



**A PERFORMANCE REVIEW
OF THE SCHOOL DISTRICT
OF BROWARD COUNTY,
FLORIDA**

Final Report



April 6, 1999

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EXECUTIVE SUMMARY

Overview

Section 11.515, Florida Statutes, was created by the 1996 Florida Legislature for the purpose of conducting performance reviews of school districts in Florida. The statute provides that the Office of Program Policy Analysis and Government Accountability (OPPAGA) contract with private firms to conduct performance reviews of identified school districts. As stated in the bill, which called for the creation of this statute:

Public officials and citizens need to know if government funds are handled with the highest level of efficiency and productivity to ensure a quality education for students....

The bill also stated that:

School Board members and Superintendents can benefit from an objective and professional review of their school district's management and performance.

The purpose of the Florida school district performance review is to identify ways that a designated school district can:

- save funds;
- improve management; and
- Increase efficiency and effectiveness.

The Broward County School District was identified to participate in the 1998-1999 performance review by the 1998 Legislature. Board members and district officials stated that the performance review process would provide valuable information for improving management practices that support the instruction of students in the district. OPPAGA contracted with MGT of America, Inc. to conduct the performance review of the Broward County School District.

The report contains findings and recommendations resulting from the performance review of the Broward County School District. The entire process was completed within a six-month time period as reflected in Exhibit 1. The implementation of report findings is voluntary and, in numerous instances, may require the school district to carefully reconsider long-held practices. For instance, the benefits of some recommendations must be weighted against those resulting from school district practices designed to provide enhanced services or to use certain service delivery methods. We recommend that the Broward County School Board and district administrators give these recommendations serious consideration, develop a plan to proceed with their implementation, and establish a system to monitor subsequent progress.

**EXHIBIT 1
BROWARD COUNTY SCHOOL DISTRICT PERFORMANCE REVIEW
MAJOR ACTIVITIES BY MONTH**

MONTH	MAJOR ACTIVITIES
October 1998	<ul style="list-style-type: none"> ■ Signed contract between MGT and OPPAGA with consent of Joint Legislative Committee. ■ Conducted initial meetings between MGT and officials of the Broward County School District and OPPAGA. ■ Designed interview and focus group instruments. ■ Obtained and analyzed existing reports and materials on the Broward County School District obtained from the district and state. ■ Developed profiles of the district. ■ Designed surveys for use with Broward County district administrators, principals, and teachers. ■ Conducted surveys of central office administrators, principals, and teachers. ■ Conducted diagnostic review (Week of October 26, 1998). ■ Held first public hearing on October 27, 1998 at Ely High School. ■ Conducted interviews and summarized findings from interviews with School Board members, senior administrators, and community leaders, and focus group sessions with selected groups. ■ Visited schools. ■ Tailored guidelines for the performance review to reflect unique local conditions as well as public and employee input and concerns in the Broward County School District.
November 1998	<ul style="list-style-type: none"> ■ Conducted in-depth on-site review (Week of November 15, 1998). ■ Held second public hearing on November 18, 1998 at Indian Ridge Middle School. ■ Visited schools. ■ Collected and analyzed additional information as needed.
December 1998 - January 1999	<ul style="list-style-type: none"> ■ Developed first draft of final report.
February 1999	<ul style="list-style-type: none"> ■ Submitted first draft of final report. ■ Presented first draft to Broward County School District. ■ Revised first draft report.
March 1999	<ul style="list-style-type: none"> ■ Submitted second draft report. ■ Prepared final report.
April 1999	<ul style="list-style-type: none"> ■ Distributed final report to the public and to the school district. ■ Presented final report to school board.

Overview of the Broward County School District

At the time MGT was awarded the contract, Broward school superintendent, Dr. Frank Petruzielo, had been in the district for four years and established the present organizational structure. The Superintendent announced his impending resignation immediately prior to the MGT audit team visiting the Broward County School District in November 1998. He assumed another superintendency in February 1999. When MGT's report was released, an interim superintendent was in charge of the district, and a national search for a new superintendent was underway. During the course of this study, there was a lack of a permanent Superintendent and the district was in a state of transition.

The Broward County School District is the second largest public school system in the state of Florida and the fifth largest public school system in the nation. In Fall 1997, student enrollment in the Broward County School District reached almost 225,000. According to the Broward County School District's web page, the 20th day membership for the 1998-99 school year was 230,552, an increase of almost 7,000 students from the 1997-98 20th day membership. The district has over 20,000 employees and an annual budget of over \$2.3 billion.

As of Fall 1998, there were a total of 201 schools in operation in Broward County School District including 127 elementary schools, 33 middle schools, 24 high schools, six adult/vocational schools, and 11 special centers. The school district provides educational programs to meet the needs of exceptional students, pre-kindergarten students, adult students, and students in kindergarten through 12th grade.

Policy making in the Broward County School District is the responsibility of, and vested in, a nine-member school board. Seven members of the Board are elected in a single-member district and two are at-large positions. Each Board member serves for a four-year staggered term with elections held every two years in November (1998, 2000, 2002). Prior to the November 1998 election, seven members served on the Broward County School Board. In November 1997, Broward County residents voted to redistrict the county and elect nine school board members (seven in districts; two at large).

Methodology for the Review

MGT consultants began research for this project in October 1998. Several methods were used to gather and analyze new and existing data for the performance review. The first step included a review of an extensive set of records, documents, and data. This information was used as a starting point for collecting data during the diagnostic review and on-site work.

A major component of the study was the input provided by Broward County School District's administrators, teachers, instructional and classified employees, parents, and community members. Board members, administrators, teachers, other district employees, and students participated in the study through interviews and confidential surveys.

Employee Surveys

To secure input from district administrators, principals, and teachers prior to beginning the on-site review, MGT prepared and disseminated three different survey instruments. Through these anonymous surveys, district administrators, principals, and teachers were given the opportunity to express their views about the management and operations of the school district. The survey instruments for each group were similar in format and content to provide a baseline database for determining how the opinions and perceptions of district administrators, principals, and teachers varied. The survey results were used to identify potential areas for improvement and cost savings, and were not used as a sole basis for report findings.

Diagnostic Review

A diagnostic review of district operations was conducted in October 1998 prior to a more detailed on-site review. The diagnostic review included the collection of additional data plus interviews with administrators, Board members, and a variety of community stakeholders.

The diagnostic review was conducted during the week of October 26, 1998, and included several tasks:

- soliciting community input in the performance review during two public forums held at Ely High School on October 27, 1998 and at Indian Ridge Middle School on November 18, 1998;
- conducting interviews and focus groups with a cross-section of community leaders;
- examining school system management and administrative functions, organizational structures, and operations;
- reviewing education services delivery;
- visiting school sites and interviewing a cross-section of school-based staff; and
- tailoring the MGT management and performance review guidelines for the full team's in-depth review.

In-Depth On-Site Review

During the week of November 16, 1998, 18 members of the MGT project team conducted an in-depth on-site review of the district's management functions. The team examined components of the following 12 systems as identified by OPPAGA in its Request for Proposals and emphasized by MGT in our project work plan:

- School District Organization and Management
- Educational Service Delivery and Performance Measures
- Personnel Management
- Community Involvement
- Facilities Use and Management
- Asset and Risk Management
- Financial Management
- Purchasing and Warehouse Services
- Food Service
- Transportation
- Safety and Security
- Administrative and Instructional Technology

The on-site review included meetings with dozens of district-level and school-level staff and the subsequent review of data and documentation provided by these individuals. Members of the review team conducted formal visits in 62 of the district's schools. On-site visits incorporated information from principals, teachers, and other staff involved with the various components of district operations identified above. More than 300 campus-level employees were interviewed by review team members.

Major Findings and Recommendations

Although this executive summary briefly highlights key management issues in the Broward County School District, detailed recommendations for improving operations and commendations for exemplary management practices are contained throughout the main body of the report. Key findings and recommendations for improvement include the following:

- A comparison of the staffing of school boards in 14 school systems shows that the Broward County School Board has a support staff per school board member ratio of one school board member to 1.44 support staff which is significantly higher than the average of the comparison school districts. The district could save almost \$327,000 annually by reducing support staff in the School Board offices (Chapter 4, Recommendation 4-4).
- The current design of the administrative structure shows four layers of administration between the Superintendent and school principals. The district has a large senior staff structure dealing with schools which is currently focused under the Deputy Superintendent for School Operations. Four area superintendents supervise area directors who directly work with the principals in the schools. In addition, the current situation organizes all Exceptional Student Education (ESE), vocational, and alternative schools into one area. The area superintendents with their directors have a span of control so large that the amount of time spent by the area directors and the area superintendents in the schools coaching principals is minimal. In order to reduce the levels of administration between the Superintendent and principals, the district should reorganize to change the responsibilities of the two deputy superintendents, eliminate the position of Area Superintendent for Schools, create a new position of Area Executive Director for Schools who would each be responsible for about 20 schools, and realign vocational, alternative, and special education center responsibilities to each area. By realigning the administrative structure, MGT estimates the district could save approximately \$1.9 million over a period of five years (Chapter 4, Recommendations 4-11, 12, and 13; and Chapter 5, Recommendations 5-1 and 5-9).
- The Broward County School District currently has 172 teachers on special assignment. To the extent possible, teachers should be in the classroom instructing students. Although a teacher on special assignment provides exposure to administrative positions, the district does not have a policy for the use of teachers on special assignment. Consequently, there is no limitation of the number of years that a teacher may remain working in the capacity as a teacher working on special assignment. By establishing a policy delineating the types of teachers who can serve on special assignment, the total number by department, the length of the assignment and reducing the numbers of teachers on special assignment to no more than one percent of the total teacher FTE per year, the district could save over \$2.7 million annually (Chapter 4, Recommendations 4-18 and 4-19).
- The Broward County School District participates in the Medicaid Certified School Match Program established by federal and corresponding state legislation which provides for administrative claiming and fee for service reimbursements. To receive reimbursement for these services, individualized service records must be maintained on each student who is Medicaid eligible. The Broward County School District has not started this process and should accelerate the implementation of fee for service claims for Medicaid eligible special education

students to increase the potential collection of \$864,000 from the federal government over a five-year period (Chapter 5, Recommendation 5-19).

- On average, Broward County School District returns over \$523,000 in grant funds annually. The district's Accounting Unit within Grants Administration does not issue reminders for spending funds and no database is available for historical data. The district should improve accountability for grants administration and realign the unit which will enhance the unit's processing and information management capacity and centralize the coordination and monitoring of the unit's reporting requirements. By improving the administrative role of the Grants Administration Unit in monitoring grant budgets, at least 75 percent of this loss could be avoided potentially saving the district \$1.65 million over five years (Chapter 5, Recommendation 5-23).
- The district spends excessive amounts of funds on textbooks which are not being fully utilized. MGT conservatively estimates that the district could save \$1,430,000 annually by requiring textbook publishers to respond to specific curriculum needs (Chapter 5, Recommendation 5-7).
- The New Educator's Support System (NESS) Program has a 1997-98 budget of over \$1.8 million. MGT surveyed comparison districts and found that other districts are implementing a similar program for substantially less money. For example, the program in the Duval County is budgeted at \$350,000 and Palm Beach's program is being implemented for less than \$100,000. If the Broward County School District eliminated the NESS Program and replaced it with an alternate program which meets the state's requirements, an annual savings of over \$1.4 million could be realized (Chapter 5, Recommendation 5-33).
- Nova schools primarily remain traditional, have not established a common shared vision, and have not made adequate progress in implementing a distinct set of board- approved recommendations. Returning all Nova schools to the classification of schools with identified student boundaries should save the district approximately \$1.5 million per year (Chapter 5, Recommendation 5-34).
- Other school districts operate with fewer staff in the personnel office than in the Broward County School District. The discrepancy when making comparisons to other school districts is greater at the clerical level. Six clerical positions should be deleted for an annual savings of \$133,200 (Chapter 6, Recommendation 6-1).
- By implementing a year-round calendar at some schools, even with the added costs associated with transportation, food service, and other support services, the Broward County School District should realize a substantial cost avoidance in the construction of new schools. It is reasonable to project that the district could save approximately \$20.1 million over a period of five years (Chapter 8, Recommendation 8-7 and Chapter 5, Recommendation 5-11).
- MGT estimates that the Broward County School District could save approximately \$7.8 million over a five-year period and improve its effectiveness in the design and construction arena through the increased use of cost savings alternatives such as value engineering, design standards, and pre-determined specifications (Chapter 8, Recommendation 8-8).

- MGT estimates the district could save approximately \$6 million over a five-year period by implementing performance standards for maintenance trade persons. The implementation of performance standards should increase productivity and reduce the need for additional maintenance funding (Chapter 8, Recommendation 8-11).
- If Broward County School District would create a passive order system for custodial supplies and standardize the type and amount of custodial supplies used by each school, it is estimated the district should incur an annual savings of \$900,000 (Chapter 8, Recommendation 8-15).
- Currently, 45 percent of Broward County School District employees are using direct deposit for their paychecks. Many other school districts have up to 85 or 90 percent of employees on direct deposit. If the district would implement a mandatory direct deposit program, annual savings and gains in productivity are calculated to be approximately \$570,000 annually (Chapter 9, Recommendation 9-10).
- During MGT's on-site review, we found items at the warehouse (such as audio-visual transparencies and pens) which are conducive for storage at the school sites. A reduction in warehouse inventory items would reduce costs of storing the inventory and a smaller inventory will require less physical space. A reduction of approximately \$1.9 million in inventory (about 36 percent) should enable the school district to earn approximately \$85,600 annually since the money is no longer tied up in supplies, and the district could invest in interest bearing accounts and earn investment interest (using a conservative investment rate for accruing interest at six percent). As a result of reduced inventory levels, the district could reduce its staff in the Central Warehouse Stockroom and thus save the district an additional \$200,000 per year (Chapter 11, Recommendations 11-5 and 11-6).
- For 1997-98, the district's warehouse stockroom budget was \$1.76 million dollars; a significant portion of the salary and benefit costs are for supply and delivery personnel. With MGT's recommendation of reducing inventory at the warehouse, the district can reduce warehouse service positions and drivers in the Central Warehouse Stockroom and save approximately \$1.4 million over a five-year period (Chapter 11, Recommendation 11-7).
- During MGT's on-site interviews, the absence of district coordination of instructional technology efforts was cited frequently by school and district-level personnel as a district weakness. As technology becomes more pervasive, its use in the classrooms of the Broward County School District is growing rapidly. Where networks were once a luxury, they are becoming a necessity. As schools install networks, there is an increasing demand for network support and assistance. Although it will cost the district approximately \$179,400 annually, MGT recommends that the district create a position of Instructional Technology Coordinator and locate this position in Educational Technology Services as well as create two Instructional Technology Support positions (Chapter 12, Recommendations 12-4 and 12-5).
- Overtime use in Vehicle Maintenance and Pupil Transportation in Broward County School District exceeds the authorized amount budgeted by the school district. No cost records for overtime were readily available from the

Transportation Services Department or Finance Office. The lack of records is an indication that the Transportation Services Director and both Directors of Pupil Transportation and Vehicle Maintenance do not have the data that are needed to properly manage the overtime account. MGT recommends the district reduce overtime usage to a more acceptable three to five percent rate for an annual savings of about \$1.3 million (Chapter 13, Recommendation 13-2).

- If the district focuses the transportation's computer-based route scheduling system on the dynamics of changes in students during the school year and the efficiencies available by finding space on buses which cross boundaries, the district could reduce the current number of routes by an additional five percent and the district could save approximately \$5 million over a five-year period (Chapter 13, Recommendation 13-6).
- Many school districts throughout the country use a 12-year replacement schedule for school buses. Those districts include Fairfax County, Virginia; Prince George's County Maryland; Richmond, Virginia; Port Arthur, Texas; Houston, Texas; and Dallas, Texas. The Broward County School District has a 10-year replacement policy. MGT recommends that the district establish a school bus replacement policy of 12 years for an estimated savings of \$2.7 million over a five-year period (Chapter 13, Recommendation 13-7).
- The Broward County School District has realized extensive savings through the Food Service Dual Manager Program and should increase participation in the program. By increasing the number of managers in the Dual Manager Program, the district could save about \$864,000 over a five-year period (Chapter 14, Recommendation 14-2).
- By assigning the Special Investigating Unit (SIU) investigators a personal laptop computer so they could complete their own case reports, the district could eliminate four data entry positions. Although the initial one-time cost to the district is estimated at \$47,500, the district could save \$113,100 annually by eliminating four data entry positions. (Chapter 15, Recommendation 15-4).

Although the findings and recommendations summarized herein may have the most significant impact on the district due to (1) the magnitude of change recommended, (2) their fiscal implications, or (3) their potential for improving services or increasing resources available for students, many other findings, recommendations, and commendations are presented in the main body of the report. Readers are encouraged to carefully study the entire report for a complete understanding of this performance review of the Broward County School District.

Fiscal Impact of Recommendations

The performance review identified many commendations and recommendations. Some of these recommendations can be implemented immediately; others will require months or years to implement. Detailed implementation strategies, a recommended timeline, and the fiscal impact are provided for each recommendation in the final report.

MGT identified a total gross savings of over \$104.5 million that could be realized by the Broward County School District over the next five years if MGT's recommendations are implemented. The recommendations include investment opportunities of \$499,525 in 1999-2000 and total investment opportunities of \$5.6 million over the next five years (see Exhibit 2).

**EXHIBIT 2
SUMMARY OF NET SAVINGS**

Year Savings Begin		Total
1999-2000	Initial Annual Net Savings	\$5,101,430
2000-2001	Annual Net Savings	\$22,594,929
2001-2002	Annual Net Savings	\$24,922,949
2002-2003	Annual Net Savings	\$23,230,910
2003-2004	Annual Net Savings	\$23,035,881
	One-Time (Cost) Savings	(\$337,500)
TOTAL NET SAVINGS PROJECTED FOR 1999-2004		\$98,548,599

Exhibit 3 shows savings and costs associated with the recommendations in this report. It should be noted that some savings (e.g. Recommendation 8-8) represent capital revenues. A large number of the recommendations throughout this report will not have a direct fiscal impact, but these recommendations, nonetheless, represent important improvements over current policies and operating practices.

Throughout the full report, as reflected in the executive summary, significant opportunities are presented to improve management, instructional delivery, and communication with internal and external stakeholders, and ultimately to improve the district's efficiency and effectiveness. The recommendations contained in the report should provide the support necessary for an enhanced school district.

EXHIBIT 3
SUMMARY OF POTENTIAL SAVINGS AND COSTS IN BROWARD COUNTY SCHOOL DISTRICT

CHAPTER REFERENCE	Annual (Costs) or Savings/Revenue					Total Five-Year (Costs) or Savings	One-Time (Costs) or Savings
	1999-2000	2000-01	2001-02	2002-03	2003-04		
CHAPTER 4: DISTRICT ORGANIZATION AND MANAGEMENT							
4-4	Combine School Board Office Positions (p. 4-16)	\$326,900	\$326,900	\$326,900	\$326,900	\$326,900	\$1,634,500
4-11	Eliminate Four Area Superintendents (p. 4-39)	\$0	\$756,600	\$756,600	\$756,600	\$756,600	\$3,026,400
4-11	Create Area Executive Directors (p. 4-40)	\$0	(\$522,500)	(\$522,500)	(\$522,500)	(\$522,500)	(\$2,090,000)
4-12	Eliminate Associate Superintendent for District Administration (p. 4-41)	\$0	\$198,000	\$198,000	\$198,000	\$198,000	\$792,000
4-13	Eliminate Director of District Administration (p. 4-42)	\$0	\$153,250	\$153,250	\$153,250	\$153,250	\$613,000
4-19	Reduce Teachers on Assignment (p. 4-55)	\$0	\$2,704,000	\$2,704,000	\$2,704,000	\$2,704,000	\$10,816,000
4-26	Convert TSAs to Coordinators (p. 4-85)	(\$70,400)	(\$70,400)	(\$70,400)	(\$70,400)	(\$70,400)	(\$352,000)
4-30	Eliminate Assistant Principals (p. 4-99)	\$0	\$889,000	\$889,000	\$889,000	\$889,000	\$3,556,000
CHAPTER 5: EDUCATIONAL SERVICE DELIVERY							
5-7	Respond to Curriculum Needs (p. 5-33)	\$0	\$1,430,000	\$1,430,000	\$1,430,000	\$1,430,000	\$5,720,000
5-9	Eliminate School-to-Work Director (p. 5-41)	\$52,250	\$104,500	\$104,500	\$104,500	\$104,500	\$470,250
5-12	Eliminate Coordinator of Diversity/Cultural Outreach (p. 5-51)	\$46,200	\$69,300	\$69,300	\$69,300	\$69,300	\$323,400
5-19	Accelerated Medicaid Reporting (p. 5-87)	\$96,000	\$192,000	\$192,000	\$192,000	\$192,000	\$864,000
5-20	Hire an Evaluation Specialist (p. 5-95)	(\$54,000)	(\$54,000)	(\$54,000)	(\$54,000)	(\$54,000)	(\$270,000)
5-22	Reduce Purchases of Tests (p. 5-105)	\$131,250	\$131,250	\$131,250	\$131,250	\$131,250	\$656,250
5-23	Improve Accountability for Grants (p. 5-114)	\$330,000	\$330,000	\$330,000	\$330,000	\$330,000	\$1,650,000
5-24	Hire Four Social Worker Assistants Annually (p. 5-120)	(\$87,525)	(\$175,050)	(\$262,575)	(\$351,100)	(\$437,625)	(\$1,313,875)
5-33	Eliminate NESS Program (p.5-135)	\$0	\$1,433,000	\$1,433,000	\$1,433,000	\$1,433,000	\$5,732,000
5-34	Reclassify Nova Schools (p. 5-137)	\$0	\$1,473,964	\$1,473,964	\$1,473,964	\$1,473,964	\$5,895,856
CHAPTER 6: PERSONNEL MANAGEMENT							
6-1	Eliminate Six Clerical Positions (p. 6-7)	\$133,200	\$133,200	\$133,200	\$133,200	\$133,200	\$666,000
6-3	Reclassify Director as an Executive Director (p. 6-9)	(\$6,500)	(\$6,500)	(\$6,500)	(\$6,500)	(\$6,500)	(\$32,500)
6-15	Eliminate Five Clerical Positions (p. 6-47)	\$0	\$0	\$112,300	\$112,300	\$112,300	\$336,900

EXHIBIT 3 (Continued)
SUMMARY OF POTENTIAL SAVINGS AND COSTS IN BROWARD COUNTY SCHOOL DISTRICT

CHAPTER REFERENCE	Annual (Costs) or Savings/Revenue					Total Five-Year (Costs) or Savings	One-Time (Costs) or Savings
	1999-2000	2000-01	2001-02	2002-03	2003-04		
CHAPTER 7: COMMUNITY INVOLVEMENT							
7-6	Change Graphic Arts Funding (p. 7-23)	\$0	\$10,000	\$20,000	\$20,000	\$20,000	\$70,000
7-17	Fund Education Foundation Internally (p. 7-73)	\$0	\$0	\$146,300	\$146,300	\$146,300	\$438,900
7-23	Eliminate Intergovernmental Relations Staff (p. 7-92)	\$0	\$33,250	\$33,250	\$33,250	\$33,250	\$133,000
CHAPTER 8: FACILITIES USE AND MANAGEMENT							
8-7	Implement Multi-Track, Year-Round Calendar (p. 8-29)	\$0	\$5,830,000	\$5,987,800	\$4,460,700	\$3,884,000	\$20,162,500
8-8	Implement Construction Cost Savings Measures (p. 8-36)	\$1,801,500	\$1,850,300	\$1,378,400	\$1,200,200	\$1,560,000	\$7,790,400
8-9	Establish Satellite Offices (p. 8-45)	\$83,000	\$83,000	\$83,000	\$83,000	\$83,000	\$415,000
8-11	Implement Performance Standards (p. 8-49)	\$500,000	\$1,000,000	\$1,500,000	\$1,500,000	\$1,500,000	\$6,000,000
8-15	Implement Passive Order System and Standards (p. 8-63)	\$900,000	\$900,000	\$900,000	\$900,000	\$900,000	\$4,500,000
CHAPTER 9: FINANCIAL MANAGEMENT							
9-9	Reduce Payroll Checks (p. 9-32)	\$31,065	\$62,130	\$62,130	\$62,130	\$62,130	\$279,585
9-10	Implement Mandatory Direct Deposit (p. 9-34)	\$285,000	\$570,000	\$570,000	\$570,000	\$570,000	\$2,565,000
CHAPTER 10: ASSET AND RISK MANAGEMENT							
10-4	Eliminate Two Technicians (p. 10-17)	\$0	\$58,700	\$58,700	\$58,700	\$58,700	\$234,800
10-7	Privatize UBC Inspections (p. 10-29)	\$63,600	\$63,600	\$63,600	\$63,600	\$63,600	\$318,000
10-8	Contract for Actuary Services (p. 10-34)	(\$15,000)	(\$15,000)	(\$15,000)	(\$15,000)	(\$15,000)	(\$75,000)
CHAPTER 11: PURCHASING, AND WAREHOUSING							
11-1	Eliminate Clerk Specialists (p. 11-9)	\$161,000	\$161,000	\$161,000	\$161,000	\$161,000	\$805,000
11-5	Fully Implement Procurement Card (p. 11-24)	\$34,000	\$68,000	\$68,000	\$68,000	\$68,000	\$306,000
11-6	Reduce Inventory Levels (p. 11-31)	\$85,000	\$85,000	\$85,000	\$85,000	\$85,000	\$425,000
11-7	Reduce Warehouse Positions (p. 11-33)	\$160,000	\$320,000	\$320,000	\$320,000	\$320,000	\$1,440,000
11-8	Reduce Vehicles (p. 11-34)	\$17,780	\$17,780	\$17,780	\$17,780	\$17,780	\$88,900

EXHIBIT 3 (Continued)
SUMMARY OF POTENTIAL SAVINGS AND COSTS IN BROWARD COUNTY SCHOOL DISTRICT

CHAPTER REFERENCE	Annual (Costs) or Savings/Revenue					Total Five-Year (Costs) or Savings	One-Time (Costs) or Savings
	1999-2000	2000-01	2001-02	2002-03	2003-04		
CHAPTER 12: ADMINISTRATIVE AND INSTRUCTIONAL TECHNOLOGY							
12-1	Create CIO Position (p. 12-13)	(\$12,800)	(\$12,800)	(\$12,800)	(\$12,800)	(\$12,800)	(\$64,000)
12-4	Create Instructional Coordinator Position (p. 12-20)	(\$55,000)	(\$73,000)	(\$73,000)	(\$73,000)	(\$73,000)	(\$347,000)
12-5	Create Instruction Technology Support Position (p. 12-21)	(\$79,800)	(\$106,400)	(\$106,400)	(\$106,400)	(\$106,400)	(\$505,400)
12-11	Purchase Uniform Grade Book Package (p.12-37)						\$0 (\$200,000)
12-12	Replace Manatee System (p. 12-38)						\$0 (\$80,000)
CHAPTER 13: TRANSPORTATION							
13-2	Reduce Overtime in Half (p. 13-13)	\$0	\$650,000	\$1,300,000	\$1,300,000	\$1,300,000	\$4,550,000
13-3	Reduce Trainers (p. 13-17)	\$0	\$16,200	\$32,400	\$32,400	\$32,400	\$113,400
13-5	Eliminate 15 Field Supervisors (p. 13-23)	\$0	\$278,760	\$557,520	\$557,520	\$557,520	\$1,951,320
13-6	Reduce Bus Routes (p. 13-26)	\$0	\$1,335,000	\$1,210,000	\$1,210,000	\$1,210,000	\$4,965,000
13-7	Change Bus Replacement Policy (p. 13-33)	\$0	\$640,000	\$659,000	\$678,776	\$699,112	\$2,676,888
CHAPTER 14: FOOD SERVICE							
14-2	Increase Participation in Dual Manager Program (p. 14-15)	\$57,560	\$115,120	\$172,680	\$230,240	\$287,800	\$863,400
14-3	Add Two Supervisors (p. 14-17)	(\$105,000)	(\$105,000)	(\$105,000)	(\$105,000)	(\$105,000)	(\$525,000)
14-4	Eliminate Clerk Specialists (p. 14-19)	\$38,450	\$38,450	\$38,450	\$38,450	\$38,450	\$192,250
14-6	Hire Food Service Staff as Part-time Employees (p. 14-22)	\$91,600	\$91,600	\$91,600	\$91,600	\$91,600	\$458,000
14-8	Purchase Lockers (p. 14-24)						\$0 (\$15,000)
14-12	Expand Catering Services (p. 14-31)	\$62,500	\$78,125	\$97,650	\$122,100	\$152,600	\$512,975

EXHIBIT 3 (Continued)
SUMMARY OF POTENTIAL SAVINGS AND COSTS IN BROWARD COUNTY SCHOOL DISTRICT

CHAPTER REFERENCE	Annual (Costs) or Savings/Revenue					Total Five-Year (Costs) or Savings	One-Time (Costs) or Savings
	1999-2000	2000-01	2001-02	2002-03	2003-04		
CHAPTER 15: SAFETY AND SECURITY							
15-4 Purchase Laptops/Computers (p. 15-46)						\$0	(\$47,500)
15-4 Eliminate Four Data Entry Positions (p. 15-46)	\$113,100	\$113,100	\$113,100	\$113,100	\$113,100	\$565,500	
15-6 Provide SRO Training (p. 15-55)	(\$13,500)	(\$13,500)	(\$13,500)	(\$13,500)	(\$13,500)	(\$67,500)	
TOTAL SAVINGS	\$560,955	\$23,749,079	\$26,164,624	\$24,561,110	\$24,452,606	\$104,528,374	
TOTAL (COSTS)	(\$499,525)	(\$1,154,150)	(\$1,241,675)	(\$1,330,200)	(\$1,416,725)	(\$5,642,275)	(\$337,500)
TOTAL NET SAVINGS	\$5,101,430	\$22,594,929	\$24,922,949	\$23,230,910	\$23,035,881	\$98,886,099	

Total Five-Year Net Savings Minus One-Time Costs	=	\$98,548,599
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1.0 INTRODUCTION

1.1 Overview

Section 11.515, Florida Statutes, was created by the 1996 Florida Legislature for the purpose of conducting performance reviews of school districts in Florida. The statute provides that the Office of Program Policy Analysis and Government Accountability (OPPAGA) contract with private firms to conduct performance reviews of identified school districts. As stated in the bill, which called for the creation of this statute:

Public officials and citizens need to know if government funds are handled with the highest level of efficiency and productivity to ensure a quality education for students....

The bill also stated that:

School Board members and Superintendents can benefit from an objective and professional review of their school district's management and performance.

The purpose of the Florida school district performance review is to identify ways that a designated school district can:

- save funds;
- improve management; and
- increase efficiency and effectiveness.

On October 16, 1998, OPPAGA contracted with MGT of America, Inc. to conduct a performance review of the Broward County School District.

The entire review process was completed in a five-month time period. The major activities were scheduled and accomplished as displayed in Exhibit 1-1. In the methodology section that follows, the various mechanisms that were used to maximize community and employee involvement in the initial phase of the performance review are described. Throughout the project, every effort was made to minimize disruptions to schools and to the central office.

Appreciation is expressed to members of the Broward County School Board, Former Superintendent Frank Petruzielo, and school district employees, students and community residents who provided information during the preparation for, and implementation of, on-site activities. Special appreciation is expressed to Mr. John Quercia, Associate Superintendent for Financial Management and Support Services, who was assigned by the Superintendent as liaison with MGT for the review. We appreciate his efforts in providing requested documents, office space, meeting room facilities, and helpful staff to accommodate the MGT team's on-site needs.

**EXHIBIT 1-1
BROWARD COUNTY SCHOOL DISTRICT PERFORMANCE REVIEW
MAJOR ACTIVITIES BY MONTH**

MONTH	MAJOR ACTIVITIES
October 1998	<ul style="list-style-type: none"> ■ Signed contract between MGT and OPPAGA with consent of Joint Legislative Committee. ■ Conducted initial meetings between MGT and officials of the Broward County School District and OPPAGA. ■ Designed interview and focus group instruments. ■ Obtained and analyzed existing reports and materials on the Broward County School District obtained from the district and state. ■ Developed profiles of the district. ■ Designed surveys for use with Broward County district administrators, principals, and teachers. ■ Conducted surveys of central office administrators, principals, and teachers. ■ Conducted diagnostic review (Week of October 26, 1998). ■ Held first public hearing on October 27, 1998 at Ely High School. ■ Conducted interviews and summarized findings from interviews with School Board members, senior administrators, and community leaders, and focus group sessions with selected groups. ■ Visited schools. ■ Tailored guidelines for the performance review to reflect unique local conditions as well as public and employee input and concerns in the Broward County School District.
November 1998	<ul style="list-style-type: none"> ■ Conducted in-depth on-site review (Week of November 15, 1998). ■ Held second public hearing on November 18, 1998 at Indian Ridge Middle School. ■ Visited schools. ■ Collected and analyzed additional information as needed.
December 1998 - January 1999	<ul style="list-style-type: none"> ■ Developed first draft of final report.
February 1999	<ul style="list-style-type: none"> ■ Submitted first draft of final report. ■ Presented first draft to Broward County School District. ■ Revised first draft report.
March 1999	<ul style="list-style-type: none"> ■ Submitted second draft report. ■ Prepared final report.
April 1999	<ul style="list-style-type: none"> ■ Distributed final report to the public and to the school district. ■ Presented final report to school board.

1.2 Methodology

Stakeholder Involvement

During the week of October 26th, on-site interviews were conducted in the Broward County School District. Interview participants consisted of business leaders, chairpersons, and members of various advisory committees, parents, and concerned citizens. The first public hearing or CHARRETTE was conducted on October 27th at Ely High School in Pompano Beach from 4:00 to 8:00 p.m. The second public hearing was held on November 18th at Indian Ridge Middle School in Davie. A total of 54 community representatives participated.

Over 200 internal and external stakeholders were interviewed for the stakeholder involvement phase of the performance review. Stakeholders were interviewed individually or in focus groups between October 26 and 30th.

External stakeholders included persons who were identified either by school district administrators or by referrals from other stakeholders in the community. Selection and referral criteria for the interviews were based on knowledge and/or interest in the district such as community leaders, parents, business persons, PTA members, teachers, members of civic organizations, retired citizens, and citizens who previously had children in public schools.

Employee Surveys

To secure the initial involvement of central office administrators, school principals, and teachers in determining the scope of the performance review, individual surveys were conducted. Surveys provided administrators and teachers the opportunity to express their opinions about the way the school district was operating and to recommend opportunities to improve efficiency and effectiveness.

The written surveys provided statistically reliable information on the perceptions and opinions of school-based and non-school-based administrators as well as teachers, and the surveys allowed the review team to determine how the opinions and perceptions of central office administrators, school administrators, teachers, and the community differed. In addition, the survey responses of Broward County employees were contrasted with the survey responses obtained in previous performance reviews to provide benchmark comparisons with employees in other school systems across the country. The survey results and comparisons are included in Chapter 3 with instruments and survey results in Appendices A and B.

Diagnostic Review

The results of the surveys and focus groups were used to ensure that major issues of concern were addressed during the performance review. Additionally, requests from individuals and groups who wanted to provide information either during the on-site phase of the project or by telephone were accommodated. Concerned citizens who were aware of the review expressed their opinions about various aspects of performance within the Broward County School District. Common issues were then incorporated into the scope of the performance review.

In-Depth On-Site Review

During the week of November 15, 1998, a total of 18 members from the MGT project team were involved in on-site work. These individuals were organized into specialized teams that examined components of the following 12 systems as defined in the OPPAGA Request for Proposals (RFP) project work plan:

- School District Organization and Management
- Educational Service Delivery and Performance Measures
- Personnel Management
- Community Involvement
- Facilities Use and Management
- Asset and Risk Management
- Financial Management
- Purchasing and Warehouse Services
- Food Service
- Transportation
- Safety and Security
- Administrative and Instructional Technology

The systematic assessment of the district was aided by the use of MGT's *Guidelines for Conducting Management and Performance Audits of School Districts*. Following the collection and analysis of existing data, and new information from community input and surveys, guidelines were developed to reflect local rules and regulations, the unique conditions of Broward County School District, and the input of local residents, community leaders, central office administrators, principals, teachers, and students.

The on-site review included meetings with most district-level and school-level staff, and the subsequent review of data and documentation provided by these individuals. Members of the review team conducted formal visits to over one-fourth of the district's schools (see Exhibit 1-2).

On-site visits incorporated information from principals, teachers and other staff involved with the various components of the 12 district operations that were identified above. More than 300 campus-level employees were interviewed by one of the members of the MGT performance review team during this time.

1.3 Overview of Broward County

Broward County, with a July 1996 estimated population of over 1.4 million, is the second largest county in terms of population in the state of Florida. The county is situated between the Atlantic Ocean and the Everglades in the Southeast portion of the state. To the north is Palm Beach County, and Miami-Dade County and Miami are to the south. Fort Lauderdale is the county seat and largest municipality with an estimated July 1996 population of almost 152,000. There are 27 other municipalities within Broward County and the following three have estimated July 1996 populations of over 100,000: Hollywood, Pembroke Pines, and Coral Springs. This large number of municipalities is second only to Palm Beach County, which has 37.

**EXHIBIT 1-2
SCHOOLS VISITED IN THE
BROWARD COUNTY SCHOOL DISTRICT**

1. Atlantic Vocational Technical School	32. Horizon Elementary
2. Attucks Middle School	33. Indian Ridge Middle
3. Bennett Elementary	34. Majory Stoneman Douglas High
4. Bethune Elementary	35. Maplewood Elementary
5. Boyd Anderson High	36. Margate Elementary
6. Broward Estates Elementary	37. Markham Elementary
7. Coconut Creek Elementary	38. McFatter Vocational Technical Center
8. Colbert Elementary	39. Mirimar High
9. Collins Elementary	40. Northeast High School
10. Coral Springs High	41. Panther Run Elementary
11. Coral Springs Middle	42. Park Springs Elementary
12. Country Isles Elementary	43. Parkridge Elementary
13. Country Hills Elementary	44. Parkway Middle
14. Cresthaven Elementary	45. Pembroke Pines Elementary
15. Croissant Park Elementary	46. Pioneer Middle
16. Cypress Lake Middle Community School	47. Plantation Middle
17. Cypress Run Alternative Exceptional Student Center	48. Pompano Beach Middle
18. Deerfield Beach Elementary	49. Ramblewood Elementary
19. Deerfield Beach High	50. Ramblewood Middle
20. Deerfield Beach Middle	51. Sawgrass Springs Middle
21. Dillard High	52. Silver Ridge Elementary
22. Ely High	53. South Broward High
23. Everglades Elementary	54. South Plantation High
24. Forest Glen Middle	55. Stranahan High
25. Fort Lauderdale High	56. Sunrise Middle
26. Fox Trail Elementary	57. Tamarac Elementary
27. Gator Run Elementary	58. Taravella High
28. Hallandale High	59. Walker Elementary
29. Harbordale Elementary	60. Welleby Elementary
30. Hollywood Hills High	61. Western 9 th Grade Annex
31. Hollywood Hills Elementary	62. Western High

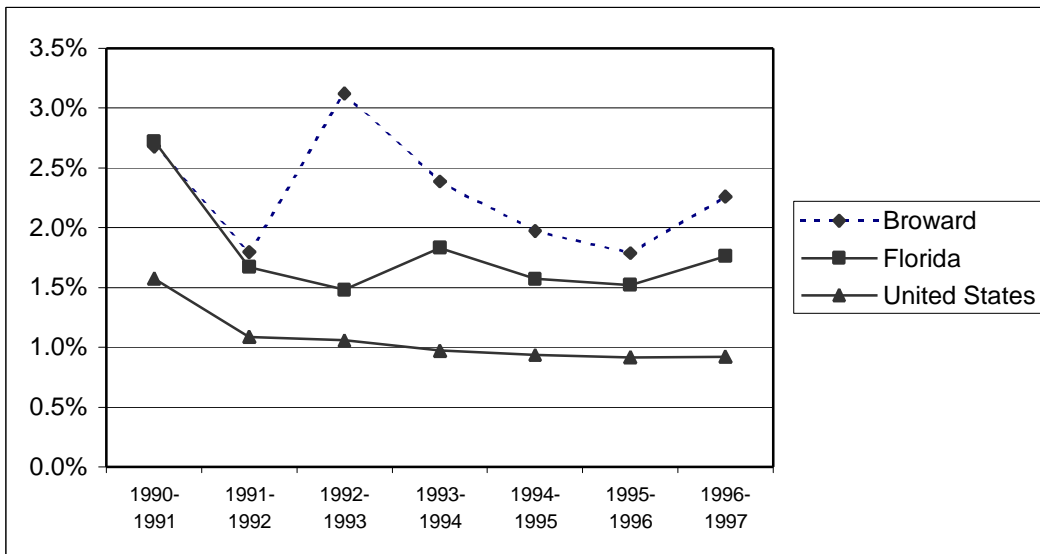
Source: MGT On-site Visits, October 1998 and November 1998.

According to the 1990 Census, Broward County has a total land area of 1,209 square miles which is the seventh largest in the state. However, approximately 65 percent, or 787 square miles is designated as a Conservation Area and is protected from development. Within the developable 410 square miles is 23 miles of coastline. Using July 1996 estimated population figures, Broward County had 1,190 residents per square mile. This 1996 figure is second only to Pinellas County with 3,101 residents per square mile. However, considering Broward County only has 410 habitable square miles, a more realistic population density of over 3,500 residents per square mile is derived.

From 1980 to 1990, Broward County experienced a 23 percent increase in population. This was less than the state of Florida which had a 33 percent increase in population, but greater than the United States which experienced a 10 percent increase in population. Although Broward County is still experiencing greater than average growth, the county has not reached the high rate as seen in previous decades.

Since 1990, census estimates have shown greater population increases for Broward County than Florida and the United States. Exhibit 1-3 indicates that Broward County has experienced a greater percentage of growth increases than the state each year except between 1990 and 1991, and greater than the United States in all of the years.

**EXHIBIT 1-3
YEARLY PERCENTAGE INCREASES IN ESTIMATED POPULATION
1990-91 TO 1996-97**



Source: United States Census Bureau, 1990, 1991, 1992, 1993, 1994, 1995, 1996 and 1997.

Among the 67 counties in Florida, Broward ranks 30th in terms of percentage increase from the 1990 census and the July 1997 estimate with an increase of 17 percent. However, among the seven counties in Florida with populations over 500,000, Broward had the second largest percentage increase. Exhibit 1-4 shows the percentage increases in populations for the seven largest counties in Florida.

According to the U.S. Bureau of Economic Analysis, Broward County had a per capita income of \$22,393 in 1990, which rose to \$25,494 in 1994. The Broward Economic Development Council projects this figure to rise to \$34,632 by the year 2000. The Florida Department of Labor and Employment Security reported that the average annual unemployment rate in Broward County was 5.1 percent in 1996. Of those employed in the nonagricultural sector, 34 percent were in the service industry, 22 percent in retail, 14 percent in government service and the remaining 30 percent were spread fairly evenly between manufacturing; finance, insurance and real estate; wholesale; transportation, communication and public utilities; and construction.

**EXHIBIT 1-4
PERCENTAGE INCREASE IN ESTIMATED POPULATION
LARGE FLORIDA COUNTIES
1990 TO 1997**

	1990 CENSUS	JULY 1997 ESTIMATE	PERCENTAGE INCREASE
Palm Beach	863,503	1,018,524	18.0%
Broward	1,255,531	1,470,758	17.1%
Orange	677,491	783,974	15.7%
Hillsborough	834,054	909,444	9.0%
Duval	672,971	732,622	8.9%
Miami-Dade	1,937,194	2,044,600	5.5%
Pinellas	851,659	871,766	2.4%

Source: United States Census Bureau, 1990 and 1997.

The three largest manufacturing employers in Broward County in 1996 were Motorola (2,215), Sun-Sentinel (1,500), and Allied Signal Commercial Avionics (1,340). The largest non-manufacturing employers in 1996 were Publix Supermarkets (7,000), Winn-Dixie Stores, Inc. (5,500), and Eckerd Drug Co. (4,500). The largest public employers are the Broward County School Board with over 23,000 employees, and the Broward County government with over 7,000 employees.

There are 10 colleges or universities that are located in Broward County, including Florida Atlantic University, Nova Southeastern University, and Broward Community College. For transportation, the county is served by the Fort Lauderdale-Hollywood International Airport, Port Everglades Seaport, Tri-Rail commuter train service, and numerous freeways and turnpikes.

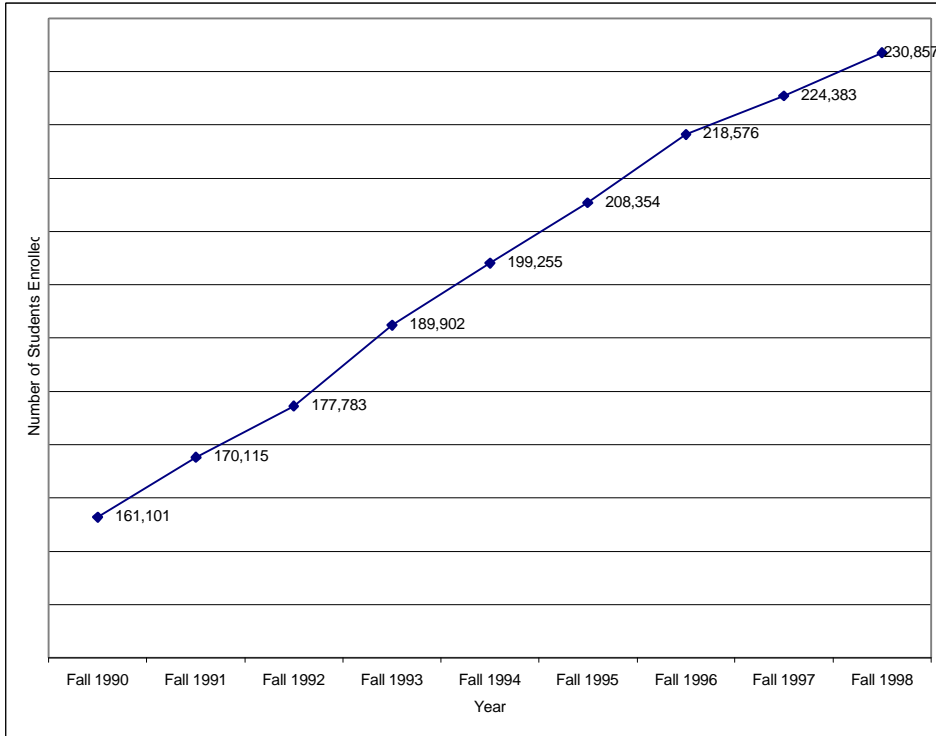
1.4 The Broward County School District

The Broward County School District is the fifth largest public school system in the nation and second largest district in the state of Florida. In Fall 1997, student enrollment in the Broward County School District reached almost 225,000. According to the Broward County Public Schools web page, the 20th day membership for the 1998-99 school year was 230,552, an increase of almost 7,000 students from the 1997-98 20th day membership. Exhibit 1-5 depicts the upward trend in enrollment for the Broward County School District since Fall 1990.

Facilities and Programs

As of Fall 1998, there were a total of 201 facilities in operation in Broward County as shown in Exhibit 1-6. The school district offers education centers and programs to meet the needs of exceptional students, pre-kindergarten students, alternative education students, adult students, and students in kindergarten through the 12th grade. The pre-kindergarten program serves over 4,000 students and 22,000 school-age children are served in after-school programs. Also, the school district is currently offering 19 magnet schools/programs as listed in Exhibit 1-7. The adult education

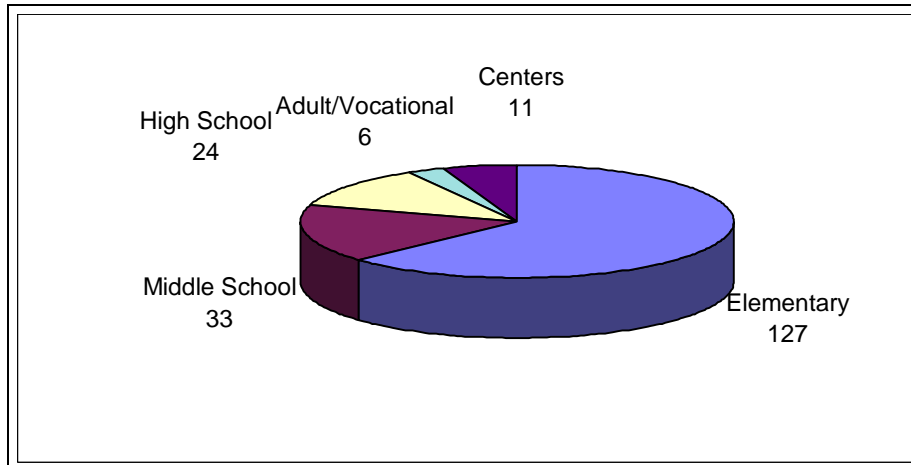
**EXHIBIT 1-5
TRENDS IN PK-12 ENROLLMENT IN THE
BROWARD COUNTY SCHOOL DISTRICT
1990-97**



Source: Statistical

Brief, Florida Department of Education, Membership in Florida Public Schools, 1990 through 1997.

**EXHIBIT 1-6
PUBLIC SCHOOL FACILITIES IN THE
BROWARD COUNTY SCHOOL DISTRICT**



Source: Broward County Public Schools Web Page, November 1998.

**EXHIBIT 1-7
BROWARD COUNTY SCHOOL DISTRICT MAGNET PROGRAMS
1998-99 SCHOOL YEAR**

Advanced Communication Skills	Architecture & Design	Business & Entrepreneurship
Communications/Broadcast Arts	Environmental Science	Emerging Computer Technology
Health & Wellness	International Affairs & Business	International Baccalaureate
Languages	Liberal Arts	Marine Science
Montessori	Performing & Visual Arts	The Latin School
Medical Sciences	Pre-Law & Public Affairs	Science/Pre-Engineering
	Science, Mathematics & Technology	

Source: Broward County Public Schools Web Page, November 1998.

program serves more than 240,000 adult students in adult and community education and offers classes for language skills, high school graduation, basic academic skills, General Equivalency Diploma (GED) testing, lifestyle enhancement, community services, and technical training.

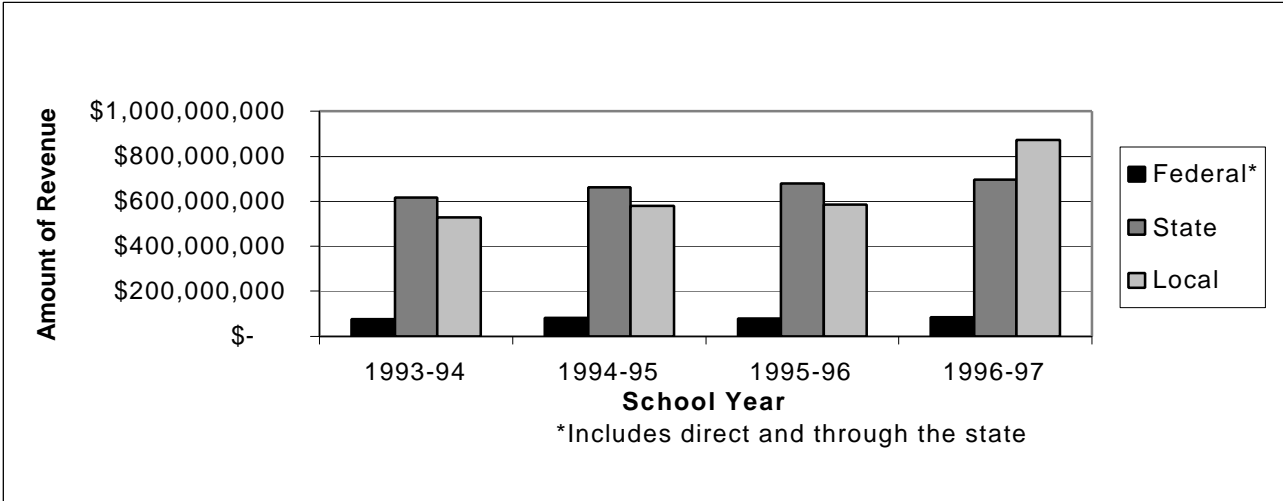
Community Involvement

The school district receives support from the community in a variety of ways. Parents are involved with the Parent Teacher Association (PTA), the Parent Teacher Organization (PTO), School Advisory Committees (SAC), and School Improvement Teams (SIT). There are active partnerships with several businesses including IBM, the Panasonic Foundation, the Ford Foundation, and North and South Florida Hospital Districts. In addition, the district stages a Partnership Week whereby community and business leaders work with school administrators and teachers in the course of a normal school day.

Revenue

Exhibit 1-8 demonstrates the increase in revenues for the Broward County School District. In four years, overall revenues have increased by 12 percent. During this time frame, funding from federal sources has increased by 11 percent. Similarly, state and local funding have increased by 12 percent and 14 percent, respectively. Over the last four school years, the percentages of the sources of funds have remained about the same: federal - six percent; state - 50 percent and local - 44 percent.

**EXHIBIT 1-8
BROWARD COUNTY SCHOOL DISTRICT
REVENUE IN DOLLARS BY SOURCE
1993-94 THROUGH 1996-97**



Source: Profiles of Florida School Districts, Florida Department of Education, 1993-94 through 1996-97.

As a result of both the special session on school construction held in November 1997 and the regular 1998 legislative session, the Broward County School District will receive more than \$361 million in new funds for the 1998-99 school year. This amount includes about \$282 million earmarked for new school construction to help relieve overcrowding, and another additional \$79 million to support 1999-2000 student enrollment increases, address salary increases, and address improvements to programs.

Expenditures

The trend in Broward County's expenditures per unweighted full-time equivalent student (FTE) for different categories over the last four years, is illustrated in Exhibit 1-9. Current expenditures represent the total amount expended by the district for everyday operations and maintenance of the schools excluding capital outlay and debt service. This total is divided by the student FTE to determine the current expenditures per FTE. The expenditures for the different program areas are divided by the weighted FTEs as determined by the Florida Education Finance Program. As evidenced, expenditures per FTE have increased slightly in all program areas.

Exhibit 1-10 shows the percentage of general fund expenditures by major object categories. As shown, the percentage of general fund expenditures devoted to salaries and benefits has declined from 86 percent to 84 percent. This has been offset by an increase of one percentage point increase in both capital outlay and materials and supplies.

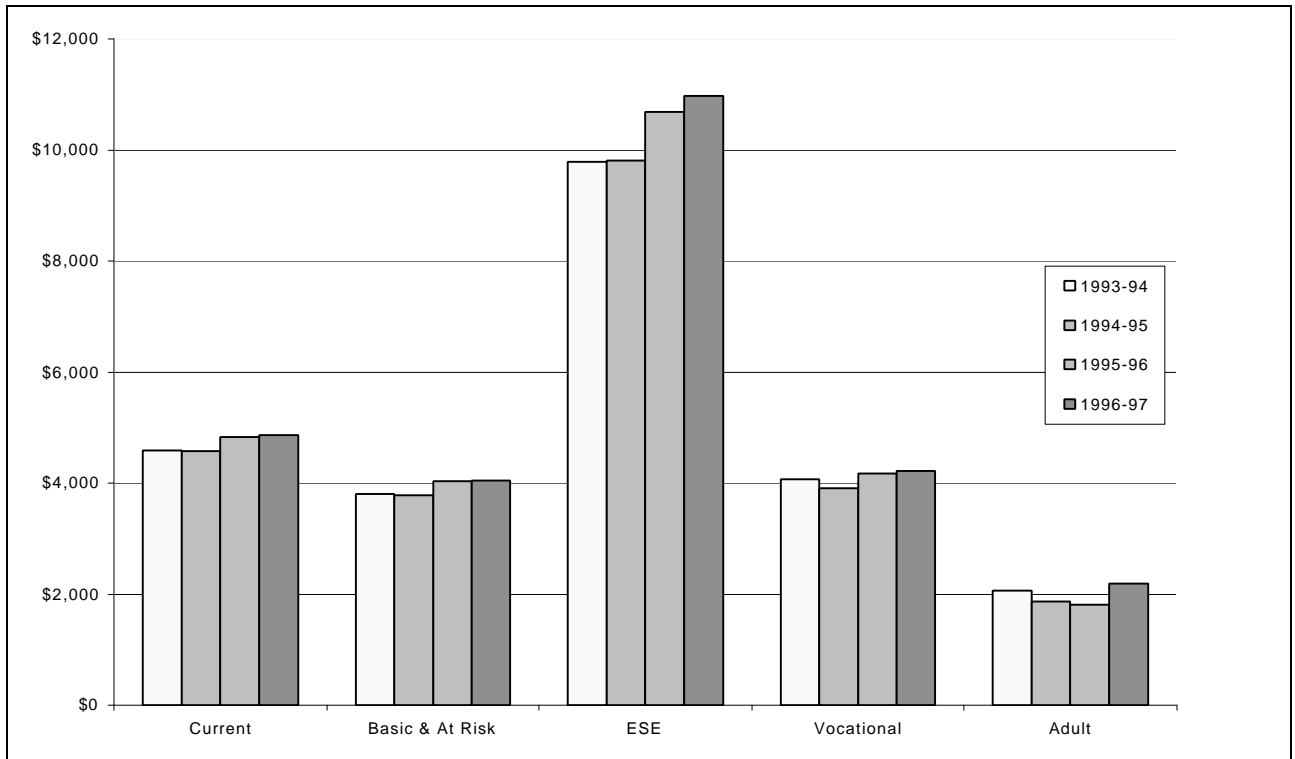
Student Enrollment

The Broward County School District has shown steady growth in student enrollment since 1992-93. Exhibit 1-11 shows that all levels of schools have experienced enrollment increases since 1992-93. There has been a 26 percent increase in enrollment over this time period and the greatest percentage increase (33 percent) was in the middle schools.

The dropout rate is the number of high school dropouts divided by the number of high school students. Exhibit 1-12 displays the trends in the overall dropout rate since the 1992-93 school year for Broward County and the state. During the last five years, dropout rates were the highest (7.3 percent) during the 1993-94 school year. The dropout rate leveled off in the following years and that was the only year that Broward County had a higher dropout rate than the state.

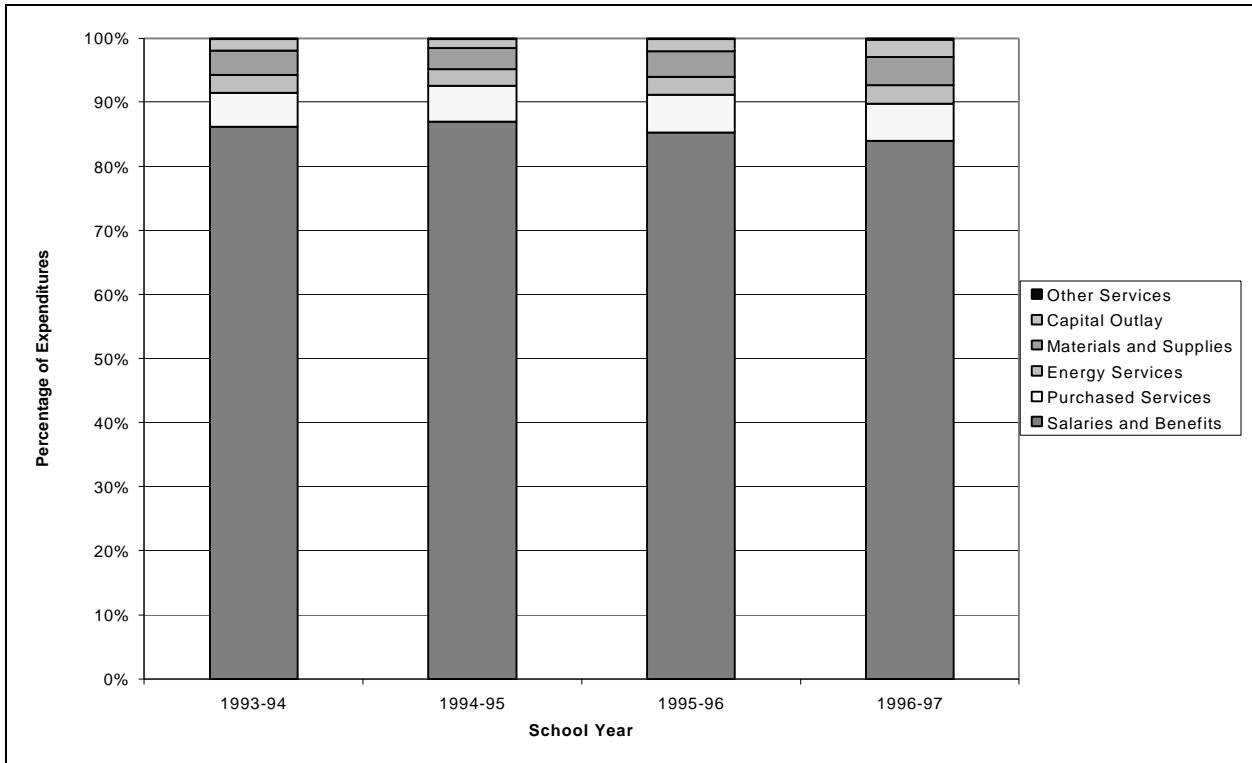
The ethnic composition of students in Broward County Schools is changing. As seen in Exhibit 1-13, the percentage of whites is decreasing while the percentage of other ethnic groups is increasing. In 1992-93, 45 percent of the total number of students enrolled were of an ethnicity other than White/non-Hispanic and in 1997-98 that number increased to 54 percent. The largest increase occurred among the Hispanic students whose enrollment increased from 11 percent in 1992-93 to 15 percent in 1997-98. African-American student enrollment also increased from 32 percent to 36 percent from 1992-93 to 1997-98.

**EXHIBIT 1-9
EXPENDITURES PER FTE IN THE
BROWARD COUNTY SCHOOL DISTRICT
1993-94 THROUGH 1996-97**



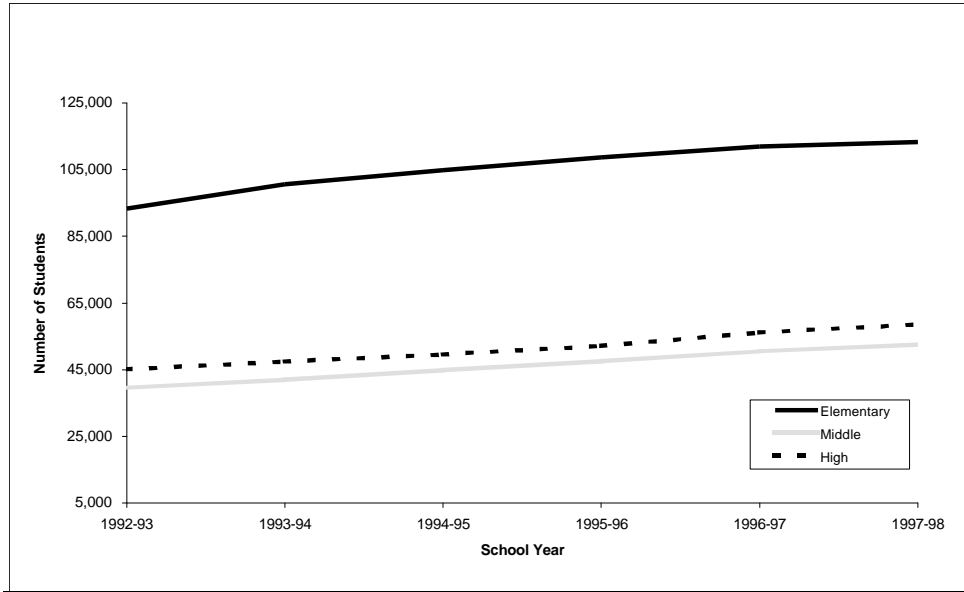
Source: Profiles of Florida School Districts Financial Data – 1993-94 through 1996-97.

EXHIBIT 1-10
EXPENDITURES BY MAJOR OBJECT CATEGORIES
BROWARD COUNTY SCHOOL DISTRICT
1993-94 THROUGH 1996-97



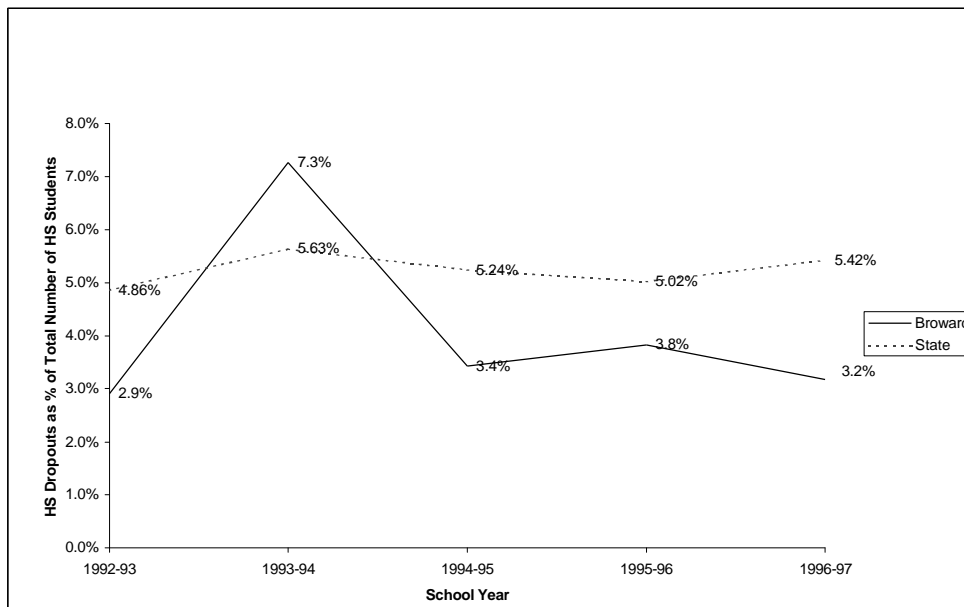
Source: Profiles of Florida School Districts (Financial Data) 1993-94 through 1996-97, Florida Department of Education.

**EXHIBIT 1-11
STUDENT ENROLLMENT TRENDS BY SCHOOL LEVEL IN THE
BROWARD COUNTY SCHOOL DISTRICT
1992-93 THROUGH 1997-98**



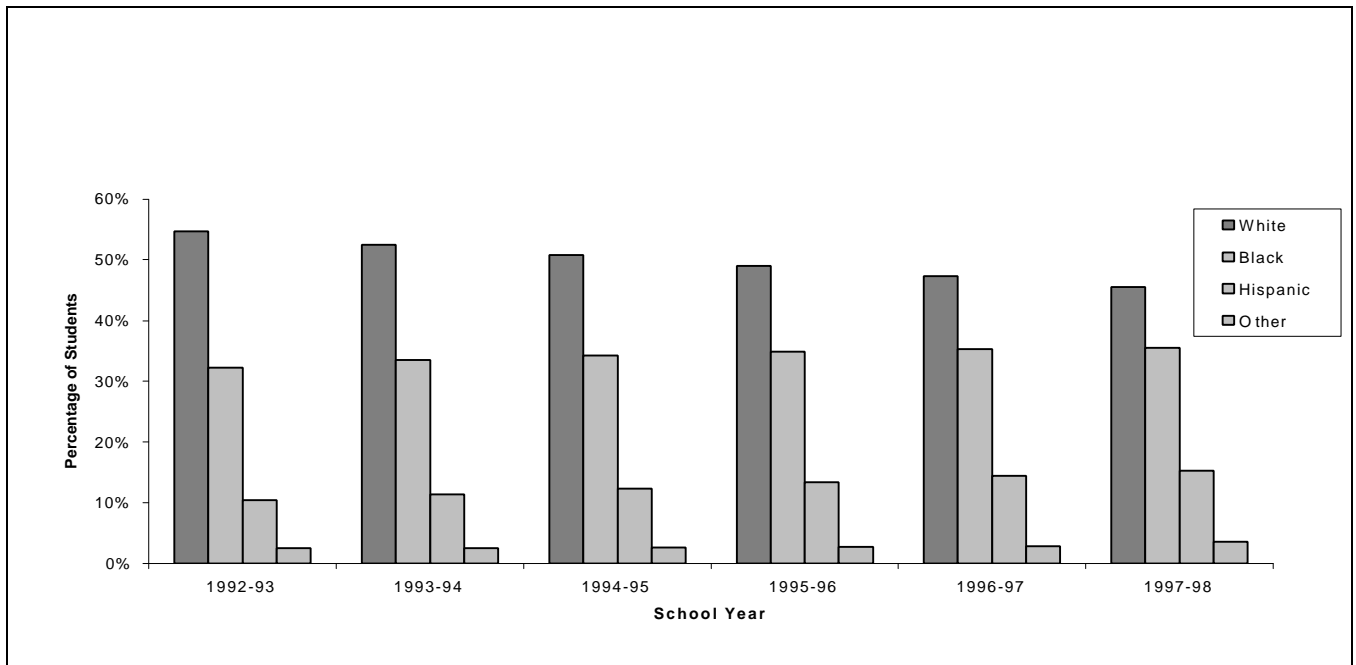
Source: Profiles of Florida School Districts, Student and Staff Data Florida Department of Education, 1992-93, 1993-94, 1994-95, 1995-96, 1996-97 and 1997-98.

**EXHIBIT 1-12
TRENDS IN DROPOUT RATES IN THE
BROWARD COUNTY SCHOOL DISTRICT AND FLORIDA
1992-93 THROUGH 1996-97**



Source: Florida Department of Education Web Page November, 1998.

EXHIBIT 1-13
STUDENT ENROLLMENT TRENDS BY ETHNICITY IN THE
BROWARD COUNTY SCHOOL DISTRICT
1992-93 THROUGH 1997-98



Source: Profiles of Florida School Districts, Student and Staff Data, Florida Department of Education, 1992-93, 1993-94, 1994-95, 1995-96, 1996-97 and 1997-98.

Student Achievement

For the 1996-97 school year, statewide data provided by the Department of Education included Broward's results on the High School Competency Test (HSCT). In the communications portion of the test, 72 percent passed and 71 percent passed the mathematics portion. Statewide, 77 percent of the students passed the communications portion and 75 percent passed the mathematics portion of the test.

Another method of measuring student achievement is by the percentage of students who graduate from high school. Exhibit 1-14 provides a comparison of the number of students who successfully graduated from school years 1992-93 to 1996-97. As shown, there is an upward trend after a low of 64 percent in the 1993-94 school year. The graduation rates for Broward County is below, or equal to, the state for all of the years shown.

Exhibit 1-15 shows the percentage of students over the past four years who have chosen to enter college or technical school following graduation. The percentage of students entering college was at its highest (69 percent) in four years during 1994-95, while the percentage of students entering technical school peaked (nine percent) during 1993-94. The percentage of students entering college in 1996-97 declined to 58 percent.

Personnel

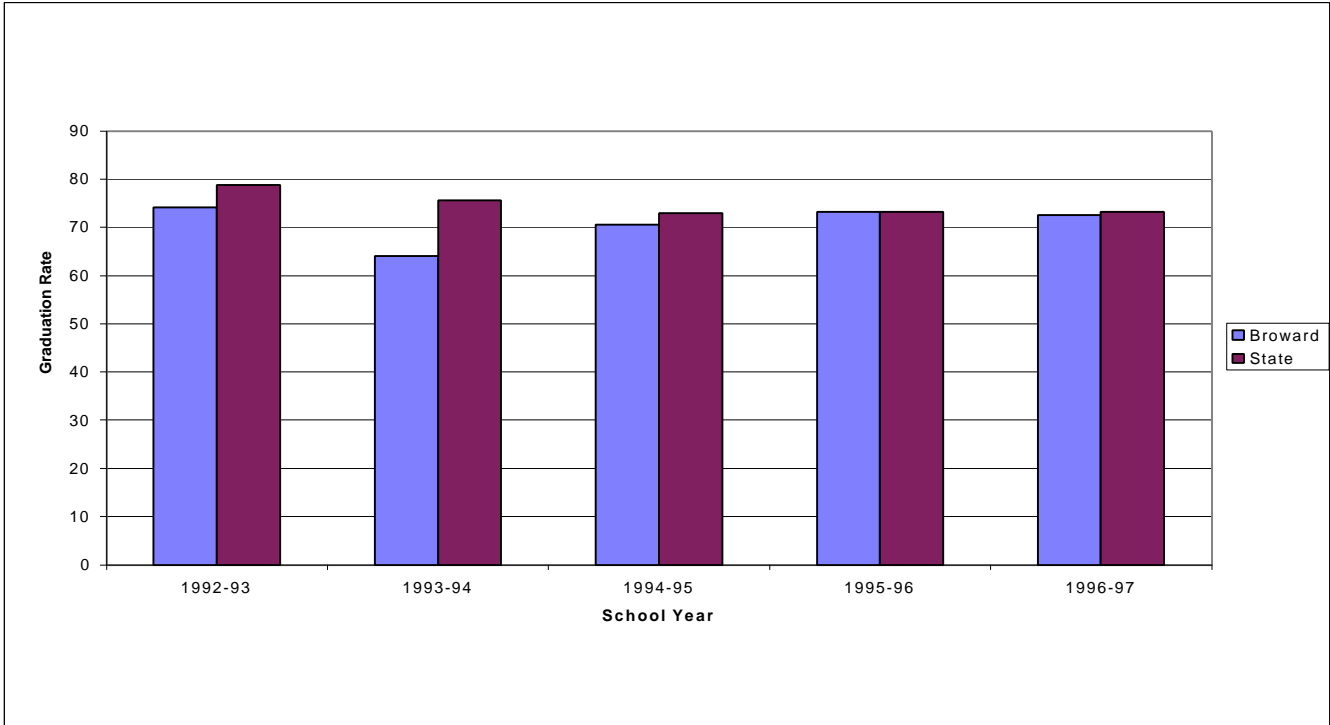
During the 1990s, the number of Broward County School District personnel has increased. As seen in Exhibit 1-16, the total number of personnel has increased by 16 percent; however, the number of administrators has decreased by four percent. The greatest percentage increase occurred among support staff: 21 percent over the five-year period.

There are various ratios that the state uses to compare the number of classroom teachers, administrative staff, instructional personnel, students, guidance counselors, paraprofessionals, and total staff. Exhibits 1-17 and 1-18 graphically depict these ratios. As evidenced, the ratios have remained fairly constant with some exceptions due to a decrease in the percentage of administrators. The total staff to administrators ratio has increased 27.5:1 to 33.2:1 and the classroom teacher to administrator staff ratio has increased from 14.7:1 to 17.5:1. The number of guidance counselors has not kept up with the increase in enrollment as the ratio of students to guidance counselors has increased from 479.6:1 to 515.8:1. Similarly, there are more students per administrator, 351.1:1 in 1997-98 compared to 286.9:1 in 1993-94.

The ethnic diversity of both students and staff of the Broward County School District can be seen in Exhibit 1-19. As evidenced, the ethnic composition of the students and instructional personnel is changing. The percentages of both white students and instructional staff is declining and increasing for all other ethnic groups. However, the percentage of white personnel is still much greater than the percentage of white students and vice versa for all other ethnic groups.

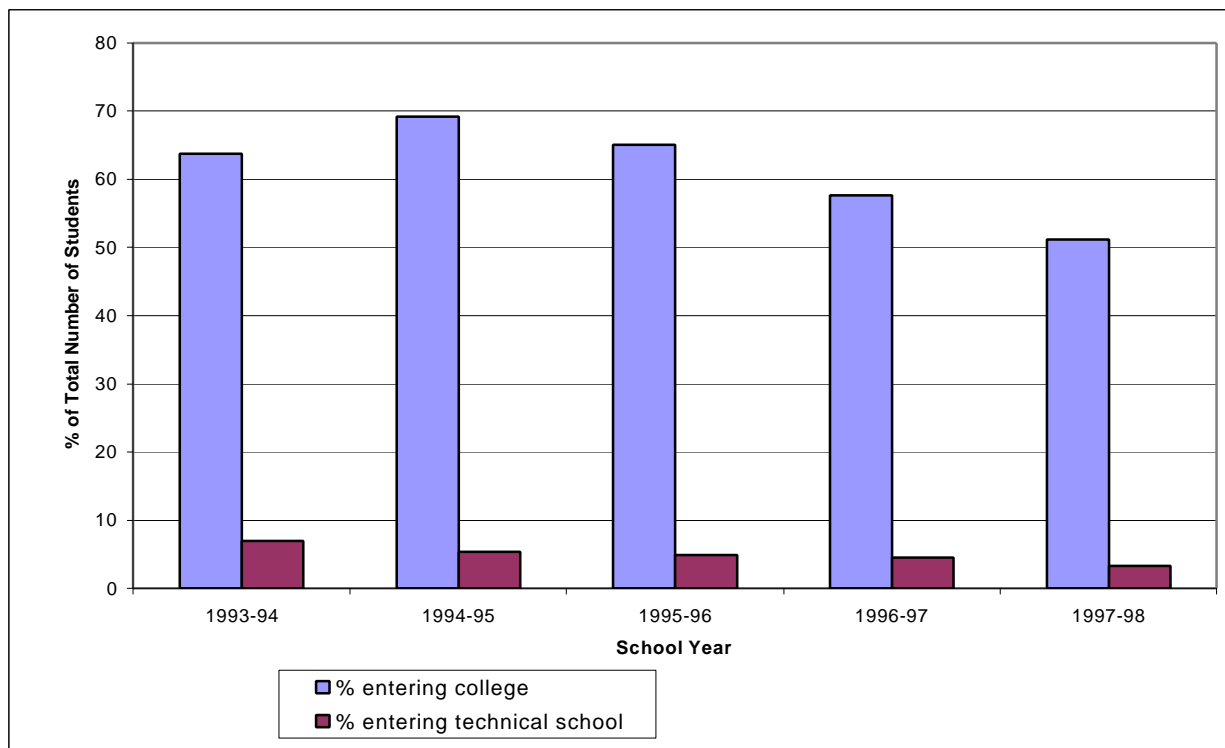
Exhibit 1-20 details the number of teachers by degree attainment from 1993-94 to 1997-98. The majority of teachers have attained a bachelor's degree; slightly over one-third have attained a master's degree. There has been a slight decline in the percentage of teachers with master's degrees over the past four years.

**EXHIBIT 1-14
GRADUATION RATES IN THE
BROWARD COUNTY SCHOOL DISTRICT
1992-93 TO 1996-97**



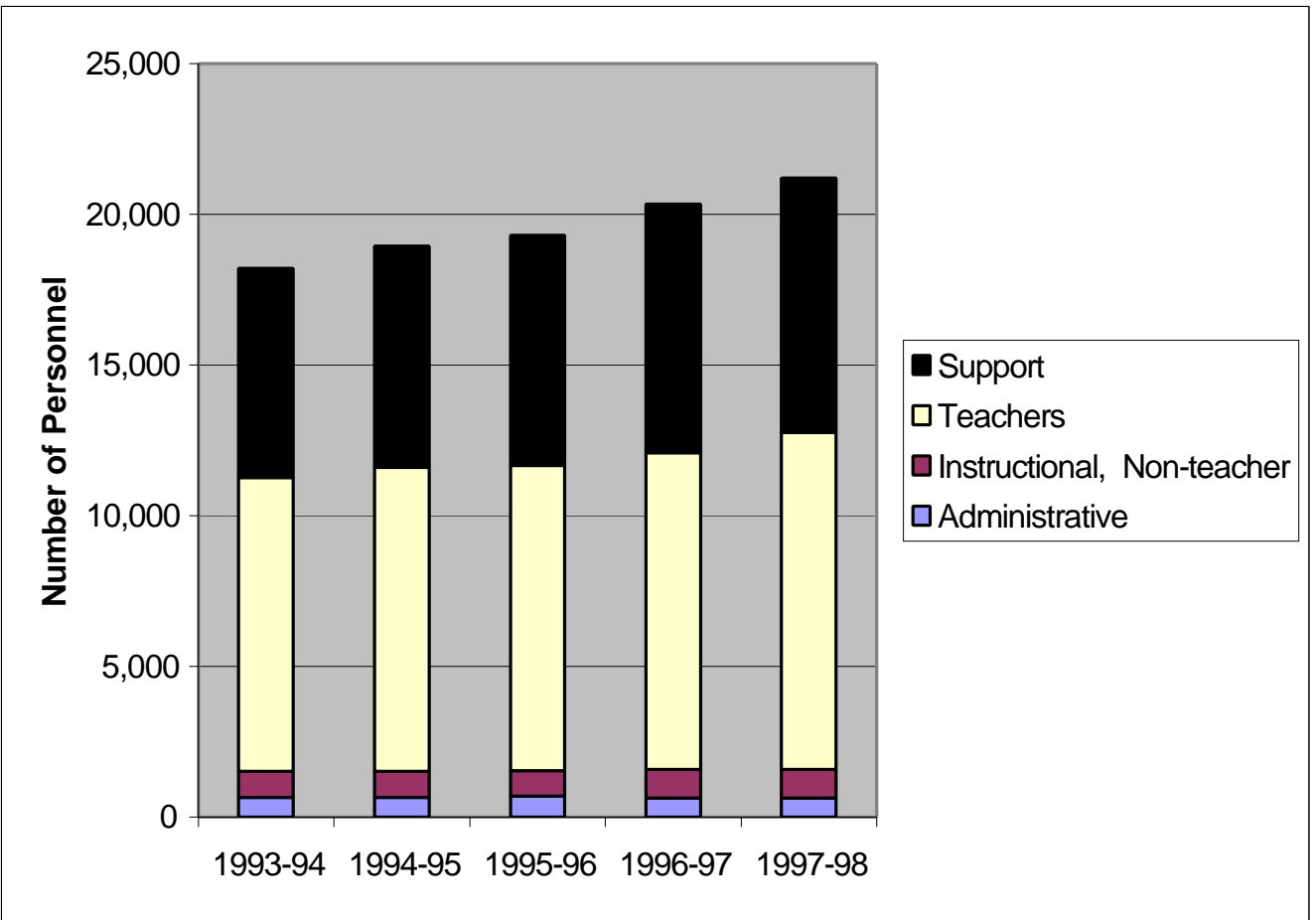
Source: Florida Department of Education Web Page, November 1998.

EXHIBIT 1-15
TRENDS IN CONTINUING EDUCATION BY STUDENTS IN THE
BROWARD COUNTY SCHOOL DISTRICT
1993-94 THROUGH 1997-98



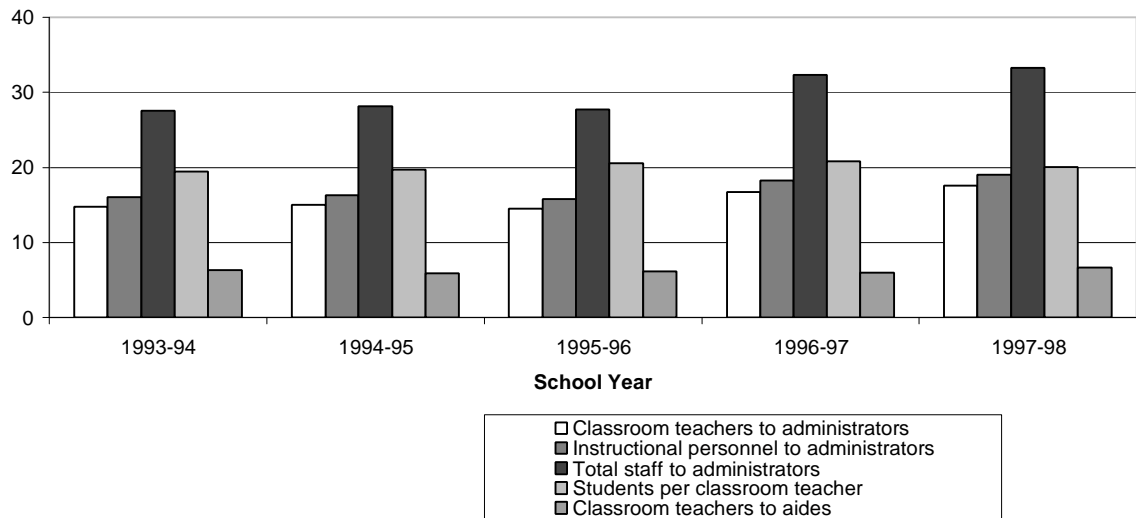
Source: Profiles of Florida School Districts, Student and Staff Data, Florida Department of Education, 1993-94, 1994-95, 1995-96 and 1996-97.

**EXHIBIT 1-16
TRENDS IN PERSONNEL IN THE
BROWARD COUNTY SCHOOL DISTRICT
1993-94 THROUGH 1997-98**



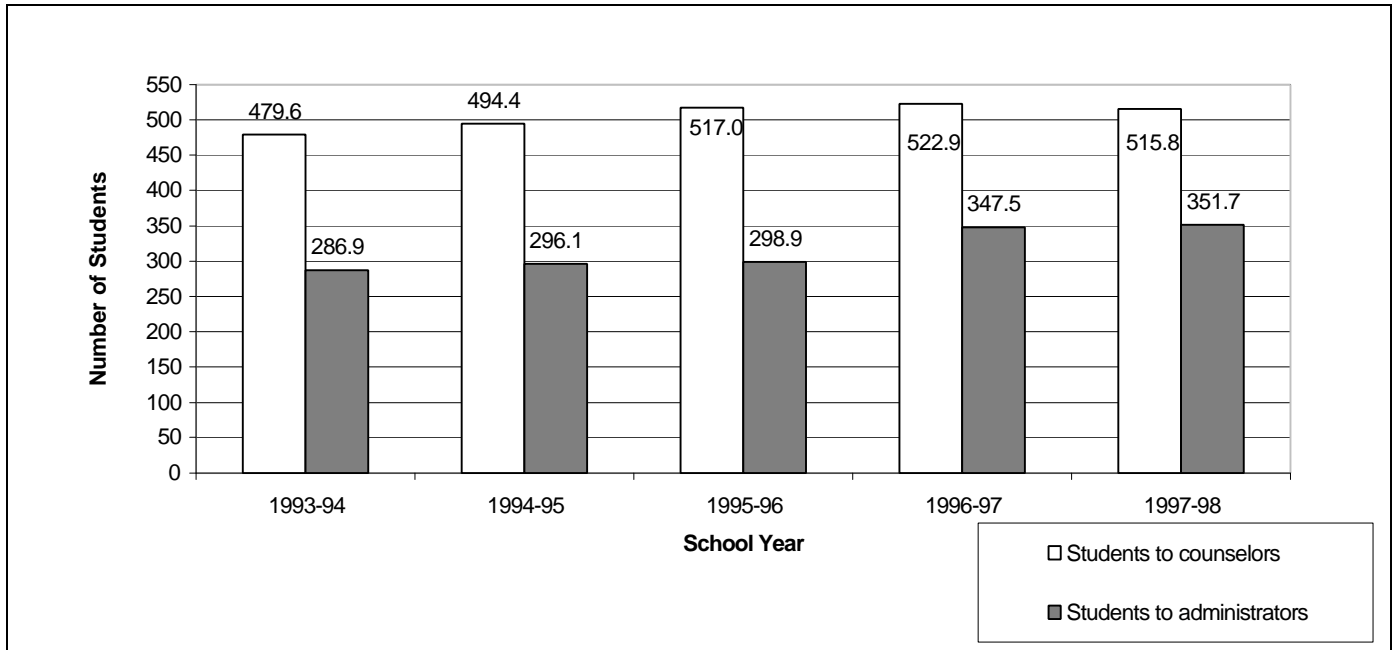
Source: Profiles of Florida School Districts, Student and Staff Data, Florida Department of Education, 1993-94, 1994-95, 1995-96, 1996-97 and 1997-98

EXHIBIT 1-17
TRENDS IN NUMBER OF STUDENTS PER STAFF MEMBER IN THE
BROWARD COUNTY SCHOOL DISTRICT
1993-94 THROUGH 1997-98



Source: Profiles of Florida School Districts, Student and Staff Data, Florida Department of Education, 1993-94, 1994-95, 1995-96, 1996-97 and 1997-98.

**EXHIBIT 1-18
STUDENT RATIOS IN THE
BROWARD COUNTY SCHOOL DISTRICT
1993-94 THROUGH 1997-98**



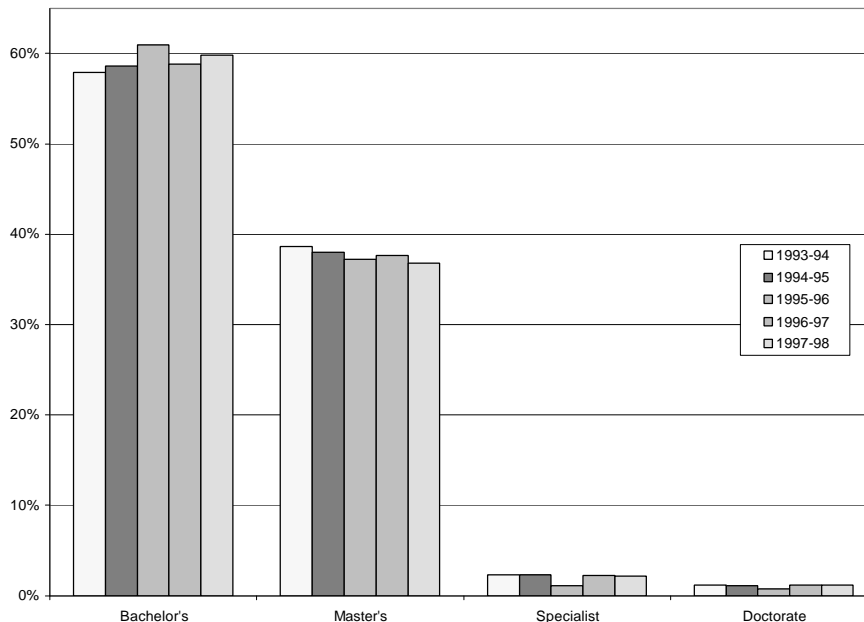
Source: Profiles of Florida School Districts, Student and Staff Data, Florida Department of Education, 1993-94, 1994-95, 1995-96, 1996-97 and 1997-98.

**EXHIBIT 1-19
TRENDS IN THE ETHNIC DIVERSITY OF STUDENTS AND STAFF IN THE
BROWARD COUNTY SCHOOL DISTRICT
1993-94 THROUGH 1996-97**

STUDENTS	1993-94	1994-95	1995-96	1996-97
White/Non-Hispanic	52.5%	50.8%	49.0%	47.3%
Black/Non-Hispanic	33.5%	34.3%	34.9%	35.4%
Hispanic	11.4%	12.3%	13.4%	14.5%
Asian/Pacific Islander	2.4%	2.4%	2.5%	2.6%
American Indian/Alaskan N	0.2%	0.3%	0.3%	0.3%
CLASSROOM AND INSTRUCTIONAL STAFF				
White/Non-Hispanic	77.0%	76.5%	75.8%	74.7%
Black/Non-Hispanic	19.2%	19.4%	19.7%	20.0%
Hispanic	3.1%	3.5%	3.8%	4.5%
Asian/Pacific Islander	0.3%	0.3%	0.4%	0.4%
American Indian/Alaskan N	0.3%	0.3%	0.3%	0.4%

Source: Profiles of Florida School Districts, Student and Staff Data, Florida Department of Education, 1993-94, 1994-95, 1995-96, and 1996-97.

**EXHIBIT 1-20
NUMBER OF TEACHERS* BY DEGREE LEVEL IN THE
BROWARD COUNTY SCHOOL DISTRICT
1993-94 THROUGH 1997-98**

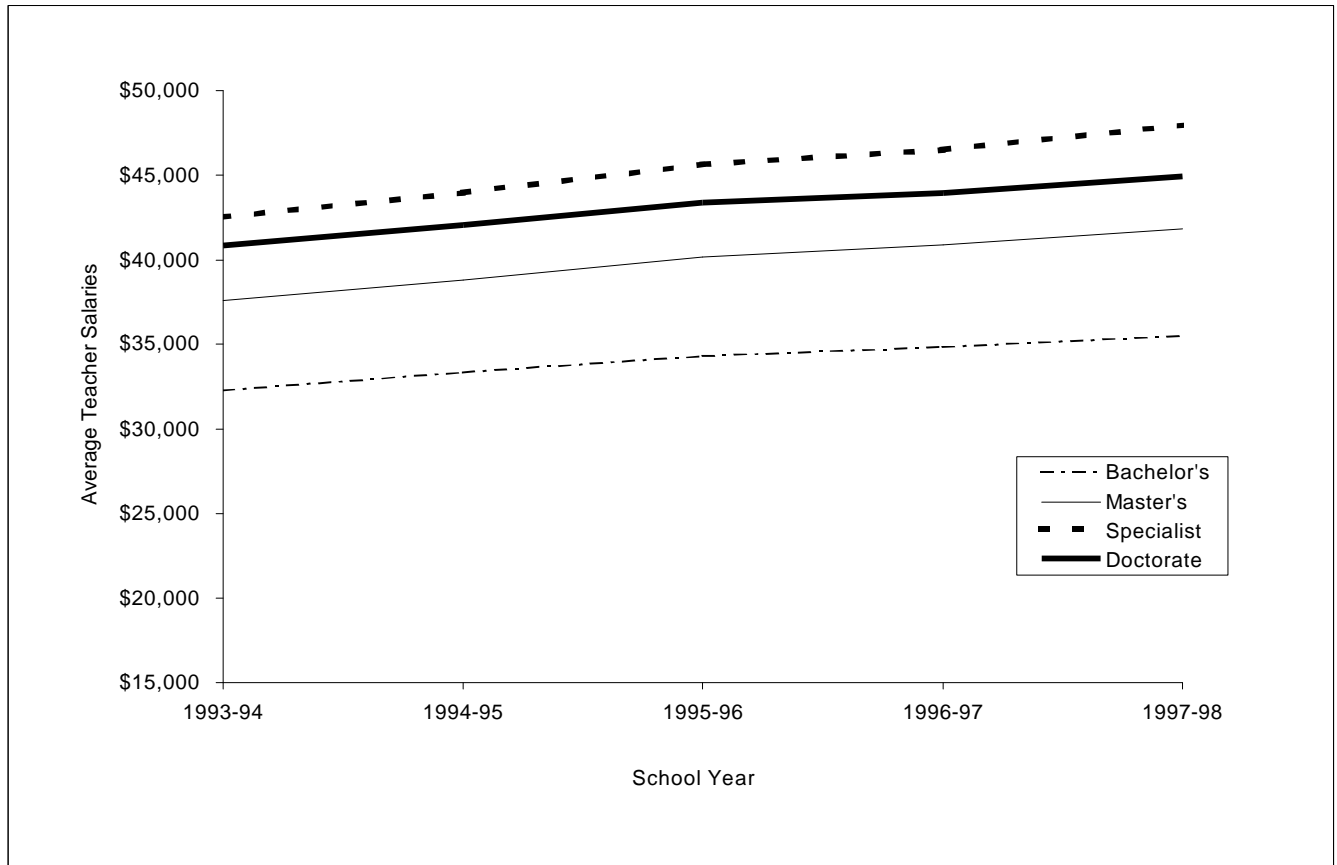


Source: Statistical Brief, Teacher Salary, Experience, and Degree Level, Florida Department of Education, 1993-94, 1994-95, 1995-96, 1996-97 and 1997-98.

*A professional paid on the instructional salary schedule negotiated by a Florida school district.

Exhibit 1-21 shows the trend in average teacher salaries based on their level of education over the last five years in Broward County. As shown, average salaries of teachers in each category have experienced a steady increase since 1993-94. Of the different categories, teachers with a specialist degree had the highest increase in average salary, almost 13 percent.

**EXHIBIT 1-21
TRENDS IN TEACHER SALARIES IN THE
BROWARD COUNTY SCHOOL DISTRICT
1993-94 THROUGH 1997-98**



Source: Profiles of Florida School Districts, Student and Staff Data, Florida Department of Education, 1993-94, 1994-95, 1995-96, 1996-97, and 1997-98.

2.0 STATISTICAL PROFILE OF THE BROWARD COUNTY SCHOOL DISTRICT

One aspect of a comprehensive school district management study is to examine how the district compares with similar districts and with the district average in Florida. Accordingly, ratios of enrollment, personnel and financial data were calculated and used to provide basic information on the Broward County School District and comparison school districts. These ratios contribute to an understanding of the unique demographic characteristics, resources, and expenditures of the Broward County School District and supplement the analysis of the issues and challenges faced by district managers.

Two sets of comparative data are used to describe the Broward County School District. First, comparisons are made with selected Florida school districts identified as similar to Broward County. The comparison districts are listed in Exhibit 2-1 with student memberships.

EXHIBIT 2-1 COMPARISON SCHOOL DISTRICTS AND ENROLLMENTS FALL 1997

SCHOOL DISTRICT	STUDENT MEMBERSHIP
Broward	224,383
Miami-Dade	345,970
Duval	126,969
Hillsborough	152,727
Orange	133,653
Palm Beach	142,621
Average	187,721
Average without Broward	180,388
State Total	2,290,726

Source: Statistical Brief, Membership in Florida Public Schools, Florida
Department of Education, November 1997.

Second, comparisons are made with averages for the state of Florida as a whole. Information displayed in the exhibits include data from the following reports:

- *Profiles of Florida School Districts (Student and Staff Data)* Florida Department of Education, 1995-96 and 1996-97.
- *Profiles of Florida School Districts (Financial Data)*, Florida Department of Education, 1996-97.
- *Statistical Brief, Membership in Florida Public Schools*, Florida Department of Education, November 1997.

- *Statistical Brief, Florida District Staff Salaries of Selected Positions, 1997-98*, Florida Department of Education, February 1998.
- *Statistical Brief, Teacher Salary, Experience, and Degree Level, 1997-98* Florida Department of Education, February 1998.

The data in this chapter are provided for the reader to obtain basic information on the Broward County School District and comparison school districts. While state-level data may contain some inaccuracies, MGT has found that such comparisons in school districts throughout the nation have provided a more reliable comparison than contacting each school district to obtain comparable data since State Departments of Education use standard definitions for submission of data by individual districts. We recognize that caution should be used when analyzing and comparing district to district data that are self-reported by individual school districts. The data contained in this chapter serve as indicators to identify trends and issues, and not to use exclusively when drawing conclusions or make recommendations.

2.1 School Characteristics

Exhibit 2-2 displays the number and types of schools within the Broward County School District and the comparison districts. As evidenced by the exhibit:

- Broward County has the second highest total number of schools of the comparison districts, which is consistent with having the second highest number of students.
- Broward County, with 127 schools, has the second highest number of elementary schools of the comparison districts.
- Broward County, along with Duval County, has the lowest number of other types of schools among the comparison districts.

**EXHIBIT 2-2
DISTRICT SCHOOL CHARACTERISTICS
1996-97**

SCHOOL DISTRICT	ELEMENTARY SCHOOLS	MIDDLE/JUNIOR HIGH SCHOOLS	SENIOR HIGH SCHOOLS	EXCEPTIONAL STUDENT SCHOOLS	VOCATIONAL SCHOOLS (INC. AREA VOC. CENTERS)	OTHER TYPES OF SCHOOLS	TOTAL
Broward*	127	33	24	11	6	-	201
Miami-Dade	208	49	39	1	6	61	364
Duval	101	22	20	2	0	11	156
Hillsborough	108	33	18	9	4	26	198
Orange	92	23	14	5	4	31	169
Palm Beach	83	23	34	6	0	52	198
State Total	1,548	443	380	109	49	627	3,156

Source: Profiles of Florida School Districts (Student and Staff Data), Florida Department of Education, 1996-97.

* With adjustments by Broward.

2.2 Student Characteristics

Exhibit 2-3 shows student ethnic characteristics. As can be seen:

- Broward County has the second lowest percentage of White students among the comparison districts with 46 percent.
- Broward County has the second highest percentage of African American students among the comparison districts with 36 percent.
- Broward County has the third lowest percentage of Hispanic students with 15 percent, compared to Hillsborough and Orange County School District at 18 percent each and Miami-Dade County School District at 52 percent.
- Hispanic, Asian/Pacific Islander, and American Indian students constitute 18 percent of the Broward County student body --- identical to the state average.

**EXHIBIT 2-3
STUDENT CHARACTERISTICS
RACIAL/ETHNIC DISTRIBUTION
FALL 1997**

SCHOOL DISTRICT	WHITE	AFRICAN AMERICAN	HISPANIC	ASIAN	AMERICAN INDIAN	MULTIRACIAL	TOTAL
Broward	45.6%	35.6%	15.3%	2.6%	.3%	.7%	224,383
Miami-Dade	13.0%	33.4%	51.9%	1.3%	.0%	.3%	345,970
Duval	52.4%	41.1%	3.0%	2.7%	.1%	.7%	126,969
Hillsborough	54.6%	23.9%	18.2%	2.0%	.3%	1.0%	152,727
Orange	49.1%	28.9%	18.1%	3.4%	.3%	.1%	133,653
Palm Beach	52.2%	29.6%	14.8%	2.0%	.4%	1.0%	142,621
State	55.8%	25.3%	16.3%	1.8%	.2%	.6%	2,290,726

Source: Statistical Brief, Membership in Florida Public Schools, Florida Department of Education, November 1997.

2.3 Staff Characteristics

Exhibit 2-4 shows the staff characteristics by ethnicity for each of the comparison school districts. This exhibit illustrates that:

- Broward County is below the state average percentage for the White staff category, below the state average for Hispanic staff, and above the average for African American staff.
- Broward County has the second lowest percentage of White staff and the third highest percentage of African American staff among the comparison districts.
- Broward County has the second lowest percentage of Hispanic staff among the comparison districts.

**EXHIBIT 2-4
STAFF CHARACTERISTICS
RACIAL/ETHNIC DISTRIBUTION
FALL 1997**

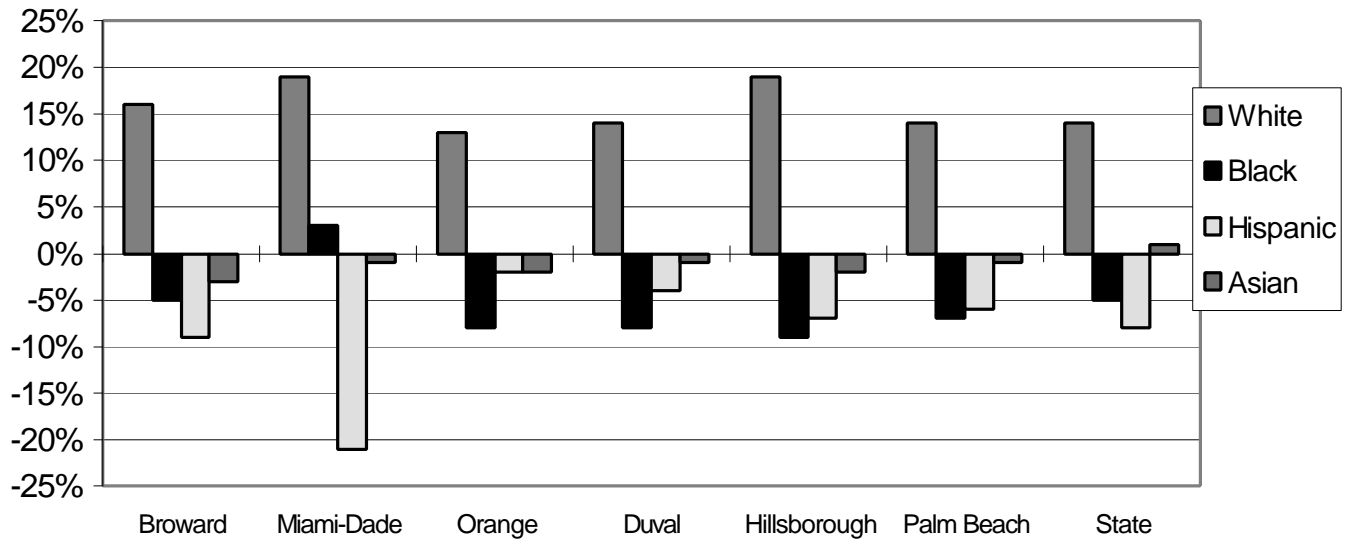
SCHOOL DISTRICT	WHITE	AFRICAN AMERICAN	HISPANIC	ASIAN	AMERICAN INDIAN	STAFF TOTAL
Broward	62.3%	30.6%	5.9%	.6%	.6%	21,206
Miami-Dade	32.3%	35.8%	31.1%	.6%	.2%	33,350
Duval	64.9%	32.8%	1.0%	1.2%	.1%	11,748
Hillsborough	68.9%	16.0%	14.3%	.5%	.3%	18,235
Orange	68.0%	20.4%	10.5%	.8%	.3%	16,633
Palm Beach	66.2%	23.5%	9.4%	.7%	.3%	15,616
State	70.4%	20.5%	8.5%	.5%	.2%	255,238

Source: Statistical Brief, Staff in Florida's Public Schools, Florida Department of Education, February 1998.

2.4 Student and Staff Comparisons

Based on the previous exhibits, Exhibit 2-5 provides an analysis of the percentage of staff ethnicity as compared to the percentage of student ethnicity. A comparison between staff and student ethnic percentages that is positive indicates that a greater percentage of staff of that particular ethnic group exists compared to the percentages of students of that ethnic group.

**EXHIBIT 2-5
DIFFERENCE BETWEEN STAFF ETHNICITY PERCENTAGES AND
STUDENT ETHNICITY PERCENTAGES
FALL 1997**



Sources: Statistical Brief, Staff in Florida's Public Schools, Florida Department of Education, February 1998.
Statistical Brief, Membership in Florida Public Schools, Florida Department of Education, November 1997

As the exhibit shows:

- In Broward County, the percentage of White staff exceeds the percentage of White students. The opposite is true for all other ethnic groups. This is also true for the state as a whole and for the comparison districts with the exception of Miami-Dade County. The difference between the percentage of White staff and White students is 16 percentage points in the Broward County School District. This percentage is similar to the previous two years.
- Broward County, along with Miami-Dade County, has the highest disparity among Hispanic Americans compared to other districts. Hispanic Americans comprise 15 percent of the student population and six percent of the staff, a difference of nine percentage points.

These data are consistent over the past three years.

2.5 Student - Staff Ratios

Exhibit 2-6 displays the ratios of various staff types per 1,000 students.

- The Broward County School District has a lower staff ratio per 1,000 students in all staff categories than the staff ratios for the state as a whole.
- The Broward County School District has the second lowest ratio of administrative personnel per 1,000 students at 2.84, after Duval County which reported 2.79 for 1997-98. In 1996-97, Broward County School District had 2.88 administrators per 1,000 students; the lowest ratio of administrators to students in the comparison districts.
- For 1997-98, the Broward County School District also had the lowest ratio of instructional personnel to 1,000 students at 4.22, down from 4.31 in 1996-97. The number of teachers per 1,000 students improved slightly from 48.15 in 1996-97 to 49.86 in 1997-98, but was still lowest among the comparison districts.
- The ratio of support staff to 1,000 students in Broward County was 37.68 in 1996-97 and 37.59 in 1997-98. For both academic years, the figures were the third lowest of the comparison districts.

2.6 Personnel Ratios

Exhibit 2-7 details personnel ratios. As can be seen:

- In Broward County, the ratio of classroom teachers to every administrator rose from 16.73 in 1996-97 to 17.54 in 1997-98. In both years, the Broward County figures were above the state average.

**EXHIBIT 2-6
NUMBER OF STAFF PER 1,000 STUDENTS
FALL 1996 AND FALL 1997**

SCHOOL DISTRICT	ADMINISTRATIVE PERSONNEL		INSTRUCTIONAL PERSONNEL		TEACHERS		SUPPORT STAFF	
	1996-97	1997-98	1996-97	1997-98	1996-97	1997-98	1996-97	1997-98
Broward	2.88	2.84	4.31	4.22	48.15	49.86	37.68	37.59
Miami-Dade	3.82	3.69	5.28	5.37	50.60	50.65	37.07	36.69
Duval	2.91	2.79	5.28	5.32	50.76	52.44	32.84	31.98
Hillsborough	4.26	4.28	6.49	6.29	59.15	59.68	49.53	49.15
Orange	3.35	3.38	7.87	8.92	55.86	59.45	52.01	52.70
Palm Beach	3.23	3.23	5.84	5.90	54.79	55.17	44.25	45.20
Average	3.41	3.37	5.85	6.00	53.22	54.54	42.23	42.22
Average without Broward	3.51	3.47	6.15	6.36	54.23	55.48	43.14	43.14
State Average	3.84	3.82	5.84	6.01	54.62	55.18	46.35	47.50

Sources: Statistical Brief, Staff in Florida's Public Schools, Florida Department of Education, March 1997, February 1998.
Statistical Brief, Membership in Florida Public Schools, Florida Department of Education, December 1996, November 1997.

**EXHIBIT 2-7
PERSONNEL RATIOS
FALL 1996 AND FALL 1997**

SCHOOL DISTRICT	CLASSROOM TEACHERS TO ADMINISTRATORS		TOTAL STAFF ¹ TO ADMINISTRATORS		STUDENTS TO CLASSROOM TEACHERS		CLASSROOM TEACHERS TO TEACHER PARAPROFESSIONALS		STUDENTS TO GUIDANCE COUNSELORS	
	1996-1997	1997-98	1996-1997	1997-98	1996-97	1997-98	1996-1997	1997-98	1996-97	1997-98
Broward	16.73	17.54	31.33	32.70	20.77	20.06	5.96	6.69	522.91	515.82
Miami-Dade	13.26	13.75	24.35	24.64	19.76	19.74	5.03	5.11	393.00	386.56
Duval	17.44	18.81	30.54	31.05	19.70	19.07	4.85	4.69	633.67	593.31
Hillsborough	13.87	13.96	27.02	27.91	16.91	16.76	4.91	5.29	421.05	417.29
Orange	16.67	17.58	34.55	37.46	17.90	16.82	4.58	4.64	475.80	457.72
Palm Beach	16.98	17.11	32.50	34.14	18.25	18.12	4.35	4.18	546.03	534.16
State Average	14.24	14.46	27.84	28.69	18.31	18.12	4.44	4.42	462.96	456.32

Sources: Statistical Brief, Staff in Florida's Public Schools, Florida Department of Education, March 1997, February 1998.
Statistical Brief, Membership in Florida Public Schools, Florida Department of Education, December 1996, November 1997.

¹ Total staff includes all full-time staff, including clerical and support personnel.

- Broward County's ratio of total staff to administrators (33:1) is the third highest among comparison districts and above the state ratio of 29:1 for 1997-98.
- The ratio of students to classroom teachers for Broward County was the highest among comparison districts and higher than the state ratio for both 1996-97 (21:1) and 1997-98 (20:1).
- There was one teacher paraprofessional for every 6.69 classroom teachers in Broward County in 1997-98. The state ratio was one paraprofessional for every 4.42 classroom teachers. The Broward County ratio was the highest teacher to teacher paraprofessional ratio among the comparison districts for both 1996-97 and 1997-98.
- The ratio of guidance personnel to students in Broward County was 1:523 for 1996-97. This was above the state average ratio of 1:463 and the third highest student to counselor ratio among the comparison district ratios. In 1997-98 the ratio of students to counselors declined to 516:1.

2.7 Staff Salaries

Exhibit 2-8 provides average salaries for selected professional staff positions. We recognize that these average salaries are not based on actual salaries paid, but rather represent a state projected salary calculation of salary related data; such as, position number, hourly rate of pay, and length of contract. Based on the 1997-98 state database:

- Broward County has the third highest paid superintendent among the comparison districts. The salary for the Broward superintendent was well above the state average; however, the Broward County School District is the second largest school district in Florida and
- High school principals in Broward County are the highest paid among comparison districts and are paid more than \$14,000 above the state average.
- Middle school principals are also the highest paid among the comparison districts and almost \$15,000 above the state average.
- The elementary principals are the highest paid among comparison districts and they are paid about \$11,500 above the state average. (Note: It should be noted, however, that Broward elementary principals are 12-month employees while several other districts have elementary principals in 10- or 11-month positions. Nonetheless, Broward's elementary principal salaries are proportionally in line with other districts shown in Exhibit 2-8).

**EXHIBIT 2-8
AVERAGE SALARIES
AS OF JANUARY 1998**

SCHOOL DISTRICT	SUPERINTENDENT	DEPUTY/ASSOCIATE/ ASSISTANT SUPERINTENDENT	HIGH SCHOOL PRINCIPAL	MIDDLE SCHOOL PRINCIPAL	ELEMENTARY PRINCIPAL
Broward	\$167,948	\$112,513	\$82,681	\$79,403	\$73,865
Miami-Dade	199,801	108,834	78,889	75,212	73,782
Duval	125,000	88,285	63,378	58,486	54,940
Hillsborough	129,998	94,175	73,509	66,544	63,091
Orange	197,900	88,009	70,927	59,590	59,024
Palm Beach	141,750	98,000	68,080	64,178	60,125
State Average	\$93,178	\$81,520	\$68,478	\$64,476	\$62,126

Source: Statistical Brief, Florida District Staff Salaries of Selected Positions, 1997-98, Florida Department of Education, February 1998.

2.8 Teacher Salaries and Experience

The following exhibits compare teacher salaries using various factors and levels of experience. Exhibit 2-9 shows that:

- The average salary for all degree categories among Broward County teachers is above the average for the state and comparison districts.
- For all degree categories, Broward County teachers are third highest in pay behind teachers in Palm Beach and Miami-Dade Counties.

**EXHIBIT 2-9
AVERAGE TEACHER SALARY
1996-1997**

SCHOOL DISTRICT	DEGREE HELD				ALL DEGREES
	BACHELOR'S	MASTER'S	SPECIALIST	DOCTORATE	
Broward	\$35,509	\$41,834	\$47,977	\$44,932	\$38,221
Miami-Dade	35,254	43,767	50,442	50,870	40,170
Duval	30,663	36,633	41,903	38,721	32,779
Hillsborough	30,686	37,386	42,864	40,832	33,320
Orange	29,408	35,545	39,684	38,604	31,676
Palm Beach	36,104	42,332	47,023	46,302	38,557
Average	\$32,937	\$39,583	\$44,982	\$43,377	\$35,787
Average without Broward	\$32,423	\$39,133	\$44,383	\$43,066	\$35,300
State Average	\$31,057	\$37,693	\$44,797	\$43,231	\$33,887

Source: Statistical Brief: Teacher Salary, Experience, and Degree Level, 1996-97, Florida Department of Education, February 1998.

Exhibit 2-10 depicts the difference between the state average salary and the average for each district by degree type. Among the comparison districts:

- Only Broward and Palm Beach Counties are above the state salary average for all degree levels.
- Broward County teachers with a bachelor's degree have higher state salary averages than any other degree holding category in Broward County.

Exhibit 2-11 provides a comparison among the districts for the minimum teacher salary agreements for all degree types. The exhibit shows that:

- On average, Broward County teachers in all categories begin their careers with higher salaries than do most other teachers in the state. However, Broward County teacher salaries are comparable with the two neighboring school districts with which they compete (Miami-Dade and Palm Beach).
- Broward County teachers with bachelor's and specialist degrees have the second highest starting salary among comparison districts, yet comparable with adjacent school districts.

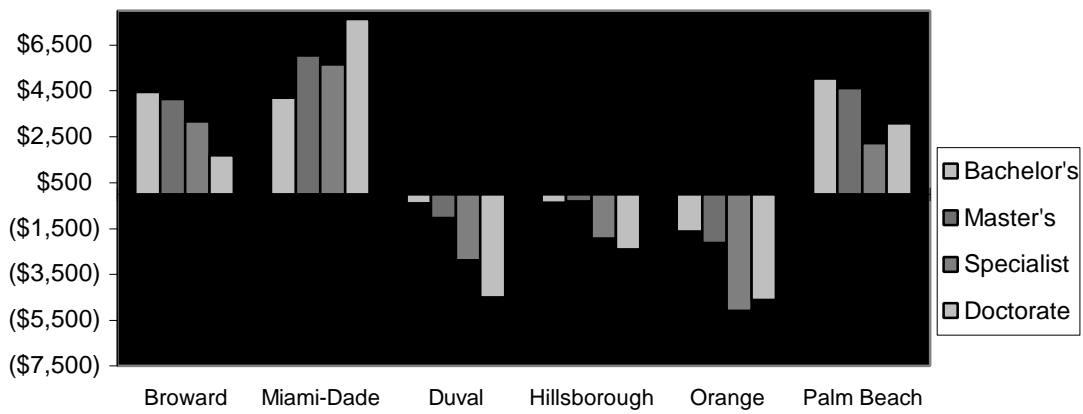
Exhibit 2-12 compares Broward County and the selected districts with regard to the average years of experience for teachers holding various levels of degrees. The exhibit shows that:

- Broward County is above the state average for years of experience in all categories and is the highest among the comparison groups in all of the four categories.
- Teachers in Broward County with a specialist degree on average have almost four years more experience than the state average and almost three more years than the next highest comparison district, Duval County.

2.9 Expenditures

The Broward County School District spent \$4,871 per unweighted FTE in the 1996-97 school year -- lower than the state average and lower than all but one of the comparison districts. Exhibit 2-13 provides the expenditures per FTE and the unweighted and weighted FTE totals for the 1996-97 school year.

**EXHIBIT 2-10
DIFFERENCE FROM STATE AVERAGE SALARIES FOR
TEACHERS BY DEGREE EARNED
1997-98**



Source: Profiles of Florida School Districts, (Student and Staff Data), Florida Department of Education, January 1998.

**EXHIBIT 2-11
MINIMUM TEACHER SALARY AGREEMENTS
1997-98**

SCHOOL DISTRICT	DEGREE HELD			
	BACHELOR'S	MASTER'S	SPECIALIST	DOCTORATE
Broward	\$28,710	\$30,850	\$32,776	\$33,745
Miami-Dade	28,650	31,650	33,650	35,650
Duval	24,782	25,933	27,255	28,288
Hillsborough	25,000	27,500	28,750	30,000
Orange	24,700	26,950	28,150	29,250
Palm Beach	28,922	31,422	32,322	33,922
State Average	\$23,686	\$25,700	\$26,755	\$27,732

Source: Florida Department of Education, Education Information and Accountability Services, October 1998.

**EXHIBIT 2-12
TEACHER AVERAGE YEARS EXPERIENCE
1997-98**

SCHOOL DISTRICT	DEGREE HELD			
	BACHELOR'S	MASTER'S	SPECIALIST	DOCTORATE
Broward	11.36	17.07	22.62	19.19
Miami-Dade	7.92	14.36	19.22	16.18
Duval	10.99	16.82	19.87	16.32
Hillsborough	10.43	16.22	14.30	13.69
Orange	9.38	15.64	19.37	16.58
Palm Beach	10.20	15.09	19.30	17.53
State Average	10.24	15.86	18.86	16.73

Source: Statistical Brief, Teacher Salary, Experience, and Degree Level, 1997-98, Florida Department of Education, February 1998.

**EXHIBIT 2-13
FTE TOTALS AND EXPENDITURES PER FTE
1996-97**

SCHOOL DISTRICT	UNWEIGHTED STUDENT FTE	FUNDED WEIGHTED FTE	EXPENDITURE PER UNWEIGHTED FTE
Broward	244,791	297,133	\$4,871
Miami-Dade	383,580	467,093	5,463
Duval	125,302	157,291	4,807
Hillsborough	157,441	197,633	5,151
Orange	139,040	167,583	4,946
Palm Beach	146,106	184,788	5,384
State	2,372,151	2,955,844	\$5,120

Source: Profiles of Florida School Districts (Financial Data) 1996-97, Florida Department of Education, June 1998.

Exhibit 2-14 displays the district expenditures per unweighted FTE by different grade categories in basic programs. The exhibit shows:

- For the ninth through twelfth grade category, Broward County has the highest unweighted FTE expenditures for basic programs among the comparison districts.
- Broward County had the second highest unweighted expenditures for the kindergarten through third grade category with \$4,075 per FTE. It also had the second highest unweighted expenditures per FTE in the fourth through eighth grade category.
- Broward County is above the average amount for the entire state in all three categories.

2.10 Revenue and Budget

Exhibit 2-15 shows the 1996-97 budget for each of the comparison districts and the percentage derived from each source. As Exhibit 2-15 indicates:

- Broward County had the second highest budget among the comparison districts.
- Broward County had the fourth highest percentage of budget derived from state sources and, consequently, the fourth lowest percentage derived from local sources.
- Orange County was tied with Broward County in receiving the lowest percentage of federal dollars among the comparison districts. Each district received only 6.12 percent of their operating funds from the federal government.

The amount of state and local funding that is received is shown in Exhibit 2-16 and calculated on a per weighted full-time-equivalent basis. As the exhibit shows:

- The Broward County School District receives the second highest gross state and local funds per FTE among comparison districts with an average of \$3,053 perweighted student.

**EXHIBIT 2-14
DISTRICT EXPENDITURES PER UNWEIGHTED FTE
FOR BASIC PROGRAMS*
1996-97**

SCHOOL DISTRICT	K - 3	4 - 8	9 - 12
Broward	\$4,075	\$3,977	\$4,506
Miami-Dade	4,759	3,950	4,274
Duval	3,589	3,300	3,755
Hillsborough	3,362	3,593	3,833
Orange	3,772	3,515	3,703
Palm Beach	3,621	4,173	4,413
State	\$3,905	\$3,733	\$4,151

Source: Profiles of Florida School Districts (Financial Data) 1996-97, Florida Department of Department of Education, June 1998.

*Excludes all special programs (e.g. vocational education, exceptional student education, etc.)

**EXHIBIT 2-15
GENERAL FUND BUDGET ANALYSIS
1996-97**

SCHOOL DISTRICT	FEDERAL REVENUE PERCENTAGE	STATE REVENUE PERCENTAGE	LOCAL REVENUE PERCENTAGE	TOTAL REVENUE
Broward	6.12%	50.01%	43.87%	\$1,460,244,972
Miami-Dade	7.89%	53.18%	38.93%	2,303,966,521
Duval	7.36%	56.56%	36.08%	703,059,860
Hillsborough	9.58%	57.18%	33.23%	944,465,251
Orange	6.12%	45.99%	47.89%	818,878,436
Palm Beach	6.64%	31.25%	62.10%	786,641,264
State	7.25%	49.82%	42.93%	\$14,095,817,997

Source: Profiles of Florida School Districts (Financial Data) 1996-97, Florida Department of Education, June 1998.

**EXHIBIT 2-16
FEFP REVENUE FUNDING PER WEIGHTED STUDENT FTE
1996-97**

SCHOOL DISTRICT	WEIGHTED STUDENT FTE FUNDED	GROSS STATE & LOCAL FEFP	FUNDING PER WEIGHTED STUDENT
Broward	297,133	\$907,151,652	\$3,053
Miami-Dade	467,093	1,462,863,787	3,132
Duval	157,291	451,057,338	2,868
Hillsborough	197,633	578,727,859	2,928
Orange	167,583	492,151,132	2,937
Palm Beach	184,788	555,374,175	3,005
State Average	2,955,844	\$8,723,596,189	\$2,951

Source: Profiles of Florida School Districts (Financial Data) 1996-97, Florida Department of Department of Education, June 1998.

- Broward County is above the state average in FEFP (Florida Education Finance Program) funding per weighted student FTE by \$102 per student.

2.11 Student Achievement

Exhibits 2-17 through 2-19 provide an examination of student achievement in the Broward County School District and the comparison school districts. The data indicate that:

- Among the comparison districts, Broward County had the highest percentage (55 percent) of surveyed graduates enrolled in postsecondary institutions.
- Broward County is five percentage points above the state average (50 percent) in terms of recent graduates (1996-97) enrolled in postsecondary institutions.

High school competency tests were also compared and analyzed. Exhibit 2-18 indicates that:

- Broward County had the second lowest percentage of students passing the competency tests among the comparison districts, with 72 percent of students passing the communications exam and 71 percent passing the mathematics exam.
- Broward County's percentages were below the state average for both portions of the test.

The graduation and dropout rates for the previous two school years were compared and analyzed. Exhibit 2-19 shows that:

- Broward County had the second lowest graduation rate for 1995-96 and the third highest rate for the following year among the comparison school districts. The improvement in the relative rating was due to a decline in graduation rates in several of the comparison school districts; it is not due to an improvement in Broward County rates.
- Broward County's high school dropout rate for 1996-97 was 3.17 percent, down from 3.83 percent in 1995-96. The dropout rate for 1996-97 was the lowest among the comparison school districts.
- Graduation rates for Broward County were very close to state averages for both academic years. However, dropout rates in Broward County were well below state averages.

**EXHIBIT 2-17
HIGH SCHOOL GRADUATE DATA
1996-97**

SCHOOL DISTRICT	PERCENT ATTENDING POSTSECONDARY INSTITUTIONS
Broward	54.8%
Miami-Dade	53.9%
Duval	48.4%
Hillsborough	50.2%
Orange	44.8%
Palm Beach	52.3%
State Average	50.3%

Source: Florida School Indicators Report, Florida Department of Education, 1996-97.

¹ Based on a follow-up survey conducted in 1997-98 by Florida Education and Training Placement Information Program.

² Including colleges and technical schools.

**EXHIBIT 2-18
HIGH SCHOOL COMPETENCY TEST
PERCENTAGE PASSED
1996-97**

SCHOOL DISTRICT	COMMUNICATIONS	MATHEMATICS
Broward	72%	71%
Miami-Dade	67%	66%
Duval	79%	72%
Hillsborough	84%	86%
Orange	78%	76%
Palm Beach	77%	76%
State Average	77%	75%

Source: Profiles of Florida School Districts (Student and Staff Data), Florida Department of Education, 1996-97, January 1998.

**EXHIBIT 2-19
GRADUATION AND HIGH SCHOOL DROPOUT RATES
1995-96 AND 1996-97 SCHOOL YEARS**

SCHOOL DISTRICT	GRADUATION RATE		DROPOUT RATE	
	1995-96	1996-97	1995-96	1996-97
Broward	73.26%	72.54%	3.83%	3.17%
Miami-Dade	74.56%	73.83%	7.89%	8.95%
Duval	71.47%	68.71%	8.05%	7.68%
Hillsborough	76.70%	73.96%	3.36%	4.98%
Orange	78.53%	65.68%	3.70%	4.65%
Palm Beach	74.86%	67.18%	4.24%	5.21%
State	73.22%	73.18%	5.02%	5.42%

Source: Profiles of Florida School Districts (Student and Staff Data), Florida Department of Education, 1996-97, January 1998.

3.0 SURVEY RESULTS

On October 16, 1998, surveys were mailed to each district administrator, each principal, and a random sample of teachers (10 percent) in the Broward County School District. A total of 761 surveys were returned and analyzed. The sections which follow contain summaries of the survey results for:

- district administrators
- principals
- teachers
- comparisons of administrators, principals, and teachers
- comparisons of Broward County School District responses to other school districts in which a similar survey has been conducted

Copies of the survey instruments are attached as Appendix A. Copies of the response frequencies for administrators, principals, and teachers are included in Appendix B.

3.1 District Administrator Survey Results

Of the 340 surveys that were disseminated to district administrators, 198 were returned for a response rate of 58 percent. Respondents are 51 percent female and 49 percent male. Seventy-two (72) percent are White, 16 percent are African-American, eight percent are Hispanic, and three percent indicate they are of another race. According to the ethnicity data given to MGT by the district's personnel office, the survey response rate is proportional to district administrator ethnicity. Also, as seen in Appendix B, a representative sample of new versus veteran district administrators responded to the survey.

Respondents are fairly new in their current positions within the Broward County School District: 64 percent have held their current position for a period of less than a year to five years and 19 percent for six to 10 years. In contrast, district administrators are fairly evenly spread in terms of how long they have worked within the Broward County School District: 23 percent from less than a year to five years, 16 percent for six to 10 years, 18 percent for 11 to 15 years, 16 percent for 16 to 20 years, and 28 percent have worked in the district for 21 years or more.

Respondents work in many areas in the district office; the area with the highest response rate is *Educational Programs, Student Support, and Human Resources Development* - 25 percent, followed by *Facilities Management and Construction* (17 percent) and *Accountability, Technology, Strategic Planning, and School Improvement* (15 percent). Forty-three (43) percent of the respondents are spread fairly evenly across the other areas.

Parts A, B, and C of the survey consist of items designed to solicit opinions about a variety of school district management and performance issues. Parts D, E, F, G, and H address issues of work environment, job satisfaction, administrative structures/practices, operations, and general questions, respectively.

The survey areas are categorized into the following broad areas, each of which are summarized separately:

- district-related responses
- school board-related responses
- school administrator-related responses
- teacher-related responses
- student-related responses
- parent/community-related responses
- work environment-related responses
- job satisfaction-related responses
- administrative structure/practices-related responses
- operations-related responses

District-related responses

District administrators in Broward County highly rate their school district; 85 percent rate its overall quality of public education as *good* or *excellent*, and 81 percent indicate that the overall quality of education is improving. Administrators indicate that the emphasis on learning has increased in recent years (88 percent *agree* or *strongly agree*), and that their schools can be described as *good places to learn* (75 percent). Sixty-three (63) percent of administrators state that taxpayer dollars are being used wisely to support public education in Broward County.

Administrators are asked to rate themselves; 21 percent grade district-level administrators with an *A* and another 51 percent give themselves a *B*. Only 17 percent give district-level administrators a *C*, eight percent a *D*, and two percent grade administrators with an *F*.

The school superintendent receives high ratings from the administrators; 77 percent indicate that his work as the instructional leader of the district is *excellent* or *good*, and 79 percent state that his work as the chief administrator of the school district is *excellent* or *good*. The Superintendent's *excellent* rating in both cases is 48 percent.

A small percentage (16 percent) of administrators state that the overall operation of the division is highly efficient. About two-thirds (63 percent) of administrators indicate that the overall operation is above average in efficiency. When asked how the operational efficiency of the Broward County School District could be improved, administrators have several suggestions. The most common suggestion to improve operational efficiency is to *privatize some support services*; this is indicated by 27 percent. The second most favored suggestion is to *offer fewer programs* chosen by 15 percent, and to *reduce the number of administrators* indicated by 14 percent of the administrators.

Administrators' responses are mixed concerning schools in the district providing safe environments. Over half (56 percent) *agree* or *strongly agree* that Broward County School District is safe and secure from crime, while 18 percent *disagree* or *strongly disagree*. Additionally, 61 percent state that there is administrative support for controlling student behavior, however only 44 percent state that their schools effectively handle misbehavior problems.

Administrators are concerned by the space and facilities within the district. Only six percent *agree* or *strongly agree* with the statement *that their schools have sufficient space and facilities to support instructional programs*, while 83 percent *disagree* or *strongly disagree* with the statement. However, 55 percent rate the condition in which schools are kept as *good* or *excellent*, and 72 percent indicate that they have adequate facilities in which to conduct their work. In addition, 56 percent indicate that schools have materials and supplies necessary for instruction.

Administrators are pleased with technology as 66 percent of administrators rate the district's job of providing adequate instructional technology as *good* or *excellent*, and 76 percent rate the district's use of technology for administrative purposes as *good* or *excellent*. Lastly, 74 percent indicate that they have adequate equipment and computers to perform their work.

There is not complete satisfaction with student services provided in the Broward County School District. Just over half (52 percent) *agree* or *strongly agree* that there is sufficient student services provided in the schools. Site-based management has been implemented somewhat effectively according to 53 percent of the administrators.

School board-related responses

Survey respondents are asked to rate school board members in three areas:

- members' knowledge of the educational needs of students in the district;
- members' knowledge of operations in the district; and
- members' work at setting or revising policies for the district.

Slightly more than half (52 percent) of the administrators rate the board members' knowledge of the educational needs of the students as *good* or *excellent*. Only 39 percent rate the board members' knowledge of operations in Broward County as *good* or *excellent*. Lastly, 55 percent rate the board members' work at setting or revising policies as *good* or *excellent*.

School administrator-related responses

District administrators have fairly high opinions of school-level administrators. Seventeen (17) percent give school-level administrators a grade of *A* and 52 percent give them a grade of *B*. The lowest grade awarded is an *F*, given by just one percent of the district administrators. Of the remaining, 21 percent give a grade of *C* and five percent give a grade of *D*.

Respondents state that principals and assistant principals care about students' needs (83 percent *agree* or *strongly agree*). Also, administrators highly rate principals' work as the instructional leaders of their schools (67 percent *good* or *excellent*), and as the managers of the staff and teachers (72 percent *good* or *excellent*). Finally, 60 percent

of the district administrators indicate that the opportunities provided by the school district to improve the skills of the school administrators are *good* or *excellent*.

Teacher-related responses

Administrators' opinions of Broward County teachers are similar to their opinions of school-level administrators. Seventeen (17) percent give teachers a grade of *A* and 52 percent give them a grade of *B*. Twenty-two (22) percent give teachers a *C*, and only two percent give them a *D* (the lowest grade given).

In regard to teachers and their students, administrators state that teachers care about students' needs (76 percent *agree* or *strongly agree*). Seventy (70) percent of administrators *agree* or *strongly agree* that teachers expect students to do their very best, however, only 51 percent state that most teachers enforce high student learning standards. Fifty-three (53) percent rate as *good* or *excellent* Broward County teachers' work in meeting students' individual learning needs and 66 percent rate as *good* or *excellent* the opportunities provided by the district to improve the skills of teachers.

Over half (58 percent) of the district administrators *agree* or *strongly agree* that teachers know the material they teach. Less than half (43 percent) rate as *good* or *excellent* teachers' work in communicating with parents. Administrators similarly rate teachers' attitudes about their jobs; just over one-third (39 percent) rate attitudes as *good* or *excellent*, and 45 percent rate attitudes as only *fair* or *poor*. Lastly, 60 percent disagree that there is little a teacher can do to overcome education problems due to a student's home life.

Student-related responses

Administrators indicate that most students in the Broward County School District are motivated to learn; 57 percent *agree* or *strongly agree*, while only 15 percent *disagree* or *strongly disagree*. Moreover, 66 percent rate the students' ability to learn as *good* or *excellent*; 19 percent rate their ability to learn as *fair* or *poor*.

Less than half (39 percent) *agree* or *strongly agree* that lessons are organized to meet students' needs, however, 31 percent indicate that they did not know. In addition, only 40 percent rate as *good* or *excellent* the amount of time students spend on task learning in the classroom. However, 64 percent of administrators are in agreement that the curriculum is broad and challenging for most students.

Parent/community-related responses

Fifty-five (55) percent of the administrators state that the school district does a *good* or *excellent* job in maintaining relations with various groups in the community. Fifty-seven (57) percent of the administrators state that the community really cares about its children's education. However, less than half (41 percent) of the administrators state that parents in Broward County are satisfied with the education their children are receiving. However, only about one-third (34 percent) indicate that parents take responsibility for their children's behavior in schools.

Administrators are divided on whether parents know what goes on in the schools; 49 percent *agree* that they do not, while 28 percent *agree*. Administrators also indicate that parents do not take an active role in decision making in the schools; only 21 percent *agree* that they do, while 13 percent *disagree*. Likewise, 21 percent rate as *good* or *excellent* parents' participation in school activities and organizations, while 62 percent rate it as *fair* or *poor*. Administrators also indicate negative ratings when evaluating parents' efforts in helping their children to do better in school; 26 percent rate them as *good* or *excellent*, but 51 percent rate their efforts as *fair* or *poor*. Likewise, only 32 percent rate as *good* or *excellent* how well students' test results are explained to parents.

Work environment-related responses

The majority of the respondents are comfortable with most aspects of their work environment. Eighty (80) percent find the Broward County School District to be an exciting and challenging place to work. They also indicate that work standards are equal to or above those of other school districts (74 percent), and that Broward County School District officials enforce high work standards (78 percent). Sixty-eight (68) percent indicate that they have sufficient authority to perform their responsibilities.

The workload is an area of concern among district administrators. Only 25 percent state that the workloads are equitably distributed among teachers and staff members, while 20 percent are in disagreement. Likewise, 29 percent are in agreement with the more general statement that *workload is evenly distributed*, and 45 percent *disagree* or *strongly disagree*.

Many administrators state that teacher and staff promotions and pay increases are not based upon individual performance. Fifty-seven (57) percent state that this is not true of teachers, and 69 percent indicate that this is not true of staff. In addition, only 25 percent state that teachers who fail to meet expected work standards are disciplined, and 37 percent state that staff who fail to meet expected work standards are disciplined.

Only 42 percent of the administrators state that administrators and teachers have excellent working relationships. However, only 22 percent *agree* or *strongly agree* that no one knows or cares about the amount or quality of work that they perform. Few (20 percent) state that it is the failure of district officials to enforce high work standards that result in poor quality work and only 19 percent state that they often observe teachers and/or staff socializing rather than working while on the job.

Job satisfaction-related responses

A majority (72 percent) of district administrators in Broward County are very satisfied with their jobs and state they have a future in the school district. A larger percentage (81 percent) plan to make a career in the Broward County School District. Only nine percent are actively looking for work outside of the district, and 91 percent indicate that they like working in a culturally diverse environment.

Administrators perceive their work is appreciated by supervisors (65 percent) and that they are an integral part of the Broward County School District team (68 percent). Administrators offer mixed views concerning salary levels. Sixty-three (63) percent of the administrators state that salary levels in the district are competitive but only 40 percent indicate that their salary level is adequate for their level of work and experience.

Administrative structures/practices-related responses

Administrators responses are not as favorable concerning most administrative structures and practices. Slightly more than half (54 percent) state that most administrative practices are highly effective and efficient. Only 50 percent indicate that central office administrators are easily accessible and are open to input. Likewise, only 37 percent are in agreement that administrative decisions are made quickly and decisively, and 42 percent indicate that teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.

The statement *authority for administrative decisions are delegated to the lowest possible level* is agreeable to only 18 percent of administrators, while 59 percent are in disagreement. The statement *Broward County School District has too many committees* is agreeable to 43 percent, while 31 percent disagree. In contrast, almost half (49 percent) of administrators agree that the extensive committee structure in the district ensures adequate input from teachers and staff on important decisions, and only 27 percent indicate that the district has too many layers of administration.

Less than half of the respondents (47 percent) indicate that most administrative processes are highly efficient and responsive, and 58 percent indicate that major bottlenecks exist in many administrative processes. A high percentage of administrators indicate that administrators are responsive to school needs (65 percent), and that they provide quality service to schools (64 percent).

Operations-related responses

District administrators are given a list of 25 programs or functions and asked to rate them with one of the following descriptions:

- should be eliminated
- needs major improvement
- needs some improvement
- adequate
- outstanding

In no cases do more than three percent of administrators state that a program should be eliminated. The program that three percent of administrators indicate should be eliminated is *risk management*.

More than 15 percent of administrators indicate that seven programs need *major improvement*.

- personnel selection (21 percent state that it *needs major improvement*)
- facilities planning (20 percent)
- staff development (19 percent)
- plant maintenance (17 percent)
- personnel recruitment (16 percent)
- custodial services (16 percent)
- personnel evaluation (16 percent)

When combining the *needs some improvement* and *needs major improvement*, no programs received a sum greater than 50 percent (the highest percentage was in personnel selection):

- personnel selection (47 percent state that it needs some or major improvement)

Seven programs are given a combined *adequate* or *outstanding* rating higher than 50 percent of the administrators:

- food service (63 percent rate it *adequate* or *outstanding*)
- transportation (61 percent)
- program evaluation, research, and assessment (56 percent)
- staff development (56 percent)
- personnel evaluation (66 percent)
- administrative technology (55 percent)
- community relations (55 percent)

Of all the programs, *program evaluation, research, and assessment* receives the highest *outstanding* rating at 24 percent.

3.2 Principal Survey Results

Of the 201 principals who were mailed surveys, 138 returned a survey; this represents a response rate of 69 percent. Seventy-one (71) percent of the respondents are female and 29 percent are male. Seventy-three (73) percent are White, 20 percent are African American, four percent are Hispanic, and three percent classify themselves as "other." According to the ethnicity data given to MGT by the district's personnel office, the survey response rate is proportional to district principal ethnicity.

Most respondents (65 percent) work in an elementary school. Another 16 percent work in a middle school and 12 percent work in a high school. In addition, seven percent indicate that they work at a facility other than an elementary, middle, or high school.

Almost two-thirds of the principals (65 percent) have been in their current position for five years or less. Twenty (20) percent have been in their current position from six to 10 years, nine percent from 11 to 15 years, four percent from 16 to 20 years, and two percent for 21 years or more. Still, a large percentage (93 percent) have worked in some capacity for the Broward County School District for more than 10 years. Almost three-fourths (68 percent) have worked in the district for 21 years or more.

District-related responses

Principals highly rate their school district; 96 percent rate the overall quality of public education in Broward County as *good* or *excellent*, and 92 percent state that the overall quality of education is improving. Like the district-level administrators, principals indicate that the emphasis on learning has increased in recent years (96 percent *agree* or *strongly agree*), and that their schools can be described as *good places to learn* (96 percent). Fewer (72 percent) state that taxpayer dollars are being used wisely to support public education in Broward County School District.

In grading district-level administrators, 21 percent of principals give them an *A*, another 54 percent give them a *B*, 20 percent give them a grade of *C*, and the remaining four percent award them a *D* or *F*.

Most principals give the school superintendent high marks. Eighty-four (84) percent rate his work as the educational leader of the district as *good* or *excellent*; while 16 percent rate it as *fair* or *poor*. A similar percentage (82 percent) also rate his work as the chief administrator as *good* or *excellent*; and 18 percent rate it as *fair* or *poor*.

Eighty-six (86) percent of the principals indicate that the overall operation of the district is at least above average in efficiency, and only six percent of the principals state that it is less efficient than other school districts. When asked to improve the operational efficiency of the school district, the largest percentage of respondents (42 percent) suggest *privatizing some support services*. The second and third most common methods chosen to improve efficiency are to *offer fewer programs* and *reduce the number of administrators* cited by 23 and 12 percent of the principals, respectively.

Most principals (90 percent) state that the schools are safe and secure from crime. In addition, principals state that the schools effectively handle misbehavior problems (79 percent), and that there is administrative support for controlling student behavior (90 percent).

Principals are concerned with district facilities. Seventy-seven (77) percent indicate that there is not sufficient space and facilities to support instructional programs. In contrast, 67 percent rate the condition in which district schools are kept as *good* or *excellent* and 75 percent *agree* or *strongly agree* that they have adequate facilities in which to conduct their work. In addition, 81 percent of the principals indicate that the schools have the materials and supplies necessary for instruction.

Concerning technology, principals (59 percent) rate the district's job of providing adequate instructional technology as *good* or *excellent*. Seventy-six (76) percent rate the district's use of technology for administrative purposes as *good* or *excellent*. It appears that principals are satisfied with equipment and computer support. Seventy (70) percent indicate that they have adequate equipment and computer support to conduct their work.

Fifty-seven (57) percent are in agreement that sufficient student services are provided and 34 percent are in disagreement. Sixty-nine (69) percent of the principals agree that site-based management has been implemented effectively in the district.

School board-related responses

Less than half (41 percent) rate the board members' knowledge of the educational needs of students as *good* or *excellent*. A higher percentage (49 percent) state that the board members' knowledge of operations in Broward County School District is *good* or *excellent* and the same percentage rate it as *fair* or *poor*. Similarly, principals are critical of the school board members' work at setting or revising policies for the school district. Fifty (50) percent rate it as *good* or *excellent*; 49 percent rate it as *fair* or *poor*.

School/school administrator-related responses

Principals give themselves high grades; 37 percent give school-level administrators an *A*, 52 percent give them a *B*, and 10 percent give them a grade of *C*. The percentage of *A* grades that principals award to themselves is higher than grades given to teachers or district-level administrators.

Almost all (98 percent) of the respondents *agree* or *strongly agree* that principals and assistant principals care about students' needs. Similarly, 96 percent rate principals' work as the managers of the staff and teachers as *good* or *excellent*. Also, most (90 percent) rate principals' work as the instructional leaders of their schools as *good* or *excellent*.

Principals are positive on the issue of the opportunities provided by the district to improve the skills of school administrators. A large percentage of principals (84 percent) rate the opportunities as *good* or *excellent*.

Teacher-related responses

In general, principals have a high opinion of district teachers --- 18 percent give teachers an *A*, 69 percent give teachers a *B*, and 12 percent give teachers a *C*.

When asked about teachers in relation to their students, principals indicate that teachers care about students' needs (93 percent *agree* or *strongly agree*). Similarly, 90 percent state that teachers expect students to do their very best, and 80 percent indicate that teachers enforce high student learning standards. Finally, 81 percent state that the teachers' work in meeting student individual learning needs is *good* or *excellent*.

Principals agree that teachers know the material they teach (90 percent). However, only 66 percent rate teachers' attitudes as *good* or *excellent*, while 34 percent rate attitudes about their jobs as *fair* or *poor*. Teachers' work in communicating with parents is rated as *good* or *excellent* by 72 percent of the principals. Lastly, few (10 percent) state that there is little a teacher can do to overcome education problems due to a student's home life and the opportunities provided by the district to improve the skills of teachers is rated as *good* or *excellent* by 85 percent of the principals.

Student-related responses

Over four-fifths of the principals (82 percent) agree that Broward County students are motivated to learn. Furthermore, 81 percent rate students' ability to learn as *good* or *excellent*, and 65 percent rate the amount of time students spend on task learning in the classroom as *good* or *excellent*.

A majority of the principals (84 percent) agree that lessons are organized to meet students' needs and only three percent are in disagreement. A slightly larger percentage of principals (87 percent) indicate that the curriculum is broad and challenging for most students.

Parent/community-related responses

Almost three-fourths (72 percent) of the respondents state that the school district does a *good* or *excellent* job of maintaining relations with various groups of the community. Likewise, principals (79 percent) state that the community really cares about children's education. Over half (53 percent) of the principals rate how well the students' test results are explained to parents as *good* or *excellent*.

Principals have positive and negative opinions concerning the involvement of parents in their schools. Three-fourths (75 percent) of the principals indicate that the parents are satisfied with the education their children are receiving. Sixty-seven (67) percent *agree* or *strongly agree* that parents play an active role in decision making in the school. However, only 57 percent state that parents take responsibility for their children's behavior in school. Also, 34 percent rate parents' participation in school activities and organizations as *good* or *excellent*. Similarly, just 37 percent rate parents' efforts in helping their children to do better in school as *good* or *excellent* and 41 percent state that parents really do not seem to know what goes on in the schools.

Work environment-related responses

Broward County principals are satisfied with many aspects of their work environment. Most (90 percent) find the school district to be an exciting, and challenging place to work. Ninety-one (91) percent indicate that work standards and expectations are equal to or above those of other school districts; while 93 percent indicate that school officials enforce high work standards. A majority percentage state that they have the authority to adequately perform their job responsibilities (70 percent) and that teachers and administrators have excellent working relationships (73 percent).

Principals are satisfied with workload distribution between teachers and staff as 62 percent *agreed* or *strongly agreed*. But when considering the general statement, *workload is evenly distributed*, only 32 percent *agree* with the statement, and 45 percent *disagree* with the statement.

The majority of principals state that teacher and staff promotions and pay increases are not based on individual performance. Sixty-nine (69) percent indicate that this is not true of teachers and 65 percent indicate this is not true of staff. Principals are more confident about teacher and staff disciplinary actions. Fifty-eight (58) percent indicate

that teachers who fail to meet expected work standards are disciplined, while 67 percent indicate that staff who do not meet expected work standards are disciplined.

Lastly, only 15 percent of the principals *agree* that the failure of district officials to enforce high work standards results in poor quality work, and only seven percent indicate that they often observe teachers and/or staff socializing rather than working while on the job. In response to the statement *no one knows or cares about the amount or quality of work that I perform*, 24 percent of the principals are in agreement while 58 percent are in disagreement.

Job satisfaction-related responses

In general, Broward County principals are satisfied with their jobs, with 78 percent either *agreeing* or *strongly agreeing* that they are very satisfied with their jobs. A higher percentage (85 percent) of principals state there is a future for them in the school district, and 95 percent plan to make a career in the school district. Only five percent indicate that they are actively looking for a job outside of the district. Almost all (99 percent) of the principals state that they enjoy working in a culturally-diverse environment.

A majority of principals (63 percent) indicate that their work is appreciated by their supervisors, and 66 percent state that they are an integral part of the Broward County School District team. Principals provide contrasting responses concerning salaries. Over four-fifths (81 percent) of the principal respondents indicate that salary levels are competitive; however, only 54 percent state that their salary level is adequate for their level of work and experience.

Administrative structures/practices responses

Principals are somewhat favorable towards most administrative structures and practices. Sixty-seven (67) percent indicate that most administrative practices in Broward County School Districts are highly effective and efficient. Two-thirds of the principals (67 percent) indicate that administrative decisions are made quickly and decisively. Just over half, (52 percent) principals indicate that central office administrators are accessible and open to input.

Principals are divided as to whether authority for administrative decisions are delegated to the lowest possible level. Thirty-three (33) percent *agree* or *strongly agree* that lower level positions make administrative decisions, while 45 percent *disagree* or *strongly disagree*. In contrast, 71 percent of the principals agree that teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.

Over half (58 percent) of the principals agree that major bottlenecks exist in many administrative processes and only 45 percent agree that most administrative processes are highly efficient and responsive. A similar percentage (44 percent) agree that the district has too many administrators.

When asked about committees, principals (53 percent) indicate that the Broward County School District has too many committees; 27 percent indicate that the school district does not. However, a similar percentage (54 percent) state that the committee

structure ensures adequate input from teachers and staff on the most important decisions.

Concerning central office administrators, over half of the principals state that they are responsive to school needs (59 percent) and provide quality service to schools (58 percent)

Operations-related responses

Principals are also given a list of 25 programs or functions and asked to rate them with the same descriptions used by district-level administrators. These descriptions range from *should be eliminated* to *outstanding*.

A few of the programs receive a rating of *should be eliminated* by a few principals, but only two have percentage responses of three percent or higher: *strategic planning* and *personnel recruitment*.

At least 15 percent of principals indicate the following nine programs *need major improvement*:

- facilities planning (31 percent *needs major improvement*)
- instructional technology (30 percent)
- plant maintenance (24 percent)
- custodial services (19 percent)
- transportation (18 percent)
- data processing (16 percent)
- administrative technology (15 percent)
- food service (15 percent)
- federal program coordination (15 percent)

When combining the *needs some improvement* and *needs major improvement*, six programs receive a sum equal to or greater than 50 percent:

- facilities planning (66 percent *needs improvement*)
- instructional technology (59 percent)
- transportation (57 percent)
- plant maintenance (56 percent)
- custodial services (54 percent)
- budgeting (52 percent)

Principals in general are positive about many programs -- almost all the programs receive a combined *adequate* and *outstanding* rating totaling more than 50 percent. The five programs given the highest combined *adequate* or *outstanding* ratings are:

- community relations (79 percent *adequate* or *outstanding*)
- pupil accounting (74 percent)
- personnel evaluation (72 percent)
- personnel selection (71 percent)
- risk management (71 percent)

Of all the programs, *curriculum planning* and *staff development* receive the highest *outstanding* rating; 20 percent of the principals rate these two areas as outstanding.

3.3 Teacher Survey Results

Of the 1,213 teachers who were mailed surveys, 425 responded, representing a response rate of 35 percent. Most respondents are female (83 percent), while 18 percent are male. The majority of respondents are White (83 percent), 11 percent are African-American, five percent Hispanic, and one percent responded that they are "other." Due to the low response rate, as well as a lack of proportional representation of teacher ethnicity, findings on the survey should be interpreted cautiously; therefore, the reader should not generalize results to all teachers.

Many respondents have worked in the Broward County School District for a lengthy period of time; 49 percent have worked in the school district for more than 10 years, and 17 percent report working in the district for more than 20 years.

Respondents are distributed throughout all grade levels. The highest percentage of respondents are from the elementary school level (49 percent), followed by high school (22 percent), and middle school, (20 percent). In addition, eight percent indicate they work at some other type of school and two percent state that they work in the district office.

District-related responses

Sixty-seven (67) percent of the teachers indicate that the overall quality of public education in the Broward County School District is *good* or *excellent*. Fifty-one (51) percent state the overall quality of education is *improving*, while 23 percent state it is *staying the same*. However, 22 percent state it is *getting worse*. In addition, 70 percent of the teachers indicate that the emphasis on learning has increased in recent years, and 67 percent state that the schools can be described as "good places to learn."

Teachers indicate that taxpayer dollars are not used wisely to support public education in the district. Only 24 percent indicate that dollars are used wisely, while 51 percent state that they are not.

District-level administrators are given a grade of *B* or better by 29 percent of the teachers. Thirty-four (34) percent give them a *C*, and 28 percent give them a *D* or *F*. The school superintendent receives a poor rating from most teachers. Only 27 percent rate his work as the educational leader of the school district as *good* or *excellent*. Similar marks are given concerning his work as the chief administrator; 28 percent rate him as *good* or *excellent* in this area.

Over half of the teachers (51 percent) state that the Broward County School District is at least above average in overall operational efficiency, while 32 percent indicate that it is less efficient than other school districts. Three percent of the teachers indicate that the district is highly efficient. When asked to improve operational efficiency, the most

popular teacher response is to *reduce the number of administrators* chosen by 35 percent. This is followed by *privatizing some support services* chosen by 18 percent, and *offering fewer programs* chosen by 15 percent of the teachers.

Teachers' responses indicate they are concerned with safety issues. Less than half (46 percent) indicate their schools are safe and secure from crime. Similarly, 52 percent of teachers are concerned whether the schools effectively handle misbehavior problems, but 57 percent of teachers indicate that there is administrative support for controlling student behavior in schools.

Like the principals and administrators, teachers are concerned with district facilities. Seventy-five (75) percent indicate that there is not sufficient space and facilities to support instructional programs. In addition, only 44 percent rate the condition in which district schools are kept as *good* or *excellent*, but 70 percent *agree* or *strongly agree* that that have adequate facilities in which to conduct their work. Fifty-six (56) percent of the teachers indicate that the schools have the materials and supplies necessary for instruction.

Concerning technology, 56 percent of the teachers rate the district's job of providing adequate instructional technology as *good* or *excellent*. Fifty-four (54) percent rate the district's use of technology for administrative purposes as *good* or *excellent*. Teachers indicate that they are satisfied with equipment and computer support; 57 percent indicate that they have adequate equipment and computer support to conduct their work.

Teachers indicate that they are somewhat pleased with student services. Over half (54 percent) indicate that there are sufficient services such as counseling, speech, and health provided. Only 29 percent of the teachers *agree* or *strongly agree* that site-based management has been implemented effectively.

School board-related responses

Less than one-fourth of the teachers (21 percent) rate the board members' knowledge of the educational needs of students as *good* or *excellent*. A higher percentage (26 percent) state that the board members' knowledge of operations in Broward County School District is *good* or *excellent* and 59 percent rate it as *fair* or *poor*. Similarly, principals are critical of the school board members' work at setting or revising policies for the school district. Only 23 percent rate it as *good* or *excellent*; 61 percent rate it as *fair* or *poor*.

School/school administrator-related responses

Teachers give school-level administrators high marks compared to marks given to district-level administrators. Ten (10) percent of teachers award school-level administrators an *A*, and 45 percent award them a *B*. Twenty-nine (29) percent of the teachers give school-level administrators a *C*, 10 percent give a grade of *D*, and four percent give a grade of *F*.

Over half (59 percent) of respondents rate as *good* or *excellent* the principals' work as instructional leaders of their schools. Likewise, 61 percent, rate the principals' work as managers of the staff and teachers as *good* or *excellent*. Over three-fourths (76 percent) indicate that principals and assistant principals care about student's needs. Less than half (40 percent) of the teachers rate the opportunity provided by the district to improve the skills of school administrators as *good* or *excellent*.

Teacher-related responses

The teachers award themselves fairly high grades with 19 percent giving themselves a grade of *A*, 59 percent a grade of *B*, 16 percent a grade of *C*, two percent graded themselves with a *D*, and one percent graded themselves with a *F*.

When asked about teachers in regard to their students, teachers indicate that they care about students' needs (87 percent). Eighty-nine (89) percent state that teachers expect students to do their very best, and 77 percent state that teachers enforce high student learning standards. Also, 73 percent of the teachers rate as *good* or *excellent* teachers' work in meeting students' individual learning needs.

Most (87 percent) of the teachers state that they know the material they teach. Almost three-fourths (71 percent) rate as *good* or *excellent* teachers' work in communicating with parents. Teachers are not as positive about their own attitudes about their jobs; only 44 percent rate it as *good* or *excellent*, and 55 percent rate their attitudes as *fair* or *poor*. In addition, 72 percent of the teachers rate the opportunities provided by the district to improve the skills of teachers as *good* or *excellent*.

Most teachers (89 percent) indicate that teachers expect students to do their best and one-third (33 percent) of teachers state that there is little a teacher can do to overcome education problems due to a student's home life.

Student-related responses

Over half of the teachers (56 percent) state that most students are motivated to learn, while 27 percent of the teachers do not agree with this statement. The same percentage (56 percent) rate students' ability to learn as *good* or *excellent*; 44 percent rate it as *fair* or *poor*. Fifty-four (54) percent rate as *good* or *excellent* the amount of time students spend on task learning in the classroom.

Almost four-fifths (79 percent) of respondents state that lessons are organized to meet students' needs. Similarly, 77 percent of the teachers indicate that the curriculum is broad and challenging for most students.

Parent/community-related responses

Only 46 percent indicate that the school district does a *good* or *excellent* job of maintaining relations with various groups in the community. A larger percentage (53 percent) state that the community really cares about its children's education. However, less than half (39 percent) rate as *good* or *excellent* how well students' test results are explained to parents.

Teachers have concerns regarding parent satisfaction with education in the Broward County School District. Less than half (46 percent) *agree* or *strongly agree* that parents are satisfied with the education their children are receiving. The results are similar when teachers are asked if parents play an active role in decision making in schools. Forty-two (42 percent) indicate that parents do play an active role in decision making.

Additionally, negative results are reflected in teachers' rating of parents' participation in school activities and organizations. Only 20 percent of the teachers rate parents' participation as *good* or *excellent*, and 79 percent rate participation as *fair* or *poor*. Teachers are critical of parents' efforts in helping their children to do better in school. Seventeen (17) percent rate parents' efforts as *good* or *excellent* and 81 percent rate parents' efforts as *fair* or *poor*. Fifty (50) percent indicate that parents do not take responsibility for their children's behavior in the schools. Lastly, 56 percent of teachers *agree* or *strongly agree* that parents really do not seem to know what goes on in the schools.

Work environment-related responses

Broward County teachers are satisfied with many aspects of their work environment. Sixty-seven (67) percent find the Broward County School District to be an exciting and challenging place to work. Fewer (55 percent) indicate that work standards and expectations are equal to or above those of other school districts. Almost two-thirds (64 percent) indicate that district officials enforce high work standards.

Almost three-fourths of the teachers (74 percent) state that they have the authority to adequately perform their job responsibilities. Teachers indicate that they are concerned with workload distribution. They are divided on whether workloads are equitably distributed among teachers and staff; 41 percent are in agreement that they are equitably distributed and 42 percent *disagree* or *strongly disagree*. When presented with the general statement, *workload is evenly distributed*, 37 percent *agree* or *strongly agree*, while 42 percent *disagree* or *strongly disagree*.

Teachers are also asked whether teacher and staff promotions and pay increases are based on individual performance. Seventy-nine (79) percent indicate that this is not true of teachers, and 58 percent indicate this is not true of staff. When asked about disciplinary actions, only 31 percent state that teachers who fail to meet expected work standards are disciplined, while only 30 percent state that staff are disciplined if they do not meet expected work standards.

Teachers are undecided concerning their relationship with administrators. Thirty-six (36) percent *agree* or *strongly agree* that they have excellent working relationships while 32 percent *disagree*. Only about one-fourth (27 percent) state that no one knows or cares about the amount or quality of work that they perform. Similarly, 25 percent state that it is the failure of district officials to enforce high work standards that results in poor quality work. Finally, only 15 percent state that they often observe teachers and/or staff socializing rather than working while on the job.

Job satisfaction-related responses

A majority of the teachers (68 percent) are very satisfied with their jobs. Moreover, 75 percent indicate they have a future in the school district; and 77 percent plan to make a career in the district. Only seven percent stated that they are actively looking for a job outside of the district. Lastly, 84 percent enjoy working in a culturally-diverse environment.

Over half (59 percent) of the teachers state that their work is appreciated by their supervisors and that they are an integral part of the district team (53 percent). However, teachers are not as satisfied with salaries. While about half (48 percent) of the teachers state that salary levels in the Broward County School District are competitive; 70 percent state that their salary levels are not adequate for their level of work and experience.

Administrative structures/practices responses

Teachers' responses are negative concerning administrative structures and practices in the Broward County School District. A small percentage of teachers (28 percent) *agree* that administrative processes are highly effective and efficient and that administrative decisions are made quickly and decisively (33 percent). Few teachers (29 percent) indicate that administrators are easily accessible and open to input. Few teachers state (25 percent) that administrative processes are highly efficient and responsive. Additionally, few teachers (10 percent) state that authority for administrative decisions is delegated to the lowest possible level.

With regard to committees, teachers say there are too many committees (57 percent). Additionally, teachers indicate the committee structure does not ensure adequate input from teachers and staff on important decisions as only 24 percent state that adequate input is provided, while 44 percent indicate that it is not.

There are too many administrators according to 60 percent of teachers and 51 percent indicate that major bottlenecks exist in many administrative processes which cause unnecessary time delays. Less than half of the teachers (45 percent) indicate that they are empowered with sufficient authority to effectively perform their responsibilities. Lastly, few (18 percent) state that central office administrators are responsive to school needs and that they provide quality service to schools (19 percent).

Operations-related responses

Teachers are given the same list as administrators and principals of the 25 school district programs or functions and are asked to rate them with descriptions ranging from *should be eliminated* to *outstanding*.

According to survey results, all programs are considered worthy of elimination by a very small percentage of teachers. However, in only one case do more than two percent indicate this way; *personnel recruitment*, with three percent. Teachers consider five programs, by more than 20 percent, to be in need of major improvement. They are:

- budgeting (27 percent indicate *needs major improvement*)

- facilities planning (27 percent)
- instructional technology (23 percent)
- financial management (21 percent)
- instructional support (21 percent)

When combining the *needs some improvement* and *needs major improvement*, three programs receive a sum of 50 percent or greater:

- budgeting (61 percent *needs some* or *major improvement*)
- instructional technology (51 percent)
- facilities planning (50 percent)

Teachers are positive about several programs; many receive a combined *adequate* and *outstanding* rating totaling more than 50 percent. The programs that scored highest in combined *adequate* or *outstanding* ratings are:

- staff development (60 percent *adequate* or *outstanding*)
- food service (51 percent)
- custodial services (52 percent)

Of all the programs, *staff development* receives the highest *outstanding* rating at 12 percent.

3.4 Comparison of District Administrators, Principals, and Teachers Surveys

This section reviews the responses given by the three employee groups in comparison to each other. Exhibit 3-1 compares responses given by district administrators, principals, and teachers to Part A of the surveys. Exhibit 3-2 compares responses for Part B of the surveys, and so on through Exhibit 3-8, which compares responses to Part H of the surveys. For Parts B, D, E, and F the *agree* and *strongly agree* responses are combined and compared to the combined *disagree* and *strongly disagree* responses. In Part C, the *good* and *excellent* responses are combined and compared to the combined *fair* and *poor* responses. In Part G, the responses *needs some improvement* and *needs major improvement* are combined and compared to the combined *adequate* and *outstanding* responses. The *should be eliminated*, *neutral* and *don't know* responses are omitted from all exhibits in this section.

In Exhibit 3-1, responses to Part A of the surveys are compared. Administrators, principals, and teachers are not in agreement concerning the quality of public education in Broward County. Ninety-six (96) percent of the principals, 85 percent of the administrators, and 67 percent of the teachers rate the quality as *good* or *excellent*. Likewise, teachers tend to agree less that the quality of education in Broward County is *good* or *excellent* and fewer teachers state that the quality of education is improving. Fifty-one (51) percent of the teachers, compared to 81 percent of the administrators and 92 percent of the principals, indicate that the overall quality of education is improving. Exhibit 3-9 shows a comparison of Broward County employee responses to responses from other districts' employees.

**EXHIBIT 3-1
COMPARISON SURVEY RESPONSES
WITHIN BROWARD COUNTY SCHOOL DISTRICT**

PART A OF SURVEY	ADMINISTRATORS RESPONSES (%)	PRINCIPALS RESPONSES (%)	TEACHERS RESPONSES (%)
1. Overall quality of public education in Broward County School District is:			
Good or Excellent	85	96	67
Fair or Poor	14	4	32
2. Overall quality of education in Broward County School District is:			
Improving	81	92	51
Staying the Same	12	6	23
Getting Worse	5	2	22
Don't Know	2	0	4
3. Grade given to Broward County School District teachers:			
Above Average (A or B)	69	87	78
Below Average (D or F)	2	1	2
4. Grade given to Broward County School District school level administrators:			
Above Average (A or B)	69	89	55
Below Average (D or F)	6	0	14
5. Grade given to Broward County School District level administrators:			
Above Average (A or B)	72	75	29
Below Average (D or F)	10	4	28

Teachers are also less positive than administrators and principals when grading employee groups particularly in the grading of both school and district-level administrators. Only 55 percent of the teachers grade the school-level administrators with an A or B compared to 69 percent of the administrators and 89 percent of the principals. Likewise, only 29 percent of the teachers grade district-level administrators with an A or B while 72 percent of administrators and 75 percent of principals grade them this high. The principals grade the teachers higher than the teachers grade themselves, with the administrators providing the lowest grades to the teachers.

Exhibit 3-2 compares responses to Part B of the surveys. Administrators, principals, and teachers are not in agreement on several questions. Administrators and principals are in general agreement with each other on all but three questions; teachers differ significantly from administrators on seven questions and have differences of opinion with principals on eight questions.

As can be seen, administrators (56 percent) and principals (90 percent) tend to agree that Broward County Schools are safe and secure from crime, but only 46 percent of the teachers *agree* that schools are safe and secure. Only 13 percent of the principals and 27 percent of the administrators are in agreement with the statement that *our schools do not effectively handle misbehavior problems*, while 52 percent of the teachers are in agreement. Similarly, higher percentages of principals (90 percent) than teachers (57 percent) and administrators (61 percent) indicate that there is administrative support for controlling student behavior in the schools.

Fewer teachers (56 percent) and administrators (56 percent) than principals (81 percent) indicate that the schools have the necessary materials and supplies for basic skills programs. Administrators (63 percent) and principals (72 percent) are more positive than teachers (24 percent) when asked if taxpayers dollars are being used efficiently to support education in the district. Additionally, more principals (69 percent) and administrators (53 percent) are in agreement with the implementation of site-based planning than teachers (29 percent).

Responses to questions concerning the community and parental involvement also resulted in differences of opinion. Fewer principals (28 percent) and administrators (36 percent), compared to teachers (50 percent), state that parents do not take responsibility for their children's behavior in school. Likewise, teachers (56 percent) more often than administrators (49 percent) and principals (41 percent), state that parents do not know what is going on in the schools. Lastly, more principals (67 percent), than teachers (42 percent) and administrators (21 percent), indicate that parents play an active role in decision making in the schools.

Similar responses are derived from the three groups of respondents concerning a student's home life. Seventy-eight (78) percent of the principals *disagree* that there is little a teacher can do to overcome problems at home, while 60 percent of the administrators and 48 percent of the teachers themselves *disagree*. Principals (75 percent) are more positive concerning parents satisfaction with education than the teachers (46 percent) and the administrators (41 percent).

Fewer administrators (39 percent), than principals (84 percent) and teachers (79 percent), indicate that lessons are organized to meet students' needs. Similarly, fewer administrators (58 percent) state that teachers know the material they teach, than principals (90 percent) and teachers (87 percent).

Exhibit 3-3 compares responses to Part C of the survey. Administrators, principals, and teachers agree in many of their assessments. There are 13 questions over which there is disagreement; teachers tend to provide lower percentages of *good* or *excellent* responses and higher percentages of *fair* or *poor* responses.

**EXHIBIT 3-2
COMPARISON SURVEY RESPONSES
WITHIN BROWARD COUNTY SCHOOL DISTRICT**

PART B	(%A + SA) / (%D + SD) ¹		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. The emphasis on learning in Broward County School District has increased in recent years.	88/5	96/2	70/16
2. Broward County schools are safe and secure from crime.	56/18	90/2	46/32
3. Our schools do not effectively handle misbehavior problems.	27/44	13/79	52/32
4. Our schools have sufficient space and facilities to support the instructional programs.	6/83	14/77	16/75
5. Our schools do not have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	16/56	11/81	27/56
6. Our schools can be described as "good places to learn."	75/9	96/1	67/16
7. There is administrative support for controlling student behavior in our schools.	61/15	90/8	57/27
8. Most students in our schools are motivated to learn.	57/15	82/9	56/27
9. Lessons are organized to meet students' needs.	39/9	84/3	79/8
10. The curriculum is broad and challenging for most students.	64/8	87/5	77/13
11. There is little a teacher can do to overcome education problems due to a student's home life.	19/60	10/78	33/48
12. Teachers in our schools know the material they teach.	58/4	90/1	87/3
13. Teachers in our schools care about students' needs.	76/4	93/1	87/4
14. Teachers expect students to do their very best.	70/6	90/4	89/4
15. Principals and assistant principals in our schools care about students' needs.	83/4	98/1	76/14
16. In general, parents do not take responsibility for their children's behavior in our schools.	36/34	28/57	50/27
17. Parents in this district are satisfied with the education their children are receiving.	41/22	75/9	46/17
18. Most parents really don't seem to know what goes on in our schools.	49/28	41/37	56/25
19. Parents play an active role in decision-making in my school.	21/13	67/19	42/35
20. This community really cares about its children's education.	57/18	79/11	53/24
21. Taxpayer dollars are being used wisely to support public education in the Broward County School District.	63/22	72/13	24/51
22. Sufficient student services are provided in Broward County School District (e.g., counseling, speech therapy, health).	52/24	57/34	54/34
23. Site-based management has been implemented effectively in the Broward County School District.	53/16	69/19	29/28

¹Percent responding *Agree* or *Strongly Agree*/Percent responding *Disagree* or *Strongly Disagree*

**EXHIBIT 3-3
COMPARISON SURVEY RESPONSES
WITHIN BROWARD COUNTY SCHOOL DISTRICT**

PART C	(%G + E) / (%F + P) ¹		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. School board members' knowledge of the educational needs of students in the Broward County School District.	52/43	41/58	21/69
2. School board members' knowledge of operations in the Broward County School District.	39/57	49/49	26/59
3. School board members' work at setting or revising policies for the Broward County School District.	55/41	50/49	23/61
4. The district school superintendent's work as the educational leader of the Broward County School District.	77/21	84/16	27/64
5. The district school superintendent's work as the chief administrator (manager) of the Broward County School District.	79/19	82/18	28/60
6. Principal's work as the instructional leaders of their schools.	67/21	90/10	59/39
7. Principal's work as the managers of the staff and teachers.	72/18	96/4	61/38
8. Teachers' work in meeting students' individual learning needs.	53/32	81/19	73/26
9. Teachers' work in communicating with parents.	43/38	72/28	71/28
10. Teachers' attitudes about their jobs.	39/45	66/34	44/55
11. Students' ability to learn.	66/19	81/19	56/44
12. The amount of time students spend on task learning in the classroom.	40/26	65/35	54/43
13. Parents' efforts in helping their children to do better in school.	26/51	37/63	17/81
14. Parents' participation in school activities and organizations.	21/62	34/66	20/79
15. How well students' test results are explained to parents.	32/42	53/46	39/53
16. The condition in which Broward County School District schools are kept.	55/42	67/33	44/55
17. How well relations are maintained with various groups in the community.	55/35	72/28	46/42
18. The opportunities provided by the district to improve the skills of teachers.	66/18	85/15	72/28
19. The opportunity provided by the district to improve the skills of school administrators.	60/33	84/16	40/21
20. The district's job of providing adequate instructional technology.	66/28	59/41	56/42
21. The district's use of technology for administrative purposes.	76/22	76/24	54/19

¹Percent responding *Good* or *Excellent* / Percent responding *Fair* or *Poor*.

Responses regarding issues concerning the school board results in differences of opinion. The district administrators tend to provide slightly higher favorable positive responses, principals provide similar percentages of both negative and positive responses, and teachers offer the most negative responses.

The teachers (27 percent) provide lower ratings of the superintendent concerning his work as the educational leader of the district than the administrators (77 percent) and principals (84 percent). Almost identical positive and negative responses are given concerning his work as the chief administrator of the district. In addition, 90 percent of the principals rate as *good* or *excellent* the principals' work as instructional leaders of their schools compared to 67 percent of the administrators and 59 percent of the teachers. Similar responses are provided concerning the principals' work as managers of the staff and teachers.

The principals (66 percent) indicate that the teachers' attitudes concerning their jobs is *good* or *excellent*, while only 44 percent of the teachers themselves and 39 percent of the administrators rate attitudes this high. A majority of principals (84 percent) and administrators (60 percent) indicate that the opportunity provided by the district to improve the skills of administrators is *good* or *excellent*, while only 40 percent of the teachers indicate the same. Likewise, more principals (76 percent) and administrators (76 percent) than teachers (54 percent) rate the district's use of technology for administrative purposes high.

Lower ratings are given by administrators (53 and 43 percent) than principals (81 and 72 percent) and teachers (73 and 71 percent) concerning the teachers' work in meeting students' needs and the teachers' work in communicating with parents. Higher percentages of teachers (81) rate as *fair* or *poor* the parents' efforts in helping their children do better in school than do principals (63 percent) and administrators (51 percent).

More principals (67 percent) and administrators (55 percent) than teachers (44 percent) highly rate the condition in which the schools are kept. Similarly, the teachers (46 percent) provide lower rankings than the administrators (55 percent) and the principals (72 percent) when asked how well relations are maintained with various groups in the community. Principals differ from the other groups in their assessment of how well students' test results are explained to parents. A majority of principals (53 percent) rate these explanations as *good* or *excellent*, while only 39 percent of teachers and 32 percent of administrators give this area a high rating. Finally, there is slight disagreement concerning the amount of time spent on task learning in the classroom--- principals rate this time on task higher (65 percent) than administrators (40 percent) and teachers (54 percent).

Exhibit 3-4 presents the responses for each group to Part D of the surveys which asks questions pertaining to the work environment. The groups are generally in agreement over the areas covered in this section. There are six statements where there are some differences among the groups.

**EXHIBIT 3-4
COMPARISON SURVEY RESPONSES
WITHIN BROWARD COUNTY SCHOOL DISTRICT**

PART D: WORK ENVIRONMENT	(% A + SA) / (% D + SD) ¹		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. I find the Broward County School District to be an exciting, challenging place to work.	80/11	90/4	67/14
2. The work standards and expectations in the Broward County School District are equal to or above those of most other school districts.	74/8	91/2	55/11
3. Broward County School District officials enforce high work standards.	78/11	93/3	64/14
4. Most Broward County School District teachers enforce high student learning standards.	52/5	80/4	77/8
5. Broward County School District teachers and administrators have excellent working relationships.	42/17	73/4	36/32
6. <u>Teachers</u> who do not meet expected work standards are disciplined.	25/30	58/20	31/33
7. <u>Staff</u> who do not meet expected work standards are disciplined.	37/35	67/12	30/30
8. <u>Teacher</u> promotions and pay increases are based upon individual performance.	10/57	15/69	7/79
9. <u>Staff</u> promotions and pay increases are based upon individual productivity.	13/69	17/65	8/58
10. I feel that I have the authority to adequately perform my job responsibilities.	68/25	70/20	74/18
11. I have adequate facilities in which to conduct my work.	72/17	75/17	70/21
12. I have adequate equipment and computer support to conduct my work.	74/16	70/21	57/34
13. The workloads are equitably distributed among teachers and staff members.	25/20	62/25	41/42
14. No one knows or cares about the amount or quality of work that I perform.	22/62	24/58	27/55
15. Workload is evenly distributed.	29/45	32/45	37/42
16. The failure of Broward County School District officials to enforce high work standards results in poor quality work.	20/52	15/67	25/42
17. I often observe other teachers and/or staff socializing rather than working while on the job.	19/56	7/83	15/71

¹Percent responding Agree or Strongly Agree/Percent responding Disagree or Strongly Disagree

One statement that lacks consensus among groups relates to workload distribution. More principals (62 percent) than administrators (25 percent) and teachers (41 percent) agree that workloads are equitably distributed among teachers and staff members. Higher percentages of principals (67 percent) *disagree* with the statement that the failure of district officials to enforce high work standards results in poor quality work than do administrators (52 percent) or teachers (42 percent).

Principals (73 percent) indicate that teachers and administrators have excellent working relationships; however, only 36 percent of the teachers and 42 percent of the administrators agree. The principals also indicate that staff (67 percent) are disciplined when work standards are not met while fewer teachers (30 percent) and administrators (37 percent) agree. Similarly, more principals (58 percent), than administrators (25 percent) and teachers (31 percent), indicate that teachers who do not meet expected work standards are disciplined.

One additional area where discrepancies in responses occur concerns the statement *I often observe other teachers and/or staff socializing rather than working while on the job*. Greater percentages of principals (83 percent) and teachers (71 percent) compared to administrators (56 percent) *disagree* with the statement.

Exhibit 3-5 details the various responses to Part E of the surveys. In this section, all groups are in agreement on every statement except two. Administrators and principals agree to a greater extent that salary levels are competitive in the Broward County School District (63 and 81 percent, respectively) than do teachers (48 percent). Similar responses are provided to the question concerning adequate salary levels for level of work and experience. Teachers provided responses indicating disagreement with this statement at a higher rate than principals or administrators.

**EXHIBIT 3-5
COMPARISON SURVEY RESPONSES
WITHIN BROWARD COUNTY SCHOOL DISTRICT**

PART E: JOB SATISFACTION	(%A + SA) / (% D + SD) ¹		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. I am very satisfied with my job in the Broward County School District.	72/13	78/9	68/17
2. I plan to make a career in the Broward County School District.	81/8	95/2	77/8
3. I am actively looking for a job outside of the Broward County School District.	9/77	5/85	7/79
4. Salary levels in the Broward County School District are competitive.	63/23	81/8	48/33
5. I feel that my work is appreciated by my supervisor(s).	65/19	63/26	59/25
6. I feel that I am an integral part of the Broward County School District team.	68/18	66/15	53/26
7. I feel that there is no future for me in the Broward County School District.	14/72	5/85	8/75
8. My salary level is adequate for my level of work and experience.	40/46	54/34	19/70
9. I enjoy working in a culturally diverse environment.	91/1	99/1	84/4

¹Percent responding *Agree* or *Strongly Agree*/Percent responding *Disagree* or *Strongly Disagree*

Exhibit 3-6 details the responses given by each group to Part F of the surveys concerning the administrative structures and practices. There is disagreement over all of the responses except for two. In most cases teachers provide less positive responses.

**EXHIBIT 3-6
COMPARISON SURVEY RESPONSES
WITHIN BROWARD COUNTY SCHOOL DISTRICT**

PART F: ADMINISTRATIVE STRUCTURE/PRACTICES	(% A + SA) / (% D + SD) ¹		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. Most administrative practices in Broward County School District are highly effective and efficient.	54/28	67/20	28/42
2. Administrative decisions are made quickly and decisively.	37/41	67/18	33/38
3. Broward County School District administrators are easily accessible and open to input.	50/29	52/27	29/43
4. Authority for administrative decisions are delegated to the lowest possible level.	18/59	33/45	10/35
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	42/27	71/17	45/35
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	58/28	58/23	51/14
7. The extensive committee structure in Broward County School District ensures adequate input from teachers and staff on most important decisions.	49/24	54/24	24/44
8. Broward County School District has too many committees.	43/31	53/27	57/10
9. Broward County School District has too many layers of administrators.	27/51	44/38	60/12
10. Most Broward County School District administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	47/29	45/38	25/37
11. Central Office Administrators are responsive to school needs.	65/8	59/25	18/30
12. Central Office Administrators provide quality service to schools.	64/5	58/19	19/27

¹Percent responding *Agree* or *Strongly Agree*/Percent responding *Disagree* or *Strongly Disagree*

Fewer teachers (28 percent) than administrators (54 percent) and principals (67 percent) indicate that most administrative practices are highly effective and efficient. Similarly, fewer teachers (33 percent) and administrators (37 percent) state that administrative decisions are made quickly and decisively than principals (67 percent).

More principals (52 percent), and administrators (50 percent) than teachers (29 percent) indicate that administrators are easily accessible and open to input. More administrators (59 percent), than teachers (35 percent) and principals (45 percent), *disagree* that authority for administrative decisions are delegated to the lowest possible level. The extensive committee structure is viewed more positively by the principals (54 percent) and the administrators (49 percent) than by the teachers (24 percent). Similarly, 57 percent of the teachers state that there are too many committees while 53 percent of the principals and 43 percent of the administrators indicate that this is the case. According to 60 percent of the teachers, there are too many layers of administrators --- more so than the administrators themselves (27 percent) or the principals (44 percent).

Higher percentages of principals (71 percent), than teachers (45 percent) and administrators (42 percent), state that teachers and staff are empowered with sufficient authority to effectively perform their responsibility. The principals (59 percent) and the administrators (65 percent) state that district administrators are responsive to school needs, while fewer teachers (18 percent) indicate likewise. Similarly, greater percentages of both administrators and principals than teachers state that central office administrators provide quality service to schools.

Exhibit 3-7 lists the responses given to Part G of the surveys. In every area except for *staff development*, there is disagreement on the quality of the programs. In most cases, the principals give higher *adequate* or *outstanding* ratings followed by the administrators, and then teachers.

The principals *disagree* with the administrators on 10 different district programs or functions. Most principals give a greater number of *adequate* or *outstanding* responses except for the area of *transportation* where only 37 percent of the principals award a high rating. Sixty-one (61) percent of the administrators rate *transportation* high. In the other areas of difference, the administrators provide lower *needs some improvement* or *needs major improvement* ratings than do the principals. The greatest areas of differences are *food service*, (administrators - nine percent to principals - 40 percent) and *transportation* (administrators-19 percent and principals - 58 percent).

The administrators and teachers differ in their assessment of almost every one of the district's programs and functions. However, there are three areas in which the administrators and teachers are in general agreement. In the areas of *personnel selection*, *personnel evaluation*, and *staff development*, administrators and teachers have similar needs improvement and adequate/outstanding percentages.

Teachers rate the quality of most programs differently than do the principals. In all cases, the principals provide higher *adequate* or *outstanding* ratings except for *custodial services*. When comparing the *needs improvement* ratings, the principals and teachers are split. Principals indicate 12 programs need improvement at a higher rate than do teachers, 12 at a lower rate, and one with the same percentage of *needs improvement* percentages.

**EXHIBIT 3-7
COMPARISON SURVEY RESPONSES
WITHIN BROWARD COUNTY SCHOOL DISTRICT**

PART G: DISTRICT/PROGRAM FUNCTION	% NEEDS SOME IMPROVEMENT + NEEDS MAJOR IMPROVEMENT		% ADEQUATE ¹ + OUTSTANDING	
	ADMINISTRATORS	PRINCIPALS	TEACHERS	
a. Budgeting	35/53	52/48	61/13	
b. Strategic planning	25/53	31/65	41/26	
c. Curriculum planning	20/49	36/64	48/41	
d. Financial management and accounting	31/50	34/63	44/21	
e. Community relations	32/54	22/78	48/38	
f. Program evaluation, research, and assessment	19/56	29/69	42/35	
g. Instructional technology	37/43	58/42	51/41	
h. Pupil accounting	11/47	21/75	31/36	
i. Instructional coordination/supervision	19/47	37/61	36/46	
j. Instructional support	20/51	46/54	49/41	
k. Federal Program (e.g., Title I, Special Education) coordination	12/53	33/50	36/35	
l. Personnel recruitment	36/51	29/63	27/32	
m. Personnel selection	47/46	27/71	35/35	
n. Personnel evaluation	36/66	27/72	38/46	
o. Staff development	39/56	34/66	34/59	
p. Data processing	28/50	43/57	19/39	
q. Purchasing	33/51	48/50	34/23	
r. Law enforcement/security	32/51	32/65	42/43	
s. Plant maintenance	35/50	56/44	43/39	
t. Facilities planning	45/39	66/34	50/22	
u. Transportation	19/61	58/37	36/34	
v. Food service	9/63	40/58	33/51	
w. Custodial services	27/50	54/44	40/51	
x. Risk management	25/52	29/71	25/36	
y. Administrative Technology	34/55	47/53	22/38	

¹Percent responding Needs Some Improvement or Needs Major Improvement / Percent responding Adequate or Outstanding

Exhibit 3-8 details the various responses to Part H of the surveys. Most respondents state that the Broward County School District is at least above average in efficiency with the principals providing the highest efficiency ratings at 86 percent. When asked how the operational efficiency could be improved, the administrators and principals are in agreement with their first choice: *privatize some support services*. The first choice of teachers is to *reduce the number of administrators*. Teachers indicate that *privatizing some support services* is a second area to improve efficiency. All respondents highly rate the choice *offering fewer programs*.

**EXHIBIT 3-8
COMPARISON SURVEY RESPONSES
WITHIN BROWARD COUNTY SCHOOL DISTRICT**

PART H: OPERATIONS	ADMINISTRATORS (%)	PRINCIPALS (%)	TEACHERS (%)
1. The overall operation of the Broward County School District is:			
Highly efficient	16	20	3
Above average in efficiency	63	66	48
Less efficient than most other school districts	13	6	32
2. The operational efficiency of the Broward County School District could be improved by:			
Offering fewer programs	15	23	15
Increasing some class sizes	1	2	2
Increasing teacher workload	2	1	1
Reducing the number of administrators	14	12	35
Reducing the number of support staff	5	6	11
Privatizing some support services	27	42	18
Reducing the number of facilities operated by the district	6	9	14
Other	26	17	30

3.5 Comparison of Broward County School District Responses to Other School Districts

This section provides a comparison of responses of the Broward County School District administrators, principals, and teachers to similar groups in school districts around the United States. In several previous studies, principals were not analyzed separately from district-level administrators. Therefore, in order to make meaningful comparisons, responses from Broward County administrators and principals have been combined. Broward County teacher responses are compared separately to teacher responses from the previous studies.

Parts A through C compare Broward County administrator and teacher responses to responses from the following school districts in which surveys were conducted in the last five years: Alachua County, Florida; Austin, Texas; Brownsville, Texas; Calhoun, Texas; Clay County, Florida; Dallas, Texas; Edinburg, Texas; El Paso, Texas; Fairfax County, Virginia; Grand Prairie, Texas; Hamilton County, Florida, Henderson County, North Carolina; Hillsborough County, Florida, Jefferson County, Colorado; La Joya, Texas; Lee County, Florida, McAllen, Texas; Midland, Texas; Pharr-San Juan-Alamo, Texas; Port Arthur, Texas, Poudre, Colorado; Prince George's County, Maryland; St. Mary's County, Maryland; San Angelo, Texas; San Diego, California; Seguin, Texas; Sherman, Texas; United, Texas; and Waco, Texas.

Parts D through G compare Broward County responses to responses from the following school districts: Alachua County, Florida; Chapel Hill-Carrboro, North Carolina (administrators only); Clay County, Florida; Edinburg, Texas; El Paso, Texas; Fairfax County, Virginia; Grand Prairie, Texas; Hamilton County, Florida; Henderson County, North Carolina, Hillsborough County, Florida; Jefferson County, Colorado; Lee County, Florida; Port Arthur, Texas; Prince George's County, Maryland; St. Mary's County, Maryland; San Diego, California; Seguin, Texas; and United, Texas. Part H of the survey is not compared to the other districts as that portion of the survey is modified periodically to fit unique situations for each district and comparison data do not exist.

Exhibits 3-9 through 3-15 present comparisons between administrators in the Broward County School District and administrators in those districts noted above. Exhibits 3-16 through 3-22 present comparisons between Broward County teachers and the other districts.

3.5.1 Administrator Comparisons of Broward County School District Responses to Other School Districts

Exhibit 3-9 compares Broward County administrator (district-level administrators and principals) responses with administrator responses in all other school districts for Part A of the surveys. The responses are more favorable for Broward County concerning the overall quality of education with 90 percent grading it as *good* or *excellent* while 86 percent in other districts rate it as high. Also, Broward County administrators (95 percent) indicate that the quality is improving or staying the same at a higher percentage than the other districts (92 percent). The grades given to the various groups of employees are similar, with Broward County giving slightly lower grades to the teachers and school administrators and higher grades to district administrators.

**EXHIBIT 3-9
COMPARISON SURVEY RESPONSES
BROWARD COUNTY SCHOOL DISTRICT ADMINISTRATORS AND
ADMINISTRATORS IN OTHER DISTRICTS^{1, 2}**

PART A OF SURVEY	BROWARD COUNTY SCHOOL DISTRICT (%)	OTHER DISTRICTS (%)
1. Overall quality of public education in Broward County School District is: Good or Excellent Fair or Poor	90 10	86 13
2. Overall quality of education in Broward County School District is: Improving Staying the Same Getting Worse Don't Know	85 10 4 1	72 20 6 2
3. Grade given to Broward County School District teachers: Above Average (A or B) Below Average (D or F)	76 1	84 1
4. Grade given to Broward County School District school administrators: Above Average (A or B) Below Average (D or F)	77 3	85 3
5. Grade given to Broward County School District administrators: Above Average (A or B) Below Average (D or F)	73 7	69 9

¹ For comparison purposes, administrators and principals in some of the other districts were combined in order to benchmark against a similar grouping in the Broward County School District.

² Other districts include Alachua, Austin, Brownsville, Calhoun, Clay, Dallas, Edinburg, El Paso, Fairfax, Grand Prairie, Hamilton, Henderson, Hillsborough, Jefferson, La Joya, Lee, McAllen, Midland, Pharr-San Juan-Alamo, Port Arthur, Poudre, Prince George's, St. Mary's, San Angelo, San Diego, Seguin, Sherman, United, and Waco.

As shown on Exhibit 3-10, in all cases except five, Broward County administrators largely agree with administrators in other districts. A greater percentage of Broward County administrators (81 percent) than other districts (56 percent) are dissatisfied with the sufficiency of space and facilities. Fewer Broward administrators state that there is administrative support for controlling student behavior (73 to 84 percent) and that the lessons are organized to meet students' needs (58 to 73 percent).

The other district administrators (85 percent) state that teachers know the material they teach while only 71 percent of Broward County administrators indicate the same. Likewise, fewer Broward County administrators (55 to 67 percent) indicate that parents in the district are satisfied with the education their children are receiving.

**EXHIBIT 3-10
COMPARISON SURVEY RESPONSES
BROWARD COUNTY SCHOOL DISTRICT ADMINISTRATORS AND
ADMINISTRATORS IN OTHER DISTRICTS ^{1, 2}**

PART B	(% A + SA) / (% D + SD) ³	
	BROWARD COUNTY SCHOOL DISTRICT	OTHER DISTRICTS ²
1. The emphasis on learning in the district has increased in recent years.	91/2	86/6
2. District schools are safe and secure from crime.	70/11	67/15
3. Our schools do not effectively handle misbehavior problems.	21/59	19/67
4. Our schools have sufficient space and facilities to support the instructional programs.	9/81	33/56
5. Our schools do not have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	14/66	15/73
6. Our schools can be described as "good places to learn."	84/6	88/4
7. There is administrative support for controlling student behavior in our schools.	73/12	84/8
8. Most students in our schools are motivated to learn.	67/12	73/14
9. Lessons are organized to meet students' needs.	58/7	73/13
10. The curriculum is broad and challenging for most students.	73/7	73/13
11. There is little a teacher can do to overcome education problems due to a student's home life.	15/68	17/70
12. Teachers in our schools know the material they teach.	71/3	85/5
13. Teachers in our schools care about students' needs.	83/3	88/3
14. Teachers expect students to do their very best.	79/5	83/6
15. Principals and assistant principals in our schools care about students' needs.	89/3	93/3
16. In general, parents do not take responsibility for their children's behavior in our schools.	33/43	31/52
17. Parents in this district are satisfied with the education their children are receiving.	55/17	67/11
18. Most parents really don't seem to know what goes on in our schools.	46/32	38/40
19. Parents play an active role in decision-making in my school.	40/15	47/24
20. This community really cares about its childrens' education.	66/15	74/11
21. Taxpayer dollars are being used wisely to support public education in the district.	67/18	69/17
22. Sufficient student services are provided in the district.	54/28	58/32
23. Site-based planning has been implemented effectively in the district.	60/17	53/25

¹ For comparison purposes, administrators and principals in some other districts were combined in order to benchmark against a similar grouping in the Broward County School District.

² Other districts include Alachua, Austin, Brownsville, Calhoun, Clay, Dallas, Edinburgh, El Paso, Fairfax, Grand Prairie, Hamilton, Henderson, Hillsborough, Jefferson, La Joya, Lee, McAllen, Midland, Pharr-San Juan-Alamo, Port Arthur, Poudre, Prince George's, St. Mary's, San Angelo, San Diego, Seguin, Sherman, United, and Waco.

³ Percent responding *Agree* or *Strongly Agree*/Percent responding *Disagree* or *Strongly Disagree*.

Exhibit 3-11 details the responses given by Broward County administrators and those in other districts for Part C of the surveys. There is greater disparity among the responses in this section. Broward County administrators differ with those in other districts on eight questions.

Responses vary among the administrators concerning the school board. Broward County administrators give higher (47 percent) *good* or *excellent* ratings than do other districts (36 percent) when rating the school board members' knowledge of the educational needs of students in the district. Similarly, higher positive ratings are given when the school board's work at setting or revising policy is considered. Broward County administrators (53 percent) rate that area as *good* or *excellent*, while only 43 percent of the administrators from other districts give as high marks.

The Broward County administrators are pleased with the performance of the Superintendent's work as the instructional leader of the district. They give higher positive ratings (79 percent) than did the other administrators (69 percent).

A lower percentage of Broward County administrators (50 percent) than other administrators (68 percent), rate the amount of time students spend on task learning in the classroom as *good* or *excellent*. More Broward County administrators (74 percent) rate highly the opportunities provided by the district to improve the skills of teachers than other administrators (64 percent). The responses pertaining to the opportunities provided by the district to improve the skills of school administrators are similarly more favorable towards Broward County.

Concerning technology, Broward County administrators are more positive. They rate as *good* or *excellent* the district's job of providing adequate instructional technology higher than other districts (63 to 51 percent) and the district's use of technology for administrative purposes (76 to 50 percent).

Exhibit 3-12 represents the comparison of responses to Part D of the survey, which covers the work environment. There are six questions where there are significant differences. The first question where there is disagreement involves teachers enforcing high student learning standards. Broward County administrators *agree* or *strongly agree* in lower percentages (63 percent) than do administrators in other school districts (75 percent) that high standards are enforced. Also, more of the other administrators (36 to 26 percent) are in disagreement that teachers who do not meet expected work standards are disciplined. Fewer Broward administrators (62 percent) are in disagreement than other administrators (73 percent) that teacher promotions and pay increases are based upon individual performance.

Lower percentages of Broward County administrators (69 to 81 percent) state that they have the authority to adequately perform their job responsibilities. Fewer Broward County administrators (40 percent) than other district administrators (50 percent) are in agreement that workload are equitably distributed among teachers and staff. Similarly, lower percentages of Broward County administrators (30 percent) than other administrators (40 percent) agree that workload is evenly distributed.

**EXHIBIT 3-11
COMPARISON SURVEY RESPONSES
BROWARD COUNTY SCHOOL DISTRICT ADMINISTRATORS AND
ADMINISTRATORS IN OTHER DISTRICTS ^{1, 2}**

PART C	(% G + E) / (% F + P)³	
	BROWARD COUNTY SCHOOL DISTRICT	OTHER DISTRICTS ²
1. School board members' knowledge of the educational needs of students in the district.	47/49	36/60
2. School board members' knowledge of operations in the district.	43/54	38/58
3. School board members' work at setting or revising policies for the district.	53/44	43/52
4. The district school superintendent's work as the instructional leader of the district.	79/19	69/28
5. The district school superintendent's work as the chief administrator (manager) of the district.	80/19	72/26
6. Principals work as the instructional leaders of their schools.	77/17	84/13
7. Principals work as the managers of the staff and teachers.	82/12	87/10
8. Teachers' work in meeting students' individual learning needs.	64/27	73/23
9. Teachers' work in communicating with parents.	55/34	60/35
10. Teachers' attitudes about their jobs.	50/41	59/38
11. Students' ability to learn.	72/19	80/16
12. The amount of time students spend on task learning in the classroom.	50/30	68/24
13. Parents' efforts in helping their children to do better in school.	31/56	35/59
14. Parents' participation in school activities and organizations.	26/63	30/65
15. How well students' test results are explained to parents.	40/43	43/50
16. The condition in which district schools are kept.	60/38	66/33
17. How well relations are maintained with various groups in the community.	62/32	59/36
18. The opportunities provided by the district to improve the skills of teachers.	74/17	64/33
19. The opportunity provided by the district to improve the skills of school administrators.	70/26	59/37
20. The district's job of providing adequate instructional technology.	63/33	51/47
21. The district's use of technology for administrative purposes.	76/23	50/47

¹ For comparison purposes, administrators and principals in some other districts were combined in order to benchmark against a similar grouping in Broward County School District.

² Other districts include Alachua, Austin, Brownsville, Calhoun, Clay, Dallas, Edinburg, El Paso, Fairfax, Grand Prairie, Hamilton, Henderson, Hillsborough, Jefferson, La Joya, Lee, McAllen, Midland, Pharr-San Juan-Alamo, Port Arthur, Poudre, Prince George's, St. Mary's, San Angelo, San Diego, Seguin, Sherman, United, and Waco.

³ Percent responding *Good* or *Excellent* / Percent responding *Fair* or *Poor*.

**EXHIBIT 3-12
COMPARISON SURVEY RESPONSES
BROWARD COUNTY SCHOOL DISTRICT ADMINISTRATORS AND
ADMINISTRATORS IN OTHER DISTRICTS ^{1, 2}**

PART D: WORK ENVIRONMENT	(% A + SA) / (% D + SD) ³	
	BROWARD COUNTY SCHOOL DISTRICT	OTHER DISTRICTS
1. I find the district to be an exciting, challenging place to work.	84/8	85/6
2. The work standards and expectations in the district are equal to or above those of most other school districts.	81/5	80/7
3. District officials enforce high work standards.	84/8	76/11
4. Most district teachers enforce high student learning standards.	63/5	75/8
5. District teachers and administrators have excellent working relationships.	54/12	63/14
6. Teachers who do not meet expected work standards are disciplined.	39/26	33/36
7. Staff who do not meet expected work standards are disciplined.	50/26	46/29
8. Teacher promotions and pay increases are based upon individual performance.	12/62	8/73
9. Staff promotions and pay increases are based upon individual productivity.	14/67	15/66
10. I feel that I have the authority to adequately perform my job responsibilities.	69/23	81/12
11. I have adequate facilities in which to conduct my work.	73/17	73/21
12. I have adequate equipment and computer support to conduct my work.	73/18	65/26
13. The workloads are equitably distributed among teachers and staff members.	40/22	50/25
14. No one knows or cares about the amount or quality of work that I perform.	23/61	17/68
15. Workload is evenly distributed.	30/45	40/38
16. The failure of district officials to enforce high work standards results in poor quality work.	18/58	19/59
17. I often observe other teachers and/or staff socializing rather than working while on the job.	14/67	17/66

¹ For comparison purposes, administrators and principals in some other districts were combined in order to benchmark against a similar grouping in Broward County School District.

² Other districts include Alachua, Chapel Hill-Carrboro, Clay, Edinburgh, El Paso, Fairfax, Grand Prairie, Hamilton, Henderson, Hillsborough, Jefferson, Lee, Port Arthur, Prince George's, St. Mary's, San Diego, Seguin, and United.

³ Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*.

Exhibit 3-13 compares the responses concerning job satisfaction which are found in Part E of the survey. Responses are comparable between the Broward County administrators and the administrators from the comparison groups. There are only two questions that reveal disparity between the two groups of respondents. More Broward County administrators (70 percent) are in agreement that salary levels are competitive with other school districts than administrators in other districts (42 percent). Also, more Broward County administrators are in agreement that their salary level is adequate for their level of work and experience (46 to 35 percent).

The response comparisons to Part F of the survey which address the administrative structures and practices of the school district are found on Exhibit 3-14. The results vary on eight of the 12 questions between the Broward County administrators and administrators in comparison districts. Fifty-one (51) percent of Broward County administrators indicate that district administrators are easily accessible and open to input compared to 70 percent of the administrators in other districts. Likewise, fewer Broward County administrators (24 to 36 percent) indicate that authority for administrative decisions are delegated to the lowest possible level. More Broward County administrators (58 percent) *agree* that major bottlenecks exist in many administrative processes than do administrators in other districts (41 percent). Also, fewer Broward County administrators (54 percent) than other administrators (68 percent) indicate that teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.

Broward County administrators are more inclined to *agree* or *strongly agree* that the district has too many committees. Forty-seven (47) percent of Broward County administrators are in agreement with the statement, while only 37 percent of the administrators in other districts are. Similarly, more Broward County administrators (34 percent) than other administrators (18 percent) state that the district has too many administrators.

Fewer Broward administrators (46 percent) state that most administrative processes are highly efficient and responsive than other districts' administrators (59 percent). Lastly, other district administrators are in agreement that administrators provide quality service to school by higher percentages (72 to 61 percent) than Broward County administrators.

**EXHIBIT 3-13
COMPARISON SURVEY RESPONSES
BROWARD COUNTY SCHOOL DISTRICT ADMINISTRATORS AND
ADMINISTRATORS IN OTHER DISTRICTS^{1, 2}**

PART E: JOB SATISFACTION	(% A + SA) / (% D + SD) ³	
	BROWARD COUNTY SCHOOL DISTRICT	OTHER DISTRICTS
1. I am very satisfied with my job in the district.	75/11	80/10
2. I plan to make a career in the district.	87/5	81/4
3. I am actively looking for a job outside the district.	8/81	8/78
4. Salary levels are competitive (with other school districts).	70/17	42/44
5. My work is appreciated by my supervisor(s).	64/22	71/15
6. I am an integral part of the district team.	68/17	74/13
7. There is no future for me in the district.	11/78	8/79
8. My salary level is adequate for my level of work and experience.	46/41	35/54
9. I enjoy working in a culturally diverse environment.	94/1	90/2

¹ For comparison purposes, administrators and principals in some other districts were combined in order to benchmark against a similar grouping in Broward County School District.

² Other districts include Alachua, Chapel Hill-Carrboro, Clay, Edinburgh, El Paso, Fairfax, Grand Prairie, Hamilton, Henderson, Hillsborough, Jefferson, Lee, Port Arthur, Prince George's, St. Mary's, San Diego, Seguin, and United.

³ Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*.

**EXHIBIT 3-14
COMPARISON SURVEY RESPONSES
BROWARD COUNTY SCHOOL DISTRICT ADMINISTRATORS AND
ADMINISTRATORS IN OTHER DISTRICTS ^{1, 2}**

PART F: ADMINISTRATIVE STRUCTURE/PRACTICES	(% A + SA) / (% D + SD) ³	
	BROWARD COUNTY SCHOOL DISTRICT	OTHER DISTRICTS
1. Most administrative practices in the district are effective and efficient.	60/25	62/19
2. Administrative decisions are made quickly and decisively.	49/31	48/30
3. District administrators are easily accessible and open to input.	51/28	70/17
4. Authority for administrative decisions are delegated to the lowest possible level.	24/53	36/37
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	54/23	68/13
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	58/26	41/37
7. The extensive committee structure in the district ensures adequate input from teachers and staff on most important decisions.	51/24	58/19
8. The district has too many committees.	47/29	37/34
9. The district has too many layers of administrators.	34/45	18/64
10. Most administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	46/32	59/25
11. Central Office Administrators are responsive to school needs.	62/15	67/13
12. Central Office Administrators provide quality service to schools.	61/11	72/11

¹ For comparison purposes, administrators and principals in some other districts were combined in order to benchmark against a similar grouping in Broward County School District.

² Other districts include Alachua, Chapel Hill-Carrboro, Clay, Edinburgh, El Paso, Fairfax, Grand Prairie, Hamilton, Henderson, Hillsborough, Jefferson, Lee, Port Arthur, Prince George's, St. Mary's, San Diego, Seguin, and United.

³ Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*.

Exhibit 3-15 shows the comparisons between the two groups concerning district programs and functions which are found in Part G of the survey. There are 12 program areas in which the respondents differ.

In most instances, Broward County administrators (first percentage given) indicate, to a lesser degree, that a program needs *some* or *major improvement* compared to the administrators in other districts:

- strategic planning (28 percent of Broward administrators to 46 percent of administrators in other districts stated *needs some* or *major improvement*);
- curriculum planning (26 to 47 percent);
- community relations (28 to 42 percent);
- program evaluation, research, and assessment (23 to 41 percent);
- pupil accounting (15 to 29 percent);
- instructional coordination/supervision (26 to 36 percent);
- instructional support (31 to 41 percent);
- federal program coordination (21 to 36 percent);
- personnel evaluation (34 to 45 percent); and
- food service (22 to 32 percent).

However, there is one area in which Broward County administrators have a higher percentage of *needs some improvement* and *needs major improvement*---facilities planning, 54 percent to 44 percent.

There are a few areas that the Broward County administrators rate as *adequate* or *outstanding* at a higher percentage than do the administrators in other districts:

- strategic planning (58 to 41 percent *adequate* or *outstanding*);
- community relations (64 to 52 percent);
- personnel recruitment (56 to 45 percent); and
- personnel evaluation (62 to 49 percent).

Again, facilities planning is viewed less favorably by Broward County administrators, as only 37 percent rate it as *adequate* or *outstanding* compared to 49 percent in other districts.

EXHIBIT 3-15
COMPARISON SURVEY RESPONSES
BROWARD COUNTY SCHOOL DISTRICT ADMINISTRATORS AND
ADMINISTRATORS IN OTHER DISTRICTS ^{1, 2}

PART G: DISTRICT/PROGRAM FUNCTION	% NEEDS SOME IMPROVEMENT + NEEDS MAJOR IMPROVEMENT	% ADEQUATE ³ + OUTSTANDING
	BROWARD COUNTY SCHOOL DISTRICT	OTHER DISTRICTS
a. Budgeting	42/51	43/54
b. Strategic planning	28/58	46/41
c. Curriculum planning	26/55	47/47
d. Financial management and accounting	32/56	37/56
e. Community relations	28/64	42/52
f. Program evaluation, research, and assessment	23/61	41/52
g. Instructional technology	46/42	53/42
h. Pupil accounting	15/59	29/56
i. Instructional coordination/supervision	26/53	36/55
j. Instructional support	31/52	41/53
k. Federal program (e.g., Chapter I, Special Education) coordination	21/52	36/47
l. Personnel recruitment	33/56	42/45
m. Personnel selection	39/57	39/51
n. Personnel evaluation	34/62	45/49
o. Staff development	37/61	42/54
p. Data processing	34/53	37/49
q. Purchasing	39/51	33/56
r. Law enforcement/security	32/57	33/58
s. Plant maintenance	44/47	48/49
t. Facilities planning	54/37	44/49
u. Pupil transportation	35/51	35/57
v. Food service	22/61	32/64
w. Custodial services	39/48	40/56
x. Risk management	26/60	27/59
y. Administrative technology	40/54	46/51

¹ For comparison purposes, administrators and principals in some other districts were combined in order to benchmark against a similar grouping in Broward County School District.

² Other districts include Alachua, Chapel Hill-Carrboro, Clay, Edinburgh, El Paso, Fairfax, Grand Prairie, Hamilton, Henderson, Hillsborough, Jefferson, Lee, Port Arthur, Prince George's, St. Mary's, San Diego, Seguin, and United.

³ Percent responding *Needs Some Improvement* or *Needs Major Improvement* / Percent responding *Adequate* or *Outstanding*.

3.5.2 Teacher Comparisons of Broward County School District Responses to Other School Districts

Exhibit 3-16 lists the responses Broward County teachers and teachers in other districts give to Part A of the surveys. Similar percentages of Broward County teachers (67 percent) and other teachers (69 percent) state that the overall quality of public education is *good* or *excellent* and the overall quality of education is at least staying the same (74 to 78 percent). In addition, Broward County teachers give lower grades to all employee groups than do teachers in other districts as seen in Exhibit 3-16.

**EXHIBIT 3-16
COMPARISON SURVEY RESPONSES
BROWARD COUNTY SCHOOL DISTRICT TEACHERS AND TEACHERS IN OTHER
DISTRICTS ¹**

PART A OF SURVEY	BROWARD COUNTY SCHOOL DISTRICT (%)	OTHER DISTRICTS (%)
1. Overall quality of public education in the district is: Good or Excellent Fair or Poor	67 32	69 28
2. Overall quality of education in the district is: Improving Staying the Same Getting Worse Don't Know	51 23 22 4	53 25 17 4
3. Grade given to teachers: Above Average (A or B) Below Average (D or F)	78 2	83 1
4. Grade given to school administrators: Above Average (A or B) Below Average (D or F)	55 14	59 12
5. Grade given to district administrators: Above Average (A or B) Below Average (D or F)	29 28	39 24

¹ Other districts include Alachua, Austin, Brownsville, Calhoun, Clay, Dallas, Edinburg, El Paso, Fairfax, Grand Prairie, Hamilton, Henderson, Hillsborough, Jefferson, La Joya, Lee, McAllen, Midland, Pharr-San Juan-Alamo, Port Arthur, Poudre, Prince George's, St. Mary's, San Angelo, San Diego, Seguin, Sherman, United, and Waco.

Exhibit 3-17 lists the responses and comparisons to Part B of the survey. There are two questions in which there is disparity between Broward County teachers and teachers in comparison districts.

The Broward County teachers (16 percent) are less inclined to *agree* that the schools have sufficient space and facilities to support the instructional programs than do other teachers (29 percent). Fewer Broward County teachers (24 to 36 percent) state that taxpayers dollars are being used wisely to support education.

Exhibit 3-18 provides comparisons to Part C of the teacher surveys. There are four statements in which there are differences in the responses between Broward County teachers and teachers in other districts. Broward County teachers are less favorable toward their Superintendent than the teachers of other districts. Concerning his work as the instructional leader of the district, fewer Broward County teachers (27 percent) than other teachers (42 percent) rate him as *good* or *excellent*. In addition, greater percentages of other teachers (46 to 28 percent) rate their superintendents' work as the chief administrator of the district as *good* or *excellent*.

Broward County teachers indicate to a higher degree (72 to 58 percent) that the opportunities provided by the district to improve the skills of teachers are *good* or *excellent*. In addition, the district's job of providing adequate instructional technology is rated as *good* or *excellent* by more Broward teachers (56 to 45 percent).

Exhibit 3-19, which contains the comparisons to Part D of the surveys, finds no real differences of opinions between the teachers in their responses concerning the work environment.

**EXHIBIT 3-17
COMPARISON SURVEY RESPONSES
BROWARD COUNTY SCHOOL DISTRICT TEACHERS AND TEACHERS IN OTHER
DISTRICTS ¹**

PART B	(% A + SA) / (% D + SD) ²	
	BROWARD COUNTY SCHOOL DISTRICT	OTHER DISTRICTS
1. The emphasis on learning in district has increased in recent years.	70/16	68/15
2. District schools are safe and secure from crime.	46/32	40/39
3. Our schools do not effectively handle misbehavior problems.	52/32	53/32
4. Our schools have sufficient space and facilities to support the instructional programs.	16/75	29/60
5. Our schools do not have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	27/56	31/54
6. Our schools can be described as "good places to learn."	67/16	70/13
7. There is administrative support for controlling student behavior in our schools.	57/27	49/35
8. Most students in our schools are motivated to learn.	56/27	52/33
9. Lessons are organized to meet students' needs.	79/8	77/9
10. The curriculum is broad and challenging for most students.	77/13	70/15
11. There is little a teacher can do to overcome education problems due to a student's home life.	33/48	35/47
12. Teachers in our schools know the material they teach.	87/3	86/4
13. Teachers in our schools care about students' needs.	87/4	88/4
14. Teachers expect students to do their very best.	89/4	86/6
15. Principals and assistant principals in our schools care about students' needs.	76/14	80/8
16. In general, parents do not take responsibility for their children's behavior in our schools.	50/27	59/23
17. Parents in this district are satisfied with the education their children are receiving.	46/17	48/17
18. Most parents really don't seem to know what goes on in our schools.	56/25	59/24
19. Parents play an active role in decision-making in my school.	42/35	36/40
20. This community really cares about its children's education.	53/24	52/23
21. Taxpayer dollars are being used wisely to support public education in district.	24/51	36/41
22. Sufficient student services are provided in the district.	54/34	56/33
23. Site-based management has been implemented effectively in the district.	29/28	38/36

Other districts include Alachua, Austin, Brownsville, Calhoun, Clay, Dallas, Edinburgh, El Paso, Fairfax, Grand Prairie, Hamilton, Henderson, Hillsborough, Jefferson, La Joya, Lee, McAllen, Midland, Pharr-San Juan-Alamo, Port Arthur, Poudre, Prince George's, St. Mary's, San Angelo, San Diego, Seguin, Sherman, United, and Waco.

² Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*

**EXHIBIT 3-18
COMPARISON SURVEY RESPONSES
BROWARD COUNTY SCHOOL DISTRICT TEACHERS AND TEACHERS IN OTHER
DISTRICTS ¹**

PART C	(%G+ E) / (%F + P) ²	
	BROWARD COUNTY SCHOOL DISTRICT	OTHER DISTRICTS
1. School board members' knowledge of the educational needs of students in the district.	21/69	26/64
2. School board members' knowledge of operations in the district.	26/59	31/57
3. School board members' work at setting or revising policies for the district.	23/61	30/58
4. The district school superintendent's work as the instructional leader of the district.	27/64	42/48
5. The district school superintendent's work as the chief administrator (manager) of the district.	28/60	46/43
6. Principals work as the instructional leaders of their schools.	59/39	60/38
7. Principals work as the managers of the staff and teachers.	61/38	63/35
8. Teachers' work in meeting students' individual learning needs.	73/26	77/22
9. Teachers' work in communicating with parents.	71/28	70/28
10. Teachers' attitudes about their jobs.	44/55	50/49
11. Students' ability to learn.	56/44	61/38
12. The amount of time students spend on task learning in the classroom.	54/43	61/37
13. Parents' efforts in helping their children to do better in school.	17/81	19/78
14. Parents' participation in school activities and organizations.	20/79	21/78
15. How well students' test results are explained to parents.	39/53	36/54
16. The condition in which district schools are kept.	44/55	53/46
17. How well relations are maintained with various groups in the community.	46/42	45/43
18. The opportunities provided by the district to improve the skills of teachers.	72/28	58/41
19. The opportunity provided by the district to improve the skills of school administrators.	40/21	35/27
20. The district's job of providing adequate instructional technology.	56/42	45/51
21. The district's use of technology for administrative purposes.	54/19	46/27

¹ Other districts include Alachua, Austin, Brownsville, Calhoun, Clay, Dallas, Edinburg, El Paso, Fairfax, Grand Prairie, Hamilton, Henderson, Hillsborough, Jefferson, La Joya, Lee, McAllen, Midland, Pharr-San Juan-Alamo, Port Arthur, Poudre, Prince George's, St. Mary's, San Angelo, San Diego, Seguin, Sherman, United, and Waco.

² Percent responding *Good* or *Excellent* / Percent responding *Fair* or *Poor*

**EXHIBIT 3-19
COMPARISON SURVEY RESPONSES
BROWARD COUNTY SCHOOL DISTRICT TEACHERS AND TEACHERS IN OTHER
DISTRICTS ¹**

PART D: WORK ENVIRONMENT	(% A + SA) / (% D + SD) ²	
	BROWARD COUNTY SCHOOL DISTRICT	OTHER DISTRICTS
1. I find the district to be an exciting, challenging place to work.	67/14	67/13
2. The work standards and expectations in the district are equal to or above those of most other school districts.	55/11	60/16
3. District officials enforce high work standards.	64/14	59/19
4. Most district teachers enforce high student learning standards.	77/8	74/10
5. District teachers and administrators have excellent working relationships.	36/32	39/33
6. Teachers who do not meet expected work standards are disciplined.	31/33	24/40
7. Staff who do not meet expected work standards are disciplined.	30/30	25/37
8. Teacher promotions and pay increases are based upon individual performance.	7/79	8/71
9. Staff promotions and pay increases are based upon individual productivity.	8/58	8/52
10. I feel that I have the authority to adequately perform my job responsibilities.	74/18	80/14
11. I have adequate facilities in which to do my work.	70/21	65/26
12. I have adequate equipment and computer support to do my work.	57/34	49/39
13. The workloads are equitably distributed among teachers and among staff members.	41/42	40/46
14. No one knows or cares about the amount or quality of work that I perform.	27/55	24/55
15. Workload is evenly distributed.	37/42	34/45
16. The failure of district officials to enforce high work standards results in poor quality work.	25/42	29/42
17. I often observe other teachers and/or staff socializing rather than working while on the job.	15/71	20/62

¹ Other districts include Alachua, Clay, Edinburg, El Paso, Fairfax, Grand Prairie, Hamilton, Henderson, Hillsborough, Jefferson, Lee, Port Arthur, Prince George's, St. Mary's, San Diego, Seguin, and United.

² Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*

Exhibit 3-20 lists the responses and comparisons to Part E, the job satisfaction portion of the survey. There is one statement that provides significant differences of opinion and it concerns salaries. More Broward teachers (48 percent) state that salary levels are competitive with other school districts compared to teachers in other districts (32 percent). There is one response where the percentages are identical--84 percent of Broward teachers *agree* that they enjoy working in a culturally diverse environment while four percent *disagree* in other districts.

**EXHIBIT 3-20
COMPARISON SURVEY RESPONSES
BROWARD COUNTY SCHOOL DISTRICT TEACHERS
AND TEACHERS IN OTHER DISTRICTS ¹**

PART E: JOB SATISFACTION	(% A + SA) / (% D + SD) ²	
	BROWARD COUNTY SCHOOL DISTRICT	OTHER DISTRICTS
1. I am very satisfied with my job in the district.	68/17	70/16
2. I plan to make a career in the district.	77/8	70/10
3. I am actively looking for a job outside the district.	7/79	11/72
4. Salary levels are competitive (with other school districts).	48/33	32/52
5. My supervisor(s) appreciates my work.	59/25	65/21
6. I am an integral part of the district team.	53/26	60/18
7. There is no future for me in the district.	8/75	10/71
8. My salary level is adequate for my level of work and experience.	19/70	21/66
9. I enjoy working in a culturally diverse environment.	84/4	84/4

¹ Other districts include Alachua, Clay, Edinburg, El Paso, Fairfax, Grand Prairie, Hamilton, Henderson, Hillsborough, Jefferson, Lee, Port Arthur, Prince George's, St. Mary's, San Diego, Seguin, and United.

² Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*

The responses and comparisons to Part F of the survey are found on Exhibit 3-21. In comparing the administrative structures and practices of their respective districts, there are only two statements that find a significant difference of opinion. More teachers in other districts (40 percent) state that district administrators are more easily accessible and open to input than Broward teachers (29 percent). Likewise, the other districts' teachers (37 percent) indicate that most administrative processes are highly efficient and responsive more so than Broward teachers (25 percent).

**EXHIBIT 3-21
COMPARISON SURVEY RESPONSES
BROWARD COUNTY SCHOOL DISTRICT TEACHERS AND TEACHERS IN OTHER
DISTRICTS ¹**

PART F: ADMINISTRATIVE STRUCTURE/PRACTICES	(% A + SA) / (% D + SD) ²	
	BROWARD COUNTY SCHOOL DISTRICT	OTHER DISTRICTS
1. Most administrative practices in the district are effective and efficient.	28/42	32/37
2. Administrative decisions are made quickly and decisively.	33/38	32/37
3. District administrators are easily accessible and open to input.	29/43	40/35
4. Authority for administrative decisions are delegated to the lowest possible level.	10/35	16/32
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	45/35	52/31
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	51/14	48/18
7. The extensive committee structure in the district ensures adequate input from teachers and staff on most important decisions.	24/44	31/40
8. The district has too many committees.	57/10	46/17
9. The district has too many layers of administrators.	60/12	58/17
10. Most administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	25/37	37/29
11. Central Office Administrators are responsive to school needs.	18/30	24/36
12. Central Office Administrators provide quality service to schools.	19/27	24/34

¹ Other districts include Alachua, Clay, Edinburgh, El Paso, Fairfax, Grand Prairie, Hamilton, Henderson, Hillsborough, Jefferson, Lee, Port Arthur, Prince George's, St. Mary's, San Diego, Seguin, and United.

² Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*

Exhibit 3-22 lists the responses and comparisons to Part G of the teacher surveys. As can be seen in this exhibit, there are no significant differences of opinion on any of the district program and function areas. In fact, there are five instances where the *needs improvement* and *needs major improvement* ratings are identical and one instance where the *adequate* and *outstanding* ratings are identical.

3.5.3 Summary

Within Broward County

The grades given to district administrators by district administrators and principals are similar; however, teachers give district administrators a significantly lower grade. The grade given to Broward teachers are similar for all three groups of Broward respondents. The grades given to principals by principals are significantly higher than the grade given to principals by teachers and district administrators. The responses to the summary question pertaining to the overall quality of public education in the district are higher from Broward County administrators and lower from the teachers. Similarly, concerning the improvement of the quality of education, administrators respond more favorably than did the teachers.

Between Broward County and Other School Districts

As seen in the exhibits, the responses from Broward County administrators and teachers are less positive than those from comparison districts. There are several areas where there are noticeable differences between Broward County respondents and respondents from other districts. In all responses pertaining to the School Board and the Superintendent, the responses from Broward County administrators are more positive from the administrators in other districts, but less positive from the teachers. Both Broward County teachers and administrators rated facilities planning more negative than did other districts. The Broward County School District teachers rated the district's schools as having less sufficient facilities to support the instructional programs as compared to other districts. Questions pertaining to technology brought more favorable responses from Broward County employees as did questions pertaining to the competitiveness of their salaries. However, concerning administrative structures and practices, the responses from Broward employees are overall less favorable than employees in other districts.

**EXHIBIT 3-22
COMPARISON SURVEY RESPONSES
BROWARD COUNTY SCHOOL DISTRICT TEACHERS AND TEACHERS IN OTHER
DISTRICTS ¹**

PART G: DISTRICT/PROGRAM FUNCTION	% NEEDS SOME IMPROVEMENT + NEEDS MAJOR IMPROVEMENT	% ADEQUATE ² + OUTSTANDING
	BROWARD COUNTY SCHOOL DISTRICT	OTHER DISTRICTS
a. Budgeting	61/13	61/20
b. Strategic planning	41/26	47/24
c. Curriculum planning	48/41	53/39
d. Financial management and accounting	44/21	46/26
e. Community relations	48/38	48/40
f. Program evaluation, research, and assessment	42/35	41/38
g. Instructional technology	51/41	52/37
h. Pupil accounting	31/36	31/42
i. Instructional coordination/supervision	36/46	39/45
j. Instructional support	49/41	49/43
k. Federal program (e.g., Chapter I, Special Education) coordination	36/35	37/39
l. Personnel recruitment	27/32	35/37
m. Personnel selection	35/35	40/39
n. Personnel evaluation	38/46	42/45
o. Staff development	34/59	41/51
p. Data processing	19/39	19/37
q. Purchasing	34/23	32/31
r. Law enforcement/security	42/43	38/45
s. Plant maintenance	43/39	42/40
t. Facilities planning	50/22	41/32
u. Pupil transportation	36/34	33/44
v. Food service	33/51	39/49
w. Custodial services	40/51	41/50
x. Risk management	25/36	26/36
y. Administrative technology	22/38	26/36

¹ Other districts include Alachua, Clay, Edinburgh, El Paso, Fairfax, Grand Prairie, Hamilton, Henderson, Hillsborough, Jefferson, Lee, Port Arthur, Prince George's, St. Mary's, San Diego, Seguin, and United.

² Percent responding *Needs Some Improvement* or *Needs Major Improvement* / Percent responding *Adequate* or *Outstanding*

4.0 SCHOOL DISTRICT ORGANIZATION AND MANAGEMENT

This chapter of the report contains four sections:

- 4.1 Board and Governance Issues
- 4.2 Policies and Procedures
- 4.3 District Organization and Management
- 4.4 School Management

4.1 Board and Governance Issues

Each Florida school district is governed by an elected school board. A school board derives its legal status from the State Constitution and the State Legislature. In discharging its duties, each school board must function in accordance with applicable state and federal statutes, controlling court decisions, and applicable regulations promulgated pursuant to statute by state and federal agencies. The school board is a corporate body and has the exclusive power to manage and govern the public schools of each district in the state of Florida.

According to Section 230.22, Florida Statutes, the school board, as a legal agent, has specific statutory powers. The school board has the legal power and duty to:

- determine policies and programs;
- adopt rules and regulations;
- prescribe minimum standards;
- contract, sue and be sued;
- perform duties and responsibilities; and
- assign students to schools.

Section 230.23, Florida Statutes, provides additional powers and duties of Florida school boards:

- require minutes and records to be kept;
- control property;
- adopt school programs;
- establish, organize, and operate schools;
- designate positions to be filled; prescribe qualifications for those positions; and provide for the appointment, compensation, promotion, suspension, and dismissal of employees subject to the requirements of Chapter 231, Florida Statutes;

- provide for child welfare (accounting, attendance, and control and the attention to health, safety, and other matters);
- provide adequate instructional aids for all children in accordance with the requirements of Chapter 233, Florida Statutes;
- provide for the transportation of pupils;
- approve plans for locating, planning, constructing, insuring, maintaining, protecting, and condemning school property as prescribed in Chapter 235, Florida Statutes;
- comply with finance procedures identified in Chapters 236 and 237, Florida Statutes;
- provide for the keeping of all necessary records and reports;
- cooperate with other school boards and other agencies;
- cooperate with the Superintendent;
- maintain a school lunch program;
- adopt procedures whereby the general public can be adequately informed of the education programs, needs, and objectives of public education with the district; and
- implement school improvement and accountability.

CURRENT SITUATION

Policy making in the Broward County School District is the responsibility of, and vested in, a nine-member school board. Seven members of the Board are elected in a single-member district and two are at-large positions. Each Board member serves for a four-year staggered term with elections held every two years in November (1998, 2000, 2002).

Prior to the November 1998 election, seven members served on the Broward County School Board. In November 1997, Broward County residents voted to redistrict the county and elect nine school board members (seven in districts; two at large). The new boundary lines were approved by the School Board on December 16, 1997 through Resolution 96-28 - *A Resolution Determining the Boundaries of the Seven Single-Member School Board Residence Areas*.

The current School Board of Broward County is shown in Exhibit 4-1.

**EXHIBIT 4-1
SCHOOL BOARD OF BROWARD COUNTY
NOVEMBER 1998**

SCHOOL BOARD MEMBER AND DISTRICT	TITLE	CURRENT TERM EXPIRES	SERVING SINCE	CURRENT/ FORMER OCCUPATION
District #1 Carole L. Andrews	Member	2002	1998	Supervisor, School Resource Officers Program
District #2 Diana Wasserman	Member	2000	1988	Community Activist, Diversity Consultant
District #3 Judie S. Budnick	Member	2000	1998	Interior Decorator
District #4 Stephanie Arma Kraft, Esq.	Member	2002	1998	Attorney
District #5 Miriam M. Oliphant	Member	2000		Supervisor, Witness Management Program
District #6 Paul D. Eichner, Esq.	Member	2002	1998	Attorney
District #7 Robert Parks, Ed.D.	Member	2002	1986	Professor, FAU
At-Large, Seat 8 Darla L. Carter	Vice Chairman	2002	1996	Business/ Banking
At-Large, Seat 9 Lois Wexler	Chairman	2000	1992	Community Activist

Source: Broward County School District, School Board Office, November 1998.

FINDING

Each Board member represents the Broward County School District on a number of committees. The most recent committee assignments, which were made at the November 1998 organizational meeting of the Broward County School Board, are shown in Exhibit 4-2. Although this exhibit is limited to current organizational assignments, a review of previous committee assignments found that Broward County School Board members are actively involved on a number of internal and external committees and have been for several years.

COMMENDATION

The School Board of Broward County is commended for its extensive involvement in, and use of, internal and external committees.

**EXHIBIT 4-2
SCHOOL BOARD OF BROWARD COUNTY
COMMITTEE ORGANIZATIONAL ASSIGNMENTS
NOVEMBER 1998**

ORGANIZATIONAL ASSIGNMENT	SCHOOL BOARD MEMBER
Broward County Juvenile Justice Board	Carole L. Andrews Alternate: Paul D. Eichner
Broward County Planning Council	Diana Wasserman
Broward Cultural Affairs Council	Miriam Oliphant
Broward Education Foundation	Darla L. Carter
Broward Alliance (formerly Broward Economic Development Council)	Judie S. Budnick Alternate: Miriam Oliphant
Broward Regional Juvenile Detention Center Advisory Board	Miriam Oliphant Alternate: Paul D. Eichner
Consultant's Review Committee	TBA
Council of Great City Schools	Judie S. Budnick Alternate: Carole L. Andrews
Financial Advisory Committee	Miriam Oliphant
Florida School Boards Association (FSBA) Board of Directors	Darla L. Carter Alternate: Paul D. Eichner
Department of Health & Rehabilitative Services (HRS) Nominee Qualifications Review Committee	Stephanie Arma Kraft
Insurance Committee	Miriam Oliphant Lois Wexler Paul D. Eichner
Interagency Coordinating Council on Early Childhood Services	Stephanie Arma Kraft
League of Cities	Darla L. Carter Alternates: Carole L. Andrews and Paul D. Eichner
Legislative Liaison - Federal	Diana Wasserman Alternate: Judie S. Budnick
Legislative Liaison - State	Judie S. Budnick Co-Representative Darla L. Carter
Management and Efficiency Committee	Lois Wexler
Museum of Discovery & Science Board of Trustees	Judie S. Budnick
New World Aquarium & Environmental Education Center	Bob Parks
Public Safety Coordinating Council	Miriam Oliphant
South Florida Consortium of School Boards	Carole L. Andrews
Value Adjustment Board	Stephanie Arma Kraft and Paul D. Eichner Alternates: All Board Members
World Class Schools	Darla L. Carter Alternate: Miriam Oliphant
Legal Services Committee	Stephanie Arma Kraft and Paul D. Eichner
Metropolitan Planning Organization (MPO)	Darla L. Carter

Source: Broward County School District, School Board Office, 1998.

Through involvement of various committees, the School Board of Broward County, Florida has developed partnerships with agencies and organizations in the community who, in turn, have been supportive and involved in the schools.

FINDING

As part of the performance review, MGT conducted an analysis of background materials provided to Board members for four randomly selected regular Board meetings during the 1997-98 and 1998-99 school years. This analysis showed that these materials are comprehensive, and provide the Board with sufficient information to make informed decisions.

Board agenda packages are sent to the members one week prior to the Tuesday Board meeting. As shown in Exhibit 4-3, a cover page for each action agenda item enables senior staff to communicate effectively with the Board on each agenda item. The cover page has been developed to provide detail on each staff recommendation for Board action, an explanation for the item with background information, financial impact, supporting documentation, and the employee submitting the request. An additional item included on the form is a reference to the major system priority which the agenda item addresses.

COMMENDATION

Central office administrators provide comprehensive materials to Board members to prepare them for meetings and assist them in making informed decisions.

The cover page for each agenda item provides an informative synopsis for Board members on each agenda item, and can be used by members as a summary for the detailed information which is included.

FINDING

A review of the Board minutes for the 1997-98 and 1988-99 school years found that appropriate information is included in the minutes regarding Board discussions and actions. A summary regarding the discussion of action items is provided. Items which were controversial, such as those which resulted in a split vote, tended to have more information provided. If certain Board actions were to be questioned by the public, the Board minutes in their current form provide adequate justification or accountability for Board decisions. Information on how Board members voted is also included in the minutes.

In 1994, the Board implemented a software package which provides an easily accessible retrieval system for Board minutes. For example, if a search is needed for all agenda items which relate to facilities, the items can be retrieved. The School Board Records Office is currently scanning minutes prior to 1994 so that they also can be retrieved electronically.

**EXHIBIT 4-3
AGENDA REQUEST FORM
THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA**

MEETING DATE

AGENDA ITEM NUMBER

TITLE:	
REQUEST ACTION:	
SUMMARY EXPLANATION AND BACKGROUND:	
MAJOR SYSTEM PRIORITY:	
FINANCIAL IMPACT:	
EXHIBITS: (List)	
BOARD ACTION:	SOURCE OF ADDITIONAL INFORMATION
(official school board records office only)	NAME _____ PHONE _____

OFFICE OF THE SUPERINTENDENT OF SCHOOLS

DIVISION OF _____

APPROVED IN OPEN BOARD MEETING ON: _____

BY: _____ SCHOOL BOARD CHAIRPERSON

Revised 12-9-94

Source: Broward County School Board Records Office, 1998.

COMMENDATION

The School Board Records Office is commended for developing comprehensive minutes and for the effective software system used to catalog and retrieve minutes.

FINDING

Regular Board meetings are generally held on the first and third Tuesday of each month commencing at 1:00 p.m. in the School Board Room of the K.C. Wright Administration Building Center. In addition to these regular Board meetings, special Board meetings are held to address specific issues.

A list of all Board meetings for the 1997-98 year and 1998-99 year (to date) is shown in Exhibit 4-4. This exhibit provides specific information on the length and type of Board meetings. As can be seen, regular Board meetings occur during the day and generally conclude prior to 5:00 pm. Exhibit 4-5 follows with summary information on Board meetings for the 1996-97 and 1997-98 years.

The School Board of Broward County is the first school board that MGT has studied (of over 50 which we have reviewed in the past seven years) which has consistently scheduled its regular School Board meetings only during the day. The only reason cited by Board members is that this has been a staff preference since staff expressed a concern about attending late night Board meetings. Nonetheless, Board meetings held during the day restrict parent and community participation.

RECOMMENDATIONS

Recommendation 4-1:

Schedule at least one regular Board meeting a month as an evening meeting.

Parents and other taxpayers should have access to the Board through regular evening meetings (**Note:** At the November 1998 organizational meeting of the new nine-member School Board, the Chairman expressed interest in holding night meetings and on December 8, 1998 the Broward approved one night meeting a month beginning in January 1999. Such interest had been expressed by previous boards, but not implemented).

Recommendation 4-2:

Rotate the location of regular Board meetings and/or special meetings among school campuses.

School boards throughout the country have found that by holding Board meetings at school campuses at least once a month, campuses can be showcased. In addition, Board members can be more knowledgeable of school-based operations and accomplishments. Such practice promotes a positive relationship between the Board and campus personnel. Finally, this practice provides access to teachers, parents, and community members who reside near the campus and attend meetings in their

**EXHIBIT 4-4
SCHOOL BOARD MEETINGS
1997-98 AND 1998-99 (to date)**

1997-98			
DATE	TYPE	REASON	TIME
July 15, 1997	Special	Student Expulsions	11 am - 1:37 pm
July 15, 1997	Regular		1 pm - 6:15 pm
July 29, 1997	Special	Student Expulsions	11 am - 11:21 am
July 29, 1997	Regular		1 pm - 3:35 pm
July 30, 1997	Special (Public Hearing)	1997-98 Tentative Budget	5:30 pm - 6:35 pm
August 19, 1997	Special	Student Expulsions	11 am - 11:45 am
August 19, 1997	Regular		1 pm - 3:55 pm
September 2, 1997	Special	Student Expulsions	11 am - 11:20 am
September 2, 1997	Regular		1 pm - 4 pm
September 9, 1997	Special	Interviews/Financial Advisors	9 am - 11:10 am
September 9, 1997	Special	Interviews/Bond Counsel	11:10 am - 2:14 pm
September 9, 1997	Special (Public Hearing)	1997-98 Final Hearing Budget	5:30 pm - 6:20 pm
September 16, 1997	Special	Facilities Element	9 am - 10:17 am
September 16, 1997	Special	Student Expulsions	11 am - 11:10 am
September 16, 1997	Regular		1 pm - 4:38 pm
October 7, 1997	Special	Student Expulsions	11 am - 3:58 pm
October 7, 1997	Regular		1 pm - 3:58 pm
October 21, 1997	Special	Student Expulsions	11 am - 11:17 am
October 21, 1997	Regular		1 pm - 5:20 pm
October 28, 1997	Special	Announce Attorney - Client	3:50 pm - 5:15 pm
November 4, 1997	Regular		1 pm - 3:50 pm
November 18, 1997	Special	Student Expulsions	11 am - 11:20 am
November 18, 1997	Special	Organizational Meeting	1 pm - 1:55 pm
November 18, 1997	Regular		1:30 pm - 6:47 pm
November 18, 1997	Special	Leasing Corporation	
November 25, 1997	Special	Interviews/Invest. Bankers	10:30 am - 4:35 pm
December 2, 1997	Special	Student Expulsions	11 am - 11:25 am
December 2, 1997	Regular		1 pm - 4:05 pm
December 2, 1997	Special	Attorney/Client	3:30 pm - 4 pm
December 9, 1997	Special (Public Hearing)	1 st Hrg./Single Member Districts	5 pm - 7:03 pm
December 11, 1997	Special (Public Hearing)	2 nd Hrg./Single Member Districts	5 pm - 5:58 pm
December 11, 1997	Special	Narrow Down Models for Single-Member Districts	7 pm - 7:50 pm
December 16, 1997	Special	Student Expulsions	NO QUORUM
December 16, 1997	Regular		1 pm - 5:02 pm
January 20, 1998	Special	Student Expulsions	11:20 am - 12:15 am
January 20, 1998	Regular		1 pm - 8:45 pm
January 21, 1998	Special (Public Hearing)	1st Hearing - Boundaries	7 pm - 9:15 pm
February 3, 1998	Special	Student Expulsions	11 am - 11:10 am
February 3, 1998	Regular		1 pm - 6:35 pm
February 17, 1998	Special	Student Expulsions	11 am - 11:10 am
February 17, 1998	Regular		1 pm, 6:10 pm
February 18, 1998	Special (Public Hearing)	2nd Hearing - Boundaries	7 pm - 7:45 pm
March 3, 1998	Special	Student Expulsions	11 am - 11:25 am
March 3, 1998	Regular		1 pm - 6:11 pm
March 17, 1998	Special	Student Expulsions	11 am - 11:27 am

**EXHIBIT 4-4 (Continued)
SCHOOL BOARD MEETINGS
1996-97 AND 1997-98 (to date)**

DATE	TYPE	REASON	TIME
March 17, 1998	Regular		1:12 pm - 4:28 pm
April 7, 1998	Special	Student Expulsions	11 am - 11:10 am
April 7, 1998	Special	Attorney/Client	11:15 am - 1:00 pm
April 7, 1998	Special	Attorney/Client	12:45 am - 1:00 pm
April 7, 1998	Special	Attorney/Client	12:15 pm - 1:00 pm
April 7, 1998	Regular		1 pm - 7:50 pm
April 21, 1998	Special	Student Expulsions	11 am - 11:04 am
April 21, 1998	Regular		1 pm - 4:04 pm
May 5, 1998	Special	Student Expulsions	11 am - 11:10 am
May 5, 1998	Regular		1 pm - 4:50 pm
May 19, 1998	Special	Student Expulsions	11 am - 11:20 am
May 19, 1998	Regular		1 pm - 5:14 pm
June 2, 1998	Special (Public Hearing)	5-Year Work Plan	7 pm - 10:45 pm
June 9, 1998	Special	Student Expulsions	9:30 am. - 9:45 pm
June 9, 1998	Regular		10 am - 4:50 pm
1998-99 (to date)			
July 14, 1998	Special	Attorney/Client	11:20 am - 11:28 am
July 21, 1998	Special	Student Expulsions	9:30 am - 9:53 am
July 21, 1998	Regular		10 am - 5:52 pm
July 29, 1998	Special (Public Hearing)	1998-99 Tentative Budget	5:30 pm - 7:30 pm
August 18, 1998	Special	Student Expulsions	9:30 am - 10 am
August 18, 1998	Regular		10 am - 6:25 pm
August 25, 1998	Special	School Site X - Baytree	11 am - 11:45 am
August 25, 1998	Special	Leasing Corporation	11:45 - 11:50 am
September 8, 1998	Special	Financial Reports	5:00 pm - 5:11 pm
September 8, 1998	Special	1998-99 Final Budget	5:30 pm - 6:30 pm
September 8, 1998	Special	Attorney/Client	6:30 pm - 6:55 pm
September 15, 1998	Special	Student Expulsions	9:30 am - 9:48 am
September 15, 1998	Regular		10 am - 2:53 pm
October 6, 1998	Special	Student Expulsions	11 am - 11:16 am
October 6, 1998	Regular		1 pm - 4:03 pm
October 20, 1998	Special	Student Expulsions	11 am - 11:31 am
October 20, 1998	Regular		1 pm - 6:05 pm
October 27, 1998	Special	Group/Medical/Atty. Eval.	10 am - 1:45 pm
November 10, 1998	Special	Student Expulsions	11 am - 11:09 am
November 10, 1998	Special	Attorney/Client	11:15 am - 1:15 pm
November 10, 1998	Special	Attorney/Client	11:30 am - 1:15 pm
November 10, 1998	Regular		1 pm - 6:45 pm
November 17, 1998	Special	Leasing Corporation	After Regular Mtg.
November 17, 1998	Special	Student Expulsions	4:30 pm - 6:03 pm
November 17, 1998	Special	Organizational Meeting	1 pm - 2:10 pm
November 17, 1998	Regular		1:30 pm - 6:02 pm
December 8, 1998	Special	Student Expulsions	11 am - 11:08 am
December 8, 1998	Regular		1 pm - 8:20 pm
December 15, 1998	Special	Student Expulsions	11 am - 11:14 am
December 15, 1998	Regular		1 pm - 6:25 pm

Source: School Board Records Office, 1998.

**EXHIBIT 4-5
SUMMARY OF 1996-97 AND 1997-98 SCHOOL BOARD MEETINGS**

TYPE OF MEETING	1996-97 MEETINGS	1997-98 MEETINGS
Regular School Board meetings	22	21
Special School Board meetings	23	25*
Student Expulsions	21	
Special	2	
School Board Leasing Corporation	5	1
Organizational Meeting	1	1
Public Hearings	7	7
Attorney/Client Sessions	8	5
TOTAL	66	59

Source: School Board Records Office, November 1998.

*Note: One special meeting had no quorum (12/16/97).

community (**Note:** At the November 1998 organizational meeting of the new nine-member School Board, the Chairman expressed interest in holding meetings at campuses. Such interest had been expressed by previous boards, but not implemented. However, in January 1999, one meeting per month is being planned at a high school campus). In the future the Board should also consider elementary and middle school campuses.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Board Chairman and Superintendent should develop a calendar that provides for evening meetings and identifies one campus (elementary, middle, or high) location per month for Board meetings. May 1999

2. The proposed calendar for evening meetings and meetings at rotating school sites should be shared with the full School Board and approved for implementation. June 1999

FINDING

MGT attended two Board meetings to observe the structure of the meeting and how it was conducted. We found the meeting to be conducted in an orderly fashion; however, some individual agenda items were lengthy and considerable discussion took place for certain items. There was no problem with the established order of agenda items. Nonetheless, if agenda items are lengthy in the beginning of the meeting, often times, towards the end of the meeting, Board members tend to hurry through agenda items to be sure the meeting adjourns at a reasonable hour. Lengthy agenda items contribute to lengthy meetings and may cause some items to receive more attention than others based on the predetermined order.

As the Board meetings shift to evening meetings, the Board will need to be more cognizant of the length of regular board meetings. For example, some school boards have implemented a policy designed to limit the length of school board meetings (e.g. El Paso ISD, Texas). This policy requires all business to be completed by a designated hour (e.g., 11:00 pm) or the Board must reconvene the following day. This type of policy is generally implemented to ensure that school board meetings end at a reasonable time and that Board members remain alert as they deliberate on district issues.

RECOMMENDATION

Recommendation 4-3:

Develop a timed agenda for Board meetings.

Currently, the Board has not prepared a timed agenda for regular Board meetings. Therefore, Board discussions can and do occur without a specified time for each item. The Broward County School Board should consider the development of a timed agenda requiring board action, in the form of an amendment, for deviations from the proposed agenda. Each section of the agenda should be appropriately timed and the Board Chairman or designee should closely monitor the time devoted to each agenda item. Implementing a timed agenda will keep the Board meeting on schedule and limit the need for lengthy meetings.

Exhibit 4-6 presents a sample of an abbreviated agenda for Board meetings in a format that specifies a time to begin each item. We have developed this exhibit based on the July 21, 1998 agenda.

**EXHIBIT 4-6
SAMPLE ABBREVIATED TIMED AGENDA FOR
BROWARD COUNTY SCHOOL BOARD
REGULAR BOARD MEETINGS**

Example Meeting July 21, 1998 – 10:00 a.m.		
Agenda Item Number	Start Time	Description
1.	10:00 a.m.	Call to Order Pledge of Allegiance
2.	10:05 a.m.	Closed Agenda
3.	10:30 a.m.	Special Presentations
	10:35 a.m.	<ul style="list-style-type: none"> ■ 1997-98 Outstanding Principal Achievement ■ Winners ■ National Champion Debate Student ■ Florida All-Stars
	10:50 a.m.	
	11:00 a.m.	
4.	11:15 a.m.	Reports
5.	Noon	Consent Agenda
		<ul style="list-style-type: none"> A. Resolutions B. Board Members C. Board Policies D. Etc.
6.	2:00 p.m.	Action Agenda

Source: Developed by MGT, 1998.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-----------|
| 1. The Superintendent, in cooperation with the Board Chairman, should develop a draft of a timed agenda to be used for Board meetings. | May 1999 |
| 2. The Board Chairman and Superintendent should receive comments from Board members and revise the agenda as appropriate. | June 1999 |
| 3. The Board Chairman should designate the Secretary of the Board to keep time and alert the Board Chairman when time periods expire. | June 1999 |
| 4. The Board should begin using the timed agenda. | July 1999 |

FISCAL IMPACT

This recommendation can be implemented within existing resources.

FINDING

The School Board Records Office is under the Associate Superintendent and Board Liaison*, who is responsible for assisting the Superintendent by ensuring that accurate and timely records of official meetings are prepared and maintained. This associate superintendent is also responsible for non-school Board functions such as equal educational opportunities. The Board secretaries also administratively report to the Associate Superintendent and Board Liaison.

The Associate Superintendent and Board Liaison spends 75 percent of her time on board-related activities and 25 percent on other responsibilities, including phone calls and correspondence, referrals, and the implementation of a referral database. With regard to Board responsibilities, the Board Liaison is responsible for implementing for the Superintendent a follow-up procedure for each agenda item after a Board meeting. An excerpt of follow-up staff assignments for the November 10, 1998 School Board meeting is shown in Exhibit 4-7. As can be seen, follow-up action for each agenda item is clearly assigned to a staff member; the required action is also provided in this exhibit.

COMMENDATION

The Associate Superintendent and Board Liaison is commended for the excellent follow-up system implemented for Board items.

The district's follow-up system for Board agenda items provides an effective accountability and feedback mechanism. The Superintendent identifies who is to be held accountable for the agenda item and Board members can easily obtain specific follow-up information if desired. This systematic follow-up system is not found in most other school districts which we have reviewed, but a practice which can be clearly emulated by and useful to other school districts.

*The Associate Superintendent and Board Liaison are one person.

**EXHIBIT 4-7
EXAMPLES OF AGENDA FOLLOW-UP ASSIGNMENTS FOR NOVEMBER 10, 1998
REGULAR SCHOOL BOARD MEETING**

Note: All staff follow-up is to be completed prior to the next regular School Board meeting unless otherwise specified.

ITEM	RESPONSIBILITY	STAFF FOLLOW-UP
A-1	S. Dudley	Adopted. (Resolution 99-19 in Support of Maintenance Personnel Month, November 1998) Resolution to be transmitted to all work locations.
A-2	S. Dudley	Adopted. (Resolution 99-20 Opposing Prayer in Schools) Resolution to be transmitted to all work locations.
B-1	S. Dudley	Approved, as amended. (Children's Dental Coverage) Add a new paragraph, under Term/Insurance Premium, No. 1.3 to read: "School Board may cancel this agreement any time with a 60-day advanced written notice to OHS." (L. Wexler, A. Fischler)
	H. Blitman J. Hunt J. Quercia A. Hanby	Staff to prepare an RFP prior to the next two years in the areas of children's dental and vision coverage, relative to getting competitive programs, and run this through the insurance committee. (A. Fischler)
B-2	S. Dudley	Approved, as amended. (Children's Vision Coverage) <u>Amendment</u> Add a new paragraph, under Term/Insurance Premium, No. 13 to read: "School Board may cancel this agreement at any time with a 60-day advanced written notice to VCS." (L. Wexler, A. Fischler)
B-3	S. Dudley	Approved. (An Addition to the Name of Pompano Beach Institute of International Studies: Pompano Beach High School Institute of International Studies)
B-4	H. Blitman M. Seigle P. Renfro	Deferred. (Amend School Board Policy and Rules #7003 - Selection of Engineers and Architects Pursuant to the Consultant's Competitive Negotiation Act)

Source: Office of the Associate Superintendent and Board Liaison, 1998.

FINDING

Each School Board member in Broward County has a secretary with one secretary serving as office manager. In addition, the School Board Office is supported by a full-time receptionist. Board member secretaries are responsible for maintaining calendars, taking phone messages, scheduling appointments, typing correspondence, and coordinating travel. In addition to the School Board Office, the Broward County School Board has a School Board Records Office. This office has a supervisor, clerk specialist, and a records management assistant. This office is responsible for coordinating:

- the recording of official minutes;
- the maintenance of official Board documents;
- and assisting with the preparation of agenda;
- the completion of legal documents; and
- information for the public on Board minutes.

A comparison of the staffing of school boards in 14 school systems is shown in Exhibit 4-8. As can be seen, the Broward County School Board has a staff per school board member ratio of 1.44 which is significantly higher than all but one other school system which were examined. In each of the school districts illustrated in the exhibit, school board members are elected (as opposed to appointed). Also, other than in the Broward County School District, the functions of the School Board Office and School Board Records Office are combined.

RECOMMENDATION

Recommendation 4-4:

Reduce support staff in the School Board Office and School Board Records Office and consider combining these two offices.

The total support staff FTE should be reduced from 13 FTE to six FTE. For administrative purposes, this office should continue to report to the Associate Superintendent and Board Liaison. A reduction to six FTE would provide a ratio of staff to School Board members of 0.7 which is at the average shown in Exhibit 4-8. The School Board Office and School Board Records Office should consider combining these offices as they are in most other school districts. A proposed organizational structure for the new office is shown in Exhibit 4-9.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The School Board Chairman should meet with the Associate Superintendent and Board Liaison and Board members to restructure the School Board staff and combine responsibilities. Spring 1999

**EXHIBIT 4-8
COMPARISON OF STAFFING PATTERNS IN FOURTEEN (14)
SCHOOL BOARD OFFICES**

School District	Number of School Board Members	Number of Students In School System ¹	Number of School Board Staff	Ratio of Staff to School Board Members
Broward County School District	9	225,000	13 ²	1.44
Fairfax County Public Schools (VA)	13	135,400	7	0.54
Montgomery County Schools (MD)	8	122,500	8	1.00
Dallas ISD (TX)	9	155,000	5	0.56
Houston ISD (TX)	9	207,000	7	0.78
San Diego Public Schools (CA)	5	133,000	2	0.40
Jefferson County Schools (CO)	5	87,000	1.5	0.30
Clay County School District	5	27,000	0.5	0.10
Lee County School District	5	52,500	2.0	0.40
Hillsborough County School District	7	147,500	1.25	0.18
Orange County School District ³	7	137,700	3.0	0.43
Miami-Dade School District ³	9	345,900	22.5	2.50
Palm Beach County School District ³	7	150,000	6	0.86
Duval County School District ³	7	127,000	3	0.43
AVERAGE				0.71
AVERAGE WITHOUT BROWARD AND MIAMI-DADE				0.50

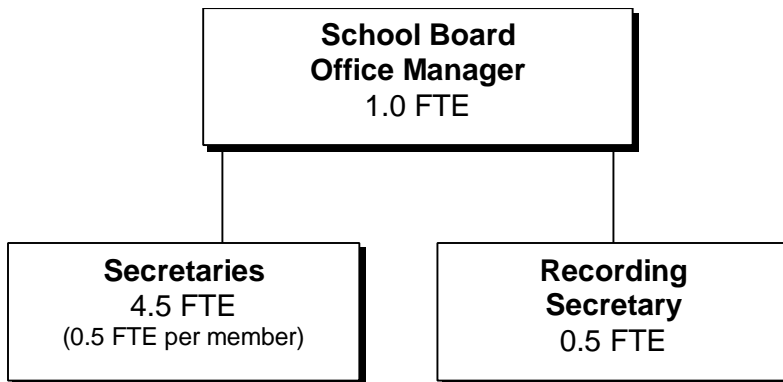
Source: MGT of America, 1998. Information contained in exhibit was obtained through telephone interviews and review of information provided by the school systems.

¹at time of management study.

²includes both the School Board Office and School Board Records Office which are combined in other districts cited in the exhibit.

³based on phone calls to these four districts.

**EXHIBIT 4-9
PROPOSED ORGANIZATION OF
SCHOOL BOARD OFFICE**



Source: Created by MGT, 1998.

2. The organizational structure of the combined office (shown in Exhibit 4-9) should be approved by the full Board. June 1999

3. The newly created office should be operational. Seven current secretaries should be reassigned based on vacancies and retirements. July 1999

FISCAL IMPACT

The average salary of a School Board secretary with benefits at 33 percent is \$46,700. The total savings for seven secretaries is \$326,900 annually.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Reduce Board Secretaries	\$326,900	\$326,900	\$326,900	\$326,900	\$326,900

FINDING

The Florida School Board Development Program was established in January 1990 as a result of 1989 legislation which encouraged the Florida School Boards Association, Inc., (FSBA) and the Florida Department of Education to jointly develop a state plan for school board development. The goal of the FSBA Board Development Program is to assist and support school boards in providing visionary leadership to meet the future challenges of education in the state.

The program is voluntary and is uniquely designed to serve the leadership development needs of the entire school board and to address the specific needs of individual school board members. This program provides a broad range of educational opportunities and activities for both new and experienced school board members, and:

- assists school board members in developing a high level of boardship skills and knowledge;
- encourages school board members to take an active leadership role in education; and
- recognizes school board members who participate.

As part of the study, MGT examined participation of members of the Broward County School Board in activities of the Florida School Boards Association. In 1996-97, four Board members attended one or more activity. In 1997-98, only two Board members attended one or more activity. A comparison of participation of other large school districts is shown in Exhibit 4-10.

**EXHIBIT 4-10
PARTICIPATION OF SCHOOL BOARD MEMBERS IN
FLORIDA SCHOOL BOARDS ASSOCIATION MEETINGS**

School District	Member Participation		FSBA Master Board Status
	1996-97	1997-98	
Broward	4 of 7	2 of 7	Never
Miami-Dade	5 of 7	2 of 7	Never
Duval	3 of 7	3 of 7	Initial in 1993 Reinstated in 1995
Hillsborough	6 of 7	6 of 7	Currently a Master Board
Orange	4 of 7	3 of 7	Initial in 1994
Palm Beach	7 of 7	6 of 7	Initial in 1998

Source: Florida School Board Association (FSBA), 1998.

Examples of the type of training activities provided by the Florida School Boards Association (FSBA) include:

- Orientation Conference
- Annual Spring Conference
- Annual Fall Conference
- Board of Director's Retreats
- School Board Academy
- Day in the Legislature
- Boardsmanship
- Special Workshops

Board members interviewed in other Florida school districts which we have reviewed have found these training session to be very valuable.

As can be seen in the exhibit, past Broward County School Board members have had only minimal involvement with the Florida School Boards Association. Since November 1998, the new nine-member Board has shown a greater interest in FSBA activities and, in December 1998, the FSBA Executive Director conducted two planning workshops in Broward County for all Board members.

RECOMMENDATION

Recommendation 4-5:

Augment involvement in training with the Florida School Boards Association.

Members of the Broward County School Board should attend, on a more regular basis, activities sponsored by the Florida School Boards Association. This includes both new members and current members, especially those who have shown no participation in years past. In fact, in some states, participation in the state's School Boards Association is mandatory. In time, the Broward County School Board should consider participating in Florida's Master School Board Program, as have over 35 other school boards in Florida.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|---------|
| 1. The Chairman of the Broward County School Board should request a calendar of FSBA activities and circulate the calendar at least quarterly. | Ongoing |
| 2. Training activities attended by Broward County School Board members should be included in district publications (i.e. <i>Board Action</i>). | Ongoing |

FISCAL IMPACT

This recommendation can be implemented using the dollars identified for travel in the Board's budget (\$17,000 in both FY 1998 and 1999 for out-of-county travel). The charge for the FSBA training is nominal and covers hotel and meal costs.

FINDING

In addition to minimal participation in state association meetings, there has not been any formal orientation program prior to the November 1998 election for new Board members in Broward County. For example, senior staff in several other school districts (e.g., Hillsborough and Palm Beach) coordinate one or two days of meetings with new Board members so new members can learn the organizational structure and school district's primary functions (finance, transportation, instruction, etc.).

After the November 1998 election, in December 1998, staff provided some reference materials for Board members and discussed these materials with the new Board members.

RECOMMENDATION

Recommendation 4-6:

Develop an internal formal orientation workshop for new Board members which can be replicated after each Board election or when a member is appointed to complete a term.

The training program should be developed with a designated agenda and senior staff positions identified as to who should be responsible for each agenda item. Handouts and informational items should be prepared.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-------------|
| 1. The Associate Superintendent and Board Liaison should draft an orientation and training program for new Board members. | Summer 1999 |
| 2. The proposed training program should be shared with the Superintendent and Board Chairman and approved. | Fall 1999 |

3. The training program should be implemented when a new Board member is elected or appointed.

November 2000
or earlier

FISCAL IMPACT

This recommendation can be implemented within existing resources.

4.2 Policies and Procedures

CURRENT SITUATION

The written School Board Policies currently in use in the Broward County School District state the title of the policy, state the policy itself, and list the rules created by the policy. Each written policy has, either at the beginning or at the end of the policy, an adoption date, the authority from which the policy is derived, and any previous policies or 'rules' adopted and/or amended by the Board. The policies contained in the manual range in adoption date from the early-mid 1970s to the current school year.

The Broward County School District maintains a manual of its School Board Policies. There are seven sections in the manual, using a numerical coding system as shown in Exhibit 4-11.

**EXHIBIT 4-11
NUMERICAL SYSTEM IDENTIFIED IN THE POLICY MANUAL OF
THE BROWARD COUNTY SCHOOL DISTRICT**

TABLE OF CONTENTS POLICY SERIES	
1000 - 1999	Community Relations
2000 - 2999	Administration
3000 - 3999	Business
4000 - 4999	Personnel
5000 - 5999	Students
6000 - 6999	Instruction
7000 - 7999	Operational Services

Source: School Board Policies of Broward County, 1998.

The hard copy of the Policy Manual contains two "Tables of Contents." The first Table of Contents lists policies and their code numbers in alphabetical order by title of the policy. The second lists the policies in their numerical order.

The School Board's policies are also located on the district's Intranet. This electronic data service was made available to district employees as of January 1998. The "Statements and Policies" is the first entry listed under the title of "Electronic Documents," on the Home Page of the Intranet. It is possible to call up the Table of Contents for the Policy Manual, and then to select and read the actual policy itself. Also

linked to this site, is a site (www.legistahve.arde.org) which makes the Intranet policy service available to those working on a legislative level, seeking information about the Broward County School District.

It is also possible to gain access to the Policy Manual electronically on a publicly available website, located at www.broward.k12.fl.us. This site is created and maintained by the district's Technology Services. The items at this site, which include the Board's policies, are located on the district's server, both inside and outside the firewall that divides the Intranet from the Internet. This makes them accessible both to school district employees and to the public. As stated on the website, the Board policies are written in a "PDF" format, which "ensures that each document retains its original format features." Because the format requires the use of Adobe Acrobat Reader, and a browser plug-in, there is a link available at the school district's site, to allow the user to get that software. The software makes it possible to view all Board policies on-line at this address.

There is also a school district-sponsored Internet site for the general public, located at <http://www.browardschools.com>. The icons at this site include a "School Board" icon, and a separate icon for the upcoming "School Board Agenda." Under the "School Board" button, it is possible to see a profile and picture of each School Board member, and a forum for contacting that member via electronic mail through the district's webmaster (see Chapter 7). It is possible to retrieve a list of upcoming meetings, with an explanation and logistics for each. It is also possible to retrieve an abbreviated review of events at a previous board meeting. There is a section at this site, called 'New School Board Policies.' Two new policies were available at this site in December 1998---the Homework Policy, and the Parent Involvement Policy. This site is created by a private Internet service provider and is sponsored by the Office of Community Relations. A discussion between this department and Technology Services is currently in progress, about creating a link between the "broward.k12" site which gives access to the entire policy manual, and the "Browardschools" site. This will give the public two sites through which they can access the Board policies.

Policies in development or revision go through a variety of steps and different procedures as they are being drafted, edited, or revised. They may initiate within any department or division. They are routed through the Office of the Associate Superintendent for District Administration to the Agenda Preparation Group, to the Communications Loop, to the Cabinet, and, if it is a strategically important policy, to the District website for input. A 'point person' for the policy's development is appointed during the process. After the policy has been through an extensive review and revision within the District Administration and, any ad hoc committees which might include both District personnel and members of the community, the policy goes to the Policy Review Committee. When they have finished their work, the policy returns to the Office of the Associate Superintendent for District Administration for final editing and then to the Superintendent and Board.

The responsibility for receiving and finally rewriting drafts of policies, taking a new or revised policy to the Policy Review Committee, and for recommending a policy to the Superintendent for his review, rests in the Office of the Associate Superintendent for Administration. All policies developed or amended by any department or division, are channeled through the Office of the Associate Superintendent for Administration, and until recently, the Director of Personnel. The Director of Personnel edited or rewrote the

policies submitted, and took them to the Policy Review Committee for input and another edit. At the present time, the Associate Superintendent for District Administration has been designated as the Chair of the Policy Review Committee. This Committee is comprised of representatives from the community, the PTA, the District Advisory Committee, the Labor Union, the business community, and the Administrators' Association.

A revision of the 4000 policies in the area of personnel was almost completed at the time of our review. While the Associate Superintendent for Administration is responsible for the preparation of policy documents for the Superintendent, he is not responsible for the comprehensive review of the policy manual. The responsibility for undertaking a complete revision of the policy manual rests with the office of the either the Deputy Superintendent for Operations or the Associate Superintendent and Board Liaison.

The official files which document the Board's actions on a given policy are located outside the Office of the Associate Superintendent for Administration. After policies have been adopted by the School Board in their final form, they are grouped together in 'bundles,' and sent to all policy book holders by this office. At around the same time, the approved policies are communicated from the Office of the Associate Superintendent to an office in Technology Services, where the new or amended policy is added to the existing on-line manual on the Intranet.

Each department and/or division is responsible for developing the administrative guidelines which support any particular policy. The Office of the Treasurer maintains a book of "Standard Procedures Bulletins," which is a compilation of the procedures which are required for use under business and financial policies.

FINDING

The district's websites on both the Intranet/Internet district server, and on the private provider's server are all easily accessible and current. These websites give the public access to the School Board's policies and are very user-friendly. Most school districts which MGT has reviewed do not have as easy access to Board policies electronically.

COMMENDATION

The School Board of Broward County, the Technology Services Department, and the Office of Community Relations are commended for the easy and varied access to the School Board's policies.

FINDING

The Policy Manual for the Broward County School District has not undergone a comprehensive review within the last 10 years. There are policies in use from the 1970s and the 1980s which have not been updated, replaced, or eliminated. A sample of these follows in Exhibit 4-12.

There is confusion within the district administration about whose responsibility it is to create a master schedule for policy revision among all divisions and departments. Four administrators (the Associate Superintendent for Administration, the Director of

**EXHIBIT 4-12
SAMPLE SCHOOL BOARD POLICIES IN CURRENT USE WHICH ARE
OLDER THAN TEN YEARS**

SAMPLE BOARD POLICIES	DATE LAST AMENDED
2305 Building Evacuation Drills	9/5/74
2310 Bus Maintenance and Inspection	1/6/77
2.5 Flexibility State Textbook Funds	9/5/74
3.1 Non-School Funds	9/5/74
3.2 Food and Beverage Services	5/2/85
4000 Personnel Policy Statement	11/2/78

Source: Created for MGT based on SBBC Policy Manual, 1998.

Personnel, the Deputy Superintendent for Operations, and the Associate Superintendent and Board Liaison) each have some responsibility to update the policy book.

There was no explanation given as to why or how the responsibility for preparing policies for the School Board's review and action rested with various senior administrators nor why one administrator was not primarily responsible. Further, these administrators could not explain how the function related to their primary responsibilities, nor was there any connection apparent from reading through their job descriptions.

Neither the job description for the Associate Superintendent for Administration nor the job description for the Associate Superintendent and Board Liaison contains a performance responsibility related to the overall updating and maintenance of the Board's policy manual. One senior administrator reported that policy review was the responsibility of each director. There are references to policy responsibilities contained in various job descriptions.

An example of this can be seen in Exhibit 4-13. These responsibilities do not provide for the performance responsibility of coordinating and overseeing policy review. At the present time, the responsibility for conducting a comprehensive review of the Board's policies is not formally assigned to any administrator; nor is one being conducted.

RECOMMENDATION

Recommendation 4-7:

Establish a master schedule for policy revision, assigning policies to all appropriate departments, and divisions for review and recommended action.

Clear updated policies should provide a framework for Board and school district decisions. Generally, we have found that the school board policy manuals necessitate a complete comprehensive review at least every 10 years. However, in 1997, Section 120.74, F.S., was revised and now requires a formal review and revisions every two years.

**EXHIBIT 4-13
EXAMPLES OF RESPONSIBILITIES FOR POLICY DEVELOPMENT
JOB DESCRIPTIONS FOR TWO DIRECTORS**

Director, Personnel: Performance Responsibilities

The Director, Personnel shall

1. plan, organize, coordinate and control policies, programs and procedures which are designed to provide positive employee relations and which are related to:
 - a. measuring and responding to employee attitudes, concerns and grievances.
 - b. negotiating in good faith with all bargaining units and adhering to federal, state and local labor relations laws and regulations.
 - c. communicating with employees generally about subjects to their interest.

Last revised: 5/21/96

Director, Equal Educational Opportunities

The Director, Equal Educational Opportunities shall

1. monitor and implement all programs, laws, rules, regulations, and policies affecting equal access in the Broward County School System.

Last revised: 10/17/95

Source: Job Descriptions, Broward County School District, 1998.

Administrators should be held accountable for the development and updating of policies. The Florida School Board Association could be consulted about the procedures used by other Florida school districts to purge policies.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should prepare a revised job description for the position of Associate Superintendent and Board Liaison, to include responsibility for ensuring a continuous and timely review of all Board policies. May 1999
2. The Associate Superintendent and Board Liaison should review the policy manual and assign policies to appropriate divisions and departments for their revision. Summer 1999
3. The Associate Superintendent and Board Liaison should set a timetable for Board review of policies, so that all policies have been created, edited, and/or reviewed every two years. May 1999
4. The Associate Superintendent and Board Liaison should set up and maintain an schedule for policy review, ensuring that the two-year schedule is enforced as required in statute. Summer 1999

5. The Associate Superintendent and Board Liaison should ensure that the policy review schedule is adhered to, and that the policy review and update is completed.

June 2000

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

When there is a need to write, edit, or finalize policies for the Broward County School Board, several senior managers (those most involved with the content of a particular policy) and legal counsel take responsibility for ensuring that different parts of the process occur. As policies go through various stages of development, revision, and discussion by the Board, no one office or manager is primarily responsible for the process. For example, looking at the part of the policy process which is the creation and maintenance of timely and chronologically accurate policy files, the policy files for the Broward County School District are physically located outside the offices of the Director of Personnel and Legal Counsel. These offices are in a different part of the building than the offices of the Superintendent and School Board. The reason provided for the location of the files in this area was that it was the responsibility of Legal Counsel to create and maintain the policy files, and Legal Counsel works closely with the Personnel Director. Generally, Legal Counsel has a direct role in the original drafting of policy statements, or in the first level revision process, after a senior manager has submitted a policy which needs to go through revisions at the school district level. However, the files need to be located near the individual or office responsible for maintaining them.

The policy files reviewed contained working copies of policies while they were under revision. The files contained a copy of the publicized notice sent to the newspaper and copies of policies as read both the first and second time. The contents of the two policy files provided for review were not systematically organized in a time sequenced order of action on the policy. However, both files were complete.

RECOMMENDATION

Recommendation 4-8:

Assign the Office of the Associate Superintendent and Board Liaison as the primary caretaker of the policy manual, including responsibility for maintaining the files and updating the manual.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should require that the School Board's policy files be relocated to the Office of the Associate Superintendent and Board Liaison. May 1999
2. Together with the Supervisor of the Records, the Associate Superintendent and Board Liaison should devise the complete clerical cycle of filing responsibilities, so that files are kept in systematic and chronological order. Summer 1999

3. The Associate Superintendent and Board Liaison should assign the specific tasks of 'bundling' hard copy policies for distribution to policy book holders, and the task of uploading the new and revised policies directly to the Intranet and Internet server file. Summer 1999

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

In addition to the numbering system based on the 1000 - 7999 explained in the Table of Contents, there are a variety of additional notations attached to Board policies. There is significant variety from policy to policy, in the policy manual, in both appearance, and apparent retrieval systems. For example, there is an additional numbering system outside of the 1000 - 7999. The Board's Policy Manual includes policies numbered one through 10, although these are not explained in the numerical explanation of the 1000 - 7999 section. These lower numbers appear at the beginning of the Table of Contents listing of policies in numerical order, and are embedded in the manual's Table of Contents' alphabetical listing of policies in alphabetical order. Examples of policies with this different numbering system are shown in Exhibit 4-14.

In an interview with the Director of Personnel and the Associate Superintendent for Administration, the policies cited above were explained as policies which were board operating procedures in a given section of policy. These administrators further explained that the policies were deliberately placed at the end of each pertinent chapter. A review of a sample of these lower-numbered policies raises questions about the consistency of that definition. The policy numbered 2.2 Community Schools, for example, would appear to be more related to the business section of the policy manual, which is the 3000 section. That section contains policies entitled, "Petty Cash Funds" (3110) and "School District and School-Based Management" (3203).

Policy 2.2 is shown in Exhibit 4-15. There is no rationale within the manual's Table of Contents about why this policy appears at the end of the higher numbered policies in the 2000 section, and no rationale within the policy that it guides Board operations as suggested by the administrators who are responsible.

An additional variation in the policy manual is the designation "New Policy." Other than the obvious interpretation that this is a policy which is new and has not been amended, there is no clear designation of what year the practice began calling un-amended policies, "new policies." There are policies in the manual which have not been amended, but are not labeled "new policy."

In addition to the unexplained numerical system, some policies carry a "supplement" number, and some do not. Some policies carry an additional number, "G6X6," and some do not. A supplement number, when included, indicates the "bundle" number. This is an internal system for keeping track of which policies are bundled together and sent on to the policy book holders. It was not clear when the bundle number is included, and when not.

**EXHIBIT 4-14
POLICIES IN THE BROWARD COUNTY SCHOOL DISTRICT POLICY MANUAL
WITH NUMBERS NOT EXPLAINED IN THE
TABLE OF CONTENTS NUMERICAL SYSTEM**

- 1.2 District Advisory Council
- 1.21 Area Advisory Council
- 1.3 School Advisory Committee
- 1.4 School Progress Reports
- 1.5 Diversity Committee
- 1.6 Direct Support Organizations
- 2.1 Activity Bus Pool
- 2.2 Community Schools
- 2.4 Bomb Threat Procedures
- 2.5 Flexibility State Textbook Funds: Requisitions
- 3.1 Non-School Funds
- 3.2 Food and Beverage Services Available to Students
- 3.3 Contracted Maintenance Services
- 3.4 Resolution of Protest Arising from the Contract Bid Process
- 4.2 Worker's Compensation
- 4.3 Certificates of Absence for Leaves
- 4.4 Disability Leave

Source: Created by MGT from Table of Contents, Broward Policy Manual, 1998.

**EXHIBIT 4-15
POLICY # 2.2
COMMUNITY SCHOOLS**

The following policy is located at the end of the 2000 - 2999 chapter on "Administration," and before the beginning of Chapter 3000 - 3999 on "Business."

1. This is to advise Community Schools earning FTE will retain the earned funds in the school under the control of the principal. Additional personnel necessary to operate the program would be funded by the schools' budget.
2. There is no change in the community grant procedure now in operation.

Adopted: 9/5/74

Source: School Board Policy Manual, 1998.

In terms of print format, there is significant variety within the Policy Manual. Most policies are legible; some parts of some policies have blurry print, usually the result of copying copies and 'copies of copies' many times, rendering them illegible. These characteristics of variable legibility and numbering were also true for the on-line versions of the manual. In the hard copy edition of the manual, some policies are printed on one side of the paper; some policies are printed on two sides. Some policies are edited by

showing lines of text crossed out and replaced by new text which is underlined; other policies are edited by showing only new text. Some policies have numbered pages beginning with the number 1 and continuing the length of the policy to, for example, page number 4 or 5; some policies have no page numbers; some policy sections have page numbers which appear mid-chapter, like 25 - 32, with no indication of what came before or after; some policy book pages have numbers crossed out by hand, with hand-written numbers replacing them. Some policies change the margins and layout of the text in the middle of the policy, with no explanation. Exhibit 4-16 provides some specific examples of this variability.

A major difficulty in legibility and ease of understanding the policies is created by the practice of crossing out old parts and underlining new parts of the policy under revision. While this may be a useful tool for those considering and re-considering policy changes, and while it may be useful as historical perspective, it is a significant hindrance to reading both the printed copies and the on-line copies of the policies.

RECOMMENDATION

Recommendation 4-9:

Develop and recommend to the School Board a revised numbering system and layout format for the Board's policies.

The Broward County School District should not only update the policy book, but also decide on a clean, uniform, professional format which will enhance the quality of both the on-line and the paper manuals. The result of this recommendation, along with the comprehensive policy review, should make the Board policy manual into the efficient, comprehensive reference text it is meant to be.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|--------------------------|
| 1. The Associate Superintendent and Board Liaison should research the best layout format and numbering system which suits the Board policies and policy manual. | Summer 1999 |
| 2. The Associate Superintendent and Board Liaison should prepare a sample layout for all Board policies and present it to the School Board for their consideration and action. | September 1999 |
| 3. The Associate Superintendent and Board Liaison should oversee the preparation of all new and revised policies in the new format and numbering system, so that all current policies are converted immediately, and subsequent policies under review are converted as completed by the Board in the revision cycle. | 1999-2000
school year |
| 4. The Associate Superintendent and Board Liaison should install the software which will allow direct uploading of newly formatted policies onto the district's website, so that this function can take place in the Associate Superintendent's office. | Fall 1999 |

**EXHIBIT 4-16
EXAMPLES OF VARIATIONS IN RECOMMENDATIONS AND TEXT
BROWARD COUNTY SCHOOL BOARD POLICY MANUAL**

VARIABILITY IN POLICY IDENTIFICATION AND FORMAT	EXAMPLE OF A POLICY WHICH HAS VARIABILITY IN IDENTIFICATION OR FORMAT
Carries the designation NEW POLICY	1164
Is unamended but does not carry the designation NEW POLICY.	3.1
Has a Supplement Number	3.2
Has no Supplement Number	Most policies
Uses the added numbering system G6X6	6GX6-3602
Does not use the added numbering system G6X6	Most policies
Legible policy	1165
Parts of the policy are illegible	1.4
Printed on one side	4305
Printed on two sides	6Gx6-4206 and 6Gx6-4208
Amended, showing edits with old lines crossed out and new lines underlined	2081
Amended, without showing old lines crossed out and new lines underlined	3800
Policy is numbered within itself 1 - 5 etc.	3109
Policy is on an unnumbered page	2.1
Policy is on pages which have numbers not related to the numbers before or after the document	3201
Policy has one typed page number and another written in by hand	4002.13
Policy deleted by a large X placed over policy page	3.21
Policy deleted by indication of deletion followed by new policy replacement	1161

Source: Created by MGT from samples of Broward County School Board Policy Manual, 1998.

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

The Broward County School District does not have a comprehensive administrative procedures manual. For the most part, administrative procedures required to manage and implement federal, state, and district policies are not found in procedures manuals issued by the various deputy, associate, and assistant superintendents and other administrators. Most divisions and departments in the school district do not have procedures manuals commonly found in many districts (e.g., Alachua County and Leon County).

Required or recommended administrative procedures developed as a result of policy are not identified on the Board policy, nor is there a general index where such procedures are referenced. Only one department maintains an official "Standard Practice" notebook. The Office of the Treasurer has Standards Practice Bulletins which are numbered; however, they are not coded to the Board's policies. It is not possible to link from policy to required procedure in any area by using a coded system, nor is it possible to link from procedure to coded policy.

No cross referencing is done within the Broward County School District to connect policies with their required procedures, or to identify for practitioners the policies which undergrid different procedures. One administrator who is partially responsible for the policy manual stated that the 'Policy on Policies' prohibited such an indexing. Once the policy was passed by the Board, no words could be attached to or placed on the policy. Exhibit 4-17 provides this policy. A review of this policy, however, found that it does not restrict cross reference of a policy to an administrative procedure or guideline.

RECOMMENDATION

Recommendation 4-10:

Develop one comprehensive administrative procedures manual or a series of division/department manuals, as appropriate, and design and establish a coding system which identifies the school board policy and the administrative procedures guided by the policy.

Each administrative procedures manual should be carefully cross-referenced to the Board Policy Manual. Administrators should be held accountable for the prompt development of administrative procedures for their divisions and departments. An administrative procedure should (1) be the source of implementation of Board policy; (2) be communicated clearly to school administrators and staff; and (3) be updated annually. The evaluation of each division and department administrator should include a component on the effective development and implementation of administrative procedures in his/her area of responsibility.

**EXHIBIT 4-17
POLICY # 1001
POLICY AND RULEMAKING**

POLICY AND RULEMAKING

The Board, representing the people of Broward County, is the body which determines all questions of general policy to be employed in the administration of the public schools, such policies and/or rules must be in conformity with the Federal and Florida Constitutions, Federal and Florida laws, and the Florida State Board of Education Administrative Rules.

Proposals regarding Board policies may initiate with a member of the board or the Superintendent, proposals for new policies or revisions to existing policies shall be submitted in writing to the Superintendent of Schools, except that a board member may sponsor a policy and/or rule on the agenda.

All policies and rules, new or revised shall require two formal readings during the Board's regular meeting. The first reading shall constitute a public hearing on the policy or rule being considered. The second reading shall be the adoption reading, which shall take place no less than twenty-one calendar days after the advertising of the intended action, as specified in Florida Statute 120.54 (Administrative Procedures Act). The Board may, at its option, defer the final adoption reading in order to give ample time for public input or for further study and revision, prior to the adoption of the policy or rule.

Prior approval will not be required by the Board for advertising for possible action concerning the establishment of the annual student attendance areas.

Policies promulgated by the School Board are defined as rules under Chapter 120 of the Florida Statutes.

All policies and rules of the Board will be available for public inspection and copying at no more than cost through the Superintendent's office.

Source: School Board of Broward County Policy Manual, 1998.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. Following a comprehensive update of Broward County School Board Rules Manual, senior staff should conduct a detailed analysis of all Board policies to determine which policies require administrative procedures. Summer 1999
2. The assigned deputy/assistant superintendent should prepare administrative procedures for each policy that requires one. Fall 1999
3. All administrative procedures should be clearly cross-referenced to Board policy. The Deputy Superintendent for Operations should create and phase in a system for Fall 1999

connecting policies and standard procedures in all divisions and departments. The system should be put into immediate use as policies which are not going to be revised are identified, as policies which are undergoing revision are revised, and as new policies are adopted by the Board.

- | | |
|---|--------------------------|
| 4. The Deputy Superintendent should train all central office and school administrators on the use of the procedures manual which should be placed on-line as is the policy manual. | December 1999 |
| 5. The Superintendent should ensure that the evaluations of senior administrators include an assessment of the effective development and implementation of administrative procedures for their divisions and departments. | 1999-2000
school year |
| 6. The Deputy Superintendent for Operations should ensure that the coding system and the means to communicate the system to all holder of policy manual holders, and to the on-line system, is completed and in full use. | January 2000 |

FISCAL IMPACT

Administrative procedures can and should be developed by in-house staff at no additional cost to the district.

4.3 District Organization and Management

The Superintendent is designated as the chief executive officer of the school district. The Superintendent is responsible for providing administrative oversight of the school district and for the efficient operation of the system and each of its divisions/departments.

As specified in Section 230.32, Florida Statutes, the Superintendent has the authority to:

- exercise general oversight over the district school system in order to determine problems and needs, and recommend improvements;
- advise and counsel with the Board on all educational matters and recommend to the Board for action such matters as should be acted upon;
- recommend to the Board for adoption such policies pertaining to the district school system as the Superintendent may consider necessary for its more efficient operation; and

- perform such duties and exercise such responsibilities as are assigned to the Superintendent by law and by regulations of the State Board of Education.

This section of the report assesses the effectiveness and efficiency of district management and contains the following subsections:

- 4.3.1 District Organization
- 4.3.2 District Planning
- 4.3.3 Legal Services
- 4.3.4 Teachers on Special Assignment

4.3.1 District Organization

CURRENT SITUATION

The current superintendent, Dr. Frank Petruzielo, has been in the district for four years and has worked with and established the present organizational structure. The Superintendent announced his impending resignation immediately prior to the MGT audit team visiting the Broward County School District in December 1998. He left the Broward County School District in late January 1999 and assumed another superintendency in Georgia in February 1999.

The 1998-99 executive administrative organizational chart for the Broward County School District is shown in Exhibit 4-18. As can be seen, the senior staff consists of:

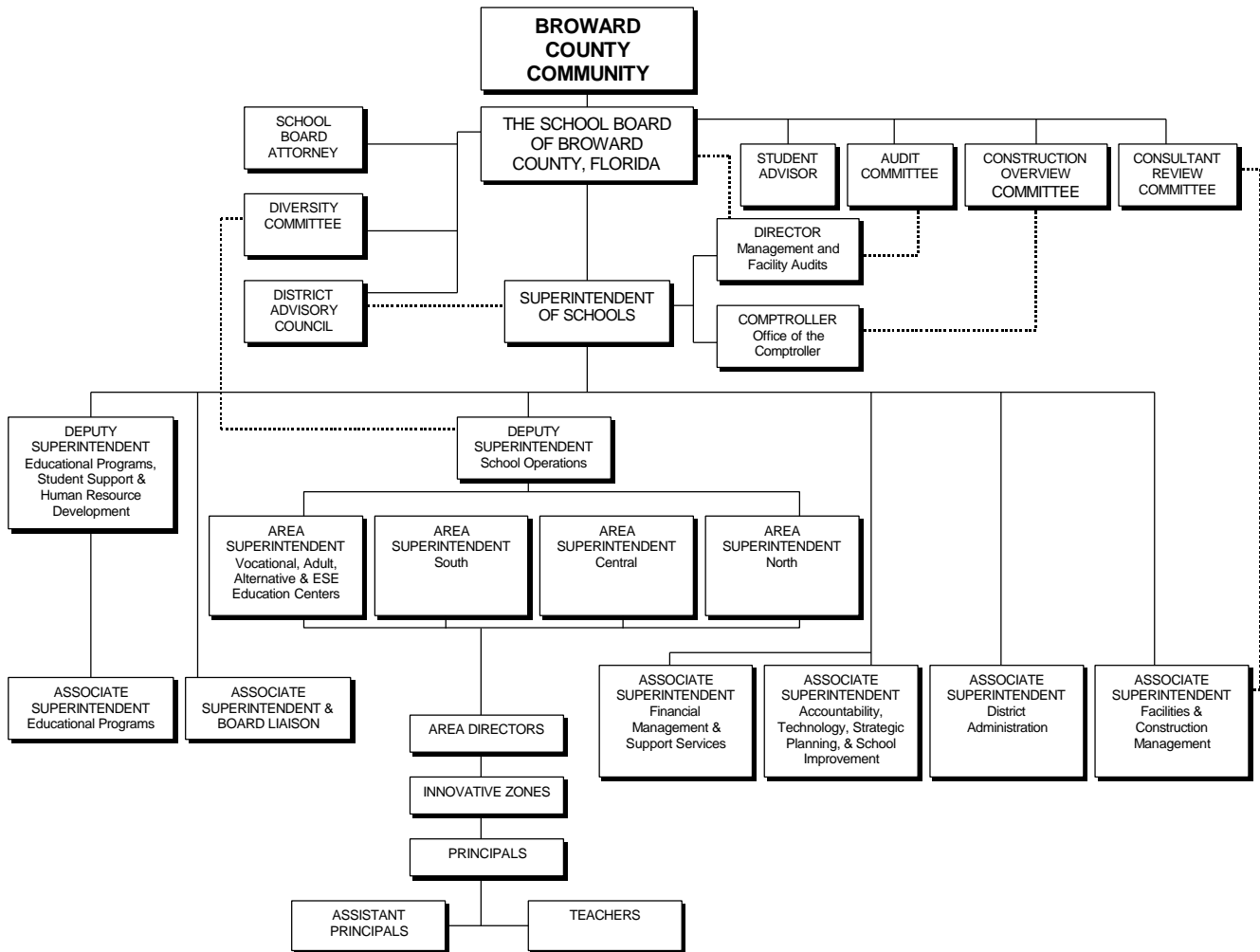
- Superintendent
- Two Deputy Superintendents
- Six Associate Superintendents
- Four Area Superintendents
- Director of Management and Facility Audits
- Comptroller
- School Board Attorney
- Area Directors

FINDING

During the four years that Dr. Frank Petruzielo served as superintendent of the Broward County School District, clear evidence of systemic reform initiatives can be found. These initiatives include, but are not limited to, the following:

- The **Urban Institute** of Washington D.C., at the request of the U.S. Department of Education, conducted a nationwide survey on the implementation of standards-driven reform efforts in public education systems. The Broward County School District is one of only nine school districts, nationally, to be recognized for exemplary performance in this area, and is the only large urban school system included among the nine.

**EXHIBIT 4-18
CURRENT ORGANIZATIONAL CHART OF THE BROWARD COUNTY SCHOOL DISTRICT**



Source: Broward County School District, August 1998.

- **Accountability Policy** - The Broward County School District is the first district in Florida that has outcome expectations, school improvement progress, and benchmarks, as well as added resources to schools that needed extra assistance to accomplish their goals. The district has taken vague, broad standards; determined critical content at each grade level and connected it to essential teacher knowledge in content and strategy necessary to teach critical content. The system also connects standards to a self-administrated Essential Knowledge I to determine what teachers need training in; and connected this to a specific results driven staff development schedule to saturate the county. Finally, they have developed an on-site support system and to a monitoring and accountability system.

- **Teacher Contract** language on student achievement - the Broward County School District was the first school district in the state to include a student achievement component in the teacher evaluation. This has been adopted by the state as a model.

- **Innovative Zones** - numerous districts have visited or inquired about this method of organizing and restructuring schools.

Each of these initiatives and others described in the chapters which follow in this report are exemplary and activities which school districts in Florida and in other states should emulate.

COMMENDATION

The Superintendent and the executive staff of the Broward County School District are commended for the exemplary systematic reform efforts that have been broadly implemented in the district.

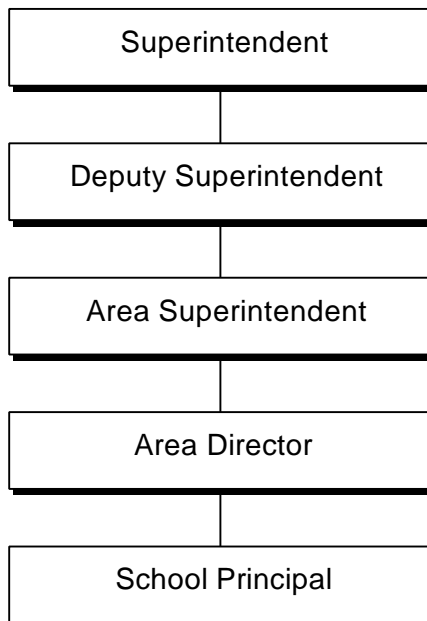
FINDING

The current organizational structure that places the two most senior positions (deputy superintendent) over school operations and educational programs, while the associate superintendents who have responsibility for administrative support services report directly to the Superintendent. In addition, a Comptroller and a Director of Management and Facility Audits also report to the Superintendent. Thus, the Superintendent has utilized direct responsibility for all administrative support areas while concentrating senior staff in the form of two deputy superintendents in the school operations and education programs areas.

The current design of the administrative structure shows four layers of administration between the Superintendent and school principals (see Exhibit 4-19). The district has a large senior staff structure dealing with schools which are now focused under the Deputy Superintendent for School Operations. Currently, four area superintendents supervise area directors who directly work with the principals in the schools. In addition, the current situation organizes all Exceptional Student Education (ESE), vocational, and alternative schools into one area. The district is now so large that the area superintendents with their directors have a span of responsibility ranging from a minimum of 17 schools in one

area, which includes more than 30 programs that focus on exceptional student education to 75 schools in another area. The span of control is so large that the amount of time spent by the area directors and the area superintendents in the schools coaching principals is minimal. This was evident in interviews with central office administrators and principals. As a result, time with principals is limited to focusing on trouble areas after events have occurred rather than counseling prior to the development of specific problems. In other words, they are functioning in a reactive and not a proactive manner. Unless area superintendents and area directors can find the time through a reduced span of control to work proactively with principals prior to the development of significant issues at the school level, this will continue.

**EXHIBIT 4-19
CURRENT HIERARCHICAL STRUCTURE BETWEEN THE
SUPERINTENDENT AND SCHOOL ADMINISTRATORS**



Source: Created by MGT, 1999.

The most important function in this structure is the individual coaching of principals. The area superintendents in particular with their central office responsibilities do not have the necessary time to spend in the schools coaching principals to stimulate development.

Currently, the Deputy Superintendent for Educational Programs, Student Support and Human Resource Development has no direct line authority over school operations. This position is responsible for education program development as well as student support and human resource development. This is arguably the most important priority in any school district. Not to have line authority over the implementation of educational programs at the school level provides a lack of continuity with educational program implementation. On the other hand, the Deputy Superintendent for School Operations has the authority required for implementation, but not the responsibility for educational

program development. The lack of linkage between these two divisions is a major concern at the school level.

At the same time, the Associate Superintendents for Finance, Support Services, Accountability, Technology, Strategic Planning, and Facilities report directly to the Superintendent. No position intercedes between the Superintendent and these Associate Superintendent positions in order to monitor and regulate all support activities. The Superintendent has two offices that assist in monitoring support activities, the Director of Management and Facility Audits and the Comptroller. Nonetheless, a position providing day-to-day supervision in other support areas would assist the new superintendent in supervising the day-to-day operation of the support services provided to the offices of the aforementioned associate superintendents.

These findings are supported by the following MGT survey results:

- Fifty-one (51) percent of Broward administrators (both central office and principals) who responded to MGT's survey agree or strongly agree that *district administrators are easily accessible and open to input*, as compared to 70 percent in other districts who were surveyed (see Chapter 3).
- Only 24 percent of Broward administrators agree or strongly agree that *authority for administrative decisions are delegated to the lowest possible level*, as compared to 36 percent in other school districts.
- Thirty-four (34) percent of Broward administrators strongly agree or agree that Broward has too many layers of administrators as compared to 18 percent in comparison districts.

RECOMMENDATION

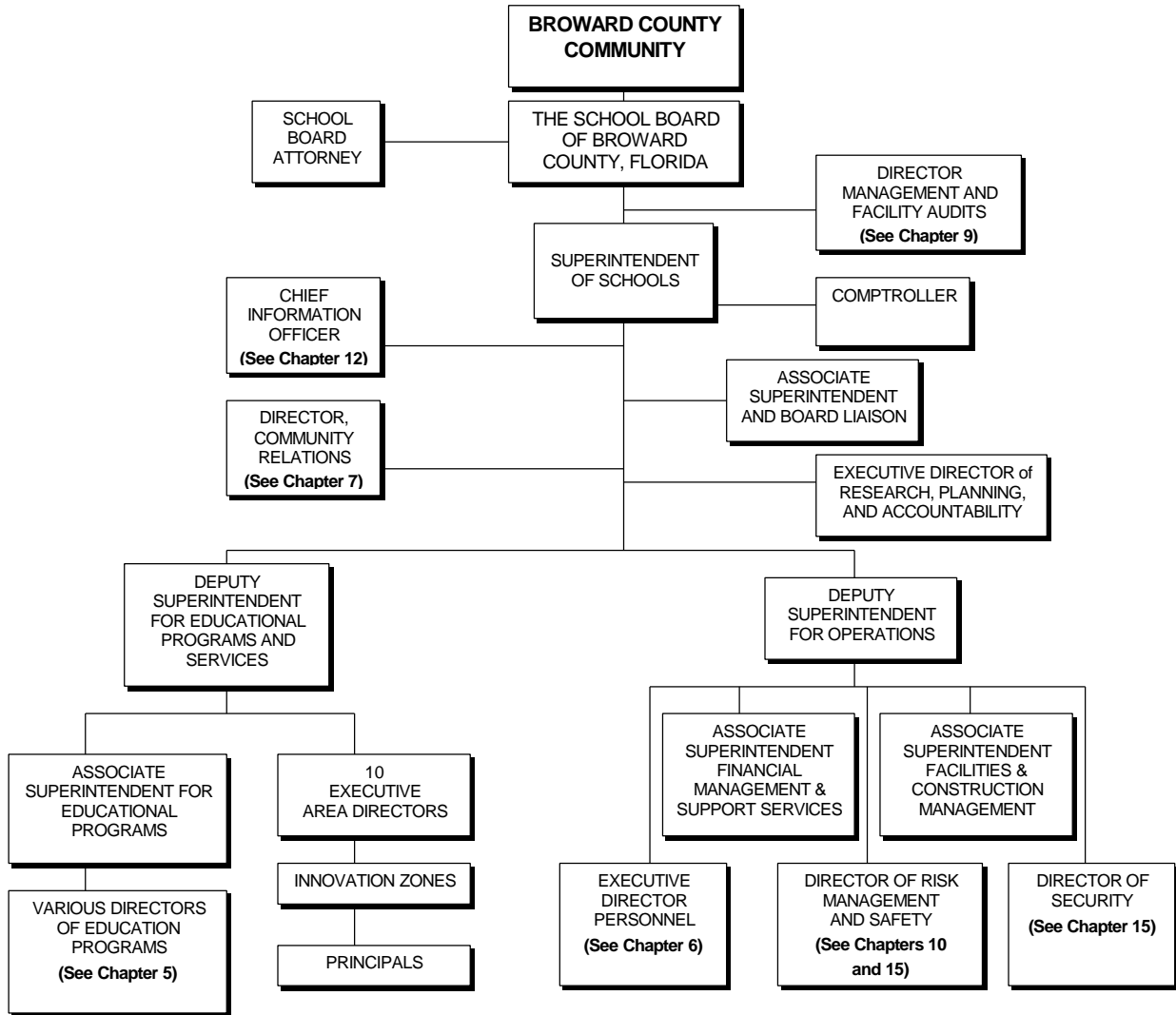
Recommendation 4-11:

Reorganize the central offices to better manage district operations and educational service delivery, and to reduce the levels of administration between the Superintendent and principals.

The proposed reorganization is shown in Exhibit 4-20. As can be seen, the proposed reorganization:

- changes the responsibilities for the two deputy superintendents;
- eliminates the position of Area Superintendent for Schools;
- creates a new position of Area Executive Director for Schools who each could be responsible for about 20 schools;
- reclassifies current Area Directors as Area Executive Directors and adds three Area Executive Directors to provide additional direct support to schools; and

**EXHIBIT 4-20
PROPOSED ORGANIZATIONAL CHART OF THE BROWARD COUNTY SCHOOL DISTRICT**



Source: Created by MGT, 1999.

- realigns vocational, alternative, and special education center responsibilities to each area.

Currently, the Deputy Superintendent for Educational Programs, Student Support, and Human Resources Development does not have line authority over the principals. While the Deputy Superintendent for School Operations has line authority but does not have direct responsibility for educational programs. The position of Deputy Superintendent for Educational Programs, Student Support and Human Development should be changed to Deputy Superintendent for Educational Programs and Services with responsibility for school operations added. The position of Deputy Superintendent for School Operations should be deleted and the position of Deputy Superintendent of Operations created.

The new Deputy Superintendent for Educational Programs and Services should have line authority over the Area Executive Directors, while the Deputy Superintendent for Operations will have line authority over:

- Associate Superintendent for Financial Management and Support Services;
- Associate Superintendent for Facilities and Construction Management;
- Executive Director of Personnel;
- Director of Risk Management and Safety; and
- Director of Security.

Both deputy superintendents will report directly to the Superintendent. Many of these organizational changes will be described in the specific chapters which follow in this report.

Individuals filling the proposed leadership positions should possess the education, skills, and experience needed to manage their assigned areas effectively. The Deputy Superintendent for Operations, for example, should have comprehensive experience in managing a department of this magnitude and complexity. Direct experience in personnel management, finance, and the operational areas of maintenance and custodial services, child nutritional services, and transportation services would ensure that state requirements are stringently monitored and directors are held accountable for cost-effective results. Persons filling positions that are eliminated during the reorganization should be allowed to apply for the newly created positions which they qualify, along with all other applicants.

The proposed reorganization would allow the district to:

- enhance program delivery;
- increase emphasis on curriculum;
- decrease an administrative layer between the Superintendent and each principal;

- improve communication and coordination between programs and schools; and
- increase efficiency.

IMPLEMENTATION STRATEGIES AND TIMELINE

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|---|---------------|
| 1. The new Superintendent should study the proposed reorganizational structure and draft a proposal for consideration by the Board. | Summer 1999 |
| 2. The Superintendent should present the draft reorganization plan to the Board for review and approval. | Fall 1999 |
| 3. The organizational charts should be finalized and approved by the Board. | December 1999 |
| 4. Following Board approval of the proposed organizational chart, the Superintendent should develop job descriptions for all new/revised positions. | December 1999 |
| 5. The Superintendent should ensure that new/revised positions are advertised and filled, as appropriate. | Spring 2000 |
| 6. The Superintendent should ensure that the new organizational structure is fully implemented. | Summer 2000 |

FISCAL IMPACT

The fiscal impact for the proposed reorganization is shown below by component.

1. Eliminate the position of area superintendent.

The average salary of area superintendents according to the 1997-98 administrative schedule is \$105,200 x 33 percent for benefits = \$139,900 times four positions = \$559,600.

A reduction of four secretarial positions with benefits is \$197,000. The combined total of savings is \$756,600.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Eliminate Four Area Superintendents	\$0	\$756,600	\$756,600	\$756,600	\$756,600

2. Create the new position of Area Executive Director to provide additional support to schools and increase the number to 10. Prorate between the director's scale and the area superintendent's scale on the administrative, supervisory, professional and technical salary scale of the Broward County School District, specifically Grades 33 and 32. The cost of increasing salaries of current area

directors = \$3,701 per position x seven = a total cost of \$25,907 (including benefits).

Three additional Area Executive Director positions need to be added to bring the total of area executive director positions to 10 = \$348,940.

The total expense of creating the new position of area executive director and increasing the number of positions to 10 is \$374,847 per year including benefits. In addition, three secretarial positions should be added at a total of \$147,630 to an approximate combined total cost of \$522,500.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Create 10 Area Executive Directors	\$0	(\$522,500)	(\$522,500)	(\$522,500)	(\$522,500)

FINDING

A position of Associate Superintendent for District Administration exists on the senior level staff. This position has the directors of risk management, safety and safety benefits, personnel, district administration, community relations and professional standards and special investigative unit. Under the proposed reorganization, these positions should report to the Deputy Superintendent for Operations as shown in Exhibit 4-20.

RECOMMENDATION

Recommendation 4-12:

Eliminate the Associate Superintendent for District Administration.

The responsibilities for this position should be assumed by the Deputy Superintendent for Operations, who will have eight staff members reporting directly to this administrator. This encompasses fewer direct reports than the Deputy Superintendent for Educational Programs and Services. The number is not excessive and will encompass a more efficient system for the administrative and operations areas of the district.

IMPLEMENTATION STRATEGIES AND TIMELINE

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|---|---------------|
| 1. The new Superintendent should study the proposed reorganization and draft a proposal for the consideration of the Board. | Summer 1999 |
| 2. The Superintendent should present the draft reorganization plan to the Board for review and approval. | Fall 1999 |
| 3. The organizational chart should be finalized and approved by the Board. | December 1999 |

- | | |
|---|---------------|
| 4. Following Board approval of the proposed reorganization, the Superintendent should recommend that the position of Associate Superintendent for District Administration be deleted. | December 1999 |
| 5. The position of Associate Superintendent for District Administration should be deleted. | June 2000 |

FISCAL IMPACT

The actual salary for this position with benefits is \$145,611. The salary of the secretarial position with benefits is \$52,198. The combined cost savings for both positions is approximately \$198,000.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Eliminate Associate Superintendent for District Administration and Secretary	\$0	\$198,000	\$198,000	\$198,000	\$198,000

FINDING

A position of Director of District Administration currently reports to the Associate Superintendent for District Administration. This position has responsibilities for student activities, athletics, and intergovernmental relations. The intergovernmental relations position works closely with the Director of Community Relations.

Currently, the Director of District Administration focuses on student activities and intergovernmental relations. To a large extent, student activities such as fundraising and athletic activities both of an interscholastic and intramural nature are coordinated by this position and to a large extent community groups are relied upon to both fund the activities and in many cases voluntarily implement the organization of such activities. The intergovernmental responsibilities deal with maintaining relationships with local cities, county government, state government, and federal government.

RECOMMENDATION

Recommendation 4-13:

Eliminate the position of Director of District Administration.

The responsibility for student activities and athletics can be handled at a lower level in the district – at the supervisor or coordinator level utilizing the already existing position. The intergovernmental relations specialist should report to the Director of Community Relations (see Chapter 7). This reorganization should increase the efficiency of the organization. While the intergovernmental relations position currently maintains communication with the Director of Community Relations, the ultimate responsibility lies with community relations and raises the profile of the intergovernmental relations responsibility.

IMPLEMENTATION STRATEGIES AND TIMELINE

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|---|---------------|
| 1. The new Superintendent should study the proposed reorganization and draft a proposal for the Board. | Summer 1999 |
| 2. The Superintendent should present the draft reorganization plan to the Board for review and approval. | Fall 1999 |
| 3. The organizational chart should be finalized and approved by the Board. | December 1999 |
| 4. Following Board approval of the proposed reorganization, the Superintendent should recommend that the positions of Director of District Administration and secretary be deleted. | December 1999 |
| 5. The position of Director of Administration and secretary should be deleted. | Summer 2000 |

FISCAL IMPACT

The actual salary for the Director of District Administration with benefits is \$112,600. The average cost of the secretarial position with benefits is \$40,650. The combined cost savings for both positions is \$153,250.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Eliminate Director of District Administration and Secretary	\$0	\$153,250	\$153,250	\$153,250	\$153,250

FINDING

The Superintendent's Cabinet is composed of the senior staff in the Broward County School District. The Cabinet works with the Superintendent in addressing the major system priorities. The Cabinet provides constant input to the Superintendent on critical operations within the school district and develops proposals to assist the Superintendent in dealing with major operational, programmatic, and fiscal issues that effect the entire school system. The Cabinet provides a point of focus for major deliberations about issues. Assignments to various divisions and department of the school system are delineated for study, development, and response. Cabinet positions are listed in Exhibit 4-21. Cabinet activities are organized and coordinated by the Associate Superintendent and Board Liaison. Minutes are kept and follow-up responsibilities for action are clearly produced.

**EXHIBIT 4-21
SUPERINTENDENT'S CABINET IN THE
BROWARD COUNTY SCHOOL DISTRICT**

Deputy Superintendent, Educational Programs, Student Support and HRD
Deputy Superintendent, School Operations
Area Superintendent, South Area
Area Superintendent, North Area
Area Superintendent, Central Area
Area Superintendent, Vocational, Adult, Alternative and ESE Centers
Associate Superintendent, Educational Programs
Associate Superintendent, District Administration
Associate Superintendent and Board Liaison
Comptroller
Associate Superintendent, Financial Management & Support Services
Associate Superintendent, Accountability, Technology, Strategic Planning and School Improvement
Director, Risk Management, Safety and Benefits
Director, Education Technology Services
Director, Diversity, Cultural Outreach, Title I, Migrant & Special Programs
Director, Management/Facility Audits
Director, Facilities & Construction Management
Director, School Boundaries and Student Assignment/Charter Schools/Summer Schools and Year Round Schools
Director, Personnel
Director, Community Relations
Consultant, Florida School Services, Inc.

Source: Broward County School District, 1998-99.

COMMENDATION

The procedure used by the Associate Superintendent and Board Liaison to follow-up on Cabinet assignments is commendable.

As with Board agenda follow-up, assignments identified in Section 4.1, the Associate Superintendent and Board Liaison effectively keeps track of Cabinet assignments to ensure appropriate follow-up and accountability for the Superintendent. The tracking system is computerized and individuals who do not respond by the specified due date are reminded of their responsibility and the Superintendent is kept informed of progress.

RECOMMENDATION

Recommendation 4-14:

Review the Cabinet, its membership, and its current function.

Whenever a new Superintendent is appointed, he/she must examine the function and the composition of the Cabinet. In light of the proposed reorganization, as well as the

administrative style and preference of the new administration for the degree involvement of senior staff, some changes may be warranted in the composition and role of the Cabinet.

IMPLEMENTATION STRATEGIES AND TIMELINE

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|---|-----------|
| 1. Following reorganization of the Broward County School District by the new Superintendent, the Superintendent should review the composition of the Cabinet to ensure it is congruent with the new organizational structure. | June 2000 |
| 2. The Superintendent should implement changes in composition of the Cabinet as appropriate. | July 2000 |

FISCAL IMPACT

This recommendation can be accomplished with present resources.

FINDING

An Agenda Preparation Group is functioning to ensure that staff at all levels of the Broward County School District are fully informed of pending Board agenda items. This group reviews each agenda item before the School Board considers it in public session, and provides an opportunity for central staff and school-based staff members to discuss pending Board agenda items. Through this process, key staff members are able to review the potential impact in their areas of responsibility. In addition, the members of this group are able to provide the Superintendent with broad input and feedback on major issues effecting the school district, primarily relating to those issues being considered by the School Board of Broward County.

Exhibit 4-22 lists the titles of the individuals on the Agenda Preparation Group. This group is extremely large and currently consists of 52 members. With a group this size, to a significant extent the information comes from the Superintendent and Associate Superintendent and Board Liaison. However, individuals who have questions about potential impact within their areas of responsibility have the opportunity to seek clarification and ask questions.

Interviews with over 40 members of the Agenda Preparation Group indicated that this group provides an effective vehicle for communication among mid-managers and senior staff to communicate with each other on a regular basis. A review of documentation developed by this group supported this claim. Effective communication among a broad cross-section of senior managers is imperative in any school district, and especially in a school system as large as the Broward County School District.

COMMENDATION

The Superintendent is commended for assembling and working with the Agenda Preparation Group.

**EXHIBIT 4-22
AGENDA PREPARATION GROUP IN THE
BROWARD COUNTY SCHOOL DISTRICT**

Deputy Superintendent, Educational Programs, Student Support and Human Resources Development
Deputy Superintendent, School Operations
Area Superintendent, South Area
Area Superintendent, North Area
Area Superintendent, Central Area
Area Superintendent, Vocational, Adult, Alternative and ESE Centers
Associate Superintendent, Educational Programs
Associate Superintendent, District Administration
Associate Superintendent, Facilities and Construction Management
Associate Superintendent and Board Liaison
Associate Superintendent, Financial Management and Support Services
Associate Superintendent, Accountability, Technology, Strategic Planning and School Improvement
Chief Special Investigative Unit
Treasurer
Director, Professional Development/Training
Director, Research and Evaluation
Director, Early Childhood and Elementary Education
Director, Student Support Services and ESE
Director, District Maintenance
Director, Instructional Staffing
Director, Multicultural, Foreign Language Education and ESOL Program Services
Director, Secondary Education
Director, Professional Standards and Special Investigative Unit
Director, Purchasing
Director, Risk Management, Safety and Benefits
Director District Administration
Director, Education Technology Services
Comptroller
Director, Grants Administration
Director, Accounting
Director, Partnerships
Director, Diversity, Cultural Outreach, Title I, Migrant and Special Programs
Director, Vocational Adult and Community Education
Director, Management/Facility Audits
Director, Facilities and Construction Management
Director, Equal Educational Opportunities
Director, Human Resource Development
Director, School Boundaries and Student Assignment/Charter Schools/Summer School/ Year Round Schools
Director, Personnel
Director, Property Management and Site Acquisition
Director, Strategic Planning
Director, School Improvement and Accountability
Director, Transportation Services
Director, Community Relations
Director, Benefits
Director, Food and Nutrition Services
Director, Budget
Director, Support Services
Chair, High School Principals
Chair, Middle School Principals
Chair, Center Principals
Chair, Elementary School Principals

Source: Broward County School District, Budget Book, 1998-99.

This responsibility in most school districts is assumed by the Cabinet. As the Broward County School District is an extremely large system, a broad-based agenda preparation group presents an exceptional opportunity to communicate regularly with a broad range of staff members about items before the School Board for consideration. The ability to review the impact by particular departments and divisions, as well as at the school level, is unusual in large school districts. This group provides a valuable function and should be continued. The expenditure of effort and time is a necessity in a large, complex, and dynamic school district such as the Broward County School District.

4.3.2 District Planning

FINDING

Currently, the Broward County School District is driven by a combination of an accountability system and a benchmarks system. These systems will be described in detail in Chapter 5. The School Board and Superintendent, in a retreat setting, have established the tenets of the accountability system which have driven the instructional program in the Broward County School District for the last several years. As a result the Board's mission statement, beliefs statements, school accountability and improvement statements, major system priorities have been established. The Board has outlined assumptions upon which accountability has been established, has clearly enunciated purpose of the accountability system, and has directed that annual performance and progress categories be clearly articulated to staff and the community.

Exhibit 4-23 provides current information on the Broward County School District strategic planning efforts. Samples of the Broward Benchmark Report that is used as a guide for the schools and community by focusing on measurable objectives is shown in Exhibit 5-43 in Chapter 5.0. The strategic plan and the accountability system are contingent with this exhibit. As will be addressed in Chapter 5, focus is brought to the instructional activities of the school district.

Currently, the school district is moving forward in an effort to implement the development of a strategic plan. To date, however, a comprehensive strategic plan has yet to be developed.

RECOMMENDATIONS

Recommendation 4-15:

Continue activities with regard to strategic planning, accountability, and the benchmark measurement system and create a comprehensive strategic plan for Broward County School District.

The Broward County School District should continue present activities with regard to strategic planning, accountability, and the benchmark measurement system, and continuing to refine and update all plans annually. The strategic planning initiatives, as outlined in Exhibit 4-23, are in an infancy stage and currently on hold until the new Superintendent is selected. The process should continue to move forward under the leadership of the new Superintendent and the newly elected nine-member School Board.

**EXHIBIT 4-23
STRATEGIC PLANNING INITIATIVES IN THE
BROWARD COUNTY SCHOOL DISTRICT**

The School Board of Broward County is in the process of a major strategic planning effort. A district strategic plan is in the initial stage of development and will be based on the School Board's Mission Statement, Beliefs Statements, and Major System Priorities. All stakeholder groups are being involved in this process.

Broward County Public Schools in conjunction with both the Coordinating Council of Broward (CCB), composed of chief executive officers of vital state and county agencies from the public and private sector, and the Broward Business Coalition for Education (BBCE), whose membership includes the Greater Fort Lauderdale Chamber of Commerce, the Broward Alliance, and Broward Workshop have developed a set of indicators of student achievement and school success. These indicators will be used by both the district and the community-at-large to identify the strengths and weaknesses of the system and to ensure continuous quality improvement for the students of Broward County.

Through a major collaborative effort, the district, the CCB, and BBCE developed one set of indicators of school progress. These will be published in the next edition of the Broward Benchmarks Report and used in the district's new Strategic Plan. These performance indicators measure progress as well as high performance, present an holistic view of our schools, and measure parent and community involvement.

The district's technology component of the planning process is a five-year work program for technology entitled Information Technology Plan. It includes funding for technology improvement projects and the vision of a districtwide infrastructure that is capable of delivering to each classroom and office the resources necessary to promote student learning, staff development and employee effectiveness.

Source: Broward County School District, Published 1997-98.

A comprehensive strategic plan should be developed that reflects the shared vision of the newly elected nine-member School Board, new Superintendent, administration, and community (including parents and business leaders), and reflects the district's long-term goals and objectives. The Broward County School District should undertake a comprehensive strategic planning initiative to build upon the processes started by the past administration. The strategic planning process should include the Board, Superintendent, administration (including school-based administrators), teachers, students, and community. This initiative should be designed to develop a shared vision, along with the district's long-term goals, objectives, implementation initiatives, timelines, and responsibility assignments. Additionally, performance measures should continue to be defined and refined to measure accomplishment of objectives. Priorities should be established and linked to the district's budget.

A sample format for a broad-based strategic plan is shown in Exhibit 4-24.

**EXHIBIT 4-24
SAMPLE FORMAT FOR A SCHOOL DISTRICT STRATEGIC PLAN**

- Shared Vision and Values
- Purpose/Mission Statement
- External Data Collection and Analysis
 - External Factors
 - Key Stakeholders
 - Competing Factors
- Internal Data Collection/Analysis
 - Student Outcomes
 - Learning Environment
 - Supporting Environment
- Critical Issues
- Strengths, Weaknesses, Threats, and Opportunities
- Student Achievement and Outcomes
- Best Practices and Benchmarks
- District Goals
- Operational Plans and Objectives
- Annual Review and Updates
- District Monitoring System

Source: Created by MGT, 1999.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The new Superintendent and Board Chairman should set a date for a strategic planning retreat to establish a shared vision for the district under the new administration and Board. | Summer 1999 |
| 2. The Board should direct the new Superintendent to develop a strategic plan for the district from goals and objectives agreed upon in the retreat. | Summer 1999 |
| 3. The Superintendent should appoint a Strategic Planning Committee consisting of administrators, Board members, principals, teachers, parents, community leaders, and business leaders. | Summer 1999 |
| 4. The Superintendent should designate a senior-level administrator as chairperson of the Committee. | Summer 1999 |
| 5. The Superintendent should present the goals and objectives from the retreat to the chairperson of the Strategic Planning Committee. | Summer 1999 |

- | | |
|--|--|
| 6. The Committee Chairman should create functional work teams to address the goals and objectives defined by the Board and Superintendent. | Fall 1999 |
| 7. The work teams should develop action plans, timelines, and performance measures for the strategic plan. | Fall 1999 |
| 8. The Strategic Planning Committee should prepare an initial draft of the strategic plan. | Spring 2000 |
| 9. The Strategic Planning Committee should present the initial draft of the strategic plan to the Board for review and comment. | June 2000 |
| 10. The work teams should revise the initial draft to include the Board's comments and present the strategic plan to the community for public input. | Summer 2000 |
| 11. The Strategic Planning Committee should include substantive comments received from the community into the draft and finalize the strategic plan. | Summer 2000 |
| 12. The Board should approve the strategic plan. | August 2000 |
| 13. The Superintendent and Board should monitor and update the strategic plan annually. | August 2001 and
each year
thereafter |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Recommendation 4-16:

Create one Research, Planning, Evaluation, and Accountability Unit and eliminate the position of Associate Superintendent for Accountability, Technology, Strategic Planning and School Improvement.

A consolidated planning and evaluation unit should be created directly under the Superintendent to assist the district in coordinating planning, research, evaluation, and accountability activities within one office, thereby providing comprehensive research, planning, and evaluation services to district administrators (see Exhibit 4-20). An executive director should head this office. This action will allow the district to eliminate the position of Associate Superintendent for Accountability, Technology, Strategic Planning and School Improvement. (NOTE: In Chapters 5 and 12, Technology and School Improvement are moved to other units.)

IMPLEMENTATION STRATEGIES AND TIMELINE

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|--|--------------|
| 1. The new Superintendent should recommend the establishment of a Research, Planning, and Accountability Unit that reports directly to the Superintendent. | Fall 1999 |
| 2. The Board should approve the new unit. | January 2000 |
| 3. The Superintendent should eliminate the position of Associate Superintendent for Accountability, Technology, Strategic Planning, and School Improvement. | Spring 2000 |
| 4. The Executive Director of Research, Planning and Accountability should establish a comprehensive plan for services to be provided by the unit, including the coordination of strategic planning and accountability. | Summer 2000 |

FISCAL IMPACT

There will be no fiscal impact to this recommendation as the position of Associate Superintendent for Accountability, Strategic Planning, and School Improvement will be replaced by an Executive Director which may result in a small reduction in salary. However, when implemented, the unit should provide a highly efficient operation for coordinating strategic planning, research, evaluation, and accountability within the Broward County School District.

4.3.3 Legal Services

FINDING

As part of this performance review, MGT analyzed legal representation to the School Board of Broward County. The legal staff in the Broward County School District consist of the Board attorney, two assistant counsels, one legal paraprofessional, a legal clerk, and a clerk specialist III. The general counsel attends most School Board meetings.

The School Board attorney has been assisting the School Board for 25 years. In 1996, the district established the current legal practice as a part of the school district and legal staff became full-time employees of the district. In essence, the firm was no longer a private law firm. Although the district could not provide actual data, reportedly, approximately 20 percent of legal works currently still contracted with private practice attorneys.

Legal work is divided among the two lawyers hired by the school district in addition to the general counsel with assistance from the paralegal hired by the school district. One assistant concentrates on appellate work and general legal administration, while the other assistant counsel handles civil rights cases for the school district, real estate cases, and other legal issues. Inservice currently being conducted by legal counsel for the district focuses on:

- religion
- sexual harassment
- public records requests

The 1998-99 budget for Legal Services Office is about \$612,000. Currently, no case tracking is being kept of internal administrative due process incidences. In addition, unlike private law firms, legal counsel in the Broward County School District do not track their time. Private law firms are contracted to handle special cases excluding insurance cases which reportedly are handled within the school district. Outside attorneys also handle construction contracts along with labor issues.

The job performance of legal staff is reviewed directly by the Board. Recently, the Board expressed some concern about not being fully informed with regard to all cases. In addition to the legal clerk, clerk specialist III, and the paralegal, the district has funded a law library for legal counsel.

The legal costs with outside firms in the Broward County School District for 1997-98, 1996-97 and 1995-96, show the district spent \$1.07 million, \$1.41 million and \$1.14 million, respectively, for outside attorneys. The 1997-98 school year was the first full year that legal services were provided by district employees at a budget of about \$600,000. Therefore, the total legal expenses for 1997-98 equal about \$1.67 million (\$1.07 million and \$600,000). It does not appear that legal expenses have been reduced by the creation of in-house attorney positions; rather, an increase was evident in 1997-98. Since 1998-99 expenses are only available for a partial year, the analysis for the current year can not be made at this time.

The number of legal staff as full-time employees of the Broward County School District appears high. Most large school systems have one full-time Board attorney or outsource services with a legal firm (which bills by the hour (e.g., Hillsborough County). No specific information on how the three attorneys and legal staff spend their time could be provided. In the absence of such data, no definite recommendation about staff size can be made.

RECOMMENDATION

Recommendation 4-17:

Closely monitor legal expenditures in the Broward County School District in an effort to reduce costs.

The Legal Services Office should submit to the School Board quarterly reports including an hourly breakdown of work by case and the activities of in-house lawyers, the paralegal, and the legal clerk. The cost to the district per hour, including all overhead and capital expenditure for square footage set aside by the school district for legal services, should be compared to the average private counsel for hourly expenditures for firms in the community of Broward County. In addition, all legal expenditures to outside firms should be coded separately and readily available for analysis.

Based on MGT's observation of the November organizational meeting of the new School Board, it was apparent that the Board intends to monitor the activities of the Legal Services Office to a greater extent than was practiced by past school boards. A Legal

Services Committee has been appointed and both members of the Board who practice law are members of this committee.

After the completion of the review by the Legal Services Committee, information about legal services should be distributed to the Board and the Superintendent for possible amendment in the following year's budget as needed.

Technical professional legal services should continue to be outsourced, particularly in labor relations, construction issues and in some real estate. School districts can not hire full-time attorneys for each specialized area; therefore, outsourcing continues to provide the least expensive alternative. Internal administrative due process legal functions should be noted, categorized, and summarized for review annually as this to a large extent is a controllable factor. Administrative practices, which in some cases may be causing administrative due process reviews, should be analyzed and, if necessary, supported with inservice activities for administrators, supervisors and principals.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|--|
| 1. The Legal Services Committee of the School Board should request that the Legal Services Office prepare quarterly reports of internal and external legal services and expenditures. | Quarterly
Commencing in
May 1999 |
| 2. The report should be submitted to the Committee and full Board. | Quarterly
Commencing in
September 1999 |

FISCAL IMPACT

Based on best practice in other districts, the number of attorneys in the Broward County School District may be reduced. However, further documentation is needed prior to affirming this recommendation.

4.3.4 Teachers on Special Assignment

FINDING

The Broward County School District currently has 172 teachers on special assignment in the current year. The percentage of teachers on special assignment in Broward (1.4%) is proportionally more than we have seen in other districts (Clay County - 1.0% and Hillsborough - 0.5%). Exhibit 4-25 shows the distribution of those individuals by department. These teachers are serving in the Broward County School District in quasi-administrative roles. In addition to these 173 teachers, 23 teachers serve as Nova Team Leaders and do not directly serve students in the classroom.

The district does not have a policy on the use of teachers on special assignment. Consequently, there is no limitation of the number of years that a teacher may remain working in the capacity as a teacher working on special assignment or criteria for placing a teacher on special assignment.

**EXHIBIT 4-25
TEACHERS ON SPECIAL ASSIGNMENT IN THE
BROWARD COUNTY SCHOOL DISTRICT
1998-99**

LOCATION OF ASSIGNMENT	NUMBER OF TEACHERS ON SPECIAL ASSIGNMENT
Teacher Training/Support Curriculum	14
Teacher Zone Staff Development Coach	20
Teacher Curriculum Facilitator	1
Teacher Behavior Support Specialist	40
Teacher Magnet Coordinator	26
Teacher Grant Facilitator	11
Teacher Technology Specialist	23
Teacher Professional Orientation	3
Teacher Coalition	1
Teacher School-to-Work Facilitator	2
Teacher Diversity	2
Teacher ESOL Resource	14
Teacher Youth Motivator Facilitator	1
Teacher AIDS/HIV Education Facilitator	1
Teacher Resource Title I	9
School Improvement Resource Teacher	4
TOTAL	172

Source: Created by MGT from budget printouts provided by the Broward County School District, 1998.

RECOMMENDATIONS

Recommendation 4-18:

Establish a policy delineating the types of teachers who can serve on special assignment, the total number by department, and the length of the assignment.

Several districts have established a Board policy that stipulates how long a teacher may fill a position that has been specially assigned. e(g., Leon County has a limit of two years). Furthermore, some districts no longer place teachers in specially assigned positions because of their commitment to keep teachers in the classroom to maximize instruction. (e.g., Bay and Sarasota County School Districts). The cost to the district of having this number of teachers on special assignment is significant.

The district should have a justification for those assignments and a sunset limit on the placements. These are teachers who could be teaching in the classroom but are not.

Potential costs can be reduced if teachers are assigned to the classroom. If assigned to the classroom, a concomitant reduction in actual student/teacher classroom ratio will be accomplished without additional expenses or a reduction in classroom, teacher costs will occur.

Recommendation 4-19:

Periodically review the number of teachers on special assignment with the goal of having no more than one percent of the teaching force on special assignment in any one year.

Teachers should be in the classroom instructing students. While having a position as a teacher on special assignment provides exposure to administrative positions, the Broward County School District has taken this initiative to an extreme by employing almost 200 teachers in quasi-administrative roles with no direct responsibility for educating students.

Teachers on special assignment are technically considered to be teachers. These individuals are obtaining administrative experience, yet for the most part, they are not directly serving students. The average salary for a classroom teacher is \$38,955 with a 33 percent benefits rate equates to \$51,810. With 172 teachers on special assignment, the total is about \$9 million in salaries and benefits for teachers who do not directly serve students.

Based on the one percent goal, teachers on special assignment should be reduced to approximately 120 teachers. An examination of the necessity of each assignment should occur during the 1999-2000 school year. This action will reduce the expenditure impact of teachers on special assignment significantly and, at the same time, allow the district to examine the necessary rationale for special assignments in certain departments. The proposed policy recommended in Recommendation 4-19 will guarantee that those assignments will be reviewed periodically by senior staff and the Board.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|---------------|
| 1. The Superintendent should draft a policy and criteria for teachers on special assignment. | Summer 1999 |
| 2. The draft policy (which limits the time for a teacher to be placed on special assignment, includes criteria for placing a teacher on special assignment, and requires written justification and periodic review of each assignment) should be submitted to the Board for review. | Fall 1999 |
| 3. The School Board should adopt the policy for teachers on special assignment. | December 1999 |
| 4. The Deputy Superintendent should conduct an analysis of the current teachers on special assignment. | Fall 1999 |
| 5. In 2001-02, not more than one percent of the Broward teaching force should be on special assignment. Current teachers on assignment should be transferred to the classroom instead of new hires filling vacant positions. | July 2000 |

FISCAL IMPACT

A reduction to one percent of the teachers in Broward County who would serve on special assignment would reduce the current number by 52 teachers. A reduction of 52 teachers will save the district over \$2.7 million annually. This calculation is based on an average teacher's salary with benefits of \$52,000. These teachers on special assignment will not actually be eliminated, but rather transferred back to schools. As openings occur, teachers on special assignments will be placed in these positions, and new teachers will not be hired resulting in a cost avoidance.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Reduce Teachers on Special Assignment	\$0	\$2,704,000	\$2,704,000	\$2,704,000	\$2,704,000

4.4 School Management

4.4.1 Innovation Zones in the Broward County School District

CURRENT SITUATION

The Broward County School District is subdivided into three regional areas for administrative purposes. These are the North Area, the Central Area and the South Area. The three areas are divided into 23 clustered groups of schools who share a common feeder pattern. These cluster groups are called Innovation Zones.

It is the district's responsibility to raise student achievement. The Broward County School District has organized itself into Innovation Zones to accomplish this purpose. Each zone creates a K-12 "district within a district," and is designed to facilitate K-12 curriculum articulation and monitor student achievement.

The Board policy on Innovation Zones describes the zones, their purpose in the educational system, and the rules for how they should operate. Some of these aspects of the policy are paraphrased in Exhibit 4-26.

EXHIBIT 4-26 OVERVIEW OF POLICY 1402: INNOVATION ZONES

<p>In order to accomplish a more decentralized, personalized educational system, schools shall be organized and realigned into Innovation Zones to focus and enhance student/staff improvement initiatives. Innovation Zones are learning communities with a focus on individual student achievement and school effectiveness. Groups of schools are empowered to plan and work in a more collaborative manner, and to better analyze, align and implement educational programs designed to meet the needs of all students, pre-K to adult.</p> <ul style="list-style-type: none"> ■ The Superintendent designates one principal from each zone to serve lead zone facilitator. ■ Each Zone has a Zone Team, made up of area director, principals, community school assistant principals, high school students, teachers, parents, business and community partners, district liaisons and Nova Links. The parent members include one parent from each school's improvement team, and parents who represent regular education students, exceptional students, and students who speak a first language other than English. ■ Zones may apply for waivers in order to innovate. ■ There will be Innovation Team Support Teams who will look at ways to support the zone educators in: training, needs assessment, planning, math, technology, parent education, budget, data analysis, reading, writing, behavior management, school to work, personnel, grant applications, and diversity assessment. ■ Zone work centers on these major areas student achievement, professional development, safe and orderly learning environment, school parent and community partnerships, family and student support services, effective leadership, and strategic planning.
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Source: Quoted and paraphrased from School Board Policy 1402, 1998.

In the 1998-99 school year, two positions were added to the Zone -- the Zone Coach and a Zone Behavioral Support Teacher.

FINDING

There is a strong alignment emerging between the Board's major system priorities, the School Board's policy on Innovation Zones, the Innovation Zone organization, and the initiatives of various divisions and departments within the Broward County School District. There is nearly a one to one correspondence between the Board's "Major System Priorities" and the areas named in the policy for Innovation Zones as the priority action areas. The evidence of linkage is shown in Exhibit 4-27. This alignment at the policy level is critical when administrators and teachers are working to raise student achievement.

There is clear evidence throughout the system that a major restructuring of many aspects of governance and service delivery is underway in the Broward County School District. Looking at the alignment, through the school improvement process, the finding was similar. All of these efforts are aimed directly at improving student achievement. Evidence of the evolving structure of the Broward County School District's alignment of personnel, plans, and dollars with student achievement targets is shown in Exhibit 4-28.

In looking at the Innovation Zone organization through a variety of lenses, the overall finding was that there is growing enthusiasm for and commitment to the concept and its unfolding practices. One administrator provided some perspective on this issue when he said that for educators who have come into the large Broward County School District from smaller K-12 districts where all schools feed into one high school, the Innovation Zone idea is a natural idea which fits into their thinking. For those who have always worked in a more centralized system, without clear feeder patterns, it has taken time and will continue to take time to understand the power of K-12 articulation for students.

Originally, the Innovation Zone initiative began as a grassroots initiative. The Superintendent took a systemic approach which has since begun to show up in many other services and structures throughout the school district. Despite the presence of policy and supporting structures and services which make this a more top down initiative, each principal and area director interviewed envision the concept as a grassroots initiative, where educators have the ability to show something unique to their schools and communities.

The Innovation Zone is well supported by the educators who participated in this performance review. When asked if the Zone facilitator position should be paid, or should have assistance which allows the principal to work more at facilitating the zone, the response was uniformly no. No principal wanted the Zone to become one more layer of administrative bureaucracy. They see the Zone as an instructional initiative which is meant to help support improvement in curriculum, instruction, and assessment for students. If it succeeds, they said, it will be because of the collegial model set up at present.

COMMENDATION

The School Board, Superintendent, and senior administrators of the Broward County School District are commended for the development of the complex, well-aligned systems approach to the Innovation Zones concept.

**EXHIBIT 4-27
A COMPARISON BETWEEN THE SCHOOL BOARD'S
MAJOR SYSTEM PRIORITIES AND THE SCHOOL BOARD
POLICY 1402 OUTLINE OF PRIORITY OUTCOME AREAS**

SCHOOL BOARD'S MAJOR SYSTEM PRIORITIES	POLICY 1402 INNOVATION ZONE PRIORITY OUTCOME AREAS
1. Improving student achievement and school effectiveness.	a. Student achievement Develop a system to define a common commitment to rigorous performance outcomes, analyze and disaggregate data, diagnose gaps, and formulate plans to address standards of service and increase achievement for all students.
2. Addressing growth.	g. Strategic Planning g-5 Address growth/boundary/diversity issues
3. Embracing, celebrating, and demonstrating diversity.	
4. Improving student/staff safety and security.	c. Student learning environment Maintain a safe and orderly learning environment in which teachers can teach and students can learn.
5. Increasing student and staff accountability.	g-6 Develop an assessment/accountability process to evaluate initiatives.
6. Expanding partnerships.	d. School, parent and community partnerships Develop school, parent and community partnerships which support readiness to learn and provide enhanced learning opportunities.
7. Attracting, retaining, and training the best teachers, principals and support staff.	f. Effective Leadership Establish effective leadership that develops ownership in Zone initiatives for all stakeholders and improves student achievement and school effectiveness.
8. Utilizing technology to improve student achievement, teaching and staff productivity.	g-2. Maximize the use of technology/facilities and other resources through shared use of services.
9. Empowering parents and community through participation.	d-1 Involve parent/community/businesses directly in the development and implementation of Innovation Zones.

Source: Statement of Board's Priorities, Principal Handbook, p. iii and Board Policy 1402, 1998.

**EXHIBIT 4-28
ALIGNMENT OF IDEAS, RESOURCES, AND ACTIONS
FROM DIFFERENT DEPARTMENTS TO THE
INNOVATION ZONE ORGANIZATION**

SOURCE	ALIGNMENT
<p>What does it mean to be a standards-driven system chart?</p>	<p>The chart defines the roles and responsibilities of 12 groups, one of which is the Innovation Zone Leadership Team. This is a complex chart, which the Superintendent identified as the beginning of Phase III of his reform and accountability agenda. The focus of this phase is to "institutionalize world-class standards for students and staff, implementing results-driven staff development and clarifying the roles and responsibilities of all stakeholders in a standards-driven system."</p>
<p>The District's "roll-out plan" for the new standards-based system of curriculum organization includes a significant zone team.</p>	<p>For each of the 23 zones, a district-level coordinator, director, supervisor or teacher on assignment has been assigned to each school in the zone. An additional director from central office has been assigned to coordinate the roll out within the zone. Training is going on at this time in the standards and assessments, for these administrators.</p> <p>The prediction from some of them is that now that they will spend more time in schools, with a specific charge of ensuring successful roll-out, their perspectives and ways of working with schools in general, will evolve. They will have first hand experiences which will help them to re-direct their own efforts and the efforts of those within their departments.</p>
<p>Policy # 1403: School Improvement and Accountability</p>	<p>Section 8b states:</p> <p>"In order to assist schools in their accountability efforts, Innovation Zones have been established to enhance school improvement initiatives already begun by individual school communities. Through defining groups of schools empowered to work in a collaborative manner, schools can better analyze, align, provide continuity, and implement innovations designed to meet the needs of all students, (pre-K - adult.)</p>
<p>The NESS (new educator training) is restructuring.</p>	<p>The New Educator trainers out of HRD are being assigned to the job by Zone. This is a departure from the traditional, centralized way of providing support to new teachers. HRD is allowing schools and zones to organize their new teacher support as needed. All of the training and support for new teachers will eventually be through the zones.</p> <p>The NESS trainers from HRD are instructional coaches for every new teacher. Instructional coaches in turn train and support veteran teacher mentors within the school and zone. At every school there is a liaison with HRD. There are four HRD trainers for about 1500 new teachers.</p>

**EXHIBIT 4-28 (Continued)
ALIGNMENT OF IDEAS, RESOURCES, AND ACTIONS
FROM DIFFERENT DEPARTMENTS TO THE
INNOVATION ZONE ORGANIZATION**

SOURCE	ALIGNMENT
<p>The use of District Liaisons and "Nova Links" as members of the Innovation Zone Teams, as explained in the Innovation Zone Communications Loop document 6/24/98, and the "Nova Link Innovation Zone Reporting Information," for 2/18/98 and 6/15/98, taken from the Nova Link Database.</p>	<p>District Liaisons represent the Division of Educational Programs, Student Support, and HRD at zone meetings. Their role is to provide curriculum expertise and to share current information on district, state and national initiatives. this sharing allows the liaisons to support zone initiatives which positively impact student achievement.</p> <p>Nova Links (these are professionals from the Nova Professional Development Center) attend each Zone meeting and act as the communications link with professional development and research throughout the county. In addition, they have the responsibility to track the activities in their assigned Zone for district dissemination. The Nova Center has established a database which contains up-to-date information on Zone activities that may be accessed through HRD's Clearinghouse located on the District's Intranet.</p>
<p>Superintendent meets with Zone facilitators and Area Directors, e.g. agenda from the August 28, 1998 meeting.</p>	<p>The Superintendent meets with the Zones' Lead Facilitators and the Area Directors to update them on vital issues, listen to their needs and concerns, and to use them as a district leadership group.</p>
<p>Two positions were created to build Zone infrastructure this year.</p>	<p>The position of behavior specialist was a direct result of the success zones had in pooling resources from their student support services monies and teachers.</p> <p>The position of Zone Coach is related to one of the specific targeted areas under policy 1402, which stipulates Professional Development as one of its main areas.</p>
<p>Grants Development Pilot Project of the Grants Administration Department.</p>	<p>A proposal has been put out to schools with the following description included:</p> <p>A recent survey to measure grants development experience in Innovation Zones was administered by the Grants Administration Department. The results show that although many zones received some level of grants development training, most zones feel only somewhat experienced with developing grant proposals and on average, zones submitted only two proposals over the past year. Therefore, to improve training effectiveness and respond to district-led initiatives, the Grants Administration Department proposes to:</p> <ol style="list-style-type: none"> 1) Restructure grant development training to incorporate results-driven professional development. 2) focus this training on Innovation Zones; and 3) extend the technical support function by establishing an IZ Grant Resource Team in each Innovation Zone.

**EXHIBIT 4-28 (Continued)
ALIGNMENT OF IDEAS, RESOURCES, AND ACTIONS
FROM DIFFERENT DEPARTMENTS TO THE
INNOVATION ZONE ORGANIZATION**

SOURCE	ALIGNMENT
	In order to be accepted, the chance to be a part of the initiative, which will pay participants for the training time, all Innovation Zone principals from a given zone had to sign the application to be included in the pilot.
Quality Pathways Initiative (described in a September 25, 1997 letter and cost proposal to Dr. Frank Petruzielo)	District Administrators, school administrators, lead facilitators, zone coaches and members of IZ teams are being trained in a long term training program with the Arthur Andersen firm. This is an HRD initiative, to "create a common language and process for implementing and sustaining continuous quality improvement in the District, to solve problems of a significant nature and to initiate desirable change." There are active projects underway in each Innovation Zone which are tied to developing capacity within the zone to make structured, measured, accountable change, and to further develop trainers within each Zone. One goal is to have the capacity to provide ongoing training to all zone employees, once the 2% permeation by Arthur Andersen has been completed.
Broward Schools of Excellence Conference held: August 28, 1998	The theme of this year's back-to-school conference for educators was "Innovation Zones Catalysts for Learning Communities." The program shows a day filled with presentations from nearly all of the Innovation Zones. Each presentation focused on one practice currently in place within the zone, which was seeing success.
Area Directors' Site Visits: Part C. (Principal's) Responsibility for Overall Administration and Supervision of the School.	The document requiring that each principal sit down with his/her Area Director, and show evidence a list of documents and plans, includes the following: 1. The principal's written plan for each of the following: Item 'I': Detailing the principal's and school's role and responsibility for involvement within innovation zone activities and collaborative efforts between and among innovation zones.
Pyramid model of professional development, in use by HRD.	Each strategic training which is designed, is designed with a "pyramid approach." This means that professionals from each Zone are invited to participate, given the content of the training, alongside 'train the trainer' practice. The purpose is to use the one or two people to train others in the Innovation Zone.

**EXHIBIT 4-28 (Continued)
ALIGNMENT OF IDEAS, RESOURCES, AND ACTIONS
FROM DIFFERENT DEPARTMENTS TO THE
INNOVATION ZONE ORGANIZATION**

SOURCE	ALIGNMENT
<p>One Zone through documents and Interviews:</p> <p>School Improvement Plans (2 elementary, 2 middle and 1 high school from one Zone)</p> <p>Action Planning: Zone established cadres of teachers within the zone to meet in the four identified areas of math, reading, writing and technology</p>	<p>Each had objectives in the four identified zone goal areas of reading, writing, math and technology. Some action strategies were common as well.</p> <p>Minutes indicate that teachers make and recommend decisions to their schools in the area of curriculum articulation, instruction, and assessment.</p> <p>Minutes also show that teachers' commitment to this zone is strong in the belief that it will help to improve student achievement.</p> <p>Documents show improved student achievement from 1995 to 1998 in the Florida Writes assessment.</p>
<p>Creation of the Zone Coach Position</p>	<p>It is the responsibility of the 23 Zone Coaches to act as consultants in professional development for schools within their zones, to facilitate excellent communication in curriculum and instruction matters, and to assist in the garnering of needed resources to improve curriculum, instruction and assessment.</p>

Source: Created by MGT from documents cited above, 1998.

Within the past three years, the Superintendent has been facilitating a major initiative in systems alignment. The vehicle for that alignment has been the Innovation Zone organization. There is significant evidence, as detailed previously in Exhibit 4-28, to show that the major departments of curriculum, instruction, human resources development, grants, student services, and technology have been focused directly on raising student achievement. This is a major accomplishment, achieved in short amount of time --- a conclusion made even more impressive by the support of more than 200 schools in the Broward County School District. The Broward County School District should continue to strengthen the infrastructure of the Innovation Zone organizational plan under the new Superintendent.

FINDING

Some areas of concern arose about the development of the Innovation Zone concept in the course of interviews with teachers, principals, and district-level administrators. In addition, about 20 teachers participated in a focus group. Comments included a frequently voiced concern that the zone principals have no part in the hiring process for new administrators. Some administrators believe that this would strengthen the principal cadre, given the strong thrust the district priorities are taking towards K-12 collegiality, and continued gains in K-12 student achievement.

An additional concern was voiced on behalf of the special education and vocational centers by administrators and teachers who participated in focus groups. The concern was that they do not feel a clear sense of identification with either the Zone to which they have been assigned, or the separate 'area' organization into which they have been placed. The innovations and programs, they reported, are K-12, with centers being seen as an after thought, and often times excluded from communications altogether. A concern arose frequently around the need to realign the budgets, so that some of the centralized monies available for different departments start to become available to the Zones. There is a strong feeling among some interviewed, that until monies outside of school and grant funds start to flow through the Zones, the system will not be really or fully aligned.

Finally, there was a concern expressed by teachers, who were not directly involved in Zone leadership meetings or in zone cadres. The enthusiasm for the zone concept has not yet reached every classroom. During interviews, teachers discussed the pros and cons of the current zone development. Exhibit 4-29 provides a summary of their written comments.

**EXHIBIT 4-29
COMMENTS BY TEACHERS FROM ACROSS THE DISTRICT
ABOUT INNOVATION ZONES**

PROS	CONS
Provides cohesion within a neighborhood district.	May not meet at opportune times.
Sharing of resources and personnel.	Little influence on each other's schools.
Common goals.	Communicate more with individual school faculties.
Innovation Zone Coach (new position).	Limited participation by only a few people who do not always share with all.
Provides continuity for so many of our children as they move from school to school.	High schools seem to be 'left out' because the number of elementary schools is so much greater.
Our IZ is doing teacher inservice as our quality project and the zone has provided opportunity to band together and do more than one school could offer.	Value vs. time?
Some direct influences for students are happening.	Crossovers where the middle school students are split up, with some going to high school "A" and some going to high school "B".
Principal collegiality.	

Source: Created by MGT from interviews and written notes, 1998.

As with any innovation, the implementation of Innovation Zones falls on a continuum of development at this stage. Differences were attributed both positively and negatively to Zone leadership, turnover of principals, the pilot support given to some zones through the Panasonic assistance, the burden of extra meetings, and the view of some teachers and principals that their knowledge base centered around their individual schools.

Included in the documents provided for this performance review was a *Zone Improvement Plan (ZIP) Matrix*. The document was provided as part of the Zone Improvement Plan, 1996 - 2000 from the Coral Springs Innovation Zone. The matrix

was set up as a rubric, with categories for assessing the following four different stages of development:

- awareness
- acceptance
- ownership
- internalization

Each stage has a clear definition. Exhibit 4-30 shows the categories which are divided into these four stages and which are defined.

The matrix provides descriptors in each of the categories listed in Exhibit 4-30, which define development at each stage. The tool is a useful one for Zones to use for self-assessment and may also be useful as a research and evaluation tool for the Department of Research and Evaluation as part of an ongoing study of the evolution of this initiative. An examination of the table of contents from the evaluation report books published by the Research and Evaluation Department for the past four years, as well as an interview with a researcher, indicated that no formative evaluation has begun to support the Innovation Zone initiative.

RECOMMENDATIONS

Recommendation 4-20:

Appoint an ad hoc committee to continue to develop the Innovation Zone organization plan.

The committee should study the role of Special Education and Vocational Centers in the Innovation Zone organization, the funding of Innovation Zones with a Zone Budget, and a role for principals within a given zone in the recruitment and hiring of new principals within the zone.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent should appoint and oversee cross functional ad hoc committee to work on further development of the Innovation Zone organization. May 1999
2. The ad hoc committee for development of the Innovation Zone organization should consider the areas of concern raised in this performance review report, and make recommendation to the Deputy as to their resolution. December 1999

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

**EXHIBIT 4-30
CATEGORIES ASSESSED BY THE ZONE IMPROVEMENT PLAN MATRIX**

<p>1.0 Professional Development and Training</p> <ul style="list-style-type: none">■ Commitment to high standards and rigorous performance outcomes■ Time for collaboration, staff training, curriculum development and improvement of structure and practice■ Use of research/Zone innovations to improve practice■ Mutual respect and common commitment <p>2.0 Student Achievement</p> <ul style="list-style-type: none">■ Data analysis and diagnosis of gap between vision and reality■ Effective assessment and accountability as a zone and as zone schools■ Effective structures, practices, policies and relationships impact teaching and learning■ Shared assessment of Zone practice and effectiveness of learning environments in zone schools <p>3.0 Student Learning Environment</p> <ul style="list-style-type: none">■ Alignment of Zone resources with Zone needs and practices including the maximum use of technology, facilities and other learning resources■ Innovative learning environments through increased staff capacity to create effective structures, practices, policies and relationships that impact teaching and learning■ Assessing Learning Strategies■ Opportunities for regular and effective communication and collaboration by general classroom, special class, exceptional education and other staff through the use of a variety of strategies <p>4.0 Parent/Community Partnerships</p> <ul style="list-style-type: none">■ Involvement of parents, community and business in development, implementation and assessment of zone work■ Use of community resources including health, safety and social services■ Shared commitment to content standards, performance standards, learner outcome and authentic learning assessments■ Establishing community relations procedures <p>5.0 Communication and Leadership</p> <ul style="list-style-type: none">■ Collaboration, mentoring, and peer coaching■ Applying systems thinking to improve practice to include a communication and feedback process and stakeholder management <p>6.0 Strategic Planning</p> <ul style="list-style-type: none">■ Standards for collaboration■ Collaboration on review of resources (fiscal and human)■ Deliberate, reflective planning■ Assessment and accountability as a Zone and as individual schools

Source: Taken from Coral Springs Innovation Zone, "Zone Improvement Plan, 1996 - 2000," ZIP Matrix, 1998.

Recommendation 4-21:

Design and implement an ongoing, formative evaluation plan to support the development of the Innovation Zone initiative, so that each of the 23 Zones has a benchmarking system for looking at progress within the zone, and so that the Broward County School District as a whole has an overall picture of the development of the zones.

Each of the 23 Zones should have a benchmarking system for looking at progress within the zones, and the schooldistrict as a whole should have an overall picture of the development of the zones. The purpose of the evaluation is to ensure progress and growth within each zones, while not attempting to homogenize or centralize the grassroots and unique nature of each zone. The instrument developed by the Coral Springs Innovation Zone provides a useful template for the formative evaluation. The evaluation plan should call for input from all sources within the zone as well as from the district professional involved with the Zone.

IMPLEMENTATION STRATEGIES AND TIMELINES

- | | |
|--|----------------|
| 1. The Deputy Superintendent, working with the Directors Human Resource Development and Research and Evaluation, should oversee the design of a formative evaluation plan for the Innovation Zone initiative. | September 1999 |
| 2. The Director of Human Resources and the Director of Research and Evaluation should oversee the training of Zone Coaches and Lead Facilitators, using the train the trainer model now in place in the implementation of the Zone evaluation process. | Summer 2000 |
| 3. The Deputy Superintendent should ensure that all zones are ready to (and are using) the evaluation process. | Fall 2000 |
| 4. The Deputy Superintendent should oversee the preparation of a reporting schedule of the results of the formative evaluation of the Innovation Zone initiative to the School Board of Broward County. | Spring 2001 |

FISCAL IMPACT

This recommendation can be implemented within existing resources.

4.4.2 School Improvement

CURRENT SITUATION

The "Accountability and School Improvement System of Broward County," is found in School Board Policy #1403, "School Accountability and Improvement." This is the policy that guides the work done in the district on school improvement. The policy has been revised four times since its original adoption in March 1995, with the most recent board level revision completed in July 1998.

The current policy statement is shown in Exhibit 4-31. The Board's policy on accountability and school improvement is 23 pages in length.

Contained in the policy are 13 sections of rules. These are listed in Exhibit 4-32.

The current collective bargaining agreement between the Broward Teachers' Union and the School Board, August 16, 1998 - August 15, 2001, contains a chapter pertaining to school accountability --- Article Fifteen, "Accountability." Accountability in the teacher-management contract is shown in Exhibit 4-33.

Contained in the negotiated agreement are various subsections which appear in Exhibit 4-34.

**EXHIBIT 4-31
SCHOOL BOARD POLICY # 1403: SCHOOL ACCOUNTABILITY
AND IMPROVEMENT POLICY STATEMENT**

The School Board of Broward County has established an accountability and school improvement system based on the performance of students and educational programs. The system supports national goals 2000, voluntary national standards as developed, Florida Blueprint 2000 and the Mission, Beliefs and Major System Priorities of the School Board of Broward County. THE BLUEPRINT: BROWARD SCHOOLS OF EXCELLENCE is the District's framework and vehicle for school improvement and accountability. In order to address the challenges and fully implement the vision articulated in the school board's mission and beliefs, there is a need for accountability at all levels of the organization to improve student achievement and school effectiveness. Accordingly, this policy describes a comprehensive accountability system for the Broward County Public School District.

Source: School Board Policy # 1403, School Board of Broward County, 7/21/98 amended version.

**EXHIBIT 4-32
SCHOOL BOARD POLICY # 1403: SCHOOL ACCOUNTABILITY
AND IMPROVEMENT RULES**

1. School Board's Mission Statement
2. School Board's Beliefs Statements
3. School Board's Major System Priorities
4. Accountability System Assumptions
5. Accountability System Purpose
6. School Accountability System Guidelines
7. Accountability Criteria and Performance Ratings
8. Accountability Incentives and Responses
9. School Board Responsibilities
10. School Advisory Council (SAC)
11. Research-Based Characteristics of Quality Schools
12. School Improvement Plan (SIP)
13. Waiver Requests

Source: School Board Policy # 1402, School Board of Broward County, 7/21/98 version.

**EXHIBIT 4-33
ARTICLE FIFTEEN OF THE NEGOTIATED AGREEMENT
SECTION A: SCHOOL-SITE ACCOUNTABILITY**

A. School-site accountability is an ongoing process through which professionals working as a team have the opportunity for authentic participation in the school and greater responsibility for its process. Those most closely affected by decisions ought to be involved significantly in making those decisions on all issues. This is the spirit of Florida's Blueprint 2000/Accountability.

Source: Collective Bargaining Agreement between The Broward Teachers Union and The School Board County, Florida, August 16, 1998 - August 15, 2001, Page 15-1.

**EXHIBIT 4-34
SUBSECTIONS OF THE NEGOTIATED AGREEMENT**

- B. Committee Involvement
- C. Training
- D. Reconciliation/Intervention Team
- E. Shared Governance
- F. School Advisory Council
- G. Waivers
- H. Transition Team
- I. Funding
- J. Professionalization of Teaching Forum (PTF) Committee

Source: Article Fifteen, Collective Bargaining Agreement Between The Broward Teachers Union and The School Board of Broward County, Florida, August 16, 1998 - August 15, 2001.

The cycle for the school improvement process established in the packet of information sent to schools each fall, officially runs from August to June. Among the data, used to make decisions about objectives and activities to include in the plan, are:

- the Stanford Achievement Test (SAT), which is given in March and for which scores are received in May;
- the State's writing test given in January, for which results come back in May; and
- the High School Competency Test (HSCT), taken in the fall, for which results come back in January.

As part of the accountability process, the Board's policy requires that schools report to the parents annually about the school's student achievement and demographics. In the Broward County School District, this report is called the School Advisory Council Report. Information about each school is provided to all principals in the fall. The information is provided on disk, along with electronic templates for the two-sided report. Principals are expected to publish the report to parents in the late fall.

The school improvement process is overseen by the Director of School Improvement and Accountability. Four resource teachers on special assignment work for the Director in the area of School Improvement. The Office of School Improvement and Accountability creates an annual packet of materials for principals and School Advisory Councils to use in order to prepare their School Improvement Plans. The packet provides the information each school's principal and school advisory council needs in order to complete the annual process of school improvement. Exhibit 4-35 shows the 1998-99 "Packet Contents" for the school improvement work the school is required to do.

**EXHIBIT 4-35
PACKET CONTENTS FOR THE SCHOOL IMPROVEMENT PLAN
1998-99**

- Timeline for 1998-99
- Proposed Training Schedule.
- Guidelines for School Improvement Plans...and Needs Assessment
- SIP Explanation Sheets
- Strategic Plan for Technology, Directions and Sample
- 1998-99 SIP Procedures Packet including forms for SIP and Waivers
- Diskette with SIP and Waiver Forms

Source: 1998-99 School Improvement Plan Procedures Packet, 1998.

FINDING

The Broward County School District has an extensive, detailed policy on school improvement. The inclusion of the School Board's mission statement, belief statements, and major system priorities is a significant effort to align the school improvement process with the central mission and objectives of all of the departments and divisions within the school district. The plan encompasses information about the connection with Innovation Zones as a support for each school's plan, incentives for improved performance, support for performance which is stagnant or low, embedded use of technology within goals as a means of accomplishing them, training needed, a requirement that any grant applied for be in line with objectives in the plan, and a student discipline plan.

Chapter 5.5 presents a more detailed review of achievement in the Broward County schools. However, a general finding confirmed through interviews with senior managers in several departments, showed that the Broward County School District does not have any schools on the critically low list. Through the school improvement procedures, and through the systematically aligned efforts described throughout this chapter, all schools on the critically low list have raised their state test scores.

The reference to "...voluntary national standards as developed," in the policy statement section written (shown previously in Exhibit 4-31) was the only wording found to be lagging behind current district initiatives in strategic areas. The Educational Programs Division is actively engaged in developing major "Critical Content" documents and training which encompasses and replaces older curriculum documents.

COMMENDATION

The School Board of Broward County, the Superintendent, and the Office of School Improvement and Accountability are commended for the comprehensive and well-aligned policy written for school improvement.

RECOMMENDATION

Recommendation 4-22:

Update the policy to include the Critical Content initiative in order to take the next step in aligning the school improvement process as a major vehicle for school reform.

Including the Critical Content initiative in the Board's policy should allow principals to be more successful in asking teachers to include specific activities in their individual growth plans, especially when a given teacher's assignment and area of certification are not an obvious match to the objectives in the School Improvement Plan. An example of this might be a geography teacher's plan, in a school where the objectives in the school's improvement plan are in writing, reading and math. The Critical Content document will assist the teacher in understanding the link to the school's improvement plan.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-------------|
| 1. The Director of School Improvement and Accountability should initiate the policy revision and procedure, in combination with the review necessitated by state-level changes. | July 1999 |
| 2. The School Board should review and adopt the amended policy. | August 1999 |

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

Also embedded within the policy is clear direction to each school that they are to use a solid base of researched practices in order to shape the progress towards improving student performance. Two different parts of the policy dictate this research base.

- The first is the requirement that schools identify and implement a process to achieve improved student performance (e.g. Coalition of Essential Schools, Modern Red Schoolhouse, Co-Nect, Paideia, Audrey Cohen College, Roots and Wings, ...or an eclectic approach combining some of these or other research based models. This requisite partnership with a major initiative appears in Section 4d of the policy, "Accountability System Assumptions."

- The second reference to "Research-based Characteristics of Quality Schools," occurs in a section by that name -- Section 11 of the policy amended in July 1998. Exhibit 4-36 shows the section's major items.

**EXHIBIT 4-36
RESEARCH-BASED CHARACTERISTICS OF QUALITY SCHOOLS
DEFINED IN POLICY 1403
ON SCHOOL IMPROVEMENT AND ACCOUNTABILITY**

10. Research-Based Characteristics of Quality Schools

a. The following describes the characteristics of Quality Schools which are used as the basis for the Broward County School District Needs Assessments:

1. Clear Mission and goals/Capable Leadership/Focus on Teaching and Learning
2. High Expectations for Student Achievement
3. Participatory Management and Leadership
4. Parental/Community Involvement with, Support of, and Satisfaction with Educational Programs
5. Continuous Assessment of Students, Staff, and Program to Evaluate Effects of Instruction
6. Staff Effectiveness
7. Safe, Orderly, and Disciplined School Climate
8. Facilities and Technology

Source: Board Policy 1403, 1998.

Included in the packet of information provided to each school was a set of *Guidelines for School Improvement Plans, 1998-99, Needs Assessment*. A comprehensive needs assessment is required each year. Another reference to a comprehensive needs assessment is found in the "Suggested Schedule for 1998-99." This reference appears in Exhibit 4-37.

**EXHIBIT 4-37
INFORMATION ABOUT COMPREHENSIVE NEEDS ASSESSMENT**

**THE SCHOOL IMPROVEMENT PROCESS
A SUGGESTED SCHEDULE FOR 1998-99**

January 1999	Select Needs Assessment Instrument to be employed at School site; arrange for Needs Assessment Training
	January 12, 13, 14: Needs Assessment Training
February 1999	Administer Needs Assessment Instrument; employ results to prioritize school needs.
	Team to review school needs; use to develop 1998-99 School Improvement Plan. Request help from School Improvement Office. As needed, attend Help Sessions and/or group trainings

Source: "The School Improvement Process: A Suggested Schedule for 1998-99" BCSD.

Each school's plan contained a specific needs assessment for the objectives chosen to be included in the plan. These are very specific to the objective and usually contain references to the type of data from tests looked at or the type of student performance considered. However, neither the school plans, the directions for developing the plan and filling out the forms, nor the templates, show a place to report how the school had conducted a needs assessment in the eight areas listed in Exhibit 4-36.

COMMENDATIONS

The Office of School Improvement and Accountability is commended for the thorough, detailed and useful packet of information they provide to the schools for their use in working through the school improvement process.

The information in the packet is easy to read and it is current and updated with both district initiatives and state-level changes. The integration of the training modules available and the order in which they are available (in the month or months preceding that particular step in the plan) is a very strong feature of the planning process presented to the schools. Principals and teachers interviewed said that they found the school improvement process designed by the Office of School Improvement to be an effective process, which did not create unneeded bureaucratic red tape, and which made the plan easy to develop. They also said repeatedly that the consistent and well publicized training schedule made it possible for them to continually maintain and increase capacity within the building to participate in the school improvement process.

The School Board, the Superintendent, and all participants in the design of the School Improvement Planning Process are commended for their planned and detailed inclusion of the need for a research-base for school improvement, and for the provision of the requirement that schools associate themselves with a research-based model for change, instruction, and learning.

While it might be a general assumption that educators continually learn about and incorporate effective, researched practices into their curriculum design, instruction and assessment, the Broward County School District have taken an additional step. The district requirement that each school choose and join a state, regional or nationally

known, research-based initiative to guide its practice, is consistent with two different district beliefs and policies. It is consistent with the district's commitment to helping school sites to be independent in their decision making around resources and approaches to raise student achievement. It is also consistent with the district's strong focus on raising student achievement scores.

RECOMMENDATION

Recommendation 4-23:

Revise the explanation sheets to include a section where School Advisory Council and plan writers explain the components of comprehensive needs assessment they used in order to meet the spirit, as well as the requirement, of the Board's policy.

This addition should provide the plan's reviewers and the other Zone schools for any particular school, a clearer idea of how the objectives were chosen, and also of initiatives not chosen.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-------------|
| 1. The Director of School Improvement and Accountability should oversee the addition of a section of explanation about comprehensive needs assessment to the packet, instructions, and templates. | May 1999 |
| 2. The revised information should be included in the packet distributed to the schools. | Summer 1999 |

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

There are references to the importance of leadership for school improvement in a variety of official Broward County School District documents. Exhibit 4-38 gives two examples of the leadership components expected for high quality school improvement.

The spirit of the language in both documents appears to call for some form of collaborative decision making and culture within Broward County schools. The focus of shared governance within the Broward County School District is the School Advisory

**EXHIBIT 4-38
LEADERSHIP CHARACTERISTICS FOR HIGH QUALITY SCHOOL IMPROVEMENT**

BOARD POLICY 1403 ON ACCOUNTABILITY	COLLECTIVE BARGAINING AGREEMENT 1998 - 2001
<p>11.a.3 Participatory Management and Leadership</p> <p>Comprehensive School Improvement Plans (SIP's) and strategies based on school's identified needs, research, and potential for successful implementation.</p> <p>Collaborative decision-making by school-based staff evident - with important budgetary, personnel, and curriculum decisions based on school's mission/goals and what's best for students.</p>	<p>A. School-site accountability is an ongoing process through which professionals working as a team have the opportunity for authentic participation in the school and greater responsibility for its process. Those most closely affected by decisions ought to be involved significantly in making those decisions on all issues. This is the spirit of Florida's Blueprint 2000/Accountability.</p> <p>E. Shared Governance: The parties shall develop a variety of shared governance models which schools may consider. Schools shall select a model that best suits their needs or the staff may develop an alternative model of governance with direct involvement by teachers, other staff and community representatives.</p>

Source: Prepared by MGT from Broward County documents Board Policy 1403, amended July, 1998; and the Collective Bargaining Agreement between The Broward Teachers Union and The School Board of Broward County, Florida, August 16, 1998 - August 15, 2001.

Team process embedded within the School Improvement Process. Under Florida's legislation, each school is required to form a School Advisory Council as the governing body for the school's improvement work. Recent legislative changes have mandated that the council which guides school improvement be known by the name of "School Advisory Council." The same legislation, House Bill 3901 has expanded the SAC's functions "to include involvement in the preparation of the school budget and plan."

This information was disseminated to the principals through a memo from the Superintendent dated August 21, 1998. In addition, the memo explained, "This (change) will be reflected in the 1999-2000 School Improvement Plans. Additionally, HB 3901 clarifies SAC participation in matters of resource allocations including budget, training, instructional materials, technology, staffing decisions, and student support services."

During Fall 1998, the Superintendent proposed a new organizational structure for the School Advisory Council and the School Advisory Forum (one of the other important governance councils in some Broward schools). He proposed to principals and to the community, through an ample variety of channels, including electronic polling at the district's website, that the SAC and the SAF meet quarterly to perform the expanded role expected by the legislation.

In addition to this change, the Superintendent and the School Board have been considering waiver requests for at least four years, from schools asking to combine the functions and the bodies of the SAC and the SAF (formerly called in different schools by

different names (e.g., the SIT). Approximately 19 schools across Broward County School District applied for and were granted this waiver for the first semester of the 1998-99 school year.

During the performance review, a request for all documents and anecdotal history pertaining to school-based decision making, was responded to with a copy of the School Improvement packet. No comments were attached to the document. Repeated inquiries were made by MGT as to who, among the district-level administrators, was responsible for ensuring that shared governance models emerged and were nurtured to sophisticated levels of functioning. No one could identify any specific initiative --- current or past --- related to shared governance. No one could identify any person or department given the assignment of ensuring that within each school, an evolving and effective level of shared governance is operational.

This function or responsibility is not monitored by the principal and area director through the Area Director Site Visit list in use for the first time this year. It is not an area specifically identified in the principal's evaluation form or in the revised Performance Appraisal Competencies. It is not an area which is specifically identified in the teacher evaluation form. Further, there are no research studies available from the Department of Research and Evaluation on the subject of evolving, shared governance within the Broward County School District.

There is a Board Policy pertaining to "Shared Decision-Making Waiver of Board Policy" (Policy # 2200). The policy was first adopted in 1990 and last amended in 1993. The brief statement of policy refers to the waiver process of the Board. It reads:

The Board and the Broward Teachers Union (BTU) have agreed to design and implement a shared decision-making program. One component of this program allows the school board to waive all or part of a board policy for one school year at the request of staff of a pilot program school.

A rules section follows with a list of specific policy areas which the Superintendent was authorized to waive during the 1993-94 school year for schools who had been approved for the "program." No other information about this policy, its eventual implementation, or any ramifications was made available to MGT for this performance review.

In response to questions in interviews, teachers reported very different practices in their schools. Exhibit 4-39 shows some of the positive and negative comments about shared governance expressed in interviews.

While it is certainly not possible to draw any conclusions from these interview comments, or from the lack of tangible evidence within the district's systems or documents, the signs point to a lack of deliberate planning to ensure the growth and evolution of faculty-administrative governance within the schools. The lack of evidence

**EXHIBIT 4-39
COMMENTS FROM TEACHERS ABOUT SHARED GOVERNANCE
IN THEIR SCHOOLS
NOVEMBER 1998**

POSITIVE COMMENTS	NEGATIVE COMMENTS
Principal encourages teacher leadership, acts as mentor, seeks opportunities for teachers, and supports activities with release time! Also encouraged is active problem solving.	There is no faculty council at my school.
Active participants in the SAC have a voice in my school.	The principal ignores the faculty voice in my school; teachers vote and then the decisions are reversed.
There is an active faculty council in my school.	A few are involved in everything, while others do nothing.
Committees within my school make many decisions, e.g. technology, math and other texts, scheduling.	No one holds my principal accountable for the way he operates with the faculty.
Grade chairs participate in the hiring of teachers.	Faculty voice is not important in our school, especially in budget planning.

Source: Prepared by MGT from interviews with classroom teachers, November 1998.

in this part of the performance review, stands in stark contrast to all of the careful and conscious thought given to the integration and nurturing of Innovation Zones into the district's plans, structures, documents, practices, and trainings. Nonetheless, the spirit if not the intent of the law of the leadership items contained in both the Board's policy and the Board-Teacher contract is one which clearly calls for shared governance.

Another one way in which teacher voices are heard in the Broward County School District is through the waiver process. The Accountability Policy allows for waiver petitions to be submitted to the School Board twice a year by either principals or School Advisory Councils/School Improvement Teams. The policy establishes the prerequisite of a two-thirds vote of the entire faculty, or of the affected faculty or department. The waiver process is also included in the Collective Bargaining Agreement. District administrators, teachers, and principals were uniformly enthusiastic about the waiver process as it is executed in the school improvement process. The policy, procedures, and implementation were heralded as clear and efficient, and importantly, as highly supportive of promoting the work of school improvement for increased student learning.

The Office of School Improvement and Accountability maintains a database of waivers, by policy and by topic. These were made available during the performance review, for the years 1994-95, 1995-1996, 1996-97, 1997-98 and the first semester of 1998-99. The Office of School Improvement and Accountability keeps track of trends in waiver requests and notifies appropriate departments of repeated waiver requests which might urge policy change. One example frequently cited as a successful waiver-based policy change is the incorporation of early release professional development time into the calendar. Another example is changes in the grading policy.

A third initiative which is growing has to do with the combination of the council which governs the school improvement process, the School Advisory Team (which was known up until this year by either that name or the School Improvement Team), and the school's more general advisory council (which might have been called the School Advisory Council, and is now referred to in the district as the School Advisory Forum). Some schools have found it more feasible to have one group, rather than continue to maintain two councils. Some of the reasoning provided by principals in interviews had to do with attendance and numbers of parents available in smaller schools. In 1998-99, a review of the entire list of waivers showed that approximately 19 schools had applied for and received a waiver of the requirement to have two site-based councils at the school.

Exhibit 4-40 presents some of the information tracked by the Office of School Improvement and Accountability about this waiver.

This emerging pattern is carefully tracked by the Office of School Improvement and Accountability, the Superintendent, and the School Board. The merger of the two councils was considered carefully by the Board and the Superintendent in February 1998. They delayed action on mid-year waiver requests, pending a meeting with the four schools seeking to combine their councils. In notes provided for this performance review, the thoroughness of the investigation was evident. It is shown in Exhibit 4-41.

**EXHIBIT 4-40
SCHOOL IMPROVEMENT TEAM/SCHOOL ADVISORY COUNCIL
MERGER SURVEY RESULTS**

- Sixteen schools requested a waiver for the 1996-97 school year
- All schools responded to the survey
- All sixteen schools renewed the waiver for 1997-98 with no changes
- Two schools began the waiver in 1995, 14 schools began in 1996
- methods employed to evaluate effectiveness of the waiver include: attendance records, district climate survey, site developed parent/staff surveys, focus group discussions, large group discussions, meeting minutes
- Membership of merged teams averaged 22
- All schools met monthly, with special meetings called on as-needed basis
- Meeting attendance (sign-in sheets) sent to area directors
- 96% of the schools showed an increase in attendance, especially VAAESEC sites; one school had no change
- Individual school meeting attendance rose, 10% - 425% dependent upon the site
- VAAESEC sites lauded the merger as parent involvement has increased; some sites have true parent participation for the first time

Source: School Improvement Team/School Advisory Council Merger Survey Results, Office of School Improvement and Accountability, 1998.

**EXHIBIT 4-41
MEETING NOTES INVESTIGATING REQUESTS FOR WAIVERS
OF SEPARATE COUNCILS**

After the School Board deferred the waivers (at the February 3, 1998 meeting), a meeting was held with the four schools requesting the waiver. Those in attendance included the principals; SIT chairs; parents; the Director of Strategic Planning, Accountability and School Improvement; and members of her staff. All schools verified that the criteria required for a waiver had been met.

- Voting and presentation procedures had been followed; requisite information is contained on the front of each individual waiver request.
- Each school had explored alternatives to the SIT/SAC combination
- Each school understood the impact of the waiver for their individual site.
- Minutes and sign-in sheets for each meeting will continue to be sent to the appropriate area director.

*Other meeting options which appear in the same notes include looking at holding meetings of two groups' meetings simultaneously, or consecutively.

Source: "The Merger of School Improvement and School Advisory Second Semester, 1997-98," Office of School Improvement and Accountability, 1998.

The waiver process is subjected to high standards for adoption which seek to guarantee flexibility to meet school's objectives, while protecting the voices of both teacher and other stakeholder groups.

One additional area of investigation yielded some perspective on the development of collaborative leadership within the Broward County School District. The Human Resource Development (HRD) Department, through the position of the Director for Leadership Development, is responsible for helping the district's leaders to acquire and develop the skills they need to lead the district's schools, their improvement, and their instructional initiatives. The concepts and skills involved with "building a collaborative culture" deeply tied to instructional improvement and professional learning and decision making is offered in the district's training programs for interim and intern principals. The HRD Department sees this aspect of the multi-faceted leadership training as a critical component. Principals and assistant principals who have gone through the recent leadership training programs expressed a strong opinion that those practicing administrators at the district office and at the school level who have not gone through the summer institute or other leadership training and experiences should do so.

The Office of School Improvement and Accountability includes its own training sessions and reminders on a general schedule of school improvement events included in the packet of information sent to schools in the fall. The training sessions are offered in a timely schedule in the month or months which precede the due date for the particular document or skill needed. The sign-in sheets examined for sessions held in October and November, 1998, showed that between 30 and 40 individuals attended the sessions. Sample handouts were well written and practical. In addition to the trainings held at central locations, the diary entries of one resource teacher assigned to the Office of School Improvement and Accountability showed a very high number of visits to schools on a regular basis, to meet needs at the school sites. Among the listed activities

were training SACs, working with steering groups, working with whole faculties, attending SIT meetings, giving workshops, helping with plans, and mediating conflicts.

There is a "School Improvement Team Assessment" which is part of the SIT/SAC training provided by the Office of School Improvement and Accountability. Exhibit 4-42 shows the specific references made in the "Suggested Schedule" to building and training the School Advisory Team.

**EXHIBIT 4-42
TEAM BUILDING/TRAINING REFERENCES IN THE SUGGESTED
SCHEDULE FOR SCHOOL IMPROVEMENT, 1998-99**

September 1998	Plan and execute team building activities; organize onsite training for SAC members
October 1998	At meeting, continue SAC training; suggest topic of the month, ongoing all year. Review off-site training opportunities
November 1998	Continue training for SAC members
December 1998	Continue training for SAC members
March 1999	Continue SAC training; target writing objectives

Source: "The School Improvement Process A Suggested Schedule for 1998-99," by the Office of School Improvement and Accountability, 1998.

There is no specific reference in the schedule to evaluating the School Advisory Team at the end of the year. The March entry is the last entry that refers specifically to the team or its training.

Looking at all of the entry points of this investigation of school-based shared decision making, there are many practices which are already in place to support an initiative specifically designed to ensure that principals, their staffs, and the councils who help them in their work, become increasingly more sophisticated in the collaboration which results in higher achievement. The School Advisory Councils are a necessary part of a strong shared decision-making culture, but they are not sufficient in and of themselves. In the absence of a deliberate initiative in this area, there may be over reliance on this one structure to 'cause' the evolution from an autocratic to a democratic culture within the school community. In any event there has not yet been an evaluation of the current culture of collaboration within schools and among schools to be able to conclude this one way or the other.

COMMENDATION

The School Board, the Superintendent, and the Office of School Improvement and Accountability are commended for the quality of the policy, procedures and implementation of the waiver process to support school reform.

The Broward County School District has met not only the letter but the spirit of the state's requirement in this area. The district has established an accountable process which allows schools to align their efforts with the district's priorities, while at the same time

exercising the flexibility necessary to be a good school. Further, the Office of School Improvement and Accountability is commended for the thorough database it has kept of the system waivers, for the initiative it takes in tracking trends, and for the assiduous monitoring done on a regular basis to ensure compliance with the letter and the spirit of the Board's policy and the union-board contract.

COMMENDATION

The Office of School Improvement and Accountability is commended for the excellent and timely training schedule which has been designed.

The ongoing visits of the resource teachers to the schools sets a high standard for service, as current initiatives call for district administrators to increase the work they do within the schools.

RECOMMENDATION

Recommendation 4-24:

Establish an evaluation plan for the overall shared governance model within each school including, but not limited to, an evaluation plan for the School Advisory Council process.

A process which calls for a 360 degree evaluation of shared governance annually should be established. Benchmarks of progress towards best practice should be developed. Principals and teachers should be held accountable for the development of a strong, learning driven, results-oriented, shared leadership model within each school.

Teacher leadership and shared decision making about curriculum, instruction and assessment, and about school operations, as they support or interfere with students' learning and teachers' work, is one of the key links to increasing student performance. There is energy and creativity born from faculty convergence around key points that influence how students learn. In order to promote that energy, teachers should have actual authority to change the system which supports learning. Clearly, in Broward County, the School Advisory Council process, especially with the pending merger of it and other participative governance councils within a school, is an important part of the shared governance model in use.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Department of Research and Evaluation should provide each school with the current research about the direct and indirect correlation among shared governance, teacher leadership, and improved student performance. December 1999

- | | |
|---|-------------|
| 2. The Department of Research and Evaluation, working with the Department of School Improvement and Accountability and the Human Resource Development Department, should develop an assessment tool which can be piloted at the close of the 1999-2000 school year. | March 2000 |
| 3. The results of the pilot information should be shared with all principals and area directors. | August 2000 |
| 4. The Department of School Accountability and the Department of Human Resource Development should create a matrix of workshop offerings and supportive coaching for principals, teachers, SACs and SAFs, which reflects the shared governance models chosen based on information from the assessment. Development of the content of these workshops and of the coaching necessary should be ongoing. | August 2001 |

FINDING

There is a well-defined accountability model contained in School Board Policy 1403. The model provides for the identification of schools into three categories, and prescribes specific incentives and supports for schools in each category. At the present time, Broward County educators have succeeded in getting all schools off of the state's list of "critically low" schools. There is a great deal of pride throughout the system, expressed in interviews with district-level administrators, school principals, and classroom teachers. Most credit the improvement to the systemic approach and support system put into place throughout the district to ensure that significant improvement took place in the least amount of time. Cross functional teams conduct an in-depth review of a school's curriculum, instruction, data, and other program aspects in schools with newly assigned principals. They meet with the principal and with other groups as the principal decides to give feedback about the visit and prepare a written report.

Exhibit 4-43 identifies the number of objectives in this year's plans.

In addition to these specific objectives in the School Improvement Plans, each school also submits:

- a list of its business and community partners;
- its strategic plan for technology; and
- its written plan for student behavior and discipline.

There is a high degree of alignment between the required components of the school improvement process and the Board's priority areas of improving student achievement; improving student and staff safety and security; expanding partnerships; and using technology to improve student achievement, teaching, and staff productivity.

**EXHIBIT 4-43
OBJECTIVES CONTAINED IN BROWARD COUNTY SCHOOL DISTRICT
SCHOOL IMPROVEMENT PLANS
1998-99**

SUBJECT/TOPIC OF OBJECTIVE	NUMBER OF OBJECTIVES
Mathematics	206
Writing	250
Science	6
Social Studies	5
School-to-Work	48
Algebra for All	20
Critical Thinking Skills	11

Source: "1998-99 School Improvement Plan," Office of School Improvement and Accountability, 1998.

Memos, reports, the current website input from the community, and interviews of district and school employees also showed an ongoing and focused awareness of the need to empower parents and community through participation. This is another component of the school improvement process which shows alignment to a strategic area of the Board. This deliberate alignment has evolved during the years of trying to develop procedures to carry out the state's accountability legislation. This evolution was further confirmed by the information contained in the survey conducted by MGT. To the item, "The emphasis on learning in Broward County School District has increased in recent years," 88 percent of the district administrators, 96 percent of the school administrators, and 70 percent of the responding teachers, *agree* or *strongly agree* with the statement. It is clear that the school improvement process is part of the systematic approach to school reform in place in the Broward County School District.

Another practice related to the school improvement is well aligned to other initiatives and procedures in the Broward County School District. After plans are submitted in near final draft form to the area superintendents in May, they are reviewed by trained review panelists from across the district. Each area superintendent submits a list of panel reviewers who will review plans in his/her area. The lists of reviewers include parents, administrators, and teachers. The plan reviews are conducted during several days in May. Written comments are returned to the schools before the plans are finally revised. This provides an opportunity for schools to receive feedback on the specificity, clarity, and practicability of their goals, from an objective point of view.

A growing initiative in the school improvement process is in the area of electronic database availability. A 1995 grant of \$2 million has allowed the school district to create a Student Achievement Data Warehouse. In notes provided for this performance review, the goal of the grant is "to move data out of the operational systems on the mainframe and AS/400 computers in the district to a computing environment where the data would be accessible to district and school administrators and teachers." Using technology to improve student achievement, teaching, and staff productivity is a priority area of the School Board.

Exhibit 4-44 provides specific information which shows the alignment between the Board's major system priorities, the accountability policy, and the technology grant.

**EXHIBIT 4-44
DESCRIPTION OF THE ACCOUNTABILITY IMPLEMENTATION PROJECT**

This past year the Accountability Implementation Project was begun to combine the goals of the data warehouse with those of the Accountability Policy. The focus of the project is to provide all schools with access to the kinds of student performance information they need in order to support instructional design decisions and school improvement planning at each school. This data is available through desktop computers utilizing query-type software. Education Technology Services (ETS) developed many standardized queries and analysis reports to provide consistent information to each school across the district. ETS has also coordinated the effort to provide training to data warehouse users and provided the technical support to the project....

There are 44 schools and 26 district offices using the system on a regular basis to create their own reports or they may choose from the over 100 pre-defined queries that are available to all users. Training classes are scheduled weekly, with a goal of trying to get a representative from all schools trained before the end of the 1998-99 school year....

An Accountability Implementation website has been created on the district's Intranet to provide updated information on training classes, data elements in the warehouse, new queries, and software installation. There is also a feedback form and a discussion group available.

The existing network usage, and hardware usage is analyzed and monitored on a weekly basis....

Source: Interview notes from Broward County School District, ETS Department, for this performance review, November 1998.

The evolution of the electronic access to data is a significant tool for principals, school advisory councils and teachers to use in their decision making. It is also a readily available source of information for the Department of Research and Evaluation. At the present time, linked data exist in the warehouse from 1991 to 1998. While it is clear that there is still a long way to go to develop the Brio-query system itself and help each principal to build capacity within his/her school, the grant and the work done have provided a solid base for the school improvement process to build upon.

There is additional work which can be done to align the school improvement process with the Innovation Zone initiatives. Innovation Zones do not necessarily coordinate the contents of their School Improvement Plans. The Fort Lauderdale Zone does do this, and through the use of the cadres in math, reading and writing, the plans are not only similar in goals between and across schools and levels, but much training and teacher development also happens cross-school as well. The results of this effort have been significant increases in the writing scores for the zone schools over the past five years. The zone coaches, at present, have no specific role in school improvement. The Critical Content roll-out teams of cross-functional district administrators, coordinators, supervisors, and the district liaisons who attend Innovation Zone meetings are in fact coordinated. At least one of the district liaisons assigned to the Zone appears on the Critical Content roll-out team list for a school in that Zone. Clearly there is a high premium on the Zone as a focus of organization for work. Nonetheless, more can be done to align the Zone initiative with the school improvement process.

The Office of School Improvement and Accountability is staffed by four resource teachers who report directly to the Director by the same title. Two of these positions are funded by the Broward County School District tax-supported budget. Two of these positions are grant funded. The newly appointed Director still resided in the office of her former position, located several floors away from the four resource teachers whose work she directs. Three of the four resource teachers share work space located in an office cubby made of partitions. The space measures 10 1/2 feet by 11 feet. It is uncomfortably crowded with resource materials and work surfaces; a space clearly designed to hold one person. This lack of adequate and articulated department space is not well aligned to the significant place school improvement holds in the process of school reform.

At the present time, there is no coordinator for School Improvement. When the resource teachers are in the field, they do not carry with them the authority which comes with a coordinator's position. This is an area to look at for alignment, because of the high numbers of administrators involved with the school improvement process. Sometimes the authority of a position can be helpful in promoting otherwise unwelcome change.

COMMENDATIONS

The Superintendent, the Deputy Superintendent, and other district administrators are commended for their use of cross functional assessment teams to assist schools with newly assigned principals in their work of improving student achievement.

The idea is innovative and principals reported that it provides support for them and has increased accountability throughout the system.

The Department of School Improvement and Accountability is commended for its work in bringing recommended policy changes to the Superintendent, and in its work to align the school improvement process with program initiatives in the Broward County School District.

RECOMMENDATIONS

Recommendation 4-25:

Establish a permanent districtwide advisory council.

An agenda should be set for the council to identify and strengthen the linkage between the school improvement process and all other district instructional and program initiatives. The council should enlist the active support of the Research and Evaluation Department in designing a research and evaluation plan for the entire school improvement process, including the development of the shared governance model and implementation by schools.

The council should systematically explore the alignment of the school improvement process with other district's systemic initiatives in the Broward County School District. The council should take up the structure of the Office's positions to see if a coordinator position should be created and use the evaluation data to support the continued evolution of the school improvement process.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Programs should appoint a standing, cross-functional advisory committee for school improvement. July 1999

2. The advisory council for school improvement should begin its work. September 1999

Recommendation 4-26:

Convert the four existing positions of teacher on task assignment in the Office of School Improvement to four coordinator positions (See Section 5.1 for a description of the realignment of the Office of School Improvement).

As it has evolved, the importance of the school improvement process within each school has become pivotal in the district's reform efforts. The professionals in the positions assigned to ensure that each school's effort are aligned with the district's efforts, the school improvement plans coordinate within Innovation zones, and that plans lead to increases in school improvement, need to have authority with both principals and the improvement teams with who they work. The positions need to be 12-month positions, so that the proper documents preparation, research, and data keeping can be accomplished in the summer months, allowing the coordinators adequate time to work directly with the schools during the school year.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Accountability and School Improvement should prepare a budget recommendation to be taken into consideration during the preparation of the 1999-2000 budget. May 1999

2. The budget should be adjusted to include the four coordinator positions. July 1999

FISCAL IMPACT

Teachers on task assignment who work as resource teachers in the district office are paid on the salary schedule. The average salary for a classroom teacher is \$38,955. Using a benefits ratio of 33 percent, the average cost for each of the four teachers on task assignment in the Office of School Improvement, is \$51,810. Four teachers on task assignment cost, on average, \$207,240.

An average cost for a coordinator position is \$52,190. Using a benefit ratio of 33 percent, the average cost for one coordinator is \$69,413. Four coordinator costs, on average, \$277,650.

The increased cost per year to convert the positions of teachers on task assignment TSAs to coordinators is, on average, \$70,400. This is in addition to the TSAs which were recommended for deletion in Section 4.3.

Recommendation	1999-2000	2000-01	2001-02	2003-03	2003-04
Convert Four Existing Teachers to Coordinators	(\$70,400)	(\$70,400)	(\$70,400)	(\$70,400)	(\$70,400)

Recommendation 4-27:

Create an adequate physical space for the Office of School Improvement, which houses the Director of that department, as well as the four positions assigned to the office.

As the school improvement staff work together and separately to support the school improvement efforts of over 200 schools, they need adequate individual workspace for research documents, books, and materials, as well as storage space for workshop presentation materials.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Deputy Superintendent should work with the Director of School Improvement and the Director of Facilities identify contiguous office and work spaces for the five members of the Department of School Improvement. | June 1999 |
| 2. The Director of Facilities should ensure that new offices are prepared to meet the work needs of this department. | July 1999 |
| 3. The Director of Facilities should assure that the department has adequate assistance for their move and a resettlement. | August 1999 |

FISCAL IMPACT

Space vacated by employees whose positions are eliminated should be used to house this office.

4.4.3 School Administration

CURRENT SITUATION

The enrollment in the Broward County School District schools as of October 31, 1998, was 229,173 students in grades K-12. In addition to the traditional K-12 population, the district also serves approximately 250,000 non-traditional students. Exhibit 4-45 shows the distribution of types of schools.

**EXHIBIT 4-45
DISTRIBUTION OF BROWARD COUNTY SCHOOLS
AS OF OCTOBER 31, 1998**

Elementary Schools	132
Middle Schools	33
High Schools	23
Exceptional Centers	7
Vocational-Technical Centers	3
Alternative/Adult High	3
Adult and Community	21

Source: 1998-99 Budget Document.

The budget allocation sheets for all schools shows that most schools have a principal and all schools (except for one) have assistant principals. The Broward County School District uses a per capita allotment of money given to schools based on the numbers of students enrolled. Schools are required to use the SACS standards for staffing. Beyond that, the school district does not have a specified allocation formula for administrative positions.

The Broward County School District is divided into four areas for administrative purposes. Three of the areas are geographic and divide the school district and its schools into the North Area, the Central Area, and the South Area. The fourth area oversees special centers and the vocational - technical schools. Seven Area Directors work for the four area superintendents. They are the direct link between central management and school administrators.

Policy 4002.13 guides the "Selection and Appointment of District-level Administrative and Supervisory Personnel." The policy was written in 1984 and last revised in 1990. Policy 4002.14 guides the "Selection Appointment and Professional Development of School-based Managerial Personnel. This policy was written in 1995 and amended in 1997. Revisions were made to comply with specific recommendations made by a state level on-site review of the Broward County School District's Human Resources Management and Development (HRMD) System in 1997.

Principals report to and are evaluated by Area Directors. This evaluation system was called the Performance Management System Evaluation. Exhibit 4-46 shows the areas in which the principals were evaluated prior to the 1997-98 school year.

A rating scale on the form identifies four possible levels of performance. These are:

- performing at a professional level
- needs improvement in professional performance
- unsatisfactory level of performance
- exceptional performance

Two additional notes show that if a principal needs improvement or receives an overall unsatisfactory rating, or if a principal receives an exceptional rating, additional documentation to the evaluation form is required.

**EXHIBIT 4-46
PERFORMANCE MANAGEMENT SYSTEM EVALUATION
USED PRIOR TO 1997-98**

1. Planning and Organizing
2. Delegation
3. Adaptability
4. Initiative and Productivity
5. Communication
6. Analysis
7. Decision making/Judgment
8. Sensitivity and Interpersonal Skills
9. Individual and Group Leadership
10. Technical and Professional Knowledge
11. Development of Personnel
12. Commitment to Mission
13. Objectives Review

Source: Form # 4050B, revised 12/88 and 9/91, Associate Superintendent for Personnel, 1998.

In 1997-98, a revised system was created to evaluate principals, assistant principals, and administrators classified as administrative, supervisory, professional and technical. The same rating scale is included in the revised system. Exhibit 4-47 shows the statement of purpose from the revised system. The revised system document also includes a list of the performance appraisal competencies. These are listed in Exhibit 4-48.

**EXHIBIT 4-47
PURPOSE OF THE ADMINISTRATOR PERFORMANCE
PLANNING AND APPRAISAL SYSTEM (APPAS)**

The Administrator Performance Planning and Appraisal System (APPAS) as its major purpose the alignment of performance consistent with major system priorities and accountability. It was designed to:

- Link job duties and responsibilities; school or departmental improvement plans; and leadership competencies.
- Stimulate improved job performance by clarifying position specific performance expectations.
- Develop administrator competencies through emphasis on feedback, coaching, and professional development activities.
- Guide performance consistent with the district's major system priorities.
- Hold individual administrators accountable for the performance of schools, departments, or work groups under their supervision, as well as the impact of these on student performance.

Source: Administrator Performance Planning and Appraisal System, Procedures and Forms, 7/15/97.

**EXHIBIT 4-48
PERFORMANCE APPRAISAL COMPETENCIES
1997-98 TO PRESENT**

1. Commitment to Mission
2. Adaptability
3. Communication
4. Decision-Making and Judgment
5. Sensitivity and Interpersonal Skills
6. Planning and Organizing
7. Initiative and Productivity
8. Analysis
9. Individual and Group Leadership
10. Instructional Effectiveness
11. Technical and Professional Knowledge
12. Delegation
13. Development of Personnel

Source: Administrator Performance Planning and Appraisal System, July 1997.

The Principal Handbook for 1998-99 contains an outlined list of tasks and responsibilities for principals in 1998-99. This list of specific tasks and written plans was foreshadowed in May, in a description given to the press by the Superintendent. The May 12, 1998 article was about 'rescuing schools from despair,' and carried the title, "Role of Principal Highlighted in the Upgrading of Schools." In the article, the Superintendent was paraphrased and quoted. Exhibit 4-49 is taken from the article.

The area directors are required to visit each school within their assigned areas, and to ensure that each principal has completed the items on the list included in the handbook. This list is referred to as the "Site-Visit List." There is an additional list of items to be completed found in the "Opening of Schools Checklist," in the Principal Handbook and entitled, "All Schools Are Expected To Have the Following." Principals have a formal job description, revised as of 6/17/97. They also have a list of performance responsibilities in the Principal Handbook.

**EXHIBIT 4-49
NEWS ARTICLE ABOUT PRINCIPAL RESPONSIBILITIES**

Role of the principal:

In interview after interview with Dr. Petruzielo on the conditions of older, eastern schools in the county, he wasn't shy about putting responsibility for a school's condition--good or bad--on the principal.

"By and large, I would say our schools are in good shape," Petruzielo said. "When there is a problem, I think you have to look at the management of the school...."

Petruzielo, who interviews all principals before they are assigned, says he has a plan to make them more accountable for the condition of their schools. On future evaluations, principals will be graded on the cleanliness and upkeep of the campus.

Source *Miami Herald*, May 12, 1998.

A statement written on page 10 of the Principals Handbook, under the heading, 'Area Director Job Responsibilities-School Site Visits,' repeats the sense of the Superintendent's press interview. It says, in part:

The attached summary of area director job responsibilities associated with daily supervision of and site visitations with principals whom they directly supervise has been developed to insure accountability for high levels of principal performance at every school. Minimally, I expect area directors' routine and unannounced site visits to address and document these factors and criteria.

The Director of Leadership Development, who reports to the Director of Human Resource Development (HRMD), oversees the leadership development component of the HRMD. Plan. There are four main components to the Leadership Development Program for aspiring and new administrators:

- the LEAD Program;
- the Interim Assistant Principal Program;
- the Intern Principal program; and
- the program for Interim Principals.

These are described in summary form in a Florida Department of Education on-site review report, from late 1997, and are shown in Exhibit 4-50. The report identifies as the fifth key component of the Leadership Development Plan the component of "Leadership Development Activities for Experienced School Leaders," but does not describe any of these in the report.

**EXHIBIT 4-50
CONTINUUM OF LEADERSHIP DEVELOPMENT COMPONENTS
IN THE CURRENT HRMD PLAN FOR THE
BROWARD COUNTY SCHOOL DISTRICT**

1. LEAD Program	The LEAD program represents a beginning of the leadership continuum for aspiring leaders. LEAD processes include a six-part portfolio workshop series, the development of a leadership portfolio, the creation and implementation of a leadership development plan, attendance in specific workshops/group meetings and demonstration of progress toward mastery of specified employability skills.
2. Interim Assistant Principal	The Interim Assistant Principal program provides a comprehensive set of experiences to enhance the successful application of skills related to job responsibilities. This program of support provides relevant learning experiences typical to the role of assistant principal, support and guidance, development of a learning community of all stakeholders and resulting in the development of a portfolio linked to identified criteria for success in the job.
3. Intern Principal	The Intern Principal program is designed to build on the experiences of assistant principals to further develop their knowledge, skills and competencies and thereby prepare them for the role of school principal. This program is designed to result in certification as a school principal. Its key elements include diagnostic opportunities specific school oriented simulations, support of a professional development team, participant networking, leadership counseling sessions, on-the-job experiences, intensive summer training experiences and creation of a leadership portfolio.
4. Interim Principals	The program for Interim Principals is specifically designed to provide experiences for principals who have moved from one level to another, principals new to the state or district and intern principals or others who have not received School Principal certification prior to their appointment to the principalship. Activities include participation in specific training events, networking, skill level identification and development with the assistance of district level staff, and completion of a leadership portfolio.

Source: Florida Department of Education On-site Review Team Report on the HRMD Plan, August 1997, page 10.

FINDING

Under the Superintendent in place at the time of the performance review, the principalship emerged as a key position within the Broward County School District. As the Superintendent helped to design and create a systems approach to school reform, he began a number of significant initiatives which have begun to shift the energy, attention, and productivity away from centralized systems, and towards individual schools and their innovation zones.

Exhibit 4-51 shows the lists of performance responsibilities found in two documents currently in use to guide principals in their work. An attempt has been made to cross-reference the lists so that similarities and differences can be highlighted. The lists are comparable; however, the omission of the first three items in the revised job description from the list given to principals in their handbook, is a major omission. These are

**EXHIBIT 4-51
PERFORMANCE RESPONSIBILITIES FOR PRINCIPALS
1998-99**

PERFORMANCE RESPONSIBILITIES IN THE PRINCIPAL JOB DESCRIPTION	ITEM	ITEM	PRINCIPAL PERFORMANCE RESPONSIBILITIES IN THE PRINCIPAL HANDBOOK
Address the needs of diverse student groups to improve student achievement.	1		No reference in this document
Establish, monitor and evaluate programs to improve student performance.	2		No reference in this document
Evaluate teacher's performance as it relates to student achievement gains.	3		No reference in this document
Review budget with staff and advisory council before May 1 of each year. Have total responsibility for the school budget including final approval of expenditures within Board approved guidelines.	4	1 7	Review the budget with the staff and the advisory committee before May 2 of each year. Have total control of the school budget including final approval of expenditures within Board approved guidelines.
Delegate authority and responsibility of administrative assistants, department heads, grade chairpersons, etc., to implement procedures for evaluation of program and personnel.	5	2	Delegate authority and responsibility of administrative assistants, department heads, grade chairpersons, etc., to implement procedures for evaluation of program and personnel.
Recommend the administrative staff in compliance with Board approved job descriptions.	6	3	Same
Recommend personnel transfers.	7	4	Same
Help place unassigned personnel.	8	5	Same
Be required to recommend dismissal or suspension of staff members due to incompetence or misconduct, and to send a copy of the supporting documentation to the Area Superintendent and the Board.	9	6	Same
Initiate student enrollment projection.	10	8	Same
Make pupil reassignments.	11	10	Same
Meet the requirements of School Board policies and Southern Association Accrediting Agency where applicable.	12	11	Same
Meet audit requirements in the use of all funds.	13	12	Same
Make decisions, render judgments, take actions to commit oneself.	14		No reference in this document
Originate actions to achieve district and school goals.	15		No reference in this document
Align the school's vision and mission with the Board's mission statement and Major System Priorities.	16		No reference in this document
Discover, understand, verbalize accurately and respond emphatically to the perspectives, thoughts, ideas and feelings of others.	17		No reference in this document
Gather and analyze data from multiple sources before arriving at an understanding of an event or problem.	18		No reference in this document
Make decisions which are based on logical assumptions and which reflect factual information.	19		No reference in this document

**EXHIBIT 4-51 (Continued)
PERFORMANCE RESPONSIBILITIES FOR PRINCIPALS
1998-99**

PERFORMANCE RESPONSIBILITIES IN THE PRINCIPAL JOB DESCRIPTION	ITEM	ITEM	PRINCIPAL PERFORMANCE RESPONSIBILITIES IN THE PRINCIPAL HANDBOOK
Utilize appropriate Interpersonal styles and methods in guiding groups toward task accomplishment and to gain agreement or acceptance from staff, parents, administration and the Board in making decisions that are in the best interest of students.	20		No reference in this document
Create and maintain a safe, orderly school for student, staff and visitors.	21		No reference in this document
Maintain effectiveness in varying environments, tasks and responsibilities	22		No reference in this document
Set high goals and standards of performance for self and staff.	23		No reference in this document
Create and maintain procedures to monitor processes, tasks or activities.	24		No reference in this document
Use effective communication skills.	25		No reference in this document
Perceive the impact of a decision on other components of the organization.	26		No reference in this document
Perform and promote all activities in compliance with equal employment and nondiscrimination policies of the School Board of Broward County.	27	13	Same
Participate, successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignment. Develop skills and competencies of staff through training and development activities.	28	14	Participate successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignments.
Review current developments, literature and technical sources of information related to job responsibility.	29	15	Same
Ensure adherence to good safety procedures.	30	16	Same
Perform other duties as assigned by the Area Superintendent.	31	17	Same
Follow federal and state laws, as well as School Board policies.	32	18	Same
No reference in this document		9	Initiate minor capital repairs up to \$1,000.
No reference in this document		19	Ensure the safety and security of employees and students at all community school off-campus sites.

Source: Job Description, Principal B-2, Principal Handbook 1998-99, page 12. Revised 6/17/97.

specific responsibilities that align closely with the district's major system priorities. Both lists carry the label of performance responsibilities. There is nothing on the list in the Handbook to indicate that it is more or less official than the job description and there is nothing in the Handbook to indicate whether the additional items --- whether tasks, skills, attitudes or behaviors --- in the job description are also mandates.

In addition to the lists of performance responsibilities, principals have task lists as well. Exhibit 4-52 shows some of the tasks for which principals are responsible during the 1998-99 school year.

On the proposed rating scale for the newly created document, "What It Means To Be A Standards-Driven System," one of the 12 columns of "Roles and Responsibilities" belongs to the Broward County principals. Exhibit 4-53 lists the roles and responsibilities the principals are expected to play in the current initiative.

This list, which represents some of the most current, research-based thinking on the principals' leadership role in curriculum, assessment and instruction, is not one which is specifically outlined on either the job description or the collection of responsibilities in the Principal Handbook.

A close reading of the items on each list indicates that the lists are purposeful, well-intended. Their relationship to the Board's priorities and the Superintendent's systems approach and high accountability model is fairly obvious. And, principals can do a better job when they know exactly what is expected of them as baseline minimums. When some principals know exactly what the givens in their jobs are, they can then feel freer to use the power of strong vision, individual creativity, and artfulness in their principalships, knowing that they are in compliance with the greater systems' ideas and requirements. And, it is clearly understood that, in these times, the job of the school principal is complex and enormous.

This view of the list notwithstanding, there are 73 items listed in the Handbook. There is some overlap, but not exact overlap with any given item. It is not clear what the relationship between the APPAS evaluation system for an individual principal is, and the items on any of the three lists. It is not clear if the job description performance responsibilities are additions to, in some cases, or subsets of, the lists of specific tasks. In some cases there is not a lot of difference in the use of the words "tasks" and "responsibilities." In some cases the responsibilities are qualities and skills, not performances at all. It is not clear whether the items on the opening of school checklist are less required than the items on the site visit list. It is not clear what relationship the two evaluation requirements have to other parts of the work principals are expected to do in supervising the evaluation program. Finally, it is also not clear why they are on the site-visit list.

Principals interviewed held very different and almost opposing views of the impact of these administrative directives on their site-based management authority. Some principals indicated that the list helped to set the framework for their individual school-based decisions and ways of working that is an understanding which is useful in systems thinking. However, others indicated just as strongly, that the lists have eroded their decision making, taking away their autonomy, and worked against the culture of school-based decision making in the district.

**EXHIBIT 4-52
TASKS ASSIGNED TO THE BROWARD PRINCIPALS
IN THE
PRINCIPAL HANDBOOK**

1. Area Director Site Visitation Checklist (pp. 10A - 10D)

A list of 60 items, expressed for the most part as written plans. The major division of the list is into four categories Student achievement, overall administration and supervision of the school, Supervision of the Facility, and Safety/Security items.

2. An Opening of School Checklist, with a section entitled,

All Schools Are Expected To Have The Following:
(page 38)

1. Schoolwide Discipline Plan
2. Standardized Recognition Plan
3. Honor Roll
4. Student of the Month
5. Student work displayed
6. Beautification program
7. System for Monitoring Curriculum
8. Standardized Grading System
9. Homework Guidelines
10. Test Improvement Plan
11. Reading Procedures According to County Guidelines
12. Team Planning
13. Child Study Team
14. Schoolwide Field Trip Procedures

3. Two additional requirements appear on page 10 of the Handbook, written in prose form. These are:

In addition to what is required under the BTU contract, principals are expected to make personal visitations to every teacher's classroom in their schools. If subsequent observations are warranted as a result of these visits, these will be done and there will be follow-up, including appropriate support, professional development and/or intervention. Additionally, principals are expected to review all observations completed by the assistant principal(s) and to initiate a principal observation for those teachers whose performance has been determined to need further review.

Source: Principals Handbook, 1998-99.

**EXHIBIT 4-53
ROLES AND RESPONSIBILITIES OF PRINCIPALS AS CONTAINED
"IN WHAT IT MEANS TO BE A STANDARDS-DRIVEN SYSTEM"**

- Know content standards and core curriculum competencies at appropriate levels.
- Know appropriate strategies.
- Diagnose student/teacher needs based on data.
- Analyze student data to determine mastery of student outcomes.
- Allocate resources to support standards implementation.
- Create an effective school culture focused on implementation of standards.
- Develop an adult learning plan which organizes time, opportunity and resources to provide job-embedded professional development.
- Provide ongoing teacher feedback linked to assessment based on quality implementation of standards.
- Form partnerships to enhance student mastery of standards.
- provide daily leadership, support and oversight/monitoring.
- Ensure that instructional management plan and SIP move students toward mastery.

Source: Draft document, "What It Means To Be a Standards-Driven System, November 1998.

The collection of lists which apply to expected and acceptable performance for Broward County principals do not lend themselves to a greater nurturance of systems thinking. They are long, detailed, and unorganized. They need to be laid side by side, and organized into a coherent, cohesive document to guide principals' work. As they stand, the items on the two performance responsibility documents, and the items in the handbook, create a tangle of responsibilities rather than a clear set of directives.

RECOMMENDATION

Recommendation 4-28:

Align the performance tasks and responsibilities in the job description for principal, the Principal Handbook, the site visit list, and any other lists of expectations in one, consistent and efficiently written document.

While the Principal Handbook provides very useful management tools for principals, it needs to be restructured as stated in the finding. Performance tasks and responsibilities should be clearly linked to the new performance appraisal system for principals.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for School Operations should organize and convene a cross-functional task force composed of principals, area administrators, and district administrators from both program and operations departments, for the purpose of creating a Principal May 1999

- Performance Responsibilities document.
2. The Deputy should oversee the development of the document until completion. July 1999
 3. The document should replace the existing documents in the personnel department the Principal Handbook, and any other separate lists of responsibilities. July 1999

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

One way in which principals receive information, directives, and updates, is through memos which come to the schools from the district office. At the present time, all memos are routed through the Superintendent's Office or the Deputy Superintendent for School Operations. The purpose of this practice is to coordinate memos and their information, so that principals receive information consistent with upper management's expectations. Additionally, the Deputy Superintendent explained, that she checks for the writing quality of the memos, to ensure that everything that is in circulation, reflects the high writing standards administrators hold for themselves in the Broward County School District. The Deputy Superintendent explained that she was aware of concern over delays in memos being disseminated, but felt that the extra time taken was a worthwhile effort.

When asked what kinds of changes would improve school administration, a common answer from administrators at the school, area, and district levels was to speed up the length of time it takes a memo to move through the district office, and out into the schools. The main complaints were that, from a district level, issues which needed to be attended to right away by school staff, were often held up unpredictably, by the busy work schedule of the Deputy assigned to read and screen the memos. From area level employees, the main concern was the number of difficult timelines created by the communications delay, which put undue stress on the system, the principals, and their staffs. At the school level, the common concern was that office employees had all bought stamps, so that for accountability purposes, when memos arrived a day before something within the memo was actually due, they could show that the lateness of the project was due to communications delays, and not to a lack of conscientious effort on the part of the school's support staff or professionals.

Exhibit 4-54 shows a sample of memos sent from the district office to the schools, with their original dates and their arrival dates in the schools.

**EXHIBIT 4-54
SAMPLE MEMOS SENT FROM DISTRICT OFFICE TO SCHOOLS**

TITLE OF MEMO SENT FROM DISTRICT ADMINISTRATION	ORIGINAL DATE ON MEMO	DATE MARKED RECEIVED AT SCHOOL
Instructional Personnel Assessment system (IPAS) Teachers With Documentation Year of 1998-99	October 23, 1998	November 20, 1998
Procedure for Requesting School Board Attorney Opinion	November 6, 1998	November 18, 1998
Data Collection for Hearing Screening	October 23, 1998	October 28, 1998
Student Activities Calendar	September 14, 1998	September 17, 1998
Critical Content - Staff Development for Principals	September 17, 1998	September 22, 1998
Minigrant Applications	October 5, 1998	October 7, 1998
Drug Education Resource Teachers	August 24, 1998	September 2, 1998
African and African American History Mandate Staff Development Session	November 9, 1998	November 9, 1998

Source: Memos collected at random upon request from school employees, 1998.

There was no consistent pattern of timeliness in the memos collected and some were very prompt. District employees suggested that the best way to have a memo appear timely, was to post-date the memo and the due date for whatever is contained in the memo by at least two weeks. In that way, it could be sure to arrive on time in the schools. In any event, the commonness of the complaint indicates that some efficiency is to be gained by re-examining the current practice in this area.

RECOMMENDATION

Recommendation 4-29:

Ensure that memos are dispatched to district offices, area offices, and schools in a more timely and predictable manner.

Sending timely information and action bulletins to the principals is one way to strengthen the support principals have from the district offices. In revising the memo system, it is important to consider a weekly 'bundling' system for memos. The bundling system could call for a specific set of fixed, weekly deadlines, in which all memos submitted by Friday of the previous week, must be dispatched through the centralized district location by Tuesday of the following week. An increased use of electronic memos should be a part of the new communication system.

IMPLEMENTATION STRATEGIES AND TIMELINES

1. The Superintendent's Cabinet should re-design the centralized memo system, including consideration of a weekly bundling system for memos, with fixed deadlines, and an increase in the use of electronic memos. May 1999

2. The new system should be put into place. August 1999

FISCAL IMPACT

This recommendation can be implemented within existing resources.

FINDING

In an inquiry about the ratio of student enrollment to assistant principals in the schools, the Associate Superintendent for Financial Management and Support Services, explained that, in general, two factors guide the allocation of staff in the schools. Schools receive their allotment of financial resources based on their student enrollment. Generally, principals, in concert with their School Advisory Councils (formerly their School Improvement Teams) follow the guidelines established by the Southern Accreditation of Colleges and Schools. In the specific case of assistant principals, he explained, the district's expected ratio is 500 students for each assistant principal.

A reading of the Southern Accreditation of Colleges and Schools' "Minimum Personnel Requirements" in the area of Administrative or Supervisory Assistants, indicates that their recommended ratio is that between 650 and 1000 students warrants one full-time assistant. Fewer than 650 students warrants a half of one position. More than 1000, increases incrementally by a .5 FTE position for each additional 250 students.

Exhibit 4-55 shows the current Broward County elementary, middle, and high schools which exceed the common standard used in the school district of 500:1. It should be noted that some schools, especially at the elementary level, have fewer administrators than their numbers warrant, using the district's guideline.

**EXHIBIT 4-55
SCHOOLS WITH MORE ASSISTANT PRINCIPALS THAN A 500:1 RATIO**

SCHOOL	STUDENT ENROLLMENT	CURRENT NUMBER OF ASSISTANT PRINCIPALS	NUMBER OF ASSISTANT PRINCIPALS IF 500:1 RATIO	DIFFERENCE
Cooper City High School*	2199	5	4	1.0
Ely High School*	2405	6.7	5	1.7
Fort Lauderdale High School	1839	5	4	1.0
Hallandale High School*	1561	4	3	1.0
McFatter Magnet Technical School*	139	2.2	1	1.2
Miramar High School*	2023	5	4	1.0
Attucks Middle School*	1193	3	2	1.0
Lauderdale Lakes Middle School*	1216	3	2	1.0
Plantation Middle School*	1139	3	2	1.0
Pompano Beach Middle School*	1192	3	2	1.0
TOTAL				10.9

Source: Student Enrollment October 31, 1998, and the 1998-99 budget allocation for each school.

*Subsequent to the release of MGT's draft report, the schools shown with asterisks provided justification statements for the need for additional assistant principal positions. As shown, two schools did not respond. The rationale for these positions provided by the respondents varied significantly and included variables such as size of student body, type of student body, size of campuses, safety issues, and student performance. These statements were written in response to MGT's draft report and not based on guidelines established by the district.

RECOMMENDATION

Recommendation 4-30:

Develop a guideline for the establishment of assistant principal positions and eliminate selected assistant principal positions at the middle and high school levels which do not support justification under the guidelines.

As shown in Exhibit 4-55, there are approximately 11 assistant principal positions which are in excess of both the SAC accreditation ratios and the common standard set by the district. The district has not established nor implemented guidelines for the creation of additional assistant principal positions.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|--------------|
| 1. The Superintendent and senior staff should establish a guideline for the creation of additional assistant principal positions. | Summer 1999 |
| 2. The Area Directors should review the 1999-2000 staffing plans with each of the affected principals. | Fall 1999 |
| 3. The Area Directors should recommend the elimination of the positions for the 2000-01 school year which can not justify the positions according to the specified guidelines. | January 2000 |

FISCAL IMPACT

The average salary (\$57,138) and benefits (calculated at 33%) for assistant principals at the middle school level, for four assistant principals, shown in Exhibit 4-57 to be in excess of the 500: 1 ratio, shows an annual savings of \$303,976.

The average salary (\$64,299) and benefits (calculated at 33%) for assistant principals at the high school level, for 6.9 assistant principals, shown in Exhibit 4-57 to be in excess of the 500:1 ratio, shows an annual savings of about \$670,000.

Recommendation	1999-2000	2000-01	2001-02	2003-03	2003-04
Eliminate Four Assistant Principal Positions	\$0	\$304,000	\$304,000	\$304,000	\$304,000
Eliminate 6.9 High School Assistant Principal Positions	\$0	\$585,000	\$585,000	\$585,000	\$585,000
TOTAL	\$0	\$889,000	\$889,000	\$889,000	\$889,000

FINDING

In 1997, the Florida Department of Education reviewed the Human Resources Management and Development (HRMD) Plan in the areas of :

- the organizational climate and support for leadership --- the district's objective-based screening, selection and appointment process for principals and assistant principals;
- the district's programs and processes to support leadership development;
- the district's program for leadership development; and
- the district's performance appraisal system.

Overall, in each area, the state-level review team found the district to be in compliance with its own policies and with the guidelines approved by the Council on Educational Management. Exhibit 4-56 shows two of the conclusions drawn by the review team. The comments refer to the overall organizational climate and support for leadership, and specifically about the Superintendent's role in appointing principals.

**EXHIBIT 4-56
REVIEWERS COMMENTS ABOUT SCHOOL LEADERSHIP SUPPORT AND
APPOINTMENTS**

The interviews and the survey confirmed the district's commitment to quality and diversity in its leaders, the focus on students, mission alignment with a focus on curriculum, and the development of a learning community. The areas in which the Superintendent and School Board may consider strengthening include building a sense of community through encouraging communication, collaboration and collegiality to increase the levels of trust and trustworthiness within the educational community and the public...(page 4).

In accordance with state law, the Superintendent recommends and the School Board approves all personnel. The School Board was provided an orientation of the selection process for administrators on May 6, 1997. The majority of school board members interviewed indicated that they trusted the judgment of the Superintendent in bringing personnel recommendations for appointment Assistant Principals and principals. The Superintendent shared that he had recommended, and the School Board approved, 80 people to fill school principal positions in the last three years. He reflected pride in each appointment and with efforts to select principals that reflect the diverse population in the district.(page 9).

Source: On-site Review of Human Resource Development and Management Report by Florida Department of Education, Fall, 1997.

The comment written by the team about strengthening collaboration and collegiality were echoed by administrators during MGT's performance review. Comments were made which included: "I want to help you out, but I just can't," and "I can't really talk to you if I

want to keep my job." A principal wondered out loud during an interview if his selection to be interviewed for the performance review had a deeper meaning--if it meant something positive or something negative for him in the future. Some administrators said that, "the fear level is high right now, and the trust level is low."

When asked for examples, the two they cited most frequently were:

- the new levels of accountability they were being held to; and
- the high number of transfers of principals in recent years.

Exhibit 4-57 shows information about principal turnover in the Broward County School District.

**EXHIBIT 4-57
TURNOVER OF PRINCIPALS
1995-96, 1996-97, and 1997-98**

REASON	NUMBER
Retirement	32
Dismissed	0
Demoted	0
New Initial Hires	58
Other changes not explained	approximately 12

Source: Compiled by MGT from information provided by the Office of Personnel, 1998.

Approximately half the vacancies were created by retirements. More were created by the opening of new schools during these years. In a request to the Office of Personnel for information, we found that 70 principals have been in their positions three years or fewer. All of these data points suggest that there is active movement of principals within the Broward County School District. The importance of matching good leaders to the right schools is aligned with the Board's priorities. A question remains about how to balance the need to move people around the system, and create a process where principals feel they have a clear understanding of how transfers happen and why, and that they have a voice in the decision and know how that voice can be effectively expressed. There may be more information in the system about transfers, but it is not available to the principals nor was it explained to MGT consultants.

Upper management, area administrators and school principals stated in interviews that, during the past four years, there had been a clear shift in the selection procedures towards the Superintendent's authority. All reported that when all was said and done, the Superintendent made the final selection of principals. One of the procedures described most frequently in interviews of administrators at all levels, was that, if the Superintendent was not satisfied with the choice he had from among the final three candidates, he would turn down the entire pool and start the process over. A specific request was made for this performance review by MGT for data about the number of principal and assistant principal candidates submitted to the Superintendent in a pool of three finalists which had been turned down, and the process begun again, in 1995-96, 1996-97, 1997-98, by year and reason. The district did not provide this information.

Rather, the query was responded to with the information provided in Exhibit 4-58. The entire district response is included in this exhibit.

**EXHIBIT 4-58
INFORMATION USED BY THE SUPERINTENDENT IN SELECTING PRINCIPALS**

<p>The Superintendent of Schools selects the candidate for the school principalship based on the following information:</p> <ul style="list-style-type: none"> ■ School statistics, enrollment, student assessment scores, community, related issues, ■ Support Staff ■ School Improvement Conversation Results ■ School Improvement Plans ■ Informal Site Analysis of School ■ Candidates <ul style="list-style-type: none"> Resume, Leadership Experience and Training Last three years performance appraisals Responses to informal discussions Other site specific needs/issues 		
YEAR	Number of Initial Hires	Number of Candidates Considered
1995-96	22 Initial Hire Principals	66 candidates
	43 Initial Hire Assistant Principals	129 candidates
1996-97	14 Initial Hire Principals	42 candidates
	37 Initial Hire Assistant Principals	111 candidates
1997-98	22 Initial Hire Principals	66 candidates
	47 Initial Hire Assistant Principals	141 candidates
<p>When the Superintendent of Schools reviews/interviews the finalists for a principalship, he recommends to the School Board the candidate that meets the specific needs of the students and school community.</p>		

Source: Responses in writing provided to MGT for this performance review, Office of District Administration, December 1998.

The interviews with middle management at the school level, and the area director level were generally uncritical of current upper management practices or Board policy. There was, however, one suggestion for improvement. Principals repeatedly identified an insufficient amount of input into the selection of assistant principals. Administrators from all levels repeatedly talked about insufficient input from the area, zone, or school levels of administration and councils into the selection of building principals. The finding in this area is that there is weak alignment of the selection process with the Zone initiative, and with the school-based decision making and accountability initiative.

Principals also felt that, if area directors had a stronger voice in the selection process, some of the unknown factors might become known, because the Area Directors are the closest link principals have with the central office management organization. Deming, in his writings about Total Quality Management, said that it is critical to "drive out fear," in order to have quality. In this performance review, repeated efforts to clarify these questions with senior management yielded only more copies of the official selection procedures. The finding in this area is that there was a significant amount of unease among administrators at the school and area level about the transfer, hiring, and placement of principals and assistant principals, which may be due to the actual practices, or may be due to the lack of information and official and professional discussion available on this topic.

RECOMMENDATION

Recommendation 4-31:

Establish an ad hoc, cross-functional advisory committee for the Department of Personnel.

This committee should be charged with developing a greater sense of openness in the current practice of moving principals. The committee on principal/assistant principal assignments should align the hiring of principals with the zone initiative. The committee should align the hiring of assistant principals with the school-based decision making and accountability model. Specific, open channels of communication should be created about the high numbers of changes in the principal positions.

The committee should examine the question of 'best' of schools and principals, and of assistant principals and principals, from a number of points of view. The committee should interview faculty and parents from a variety of schools where principals have been appointed in the past three years, from placements which were deemed successful and those which have been deemed unsuccessful. The committee should address the process used, and the balance of roles for upper management, area management, and zone administrators.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|---------------|
| 1. The Deputy Superintendent for School Operations should appoint an ad hoc advisory committee on principal/assistant principal assignments for the Department of Personnel. | May 1999 |
| 2. The Deputy Superintendent should oversee the work of the committee until completion. | February 2000 |
| 3. The Deputy Superintendent should receive the recommendations of the committee and prepare them, with her input and that of the Cabinet and Superintendent, for the Board's review, and if necessary, should prepare a policy change recommendation. | March 2000 |
| 4. The new procedures developed should be put into place. | April 2000 |

FISCAL IMPACT

This recommendation can be accomplished within existing recommendations

FINDING

An examination of the support for leadership development within the Broward County School District shows an impressive array of organized, research-based programs. These programs, and the Director of Leadership Development, were highly praised in the Florida Department of Education's 1997 audit. Interviews with principals and assistant principals who have completed one or more of the programs, yielded high praise as well. Assistant principals who had been in their jobs for many years, but who decided to enroll in a leadership development course for career reasons, reported, that they entered the programs somewhat resentful of having to re-train at this point in their careers. However, they left the program convinced that every administrator in the district, from the school level through upper management should enroll in the course, because of its intrinsic value of learning to view administration differently.

The Department of Leadership Development provided an exceptional amount of high quality information and data through which to look at the leadership programs. Exhibit 4-59 shows the recent statistics which link newly hired principals and assistant principals to the district's leadership development programs.

**EXHIBIT 4-59
LEADERSHIP DEVELOPMENT EXPERIENCES OF
NEWLY HIRED SCHOOL ADMINISTRATORS**

SCHOOL YEAR	NUMBER OF ASSISTANT PRINCIPALS/ PRINCIPALS HIRED	NUMBER OF ASSISTANT PRINCIPALS/ PRINCIPALS PARTICIPATING IN HRD PROGRAMS FOR LEADERSHIP DEVELOPMENT PRIOR TO APPOINTMENT	NUMBER OF ASSISTANT PRINCIPALS/ PRINCIPALS PARTICIPATING IN LEADERSHIP DEVELOPMENT AFTER APPOINTMENT
1995-96	43/22	na/14	43/22
1996-97	37/14	16/8	37/14
1997-98	47/22	23/16	47/22

Source: Written from Associate Superintendent for District Administration, December 1998.

There is clear evidence that a connection is established between the placing of new and transferred principals into schools and their leadership development. Information provided directly by the Department of Leadership Development shows the increased participation in leadership development programs from 1995 to the present. This is shown in Exhibit 4-60.

**EXHIBIT 4-60
LEADERSHIP DEVELOPMENT PROGRAM PARTICIPATION**

PROGRAM	1995-96	1998-99
Lead/TOPS	95	186
Interim Assistant Principal (Category 1 and 2)	37	119
Intern Principal	0	41/50
Interim Principal	9	29
Total	131	384

Source: Department of Leadership Development, 1998.

There has been a focused effort to develop leadership for aspiring administrators, for newly placed administrators, and for administrators who change levels of administration in the Broward County School District. The content of the programs is coordinated with the Florida principal competencies, the APPAS evaluation system, and the current responsibilities assigned to the building administrators.

The review conducted by the State Department of Education in 1997 of leadership development programs, identified "Leadership Development Activities for Experienced School Leaders," as one of the topics it would investigate. There was no information contained in the report specifically on this topic. However, the report in this section did conclude with a recommendation that the district "consider enhancing and expanding development opportunities for district-level leaders."

Both the job descriptions for the Area Directors and the job description for the principals, calls for administrators to "participate, successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignments," and to "review current developments, literature and technical sources of information related to job responsibility." The Area Directors and Principals do this in a variety of ways.

There is clear evidence in the past year's minutes from all three levels of principal meetings held during the past year that principals spend time at their monthly meetings exploring topics which are important to them as school administrators. The elementary principals have named their group, the "Elementary Principals General Professional Seminar," to reflect the fact that they study and learn together at these meetings. The topics identified for all three groups show that district and area-level administrators are frequently invited or initiate requests to present and discuss program development matters with the principals.

There is additional evidence, provided by the Department of Leadership Development, of the opportunities to learn, both suggested and required, which they plan and organize for practicing principals and area directors who may have been in their jobs over time, and may not have recently participated in one of the district's leadership programs. In addition to these workshops, some leadership activities are now sponsored by the area directors themselves for the administrators within their areas. Recently, a collaboration of the North Area Directors and the Department of Leadership Development, provided a significant event for all north area principals in the area of leadership development.

During interviews with senior management, newly appointed principals, assistant principals, and area-level administrators, the suggestion for improvement or next steps in the leadership development plan, which was cited most frequently, was the need to support practicing principals and area directors in a systematic way in their own leadership development.

A review of the new APPAS system for evaluation of the administrators shows that there is no direct connection between the evaluation of performance and a personal plan for ongoing development of skills, knowledge, attitudes and competencies, in a pro-active way. Principals are limited in the amount of money which they spend from discretionary funds, on their own professional development activities, which some interpreted to mean that the system does not encourage them to receive training outside of the district.

RECOMMENDATION

Recommendation 4-32:

Establish an ad hoc, cross functional advisory council for the Department of Leadership Development.

The council should be charged with the specific tasks of:

- connecting the APPAS system to a required professional development plan for all administrators at the school and area level;
- connecting the leadership development for practicing administrators to the Zone Initiative, with increased collaboration between the Department of Leadership Development, the Zone Leadership Team, and the Area Directors;
- developing and recommending a needs-based series of programs available on a regular basis for practicing principals;
- identifying staffing needs for the Department of Leadership Development based on this increase of service (Consider a transfer of some trainers from departments such as ETS and school improvement, and other departments who have a strong, active strand of administrative training going on, so that they are actually housed in the leadership development area);
- making a recommendation to improve the current procedure and spending limitation on the principal conference allowance and ensuring that the recommendation is coordinated with the professional development plan for each administrator.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of the Human Resource Development Department should appoint an ad hoc, cross-functional advisory council. May 1999

2. The Council should meet and examine the recommended tasks. July 1999
3. The Director of the Human Resource Development Department should receive, review, and carry to the Cabinet the recommendations of the advisory council. December 1999
4. The Cabinet should act to revise and implement the recommendations. June 2000

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

5.0 EDUCATIONAL SERVICE DELIVERY

This chapter reviews the most important function of Broward County School District, the delivery and evaluation of services to students. The chapter examines the educational delivery system to determine if programs that serve students are efficient, effective, and equitable. The broad-based review includes an analysis of documents as well as focus group, interview, and survey responses from many employees who participated in the study.

The chapter is divided into eight sections, each providing an overview of specific educational service delivery functions that are critical to effective programs and services for students. The eight sections include:

- 5.1 Organization and Management of Instruction
- 5.2 Curriculum and Instruction Services
- 5.3 Special Programs
- 5.4 Exceptional Student Education
- 5.5 Program Evaluation and Student Assessment
- 5.6 Grants Administration
- 5.7 Student Support Services
- 5.8 Staff Development

A cost-effective educational delivery system is one that is accountable for student achievement without unnecessary expenditures. For effective management of instructional programs, planning and budgeting must be interrelated. In addition, the district must provide a clearly focused mission supported by measurable goals and objectives. In a large district such as Broward County School District, maintaining a clear focus and direction for instruction requires extensive coordination of multiple units. The processes and outcomes in all facets of the organization must be monitored and evaluated to ensure the district's focus is maintained on student learning and achievement.

According to recent statistics, there are approximately 229,600 pre-kindergarten through 12th grade students attending Broward County schools. The district operates 23 senior high schools (Grades 9-12), 33 middle high school, 132 elementary, seven exceptional student education centers, three alternative adult high schools, three vocational-technical centers, and 21 adult and community schools. Exhibit 5-1 shows the number of schools and approximate enrollment at each school level.

Magnet programs offer educational choice to parents and students in the Broward County School District. Although similar courses and programs are available in the traditional comprehensive schools, magnet programs attract students by offering unique opportunities for in-depth study in specific areas of interest. Each magnet program emphasizes a specialized theme that corresponds with the district's goal to create educational interests, celebrate cultural and ethnic diversity, and foster student achievement. The Broward County School District also sponsors six charter schools that further enhance educational choice for parents through nontraditional programs. Special programs are also provided through the district's six adult/vocational centers

and 11 special centers. The Broward County School District is one of the fastest growing districts in the nation, enrolling between 6,000 and 7,000 new students each school year. During the 1998-99 school year, the district opened five new elementary schools to accommodate the growth in student enrollment. Rapid growth in enrollment provides a major challenge to the district in providing quality instructional services.

**EXHIBIT 5-1
NUMBER OF SCHOOLS AND ENROLLMENT IN THE
BROWARD COUNTY SCHOOL DISTRICT
1998-99**

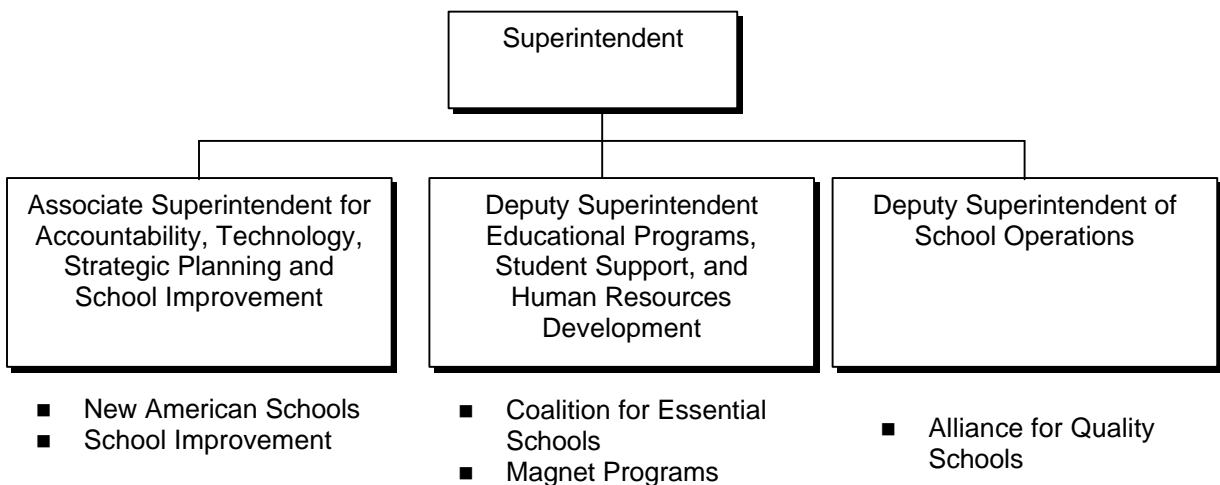
Type School	Number of Schools	Enrollment
Elementary School	127	113,007
Middle School	33	53,935
High School	24	57,504
Special Centers	11	5,152
Adult/Vocational*	6	*
Total	201	229,598

Source: *About Broward County Public Schools*, 1998.

*Students attending centers are frequently enrolled at the high school level.

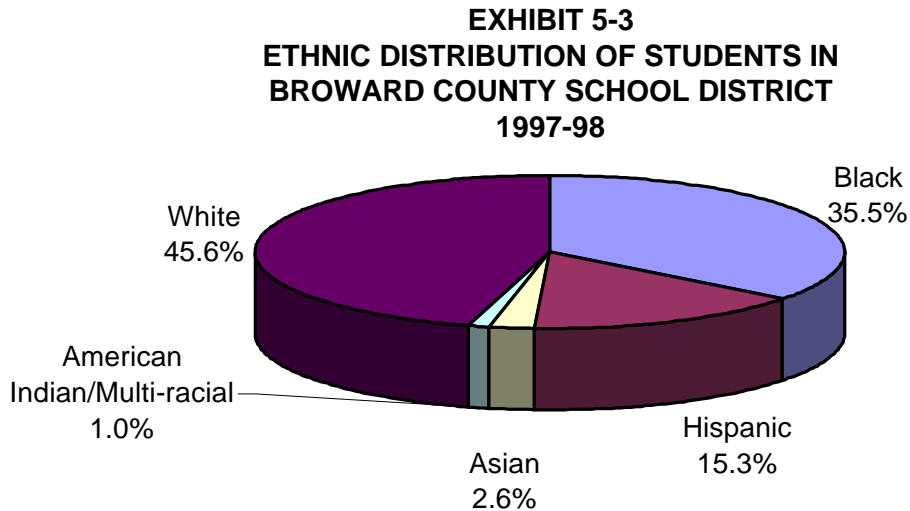
Exhibit 5-2 displays the current organizational structure of various programs and services that impact educational services delivery.

**EXHIBIT 5-2
ORGANIZATIONAL STRUCTURES OF BROWARD COUNTY SCHOOL DISTRICT
INNOVATION AND IMPROVEMENT INITIATIVES**



Source: Created by MGT, 1998.

A major factor in providing a quality instructional delivery system is understanding the student population served and how resources are distributed based on student needs. The Broward County School District has adopted a districtwide philosophy of “unequal resources for unequal needs.” This philosophy helps the district in directing more intensive supplemental resources to students who require additional support to meet the district’s achievement standards. Exhibit 5-3 displays the ethnic distribution of the Broward County School District.



Source: Broward County School District, 1998.

The district also serves a large number of students with special instructional needs. In 1997-98, there were more than 31,195 students served by Exceptional Student Education (ESE) programs including 6,688 students attending gifted programs. Exhibit 5-4 shows the number of ESE students in 1996-97 in the Broward County School District and five peer districts.

In addition, the Broward County School District serves students from a broad array of multicultural and multi-ethnic backgrounds. The district enrolls students from 164 countries, speaking 54 different languages. There are approximately 17,500 students of the district’s 229,600 students identified as Limited English Proficient (LEP) or English for Speakers of Other Language (ESOL) students. Special programs are provided in the district for those identified students. Exhibit 5-5 shows the number and percentage of ESOL students in the Broward County School District, five peer districts, and the state of Florida.

In the 1996-97 school year, 38.6 percent of the student population qualified for free or reduced price lunches. Exhibit 5-6 displays the number and percentage of students who receive either free or reduced price lunches. Although Broward County’s population is increasing, the district serves fewer students from low socioeconomic families than the state percentage and most of the peer districts.

**EXHIBIT 5-4
NUMBER OF ESE STUDENTS IN THE
BROWARD COUNTY SCHOOL DISTRICT AND FIVE PEER DISTRICTS
1996-97**

ESE PROGRAM	BROWARD	MIAMI -DADE	DUVAL	HILLSBOROUGH	ORANGE	PALM BEACH
Educable Mentally Handicapped	1,616	2,682	1,871	2,043	2,259	1,397
Trainable Mentally Handicapped	592	1,168	630	660	606	400
Physically Handicapped	590	712	671	330	324	216
Physical Therapy and Occupational Therapy Part-Time	85	15	15	13	37	34
Speech/Language Handicapped	11,075	5,916	4,820	5,837	4,690	5,927
Visual Handicapped	43	129	100	84	61	31
Emotionally Handicapped	866	2,985	1,890	2,149	1,111	1,330
Specific Learning Disabled	6,682	17,169	8,511	6,601	7,076	8,037
Gifted Part-Time	5,197	15,100	3,571	7,320	3,821	6,358
Hospital and Homebound Part-Time	149	244	133	173	113	106
Profoundly Handicapped	1,244	2,134	632	1,078	470	495
TOTAL	28,139	48,254	22,841	26,288	20,568	24,331

Source: Statistical Report, Profiles of Florida School Districts, January 1998.

**EXHIBIT 5-5
NUMBER AND PERCENTAGE OF LIMITED ENGLISH PROFICIENCY STUDENTS
IN THE BROWARD COUNTY SCHOOL DISTRICT,
FIVE PEER DISTRICTS, AND THE STATE
1996-97**

SCHOOL DISTRICT	NUMBER OF LEP STUDENTS	PERCENT OF TOTAL ENROLLMENT
Broward	17,552	8.1
Miami-Dade	55,841	16.4
Duval	1,489	1.2
Hillsborough	14,256	9.6
Orange	8,646	6.7
Palm Beach	16,382	11.9
State	143,545	6.4

Source: Statistical Report, Profiles of Florida School Districts, January 1998.

**EXHIBIT 5-6
STUDENTS AND PERCENTAGE OF STUDENTS IN FREE/REDUCED LUNCH
PROGRAM IN THE BROWARD COUNTY SCHOOL DISTRICT, FIVE PEER
DISTRICTS, AND THE STATE
1996-97**

SCHOOL DISTRICT	NUMBER OF STUDENTS	PERCENT OF TOTAL ENROLLMENT
Broward	79,303	38.6
Miami-Dade	202,065	59.2
Duval	58,507	46.4
Hillsborough	71,889	48.6
Orange	57,277	44.4
Palm Beach	40,409	29.4
State	974,496	43.5

Source: Statistical Report, Profiles of Florida School Districts, January 1998.

5.1 Organization and Management of Instruction

This section discusses two factors related to the organization and management of instruction: the organization and management among divisions and the organization and management of the Division of Educational Programs, Student Support, and Human Resource Development.

CURRENT SITUATION

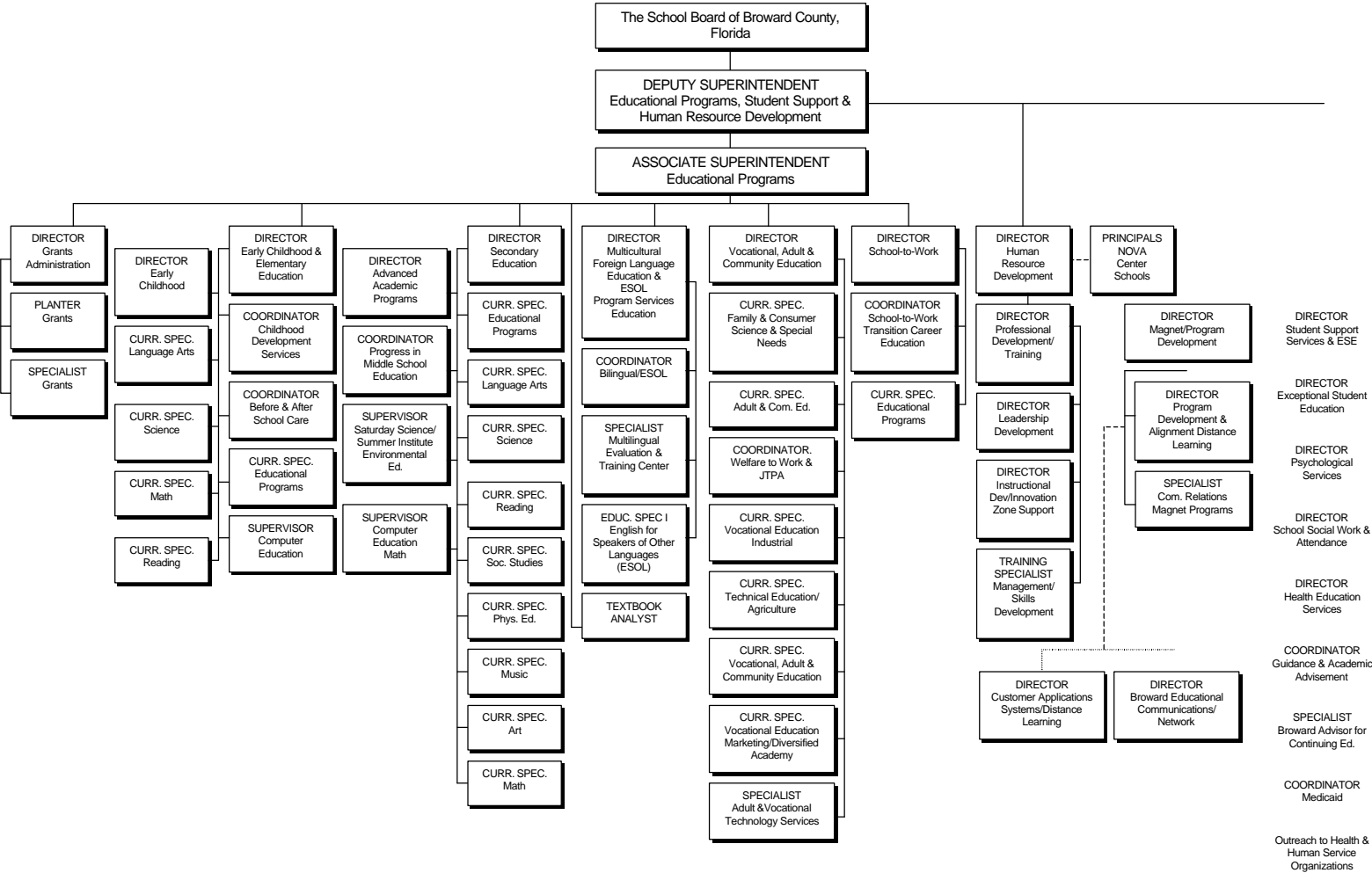
The Broward County School District provides general education services, student support services, and school support services primarily through two central office divisions --- Division of School Operations and the Division of Educational Programs, Student Support, and Human Resource Development. A third division, the Division of Accountability, Technology, Strategic Planning and School Improvement, has oversight for a few of the district's special programs.

Two Deputy Superintendents administer the Divisions of School Operations and Educational Programs, Student Support, and Human Resource Development. An Associate Superintendent administers the Division of Accountability, Technology, Strategic Planning, and School Improvement.

The goals and objectives guiding the functions of the Educational Programs, Student Support, and Human Resource Division are to provide support for *higher, more rigorous foundations in reading, writing, mathematics, and the 21st Century Core Competencies*. The 21st Century Core Competencies are competencies that Broward uses to prepare the district's students for the various skills needed to succeed in their chosen professions.

Exhibit 5-7 displays the current organizational chart for the Division of Educational Programs, Student Support, and Human Resource Development.

**EXHIBIT 5-7
ORGANIZATIONAL CHART FOR THE DIVISION OF EDUCATIONAL PROGRAMS, STUDENT SUPPORT,
AND HUMAN RESOURCE DEVELOPMENT
1998-99**



Source: Broward County School District, Division of Educational Programs, Student Support, and Human Resource Development, 1998-99.

The division's belief statement expresses the following:

- all students can learn to use their minds creatively;
- there is a common set of skills, knowledge, and core curricular competencies essential to the development of all Broward County School District students;
- these skills, knowledge, and competencies define a set of expectations that all students can achieve regardless of individual learning rates and styles; and
- achievement of these standards will enable our graduates to create and reach their goals and be active lifelong learners.

As shown in Exhibit 5-8, the second division, the Division of School Operations, provides oversight and coordination of the four Area Offices and the School Boundaries, Student Assignment, Summer School, and Year-Round Schools, and Diversity and Cultural Outreach Departments. The goals and objectives guiding the functions of this division include:

- assisting low-achieving schools in improving in specified areas of student achievement; and
- developing effective districtwide strategies and initiatives to reduce and deter youth crime and violence in schools.

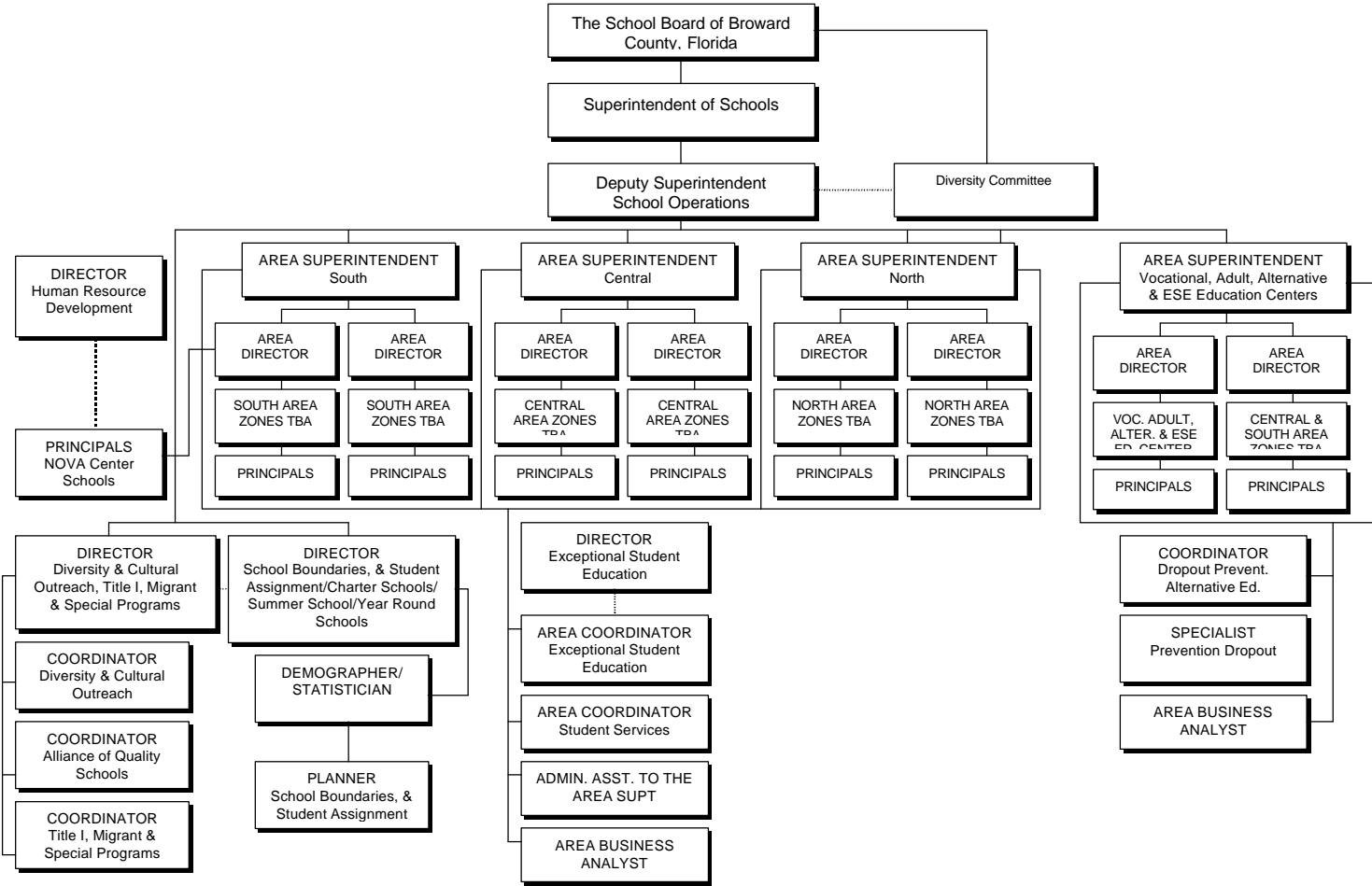
The third division, the Division of Accountability, Technology, Strategic Planning and School Improvement, provides oversight and coordination of strategic planning, school improvement and accountability, educational technology services, and research and evaluation. Within this division is a recently created Director for School Improvement and Accountability position. The primary responsibility of this director is the oversight of the Level A-E (potential critically low schools). Exhibit 5-9 shows the current organizational chart for this division. The goals and objectives of the division include:

- streamlining telecommunications, information services, and computer services;
- evaluating major district initiatives; and
- implementing the accountability policy and accompanying indicators.

As seen in Exhibit 5-7, under the current structure, the Deputy Superintendent for Educational Programs, Student Support, and Human Resources Development oversees four units:

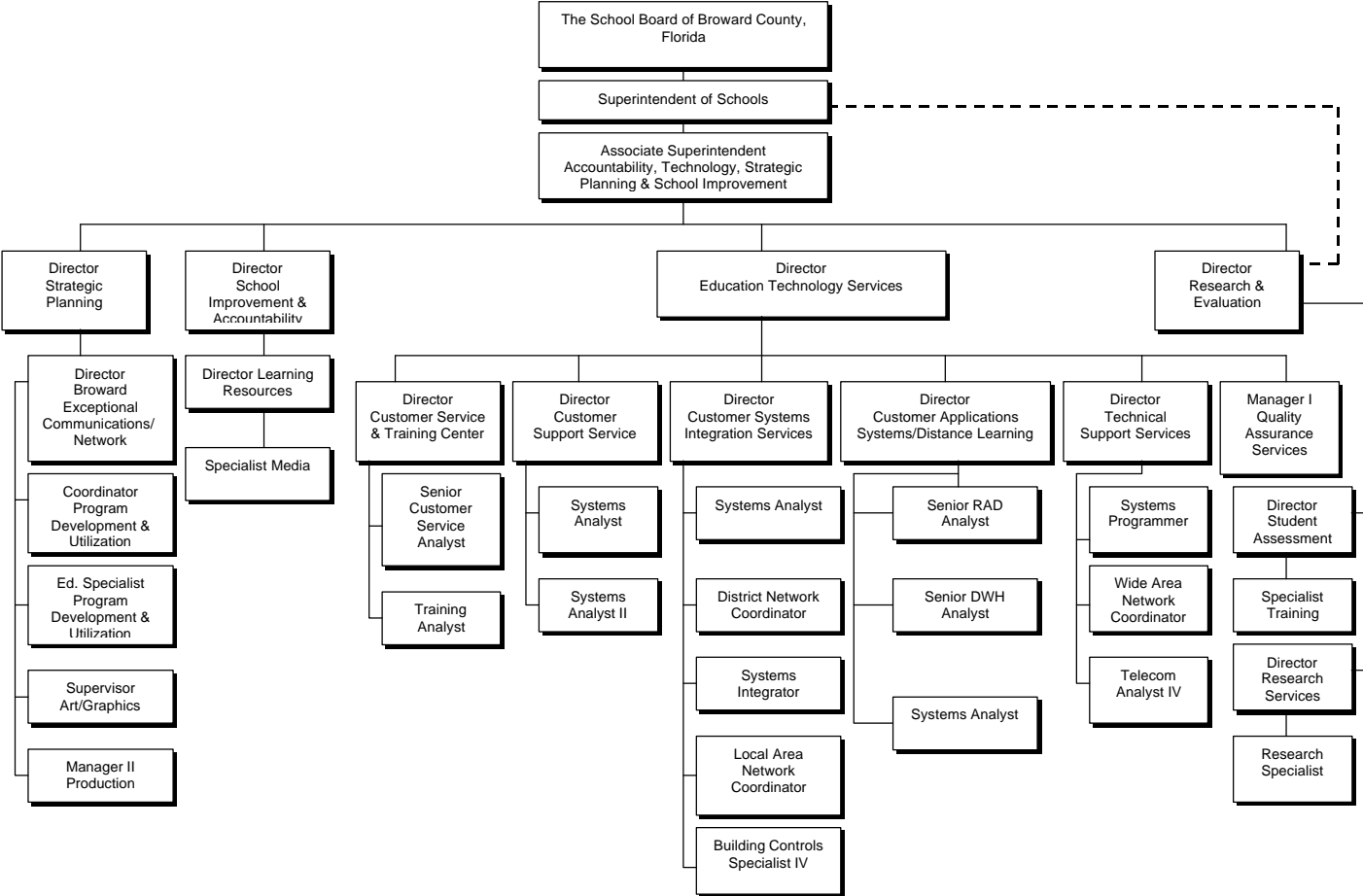
- Educational Programs;

**EXHIBIT 5-8
ORGANIZATIONAL CHART FOR THE DIVISION OF SCHOOL OPERATIONS
1998-99**



Source: Broward County School District, Division of School Operations, 1998-99.

**EXHIBIT 5-9
ORGANIZATIONAL CHART FOR THE DIVISION OF ACCOUNTABILITY,
TECHNOLOGY, STRATEGIC PLANNING, AND SCHOOL IMPROVEMENT
1998-99**



Source: Broward County School District, Division of Accountability, Strategic Planning and School Improvement, 1998-99.

- Student Support Services, and Exceptional Student Education (ESE);
- Magnet; and
- Human Resource Development.

An Associate Superintendent oversees the Educational Programs Department. The Educational Programs Department has six units including:

- Instructional Materials
- Multicultural/Foreign Language/ESOL
- Grants Administration
- Vocational, Adult, and Community Education
- Early Childhood and Elementary Education
- Secondary Education

Directors supervise the remaining departments reporting to either the Deputy Superintendent or the Associate Superintendent based on the respective division.

The Educational Programs, Student Support, and Human Resource Development Division's philosophy is to respect and have high expectations for all students (pre-k through adult), teachers, and staff. The division encourages community participation and partnerships that support the educational process. The division strives to facilitate equal access to a quality education for a diverse, multicultural student population.

The Educational Programs, Student Support, and Human Resource Division provides technical assistance to district and school-based initiatives that are consistent with the design, development, implementation, and evaluation of curricular opportunities in keeping with national, state, and local goals, performance standards, and accountability initiatives.

FINDING

As can be seen in Exhibits 5-7, 5-8, and 5-9, various educational programs and services are dispersed among three different divisions. Interviews with district-level and school administrators, as well as a review of the organizational charts and a review of various documents indicate that programs are often transferred from one division to another division when an administrator is transferred. Reportedly, the reason for this practice is that the originators or "masterminds" of the programs have the inclination to keep the programs within their span of control.

Survey results (as depicted in Exhibit 3-7) assist in confirming the findings of the lack of instructional services and program coordination. When asked to rate the quality of various programs in the three divisions housing educational programs, 36 percent of the teacher survey responses indicated that the instructional coordination and supervision in the district needs some or major improvement. Additionally, 36 percent of the teacher survey responses indicated that federal programs (e.g., Title I, Special Education) coordination in the district needs some or major improvement. Various

areas of program fragmentation are further discussed in Section 5.3 through 5.7 of this chapter.

To provide effective services, each unit delivering educational services to students must have a clear mission and support similar functions. In general, the current structure of educational services delivery in the Broward County School District is fragmented and does not provide for a functional alignment of the district's educational programs and services. Programs and services are primarily diffused throughout two divisions---the Division of Educational Programs, Student Support, and Human Resource Development and the Division of School Operations. Additionally, a third division (the Division of Accountability, Technology, Strategic Planning, and School Improvement) also oversees some of the district's special programs such as the New American Schools Program.

The Elementary Programs and Secondary Program units both have adequate spans of control and the units are focused on comprehensive services in these areas. In comparison, the Multicultural, Foreign Language, and ESOL Unit combines several of the district's special programs, but does not have a large span of control. In fact, only three staff report to this director. The role of this director could be broadened to supervise more special programs. Each of these divisions and the programs currently assigned to the three divisions will be discussed in the sections which follow in this chapter. The analysis in this section is limited to the overall organization of educational service delivery.

RECOMMENDATION

Recommendation 5-1:

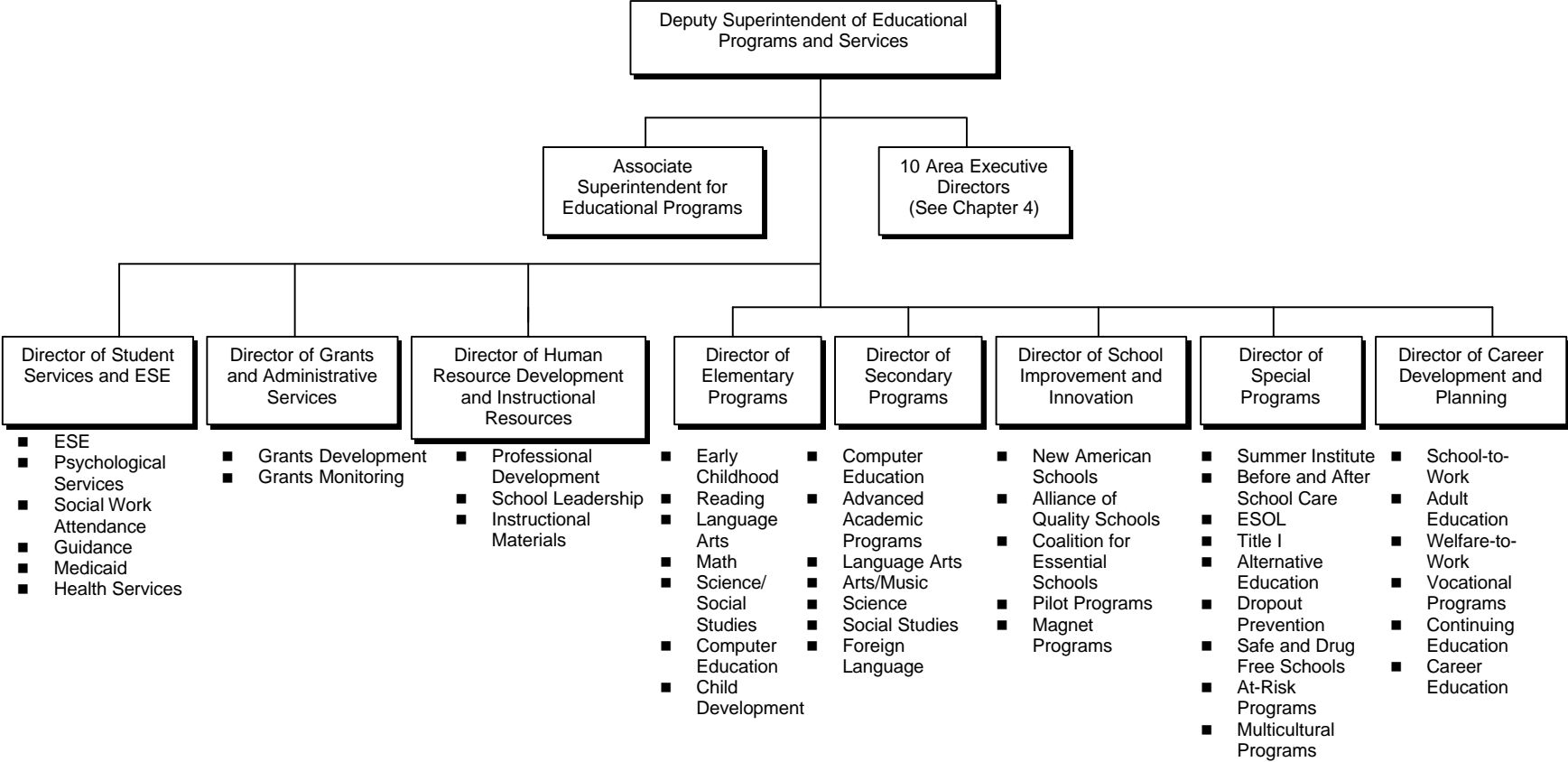
Restructure the Division of Educational Programs, Student Support, and Human Resource Development and the Division of School Operations and create the Division of Educational Programs and Services to consolidate educational programs and services.

The new division should be headed by a Deputy Superintendent. Directly reporting to the Deputy will be an Associate Superintendent of Education and 10 Area Executive Directors (see Chapter 4).

The following five functional areas should report to the Associate Superintendent of Education: Elementary Programs, Secondary Programs, School Improvement and Innovation, Special Programs, and Career Development and Planning. In addition, three services --- Student Support Services and ESE, Grants Administration, and Human Resource and Development and Instructional Resources should also report to the Associate Superintendent for Education (see Chapter 4.0 for additional information).

Exhibit 5-10 displays the proposed reorganization for educational service delivery in the new division.

**EXHIBIT 5-10
PROPOSED ORGANIZATIONAL CHART
DIVISION OF EDUCATIONAL PROGRAMS AND SERVICES**



Source: Created by MGT of America, 1998.

In any large school system, communication among central office departments, area offices, and schools is a complex task. A well-integrated continuum of services for students will most effectively address the Board's mission to serve diverse student needs and focus on high academic achievement. Educational programs should not accompany cross-divisional personnel changes, but remain in a centralized, cohesive unit. Further, it is not a common practice for a school district to have the oversight of educational programs under the same umbrella as the very same personnel who must also evaluate the programs as is currently the case with the Division of Accountability, Technology, Strategic Planning, and School Improvement. For example, this division administers and evaluates the New American Schools Program. The school improvement function will be moved to the new division. By creating a new department under the Superintendent for Research and accountability as described in Chapter 4, these functions can be separated.

The realignment and the corresponding communication structures should enhance the effectiveness of the educational service delivery system and ultimately result in management and resource efficiencies. In an integrated system, key instructional service initiatives that promote a strong continuum of services and programs for students can be effectively supported by the training and implementation strategies necessary to provide a clear and consistent vision of the Board's overall goals and objectives for students.

Specific findings and justifications for the proposed realignment of the Division of Educational Programs and Services will follow in Sections 5.2 through 5.8 in this chapter.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should direct the restructuring of the division to be overseen by the Deputy Superintendent. May 1999
2. The Deputy Superintendent should lead key departmental personnel in developing a comprehensive plan for integrating operations. July 1999
3. The Deputy Superintendent, in conjunction with key departmental personnel, should ensure that position titles and job descriptions are updated to reflect changes resulting from the proposed changes. August 1999

FISCAL IMPACT

The specific fiscal impact for this proposed reorganization is discussed under the unit recommendations that follow in specific sections.

FINDING

The majority of educational services are currently concentrated in the Division of Educational Programs, Student Support, and Human Resources Development. Several programs that provide services to schools including the Alliance for Quality

Schools, the Coalition for Essential Schools, Magnet programs, and the New American Schools Initiative are scattered throughout the central office organization. These programs provide non-traditional approaches to instruction, and/or school operation, that are developed to meet specific goals established by the district or school. Several programs provide schoolwide models for educational reform while others promote instructional themes.

The New American Schools and oversight for School Improvement is assigned to the Associate Superintendent for Accountability, Technology, Strategic Planning and School Improvements. The Coalition for Essential Schools and Magnet programs is in the Division of Educational Programs, Student Support and Human Resources Development. Conversely, the Alliance for Quality Schools is assigned to the Deputy Superintendent for School Operations.

The Broward County School District's Accountability Policy 1403 addresses the Board's mission and beliefs in setting high expectations and world class standards for all students. This policy specifies that the school improvement process should be a framework for change. The policy requires all schools to select a theme or focus that would facilitate whole school reform. To this end, schools are invited to choose from nationally known and tested, research-based models of school reform.

The goal of the Alliance of Quality Schools, for example, is to provide materials, inservice, and on-site follow-up to school staff members in reading, writing, and mathematics. The major goal of the program is to enhance and support student achievement in all academic areas.

Magnet programs also provide unique services to some students. Magnet programs have specialized curriculum and facilities or equipment, with an emphasis on instruction that is different from other programs offered in the school district.

The New American School Program provides several approaches to school improvement. These models included Atlas, Co-NECT, Modern Red Schoolhouse, Paideia, and Roots and Wings.

- The Atlas model engages teachers, parents, and administrators to collaboratively work together to set and maintain sound management policies.
- The Co-NECT model promotes technology as a vehicle to enhance every aspect of teaching, learning, professional development, and school management.
- The Modern Red Schoolhouse model emphasizes a standards-driven curriculum, the use of traditional and performance-based assessments, professional development programs, and effective community involvement.
- Paideia is a rigorous, liberal arts program that allows graduates to have the skills necessary to live, think, and act critically and to continue to educate themselves as learners.

- Roots and Wings builds upon the Success for All direct instruction reading program. The program incorporates science, history, and mathematics to achieve a comprehensive academic program. Twenty-six schools have chosen these five New American Schools designs to bring about whole school reform.
- Coalition of Essential Schools, a national school restructuring movement, is used in 18 member schools in Broward County School District

Still, other schools began the task of creating their own version of school renewal based on what works best with their students.

The Broward County School District innovation and improvement models are outlined in Exhibit 5-11.

The district's unique instructional models, magnet programs and reform initiatives should be centralized under one director. The director should report to the Associate Superintendent for Educational Programs as shown previously in Exhibit 5-10.

RECOMMENDATION

Recommendation 5-2:

Reassign the Director of School Improvement and Accountability currently located in the Division of Accountability, Technology, Strategic Planning, and School Improvement to the newly created Division of Educational Programs and Services Division to oversee all school innovation and improvement functions and create an Advisory Committee to assist schools in choosing and implementing school innovation and improvement models.

The director's title will be changed to the Director of School Improvement and Innovation. In a large organization, responsibilities for functional areas should be placed under the leadership and direction of one position that can be held specifically accountable for the program's proper functioning. Within a division, specialized managerial positions should be designed and filled with personnel reflecting the area(s) of specialization and possessing the expertise to manage. Permitting an area as important as education service delivery to be diffused among three divisions creates a significant opportunity for confusion in policy implementation and inadequate coordination of major program implementation and assessment initiatives, and can ultimately, jeopardize the ability of the Superintendent to efficiently and effectively provide the executive leadership necessary in delivering a well-integrated continuum of services to students (refer to Chapter 4, School District Organization and Management for additional information related to reorganization for educational service delivery).

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should recommend the reorganization and consolidation of the monitoring of all school improvement and innovative programs and models. May 1999

**EXHIBIT 5-11
SUMMARY OF BROWARD COUNTY SCHOOL DISTRICT'S
INNOVATION AND IMPROVEMENT MODELS**

ATLAS Communities (K-12) centers upon pathways – Innovation Zone feeder patterns. Teams of teachers from each pathway design curriculum and assessment standards. Teachers, parents, and administrators form a learning community to work together to set and maintain sound management policies.

Audrey Cohen College (K-12) focuses student learning on the study and achievement of “meaningful purposes” for each semester’s academic goals. Students plan, execute, and evaluate their constructive actions by using their knowledge to benefit the community. Leadership is emphasized; all students are expected to meet high academic standards.

Co-NECT Schools (K-12) uses technology to enhance every aspect of teaching, learning, professional development, and school management. A team of educators and parents sets goals. Small clusters of students are taught by a cross-disciplinary team, usually for a two-year duration. Teaching and learning centers on interdisciplinary projects that promote critical thinking and academic understanding.

Expeditionary Learning (K-12) operates on the belief that learning is an expedition into the unknown and draws on purposeful, intellectual investigations (learning expeditions) to improve achievement and to build character. Students and teacher work together for more than one year, both inside and outside the classroom, through academically rigorous interdisciplinary study teams, team teaching, and shared planning.

Modern Red Schoolhouse (K-12) strives to help students achieve high standards through the construction of a standards-driven curriculum, employment of traditional and performance-based assessments, professional-development programs, and effective community-involvement strategies. The rigorous curriculum develops and transmits a common culture, and promotes the principles of democracy.

Roots and Wings (K-6) builds upon the Success for All direct instruction reading program incorporating science, history, and mathematics to achieve a comprehensive academic program. Further, the design premise is that schools do whatever it takes to make sure students succeed. Realignment of resources eliminates obstacles to success, guaranteeing that all students receive the necessary services to become successful learners.

Paideia Program (K-12) is a rigorous, liberal arts education that allows graduates to have the skills necessary to live, think, and act critically and to continue to educate themselves as learners. The program employs the didactic mode, the coaching aspect, and the seminar component as teaching techniques to ensure both educational quality and equality.

Coalition of Essential Schools (K-12) is a national school restructuring movement based on a set of Ten Common Principles. The Coalition’s Common Principles call for schools to set clear and simple goals about the intellectual skills and knowledge to be mastered by all students; to personalize teaching and curriculum; make student work the center of classroom activity; to assess student achievement based on an exhibition of mastery; and to create an atmosphere of trust and respect for the school, faculty, students, and parents.

Alliance of Quality Schools (K-8) is designed as a comprehensive program that provides learner-verified research-based components to schools in the areas of reading, writing, mathematics, social behaviors, and parental involvement. The Alliance program addresses prevention and immediate intensive-corrective intervention for students based upon assessment data and enrichment activities.

High Schools That Work (9-12) is a national effort to combine challenging academic courses and modern vocational studies to raise the achievement of high school students. The High Schools That Work Consortium is a partnership of states, school systems, and school sites. Superintendents, principals, teachers, and counselors in the multi-state network are actively involved in making dramatic changes in the way they prepare students for work and further education in the 21st Century. Students at these schools are completing challenging tasks, solving real-life problems, and creating products and performances demonstrating academic and vocational skills.

Source: Broward County School District, Division of Educational Programs, Student Support, and Human Resource Development 1998.

2. The Board should approve the reorganization. June 1999
3. The Associate Superintendent, in conjunction with the Deputy Superintendent, should ensure that the new functions are implemented in the new organizational structure. September 1999

FISCAL IMPACT

This recommendation may be implemented using existing resources.

5.2 Curriculum and Instruction Services

CURRENT SITUATION

The Division of Educational Programs, Student Support, and Human Resource Development provides services to district and school-based initiatives to assist in the design, development, implementation, and evaluation of curriculum and instruction. The goals and objectives of the division include a commitment to a philosophy of respect and high expectations for all students (pre-kindergarten through adult), teachers and staff, and provide programs to support the district's diverse, multicultural student population by ensuring equal access to a quality education.

The Department of Educational Programs located within the Division of Educational Programs, Student Support, and Human Resource Development functions to support rigorous academic standards for all students and continued emphasis on reading, writing, and mathematics. The department also provides support for curriculum development and implementation that includes the integration of technology and School-to-Work skills.

The current organizational structure of the Department of Educational Programs was previously shown in Exhibit 5-7. The Elementary Education and Secondary Education sections will be discussed in this part of the report. Special programs such as the vocational, adult and community education, School-to-Work, and multicultural and foreign language programs will be addressed in Section 5.3 of this chapter.

Exhibit 5-12 displays the goals and objectives of the Department of Elementary Education. This department provides support services to elementary schools to assist in the design, development, implementation, and evaluation of curricular initiatives in keeping with national, state, and local goals, performance standards, and accountability issues. The Department of Secondary Education provides similar support services to middle and high schools.

**EXHIBIT 5-12
GOALS AND OBJECTIVES OF THE ELEMENTARY EDUCATION DEPARTMENT**

GOAL	TO IMPROVE KNOWLEDGE-BASE OF TEACHERS AND ADMINISTRATORS IN THE IMPLEMENTATION OF THE STANDARDS OF SERVICE.
Objective 1:	Provide training in newly adopted reading series to all affected teachers by 1/99.
Objective 2:	To provide training in mathematics application strategies to K-5 teachers by 5/99.
Objective 3:	To provide a series of training sessions for administration in the implementation of Standards of Service by 6/99.
Objective 4:	To provide training and implementation assistance to all K-5 teachers in the new elementary assessment instruments.
GOAL	TO UPDATE AND REVISE CONTENT CURRICULUM GUIDES AND REPORTING MECHANISMS IN THE CONTENT AREAS BY 6/99.
Objective 1:	To review all curriculum guides, resource manuals, and reporting instruments by 10/98.
Objective 2:	To discard, revise, or create appropriate curriculum support materials by 6/99.
Objective 3:	To finalize the alternative report card format for use in all elementary schools by 6/99.
GOAL	TO PROVIDED DIRECT ASSISTANCE AND SUPPORT TO CRITICALLY LOW ACHIEVING SCHOOLS.
Objective 1	To coordinate efforts of curriculum supervisors with Title I and Alliance of Quality Schools personnel to provide focused, quality support to CLA schools - 10/98.
Objective 2	To develop instructional strategies that will improve student achievement in reading comprehension, writing, and mathematics applications by 1/99.
Objective 3	To develop alternative assessment strategies for teachers to better monitor student progress by 11/98.

Source: Broward County School District, Department of Educational Programs, 1998.

In 1994, the Broward County School District began the implementation of a standards-driven educational system which functions to align curriculum, standards, and assessment. The purpose of this system is to remove the ambiguity about what is expected from students, teachers, schools, and parents. The system identifies district standards, state-level performance standards, and an accountability system to ensure students and adults master these standards. The district's goal is to have all of the district's key components (accountability, standards of service for student achievement, standards of student services, and standards of professional development) interrelated and focused on the mastery of the district and state-level standards. All stakeholder groups in the district have identified roles and responsibilities supporting the standards-driven system (see Exhibit 5-13).

The Broward County School District was recently selected as one of only seven districts in the United States by the Urban Institute as making significant progress towards becoming a standards-driven system.

**EXHIBIT 5-13
ROLES AND RESPONSIBILITIES OF STAKEHOLDERS IN THE
IMPLEMENTATION OF THE DISTRICT STANDARDS-DRIVEN SYSTEM**

STUDENTS	CLASSROOM TEACHERS	PRINCIPALS	AREA-BASED ADMINISTRATORS	INNOVATION ZONES (LEADERSHIP TEAM)	SUPPORT PERSONNEL SCHOOL/AREA/DISTRICT
<ul style="list-style-type: none"> ■ Understand standards. ■ Understand their gap in relation to mastery of standards. ■ Taking responsibility for own learning. ■ Use technology to improve their own learning. ■ Master content standards and core curriculum competencies at appropriate proficiency levels, as evidenced by scores on norm-referenced tests and other appropriate assessments. ■ Work and learn collaboratively with others, including students and other people of varying age levels, and business and community partners. ■ Participate in and create a classroom environment in which students can learn and teachers can teach. ■ Make appropriate choices based on diploma requirements and Student Code of Conduct. ■ Self-assess progress towards mastery. 	<ul style="list-style-type: none"> ■ Know content standards and core curriculum competencies at appropriate levels. ■ Diagnose student needs using data. ■ Prescribe appropriate strategies to teach content standards, core curriculum competencies and self-assessment. ■ Develop an instructional management plan that moves a diverse student population toward mastery and integrate appropriate technologies. ■ Assess for mastery. ■ Records and report student progress toward mastery. ■ Implement Sunshine State Standards. ■ Create learning climate that is safe, orderly and responsive to student needs. ■ Implement an individual professional development plan as an integral part of teacher work and determined through an individual needs assessment. ■ Demonstrate proficiency in knowledge and skills linked to increased student achievement and job performance. 	<ul style="list-style-type: none"> ■ Know current standards and core curriculum competencies at appropriate levels. ■ Know appropriate strategies. ■ Diagnose student teacher needs based on data. ■ Analyze student data to determine mastery of student outcomes. ■ Allocate resources to support standards implementation. ■ Create an effective school culture focused on implementation of standards. ■ Develop an adult learning plan which organizes time, opportunity and resources to provide job embedded professional development. ■ Provide ongoing teacher feedback linked to assessment based on quality implementation of standards. ■ Form partnerships to enhance student mastery of standards. ■ Provide daily leadership, support, and oversight/monitoring. ■ Ensure that instructional management plan and SIP move students toward mastery. 	<ul style="list-style-type: none"> ■ Know content standards and core curriculum competencies at appropriate levels. ■ Analyze schools' progress toward standards. ■ Allocate resources to support standards implementation. ■ Create an effective area culture focused on implementation of standards. ■ Organize personnel to facilitate a coordinated, Zone-based support system. ■ Participate in training on results-driven professional development. ■ Provide daily leadership, support oversight and monitoring. ■ Monitor implementation of results-driven professional development. ■ Provide ongoing feedback linked to assessment based on quality implementation of standards. ■ Ensure that principals implementing a standards-driven system through a direct link to professional development and evaluation. 	<ul style="list-style-type: none"> ■ Develop a system to define a common commitment to rigorous performance outcomes, analyze and disaggregate data, diagnose gaps, and formulate plans to address standards of service and increase achievement for all students pre K-adult. ■ Create a learning community with a commitment to clearly defined standards and high expectations. ■ Maintain a safe and orderly learning environment in which teachers can teach and students can learn. ■ Develop school, parent, and community partnerships which support readiness to learn and provide enhanced learning opportunities. ■ Establish the Community Initiatives for Families' concept for Level I, II, and III support for students and families throughout the Innovation Zones. ■ Establish effective leadership that develops ownership in Zone initiatives for all stakeholders and improves student achievement and school effectiveness. ■ Initiative and refine Innovation Zone strategic planning in order to establish a constancy of purpose and provide a quality education for all students, pre K-adult. ■ Integrate technology to provide a seamless pre-K through adult learning process. 	<ul style="list-style-type: none"> ■ Coordinate the development of rigorous standards and periodic revision. ■ Define Mastery. ■ Communicate standards to all stakeholders. ■ Align assessments with standards. ■ Align results-driven staff development with standards. ■ Align resources to support mastery of standards. ■ Use a technology to provide data on achievement of standards and support instructional management. ■ Monitor the implementation of the standards based curriculum.

Source: School Board of Broward County, 1998.

EXHIBIT 5-13 (Continued)
ROLES AND RESPONSIBILITIES OF STAKEHOLDERS IN THE
IMPLEMENTATION OF THE DISTRICT STANDARDS-DRIVEN SYSTEM

INSTITUTIONS OF HIGHER LEARNING (EDUCATIONAL CONSORTIUM)	BUSINESS/ COMMUNITY	PARENTS/COMMUNITY	SUPERINTENDENT	SCHOOL BOARD	MEDIA
<ul style="list-style-type: none"> ■ Assign field experience students to school-based on an agreement between partners to maximize teaching and learning. ■ Recruit under represented groups. Develop programs in critical shortage areas. ■ Collaborate in grant development and implementation. ■ Assess professional development needs of university students and develop a professional development plan. ■ Ensure teacher mastery of strong content knowledge and pedagogy. 	<ul style="list-style-type: none"> ■ Know and understand the standards-driven system and how it is applicable to education and applies to real world problems. ■ Endorse standards as meaningful outcomes. ■ Provide work based educational experiences for students as part of school to career. ■ Participate and communicate through appropriate structures, such as School Advisory Council, vocational and adult advisory boards, and systemic partnerships to assist the schools in implementing a standards-driven system. ■ Provide health and human services in or in close proximity to schools. ■ Jointly plan and deliver health and human services through the Community Initiatives for Families (CIF). ■ Provide release time for employees to volunteer or to participate in their child's education. ■ Assist with the development of appropriate training. ■ Provide work experiences for teachers. 	<ul style="list-style-type: none"> ■ Know and understand the standards-driven system and how it is applicable to the education of their child(ren). ■ Provide home environment which supports student learning. ■ Engage in dialogue about teaching and learning. ■ Collaborate with school personnel in mastery of standards for their child(ren). ■ Participate and communicate through appropriate structures, such as School Advisory Council, PTA, parent conferences. 	<ul style="list-style-type: none"> ■ Sets clear and rigorous expectations for a standards-driven system for all students and staff, supported by a well-defined accountability system. ■ Establishes a focus on teaching and learning and climate of accountability-based on standards. ■ Recommends policies and performance standards. <ul style="list-style-type: none"> – Standards of Practice – Standards of Service for Student Achievement – Standards of Student Services – Accountability – Public Engagement ■ Recommends and implements organizational structures and systemic partnerships which support a standards-driven system. ■ Recommends budget allocation and manages resources to support standards-driven system. ■ Define critical shortage areas. ■ Effects change to support standards-driven system. ■ Develops legislative program to recommend to the Board and advocates on behalf of that program. ■ Engages the public and communicates standards-driven system to community-at-large. 	<ul style="list-style-type: none"> ■ Adopt policies which support a standards-driven system. ■ Adopt performance standards and assessment policy for triad and standards. ■ Organize system to provide zone support. ■ Allocate resources to support a standards-driven system. ■ Approve partnerships which enhance student mastery of standards. ■ Encourage institutions of higher learning to adopt policies and support standards. ■ Initiate legislation to support standards-driven system. <p>State/Federal</p> <ul style="list-style-type: none"> ■ Define national/state goals and standards. ■ Encourage and provide support for local educational agencies to implement standards. ■ Align Federal/state programs to support student mastery of standards. ■ Provide resources and support for all mandates. ■ Require research-based pedagogy for instructional material adoption. ■ Generate public support for challenging educational standards. ■ Provide leadership on assessment issues by establishing performance standards. 	<ul style="list-style-type: none"> ■ Know and understand school/district challenges and issues and their impact on the community. ■ Communicate important information to the community concerning school/district challenges and accomplishments. ■ Work with school/district staff to obtain and communicate accurate information. ■ Respect and abide by school/district policies and procedures which protect student and staff safety, welfare and privacy. ■ Report on local, state and national educational issues on a regular and consistent basis. ■ Track and correlate educational information, trends and challenges and their relevancy to Broward County Public Schools and Broward County. ■ Base reporting on accurate data, information, and impartial observation. ■ Evaluate reporting regularly based on the highest professional standards and community expectations.

Source: School Board of Broward County, 1998.

FINDING

The Broward County School District has implemented rigorous standards for institutionalizing world class standards for students and staff. The first phase of implementing the standards-driven system was defining the district's standards and accountability. In phase two, the district ensured the standards, curriculum, and assessment were aligned. The third phase (1998-99 school year) consists of refining the standards, connecting them to the required teacher knowledge, results-driven staff development, and making the standards readily available to include in teacher lesson plans through the use of an electronic planning tool. This system provides administrators, teachers, and staff with clear information on what students need to know and be able to do at each grade (proficiency) level.

The Critical Content Guides for writing, reading, and mathematics were developed to clearly define what every student needs to learn and know in order to be successful from pre-kindergarten through the 12th grade. These Critical Content Guides also give specific information and skills that students need to know and be able to do in order to meet the Sunshine State Standards and be prepared to take the Florida Comprehensive Assessment Test and Standard Achievement Test.

The Critical Content Guides are divided into standards, benchmarks, student performance indicators, assessment, and proficiency levels and also include what the district calls Essential Teacher Knowledge. Essential Teacher Knowledge is the specific curriculum and instruction (by subject area and course) that teachers must know and be able to instruct in order to teach content and skills mastery to their students.

Exhibit 5-14 displays the various strands in the critical content area of mathematics, reading, and writing.

COMMENDATION

The Broward County School District is commended for clarifying the roles and responsibilities of all stakeholders in the implementation of the district's standards-driven system and for defining rigorous student performance standards, aligning the new standards with curriculum and assessment in the form of user-friendly Critical Content Guides, and its strong focus on institutionalizing the world class standards for students and staff.

FINDING

The Electronic Curriculum Planning Tool (ECPT) is a lesson planning software developed by the Florida Department of Education which is designed to allow teachers and other educators to either enter activities or select activities from a master database of activities. The activities in each master database are correlated with the Sunshine State Standards benchmarks and not only allows easy correlation with the Sunshine State Standards, but also with the Goal 3 Standards of Florida's System of School Improvement and Accountability. The ECPT is available in 11 different subject areas and allows the teacher to input appropriate assessments for the lesson and allows the teacher to print lesson plans in a variety of formats.

**EXHIBIT 5-14
STRANDS IN THE CRITICAL CONTENT AREAS**

There are five strands in the critical content area of mathematics: <ul style="list-style-type: none">■ number of sense■ measurement■ geometry/spatial sense■ algebraic thinking■ data collection and proficiency
The four strands in the critical content area for reading are: <ul style="list-style-type: none">■ comprehension■ vocabulary■ work identification■ literary concepts
The five strands in the critical content area of writing are: <ul style="list-style-type: none">■ pre-writing■ drafting■ revision■ editing■ publishing

Source: Broward County School District, Division of Educational Programs, Student Support, and Human Resource Development, 1998.

The teachers have the option to sign up for the ECPT training sessions and according to the Staff Development Department, the Broward County School District has taken the initial steps in the utilization of the Electronic Curriculum Planning Tool (ECPT) by training approximately 30 percent of the district's teachers in the use of the tool.

RECOMMENDATION

Recommendation 5-3:

Take immediate actions to expedite the training of all teachers in the use of the Electronic Curriculum Planning Tool.

The district could enhance the training of the lesson planning software that allows teachers to either enter activities or select activities from a master database of activities. To facilitate the planning of lessons, the district could include all of the strands, standards, and benchmarks in the planning tool.

The continued training for teachers using the electronic tool should have the potential to significantly reduce teacher planning time and paperwork. Acting upon this recommendation should assist the district in the implementation of its standards-driven educational system.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent of Educational Programs, Student Support, and Human Resources Development, in collaboration with the Director of Education Technology Services, should develop a plan designed to implement this recommendation. May 1999

2. The Associate Superintendent for Educational Programs should commence implementation of the plan.

July 1999

FISCAL IMPACT

This recommendation can be implemented through existing resources.

FINDING

The Broward County School District has recently approved a new set of benchmarks called "Our Learning Benchmarks." These revised benchmarks were a result of initiatives of the Broward Business Coalition for Education. The benchmarks have been reviewed and recommended by the district's Quality of Life and Steering Committees and the School Board of Broward County.

COMMENDATION

The Broward County School District is commended for initiating a broad-based collaboration process in the continuous refinement of student achievement benchmarks.

FINDING

The Division of Educational Programs, Student Support, and Human Resources Development provides the curriculum and instruction support for each of the district's schools and is responsible for overseeing the development and implementation of the schools' school improvement plans. The district has provided each of the schools with a revised 1998-99 School Improvement Plan Procedures Packet (which includes both hard copy as well as an electronic copy) for the use by each school advisory council in developing and implementing the school's curriculum and instruction as it relates to school improvement and student achievement. The plans request schools to address the site-based management concept of, "Every student a choice...Every school a specialized educational focus," which encourages them to select and implement a minimum of one whole school reform initiative based on the unique needs of the school. Also the district requires the schools to include at least one comprehensive reading objective. The Title I Plan, ESOL Plan, and ESE Plan are incorporated into one comprehensive school improvement plan.

The district is implementing a well-established school improvement plan procedure which requires schools to include a needs assessment, analysis of aggregated data, and other specific planning and implementation requirements as related to the curriculum and instructional needs of the school.

The district recently had more than 2,000 students receive the Department of Education Gold Seal Endorsement and Scholarship Award. These honor students can receive scholarships to pay for 75 percent of their total cost of postsecondary education.

COMMENDATIONS

The Broward County School District is commended for implementing comprehensive procedures for the development and implementation of school improvement plans. (For additional information related to the school improvement, see Chapter 4.4).

The Broward County School District is commended for having a high number of students receive the Florida Department of Education Gold Seal Endorsement and Scholarship Award.

FINDING

To strengthen the Innovation Zone concept, the district implements exemplary practices throughout an entire Innovation Zone to strengthen curriculum and instructional initiatives so there is continuity within the district's feeder schools. (See Chapter 4 for more information on the Innovation Zone concept). Examples include:

- Stranahan Zone - Through Break the Mold funding, the Zone provides after-school tutoring for students using a computerized curriculum program.
- Plantation Zone - This Zone developed a pre-kindergarten through adult integrated curriculum for communication skills. This curriculum emphasizes the skills of reading, writing, and public speaking as it relates to School-to-Work transition.
- Boyd Anderson Zone - This Zone has developed a zone-wide corrective reading program which provides direct instruction in reading in grades kindergarten through grade 12. The reading instruction provides a sequenced, comprehensive delivery system starting at kindergarten through 5th grade and continuing through middle and high school.

COMMENDATION

The Broward County School District is commended for its practice of implementing and disseminating curriculum and instruction initiatives throughout each Innovation Zone.

FINDING

The schools that were removed from the State's "Critically Low Performing List" are now called Schools in Need of Assistance (SINA) in Broward County School District. Schools in Need of Assistance are identified by the following:

- Level A - schools which have been critically low achieving for at least two years, have had intensive district support, have had additional district funding, have been members of the Alliance for

Quality Schools for at least two years (except for middle and high schools), and are not making adequate progress (three year trend). The district currently has 15 Level A schools.

- Level B - schools are schools which have been critically low achieving for at least two years and have made inconsistent progress (no steady upward trend line), or schools which have a critical indicator in the area of reading. The district currently has 20 Level B schools.
- Level C - schools which have not been on the critically low achieving list but show consistent downward achievement trends or schools which will become Critically Low achieving if scores do not improve in 1998-99. The district currently has four Level C schools.
- Level D - schools which are high schools which have four or more critical indicators and have the greatest achievement gaps to overcome, and have other indicators which make them fragile. The district currently has 12 Level D schools.
- Level E - schools which have been on the Critically Low Achieving List or meet high diversity profiles and have made substantial, consistent achievement gains in a least two areas, schools which can serve as models to others, and administrators who can serve as mentors to others. The district currently has 12 Level E schools.

The district supplies each principal of a Level A - E school with an electronic version of a yearly summary report that the administrator and School Advisory Council must complete and submit to the district. The report is comprehensive, including school improvement plan objectives, Whole School Reform progress, needs and curriculum assessment, budget information, standardized test data, plan for implementing the critical content, and the tangible impact on school improvement.

The district has a curriculum and instruction assessment procedure including, district-level teams which conduct on-site visits for assisting schools with curriculum and instruction initiatives in schools that have newly assigned principals; however, there is no similar process for schools identified as a Level A-E school unless the school has a newly assigned principal.

RECOMMENDATION

Recommendation 5-4:

Utilize a process similar to the current curriculum and instruction assessment procedure for schools with newly assigned principals to assist Level A-E schools.

The Broward County School District has committed considerable resources to developing and implementing the curriculum and instruction assessment procedure that

includes on-site visit support teams. However, this strategy was designed for schools with newly assigned principals. A district-level support team concept, based on the current model should be organized for delivering technical assistance and support to Level A-E schools. This approach offers the advantage of providing technical support through existing resources and utilizing proven support strategies. This recommendation should assist those schools which were recently removed from the State's Critically Low Performing List to render the additional technical support necessary to remain off the list.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of School Improvement and Accountability should review the existing process that is utilized for assisting schools with newly assigned principals. May 1999
2. The Director of School Improvement and Accountability should create a plan which utilizes the applicable features of the current curriculum and instruction procedure to assist Level A-E schools in the same manner. July 1999
3. The Director of School Improvement and Accountability should implement the plan as prepared. September 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources in accord with present staffing practices. Criteria should be established for prioritizing site visits to schools requiring the additional support teams' assistance. The teams should schedule site visits in accordance with the recognized criteria.

FINDING

The district has, in its curriculum and instruction staffing plan, numerous curriculum positions assigned responsibilities for providing technical assistance services directly to schools. There is a discrepancy between the goals and objectives set for these positions and the amount of time that is dedicated to direct involvement at the school level.

The curriculum specialists interviewed specified that approximately 10 percent of their time is actually spent on-site assisting schools. Additionally, in focus group interviews, school-based personnel responded that they "rarely" receive on-site assistance from the district curriculum specialists. This finding is also supported by the survey responses of the teachers. Teachers were given a list of 25 school district programs or functions, and were asked to rate the programs with descriptions ranging from should be eliminated to outstanding. According to survey results, instructional support was considered one of the five programs to be in need of major improvement with 21 percent of teachers reporting accordingly (See Chapter 3.3 for additional teacher survey results).

RECOMMENDATION

Recommendation 5-5:

Require that personnel filling curriculum support positions dedicate a minimum of 50 percent of their time delivering assigned services at schools.

The purpose of curriculum and instruction support positions is to provide schools and instructional personnel support and technical assistance in the defined areas of expertise held by district-level professional personnel. Given the increased pressures on schools to produce measurable student learning outcomes, it becomes more imperative that district-level personnel commit energy and time to delivering direct services to schools. Therefore, specific benchmarks should be incorporated to assist in assessing the district's curriculum and instructional delivery system. Implementation of this recommendation should allow schools to receive the direct, hands-on technical assistance needed to enhance the delivery of curriculum and instruction to students.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Support, and Human Resources Development should review all duties assigned to those positions to ensure alignment of actual duties with their goals and objectives. May 1999
2. The Deputy Superintendent for Educational Programs, Student Support, and Human Resources Development should prepare a plan for appropriate reassignment of personnel. July 1999
3. The Deputy Superintendent for Educational Programs, Student Support and Human Resources Development should submit the plan to the Superintendent and Cabinet staff for review and final approval. August 1999
4. The Deputy Superintendent should implement the plan as approved. September 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources and should increase the efficiency and effectiveness of the delivery of curriculum and instructional services to schools.

FINDING

The district is implementing several initiatives related to the utilization of technology to improve student achievement, assist curriculum and instruction development, and increase productivity and efficiency. For example, the district has authorized a comprehensive study by the Center for Educational Leadership in Technology (CELT)

to assist in the development of a districtwide technology policy that specifically emphasizes the use of technology in instruction as well as in other areas of the district.

Every school is required to design a technology component in its School Improvement Plan that addresses the school's use of technology for curriculum and instruction.

COMMENDATION

The Broward County School District is commended for placing a strong emphasis on requiring schools to address and integrate the most appropriate use of technology into their school improvement plans as a means of assisting the development of innovative curriculum and instruction efforts.

FINDING

The Broward County School District has begun the process of incorporating distance learning into the curriculum and instructional processes. Exhibit 5-15 explains the current status of the number of courses and students taking courses via distance learning as well as a report on their academic progress. This information was obtained through a recent survey sent to the distance learning teachers for each class. As can be seen, only three advanced placement distance learning courses are currently being offered to Broward County students through the BECON Department.

Currently, the district has three instructional distance learning teachers who are paid by the district and three distance learning facilitating teachers who are paid by the schools. All high schools have the necessary equipment to receive distance learning courses, while only three middle schools and five elementary schools are fully equipped to receive distance learning.

The district has made progress in identifying distance learning programming and teleconferencing for students, teachers, and administrators; however, it does not appear that the district has clear goals and objectives for the use of distance learning as it relates to curriculum and instructional initiatives. The implementation of this approach will enable various discontinued courses to continue and avoid the excessive personnel costs as reported in the Distant Learning section of the Program Evaluation, Research Briefs, and Selected Reports (September 1997 - August 1998, Volume 4).

RECOMMENDATION

Recommendation 5-6:

Expand and clarify the use of distance learning technology to meet instructional delivery system needs.

The implementation of this recommendation should expand the district's distance learning system so more course offerings can be made available to students, thus reducing the number of specialized teachers employed at individual schools.

**EXHIBIT 5-15
STATUS OF BROWARD COUNTY SCHOOL DISTRICT'S
DISTANCE LEARNING PROGRAM
COURSES 1998**

Advanced Placement Art History:

8:40 AM – 9:40 AM, Rotating Schedule, 2 semesters

Instructional School: Dillard H.S.
Instructional Teacher: Ms. Barbara Mazur
Students: 13

Facilitated School: Nova H.S.
Facilitating Teacher: Ms. Debbie Fisher
Students: 11

Attendance for first 9 weeks:

# of students with 0-3 absences	<u>8</u>	# of students with 0-3 absences	<u>10</u>
# of students with 4-6 absences	<u>4</u>	# of students with 4-6 absences	<u>0</u>
# of students with 7-10 absences	<u>1</u>	# of students with 7-10 absences	<u>0</u>
# of students with >10 absences	<u>0</u>	# of students with >10 absences	<u>1</u>

Grades:

#A 1 #B 4 #C 2 #D 5 #F 1 #A 8 #B 1 #C 1 #D 0 #F 1

Advanced Placement English Literature and Composition:

7:40 AM – 9:10 AM, 4 x 4 Block, 1 semester

Instructional School: Coral Springs H.S.
Instructional Teacher: Ms. Valerie Arena
Students: 1

Facilitated School: Hallandale H.S.
Facilitating Teacher: Mr. Jim Hester
Students: 9

Attendance for first 9 weeks:

# of students with 0-3 absences	<u>1</u>	# of students with 0-3 absences	<u>8</u>
# of students with 4-6 absences	<u>0</u>	# of students with 4-6 absences	<u>1</u>
# of students with 7-10 absences	<u>0</u>	# of students with 7-10 absences	<u>0</u>
# of students with >10 absences	<u>0</u>	# of students with >10 absences	<u>0</u>

Grades:

#A 1 #B 0 #C 0 #D 0 #F 0 #A 2 #B 7 #C 0 #D 0 #F 0

**EXHIBIT 5-15 (Continued)
STATUS OF BROWARD COUNTY SCHOOL DISTRICT'S
DISTANCE LEARNING
COURSES 1998**

Advanced Placement Environmental Science:

1:40 PM – 3:30 PM, 4 x 4 Block, 2 semesters, paired with Advanced Physical Science to provide time for laboratory and field work

Instructional School:	Taravella H.S.	Facilitated School:	Ely H.S.
Instructional Teacher:	Ms. Lynn Sweetay	Facilitating Teacher:	Ms. D. Richburg
Students:	23	Students:	5

Attendance for first 9 weeks:

# of students with 0-3 absences	<u>22</u>	# of students with 0-3 absences	<u>5</u>
# of students with 4-6 absences	<u>1</u>	# of students with 4-6 absences	<u>0</u>
# of students with 7-10 absences	<u>0</u>	# of students with 7-10 absences	<u>0</u>
# of students with >10 absences	<u>0</u>	# of students with >10 absences	<u>0</u>

Grades:

#A 8 #B 9 #C 3 #D 1 #F 2 #A 5 #B 0 #C 0 #D 0 #F 0

Other Outcomes:

These observations and concerns were also reported by teachers who responded to the survey:

- One teacher noted that the mentoring experience under a master AP teacher provided the opportunity to learn and build the confidence to be the Advanced Placement teacher in subsequent years.
- All (6 out of 6) teachers responding want to teach/facilitate a Distance Learning class again.
- All teachers responding agreed that the audio and video quality was good, but that improvements could be made.
- Prior preparation for Advanced Placement coursework varied considerably from school to school. This resulted in a difference in the baseline for students taking the courses at the schools.
- One of the facilitating teachers provided additional coursework for the students at the facilitated site. The intent was to give students the opportunity to raise their grades based on the assignments given by the instructional teacher. This may alter the indication of likelihood for passing the national Advanced Placement Exam for the students at that school.

Source: Broward County School District, BECON Department, 1998.

Additionally, implementation of this recommendation should enhance the educational offerings and permit students to take certain classes without being required to be physically present in the same location as the instructor. Present technology has reduced the costs, increased the availability, and broadened the thinking about the utilization of distance learning applications.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Support and Human Resources Development, the Associate Superintendent for Educational Programs, the Associate Superintendent for Accountability, Technology, Strategic Planning and School Improvement, and the Coordinator of Distance Learning should prepare a draft plan for accomplishing this recommendation. May 1999
2. The Associate Superintendent for Educational Programs should commence implementation upon approval of the plan by the Board. August 1999

FISCAL IMPACT

The implementation of this recommendation should permit the continuation of valued programs that were recommended for termination. There will be no cost to implement this recommendation in those schools that are equipped to receive distance learning courses.

FINDING

After interviews with administrators, teachers, students, and district personnel responsible for textbook policies, and a review of documents related to textbook adoption and expenditures, MGT consultants found that teachers do not, in numerous instances, utilize the full contents of expensive textbooks and other curriculum and instructional materials acquired through textbook funds.

For example, the high school oceanography, history, and science textbooks are supplemented with a variety of other instructional materials and do not contain all of the instructional information that is in alignment with the Critical Content Guides and the Sunshine State Standards. One textbook used in teaching the high school Integrated Science I course, entitled Science Interactions by GLENCOE/McGraw-Hill has four out of seven units (Units 1, 4, 6, and 7) that do not correspond with the integrated curriculum and the Critical Content Guides. Exhibit 5-16 displays the table of contents of this textbook and indicates which units do not correspond with the Critical Content Guides.

**EXHIBIT 5-16
TABLE OF CONTENTS
HIGH SCHOOL INTEGRATED SCIENCE I TEXTBOOK**

<p>*Unit 1 Storms</p> <p>1 Weather Prediction Chapter Review 5 Chapter Test 7</p> <p>2 Severe Weather Chapter Review 11 Chapter Test 13</p> <p>3 The Effects of Storm Chapter Review 17 Chapter Test 19</p> <p>Unit 2 Ecology</p> <p>4 Biotic and Abiotic Factors Chapter Review 23 Chapter Test 25</p> <p>5 Cycling of Matter and Energy Chapter Review 29 Chapter Test 31</p> <p>6 Changes in Ecosystems 35 Chapter Test 47</p> <p>Unit 3 Food</p> <p>7 Biochemistry Chapter Review 41 Chapter Test 43</p> <p>8 Photosynthesis Chapter Review 41 Chapter Test 49</p> <p>9 Soil Formation Chapter Review 53 Chapter Test 55</p> <p>10 Chemistry of Food Chapter Review 59 Chapter Test 61</p> <p>*Unit 4 Resources</p> <p>11 Resources Chapter Review 65 Chapter Test 67</p> <p>12 The Formation of Resources Chapter Review 71 Chapter Test 73</p> <p>13 Petroleum Chemistry Chapter Review 77 Chapter Test 79</p> <p>14 Recycling Chapter Review 83 Chapter Test 85</p>	<p>Unit 5 Shelter</p> <p>15 Earth's Crust in Motion Chapter Review 89 Chapter Test 91</p> <p>16 Structures and Materials Chapter Review 95 Chapter Test 9</p> <p>17 Forces and Machines in Building Chapter Review 101 Chapter Test 1</p> <p>18 Transfer of Thermal Energy Chapter Review 107 Chapter Test 109</p> <p>19 Electrical Energy Chapter Review 113 Chapter Test 115</p> <p>*Unit 6 Disease</p> <p>20 Types of Disease Chapter Review 119 Chapter Test 121</p> <p>21 Preventing and Treating Disease Chapter Review 125 Chapter Test 127</p> <p>22 Detecting Disease Chapter Review 131 Chapter Test 133</p> <p>*Unit 7 Flight</p> <p>23 Physics of Flight Chapter Review 137 Chapter Test 139</p> <p>24 Structures of Flight Chapter of Review 143 Chapter Test 145</p> <p>25 Physics of Space Flight Chapter Review 149 Chapter Test 151</p> <p>Units Tests</p> <p>Unit 1 Storms 157 Unit 2 Ecology 159 Unit 3 Food 161 Unit 4 Resources 163 Unit 5 Shelter 165 Unit 6 Disease 167 Unit 7 Flight 171</p> <p>Answers 171</p>
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The * indicates the four units that do not correspond with the Critical Content Guides and suggested Integrated Science I Curriculum.

Source: GLENCOE/McGraw-Hill Textbook, 1996.

RECOMMENDATION

Recommendation 5-7:

Require textbook publishers to respond to clearly articulated curriculum needs.

The implementation of this recommendation should reduce the amount of funds the district is spending for textbooks that include extraneous chapters that are unrelated to the Critical Content Guides and the Sunshine State Standards.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|---------------|
| 1. The Associate Superintendent for Educational Programs should establish Subject Area Committees with the assigned responsibility of identifying textbooks and other instructional materials containing a large quantity of contents that are not utilized. | June 2000 |
| 2. The Associate Superintendent should identify publishing companies that may have an interest in meeting the identified publishing needs of the district. | July 2000 |
| 3. The Subject Area Committees should also identify materials that can be developed and published or by an identified publishing company. | December 2000 |

FISCAL IMPACT

While it is not feasible to draw any definitive conclusions based on the several examples shown to MGT consultants regarding the textbook not being fully utilized by teachers and students in several courses in the district, the signs point to the district spending excessive amounts of funds on textbooks which are not being fully utilized. The district spent \$14.3 million on purchasing new textbooks for the 1997-98 school year. Based on reviews MGT has conducted in other school districts, MGT conservatively estimates that this recommendation may reduce the district's textbook expenditures by as much as 10 percent.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Require Textbook Publishers to Respond to Specific Curriculum Needs	\$0	\$1,430,000	\$1,430,000	\$1,430,000	\$1,430,000

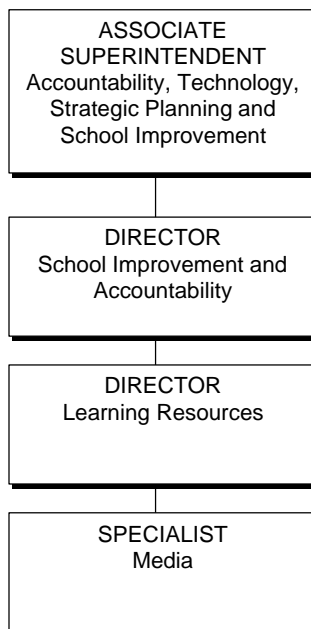
FINDING

The Learning Resources and Media Specialist functions are currently inappropriately assigned to the Director of School Improvement and Accountability within the Accountability, Technology, Strategic Planning and School Improvement Division.

These functions provide leadership and support to the overall library and media programs in the schools and other school support systems.

Based on on-site interviews and a review of the goals and objectives of this section, MGT consultants found that the Learning Resources and Media functions should have a stronger organizational relationship with curriculum and instruction. Exhibit 5-17 displays the Learning Resources and Media Specialist on the current organizational chart.

**EXHIBIT 5-17
LEARNING RESOURCES AND MEDIA SECTION WITHIN
THE BROWARD COUNTY SCHOOL DISTRICT ORGANIZATIONAL CHART**



Source: Broward County School District, Division of Accountability, Technology, Strategic Planning, and School Improvement, 1998

RECOMMENDATION

Recommendation 5-8:

Reassign the Learning Resources and Media Specialist function from the Director of School Improvement and Accountability within the Accountability, Technology, Strategic Planning and School Improvement Division to the newly created Division of Educational Programs and Services.

The reassignment of the Learning Resources Department will enable that Department to have stronger organizational relationship with curriculum and instruction. The reader should refer to Section 5.1 to review the realignment of the overall educational service delivery units.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should direct the reorganization of Learning Resources and Media by the Deputy Superintendent. May 1999
2. The Deputy Superintendent should lead key departmental personnel in developing a comprehensive plan for integrating operations. June 1999
3. The Deputy Superintendent, in conjunction with key departmental personnel, should ensure that position titles and job descriptions are updated to reflect changes resulting from the reorganization. July 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources.

5.3 Special Programs

In the subsections that follow, special programs provided by the district for students who need auxiliary support and services in reaching their academic and social potential are reviewed. Often these special programs receive supplemental funding from the state and federal government. First, the special programs located in the Division of School Operations are discussed and then the special programs located in the Division of Educational Programs, Student Support, and Human Resource Development follows. Exceptional Student Education is addressed in Section 5.4 of this chapter.

5.3.1 Vocational, Adult, and Alternative Education

The goal of a district's vocational education program is to develop the skills necessary for entering and succeeding in the world of work.

CURRENT SITUATION

The Vocational, Adult, and Alternative, and Exceptional Student Education Centers (VAAESEC) Department has been recently restructured. Due to the geographic location of the district's schools and centers, this department services the entire district. The Vocational, Adult, and Community Education Program provides curriculum and instructional support for schools, sixth grade through adult, in the delivery of programs that meet student and workplace needs. Technical assistance is school-based or center-based, and includes such activities as technology updates, teacher inservice, program development, grant facilitation, and facility renovation.

The programs offered are accredited through the Southern Association of Colleges and Schools (SACS), as well as other state, regional, and national accreditation boards for individualized programs. The department's goal is to ensure the accessibility to the best education for the district's special students. Eligible high school students can take

vocational courses one-half of the school day at a center while taking their regular courses the other half of the day at their home school. Many programs offer credit or acceleration towards a two-year degree at a community college. The district provides transportation for eligible students attending vocational centers.

Broward County has the second highest percentage of graduates entering technical school upon graduation among the comparison districts with a total of 4.54 percent as indicated in Exhibit 2-17 of Chapter 2. The district serves approximately 240,000 adults and has a total of six adult/vocational schools and 11 special centers.

Below is a description of the centers and schools.

- **Atlantic Vocational Technical Center** – Coconut Creek (Grades 9 - adult) – This is an adult education center which places its emphasis on the development of occupational training programs. The objectives for the program are based on the needs of business, industry, and the community that Broward serves. Programs include: agribusiness, automotive, building, business technology, cosmetology, family and consumer sciences, food services, health science education, marketing, and technical education.
- **Bright Horizon School** – Pompano Beach (ESE-K-12) – The mission of this school is to offer a comprehensive program including art, basic skills, BOOTS (Bringing Out Optimal Training Strategies), career education, health, music, physical education, speech and language and vocational skills.
- **Cross Creek School** – Pompano Beach (severely emotionally disturbed-pre-kindergarten through grade twelve) – Cross Creek uses a psychoeducational approach to providing a safe and orderly environment for all students enrolled. Students are provided with goal training, counseling for emotional independence, and academic preparation in the least restrictive educational and social environment.
- **Cypress Run Alternative** – Pompano Beach (Alternative/ESE 6-12) – Programs offered include 6-12 academic curriculum, home economics, computer literacy, and Intramural basketball and softball.
- **Hallandale Adult Community Center** – Hallandale (pre-kindergarten through adult) – This center address the needs of the community by providing a variety of programs to students of all ages, abilities, and nationalities. Programs range from on-site day care center to Florida Ocean Sciences Institute Programs.
- **Pine Ridge Center** – Ft. Lauderdale (Alternative kindergarten – 12) – The goal of this school is to provide a behavioral management program focused on the academic achievement of dropout

prevention students, expulsion, special education, and behavior change students. The program includes one main campus and six off-campus sites. These sites are Broward Regional Juvenile Detention Center, Covenant House, New Directions, Y-Chance, Friends of Children, and Sanofa House.

- **Pompano Multi-Purpose Education Center** – Pompano (6 – adult) – This school offers a wide variety of programs, houses district administrative support personnel, and is the home base for several area agencies and organizations. Programs include adult education and teen parenting programs.
- **The Quest Center** – Hollywood (ESE- kindergarten – 12) – The school offers handicapped students opportunities to participate in integrated educational experiences. Curriculum addresses programs for autistic, profound mentally handicapped, trainable mentally handicapped, and educable mentally handicapped.
- **Seagull School** – Fort Lauderdale (ESE-pre-kindergarten-12) – This school provides educational, medical, and social services for very special needs students. The schools student body consists of students who are physically impaired, pregnant teens, parenting teens, their babies, and students who are participating in hospital homebound.
- **Sheridan Vocational Technical Center** – Hollywood (Grades 9 - adult) – This vocational technical center places emphasis on the development and implementation of occupational training programs.
- **Sunset School** – Fort Lauderdale (severely emotionally disturbed – kindergarten – 12) – In addition to regular academic programs, psychiatric, therapeutic services, food services, horticulture, and industrial arts courses are offered.
- **Whiddon-Rogers Education Center** – Fort Lauderdale (alternative/ adult- 6- adult) – This is one of the newest schools in the district which services adult education, education in three jails, Lippman Family Center, Goodwill Industries, and the Broward Convalescent Home.
- **Whispering Pines School** – Miramar (severely emotionally disturbed/ kindergarten-12) – Center provides services to severely emotionally disturbed students. The program involves one main campus and several off-campus adult programs.
- **Wingate Oaks Center** – Fort Lauderdale (ESE- kindergarten – 12) – This school services multi-handicapped students and offers specialized training in a variety of programs.

- **McFatter Vocational Technical Center – Davie** (Grades 9 - adult)
This school offers technical education in over 30 program areas. Programs include courses such as communications technology, culinary arts, commercial vehicle driving, marine technology, and medical technology. The McFatter Technical High School is designed to prepare students with the competencies required for careers and further study in a wide range of occupational fields. The curriculum includes the use of state-of-the-art technology, alternative assessment, and digitized portfolios.

FINDING

The Vocational, Adult, Alternative and ESE Centers Department (VAAESEC) was primarily responsible for creating an on-line student support system designed to assist in the identification and support of students who may need assistance beyond that which is traditionally provided. The electronic system operates by providing school personnel of “at-risk” students information that may affect the student’s achievement. The indicators used in the system are grade point average below 2.0, excessive unexcused absences, external suspension, mobility, Department of Juvenile Justice involvement, and test scores below the 50th percentile. This system enables staff to record interventions previously used and informs other staff who may deal with the student at a future date or alternate location. Prior to the implementation of this system, staff had difficulty tracking student interventions.

COMMENDATION

The VAAESEC is commended for the creation and implementation of an electronic student tracking system.

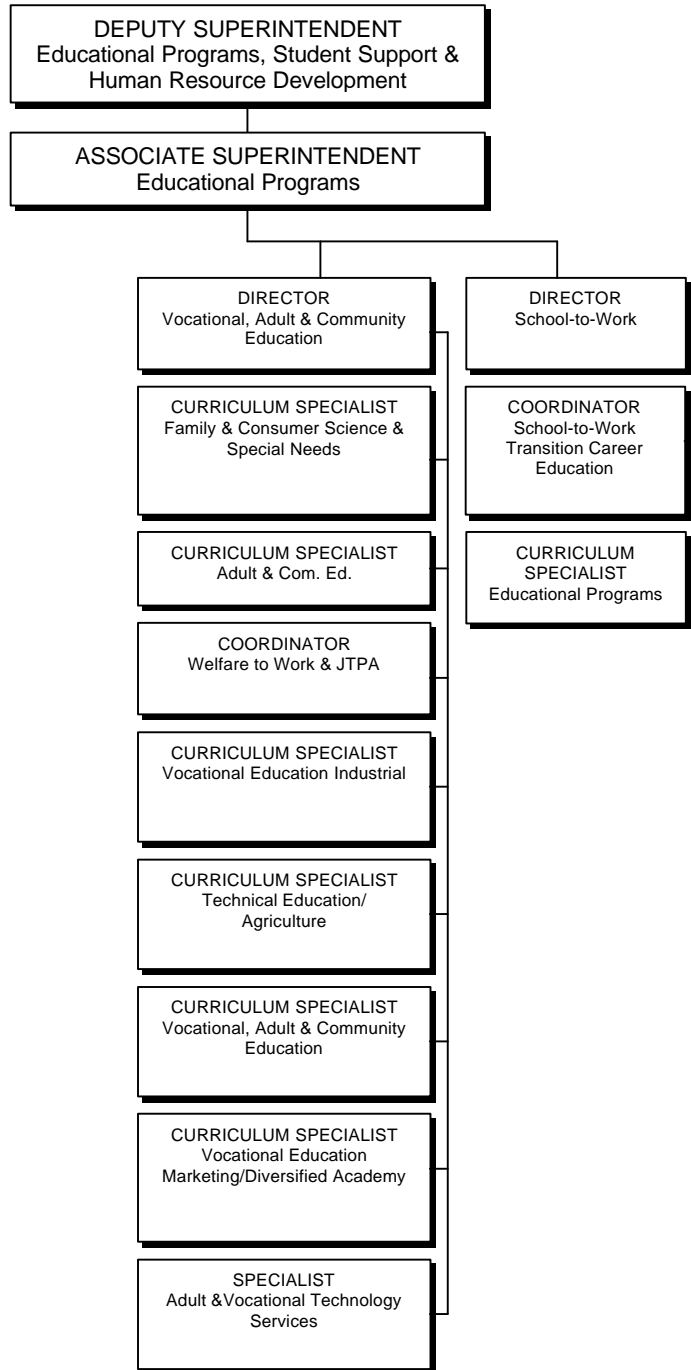
FINDING

As depicted in Exhibit 5-18 and 5-19, the district’s services for Vocational, Adult, and Alternative Education currently function under two divisions---School Operations and Educational Programs, Student Support, and Human Resource Development.

The area director, dropout prevention coordinator and specialist, and the area business analyst are located in the Division of School Operations. The curriculum, career development, School-to-Work functions are located in the Division of Educational Programs, Student Support and Human Resource Development.

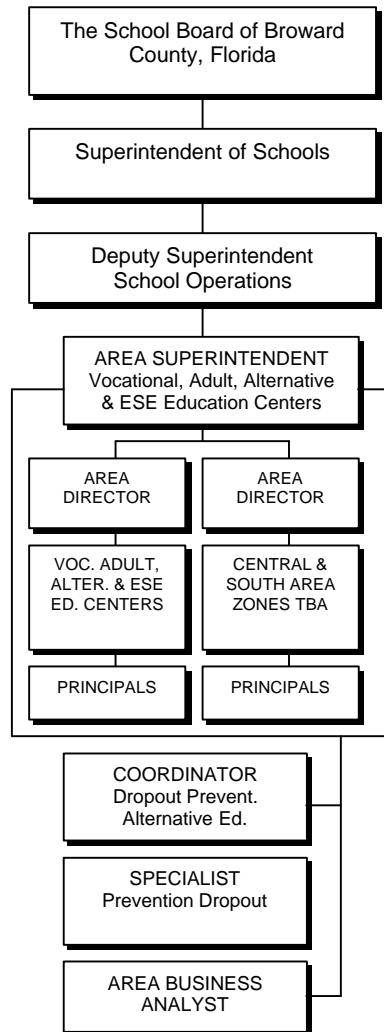
The programs are assigned to the Area Superintendent of Vocational, Adult, Alternative and ESE. The Department of Vocational Adult, and Alternative Education employs 37 positions including one area director, one coordinator, two specialists, and 10 curriculum specialists. Unlike the other three area superintendents who have an administrative assistant, the Vocational, Adult, and Alternative, and ESE Area Superintendent does not. Also the other three area offices (South, Central and North) have two areas directors; this Department has only one. The organizational chart shows two area directors; however, only one area director is currently assigned to this department.

EXHIBIT 5-18
ORGANIZATIONAL CHART OF THE VOCATIONAL, ADULT, AND COMMUNITY
EDUCATION DEPARTMENT WITHIN THE DIVISION OF EDUCATIONAL
PROGRAMS, STUDENT SUPPORT, AND HUMAN RESOURCE DEVELOPMENT



Source: Broward County School District, Division of Educational Programs, Student Support, and Human Resource Development, 1998-99.

**EXHIBIT 5-19
ORGANIZATION CHART OF THE VOCATIONAL ADULT, AND COMMUNITY
EDUCATION DEPARTMENT WITHIN THE DIVISION OF SCHOOL OPERATIONS
1998-99**



Source: Broward County School District, Division of School Operations, 1998-99.

Operating under two divisions, the current structure of adult, vocational, and alternative education programs is fragmented and does not provide for a functional alignment. To provide the effective delivery of services, the unit must have a clear mission and support similar functions. The current organizational structure does not integrate an important function of the district's vocational and adult programs, School-to-Work, and career planning and development. The director of School-to-Work has limited oversight and responsibility, supervising only two positions (See Section 5.1 for a review of the overall proposed realignment of the Education Service Delivery System).

As discussed in Chapter 4, the proposed reorganization of the Broward County School District includes the creation of 10 Executive Area Directors reporting to an Associate Superintendent for Schools. Under the proposed reorganization plan, the school principals (including the principals/directors of the 11 special centers and the six audit/vocational schools) will report to the respective executive area director. The reorganization should further enhance the underlying principles of the district's practice of clustering schools into Innovation Zones.

RECOMMENDATION

Recommendation 5-9:

Merge the career development, School-to-Work, vocational, adult and community education functions under one unit and eliminate the School-to-Work Director's position.

This recommendation should provide for a well-integrated career planning and career development program. The realignment structure should enhance the effectiveness of services delivered to students and adults and ultimately result in management and resource efficiencies. See Exhibit 5-10 for the proposed realignment of this function and refer to Section 5.3.9 for additional findings related to the School-to-Work program and the elimination of the School-to-Work Director's position.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|---------------|
| 1. The Superintendent should include this organization change in the proposal to be recommended for Board action. | May 1999 |
| 2. The Board should approve the Superintendent recommendation. | Summer 1999 |
| 3. The Superintendent and Executive Staff should implement the approved recommendation plan. | December 1999 |

FISCAL IMPACT

Eliminating the Director of School-to-Work will result in an annual savings of about \$104,500 based on an average salary of \$78,600 and a 33 percent benefits package (\$25,938).

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Eliminate School-to-Work Director	\$52,250	\$104,500	\$104,500	\$104,500	\$104,500

5.3.2 Dropout Prevention Program

CURRENT SITUATION

The district serves a large number of students at risk of dropping out of school in a variety of traditional school-site programs as well as special centers. The Office of Dropout Prevention offers support to students, teachers, parents, and administrators and provides the necessary tools for potential dropout students to succeed. Currently, the Dropout Prevention function resides in the Division of School Operations and reports to the Area Superintendent for Vocational, Adult, Alternative, and ESE as seen in Exhibit 5-20. One area superintendent is responsible for administering these services districtwide. Unlike the other area offices, this administrator must have access to districtwide program implementation and be able to determine the needs of all areas. In effect, this area superintendent is performing a central office function as described previously.

As shown previously in Exhibit 2-19 in Chapter 2, Broward County's high school dropout rate for 1996-97 was 3.17 percent, down from 3.83 percent in 1995-96. The dropout rate for 1996-97 was the lowest among the comparison school districts. Dropout rates in Broward County School District are well below state averages.

FINDING

In addition to the traditional school-based programs, the Dropout Prevention Office provides a variety of programs designed to meet the varied needs of at-risk students. The programs include:

- Educational Alternative Programs
- Disciplinary Programs
- Teen Parent Programs
- Educational Service/Community Based Programs
- Substance Abuse Programs

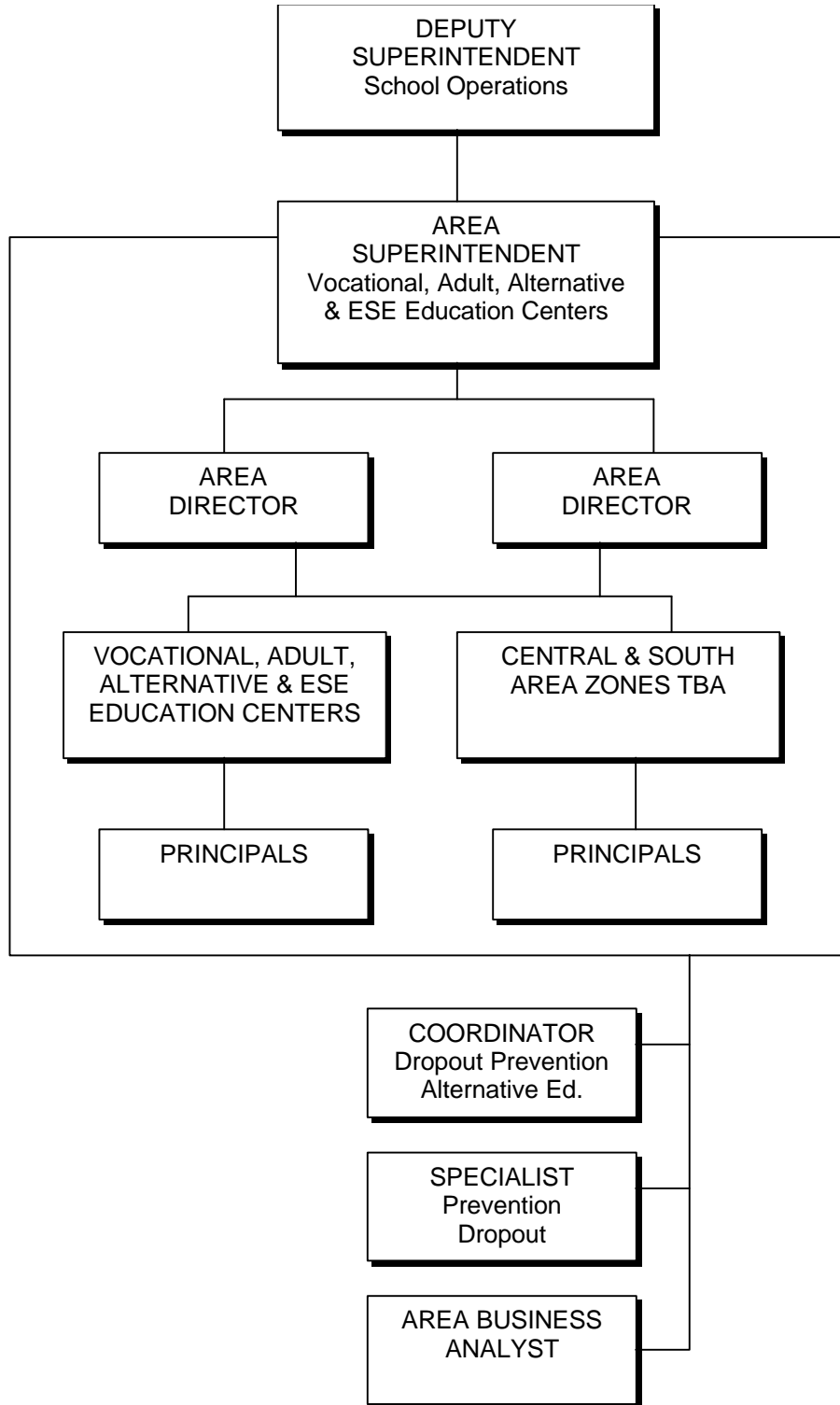
The district has established a partnership with the State's Attorney Office for identification of elementary age youth that have excessive unexcused absences from school. This collaborative effort assists in notifying parents of their legal responsibility to have their child attend school daily.

Dropout programs are funded based on the educational practice of "unequal resources to support unequal needs." Student populations at each school are reviewed to determine the number of students that have multiple at-risk indicators. The district has specific criteria identified as "at-risk" indicators and resources are allocated to schools in a prorated amount of available dropout prevention funding. This formula has been approved by the Florida Department of Education and has been recommended as a model to other districts.

COMMENDATION

The Broward County School District is commended for implementing an exemplary dropout prevention funding formula.

**EXHIBIT 5-20
ORGANIZATIONAL STRUCTURE OF THE OFFICE OF DROPOUT PREVENTION
1998-99**



Source: Broward County School District, Department of Vocational, Adult, Alternative and ESE Centers, 1998.

FINDING

The Dropout Prevention and Alternative Education Program is managed by a coordinator and specialist reporting to the Area Superintendent for Vocational, Adult, Alternative, and ESE Education Centers. MGT consultants found a lack of a coordination between this unit and the Department of Educational Programs in the areas of procedures and practices. For example, when the Department of Educational Programs requests information from the various educational program departments, or program planning functions are performed, dropout prevention as a program is neglected due to not being in alignment with the Division of Educational Programs, Student Support, and Human Resource Development. Additionally, the Dropout Prevention Program has not been an integral part of the Critical Content Roll Out Awareness Sessions.

RECOMMENDATION

Recommendation 5-10:

Reassign the Dropout Prevention Coordinator and Specialist to report directly to the Director of Special Programs in the newly proposed Division of Educational Programs and Services.

In as much as this function serves a districtwide need, the reassignment to the Division of Educational Programs and Services should ensure that the issues of Dropout Prevention are not neglected as being part of the educational programs. Additionally, with the implementation of this recommendation, the Dropout Prevention Program should become a critical component in the Roll Out of the Critical Content Awareness Sessions (See Exhibit 5-10 for the proposed realignment of this Department).

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Support and Human Resources Development, should develop a plan for the implementation of this recommendation. May 1999
2. The Deputy Superintendent should develop an appropriate plan. June 1999
3. The Superintendent and Executive Staff should incorporate the recommendations into the organization plan and present to the Board for approval. July 1999
4. The Deputy Superintendent for Educational Programs, Student Support, and Human Resource Development should implement the approved plan. September 1999

FISCAL IMPACT

This recommendation can be implemented using existing resources.

5.3.3 Charter Schools, Summer Schools, and Year-Round Schools

CURRENT SITUATION

The district has six charter schools operating for the 1998-99 school year. Charter schools are public schools that are privately operated under a contract with the sponsoring district. The six operating charter schools are Charter School of Excellence, Central Charter School, Somerset Neighborhood School, Smart School, City of North Lauderdale Academy High School, and the City of Pembroke Pines. At the time of the site visit, there were no applications on file for additional charter schools

Since the state of Florida no longer provides funding for summer school programs, the district has established three criteria for students who may attend summer school in Broward County School District. The three criteria are:

- ESE, dropout prevention students, and ESOL students;
- students who are recommended for retention; and
- any child who is attending a Level A or Level B school (see Section 5.2 for a description of Level A and B schools).

Every high school and all Level A and B schools are open for summer school. If a child does not fall into one of three categories listed above, he/she can still attend summer school provided the parents arrange for transportation.

Presently there are five schools on year-round calendars: Hallendale Elementary, Colert Elementary, Lake Forest Elementary, Watkins Elementary, and McNicol Middle School. Four of the schools are on single track and one school is on a multi-track program.

At the time of the site visit, there were no districts plans to expand the number of year-round schools for the 1999-2000 school year; however, the district is currently in the process of analyzing the standardized test scores of the students currently attending the five year-round schools.

MGT interviews with district and school-level personnel found that the teachers and parents in the current year-round schools are in support of the continuation of the program even though the original problem of overcrowding no longer exists. It was reported that parent and teacher support is clearly shown in the Innovation Zone quarterly meetings. One Innovation Zone recently produced a year-round school videotape to explain the program's benefits to other schools.

FINDING

The Broward County School District has been experiencing a high rate of pupil growth and a shortfall in funds to provide adequate classroom and related auxiliary space to support the existing educational programs. The use of large numbers of relocatable classrooms and the portable school concept is costly both from a capital as well as operating budget perspective. MGT's extensive work in school facilities has found this to be true (see Chapter 8).

RECOMMENDATION

Recommendation 5-11:

Expand the district's application of the multi-track year-round calendar.

Depending on the configuration of the calendar selected, each school's student capacity can be increased from 20 to over 40 percent. The building capacity is increased depending on the calendar chosen. By having a certain percentage of students out of school for a period of time, the vacated classroom space is then occupied by another teacher with his/her group of pupils. When the next group of students go "off track" (out of school for a period of time), the group that was previously out returns to the newly vacated space. The 60-15 calendar configuration presently employed provides the minimum increase while a 45-15 would provide for a 25 percent increase.

Utilization of the 60-15 calendar in four existing year-round schools would eliminate the need for construction of one additional school. Therefore, the conversion of 25 existing schools would eliminate the need for building five new schools.

IMPLEMENTATION STRATEGIES AND TIMELINE

For information related to implementation strategies and timeline, please refer to Recommendation 8-7 in the Facilities Use and Management (see Chapter 8).

FISCAL IMPACT

For information related to the fiscal impact of this recommendation, please refer to Recommendation 8-7 in the Facilities Use and Management (see Chapter 8).

5.3.4 Diversity and Cultural Outreach

CURRENT SITUATION

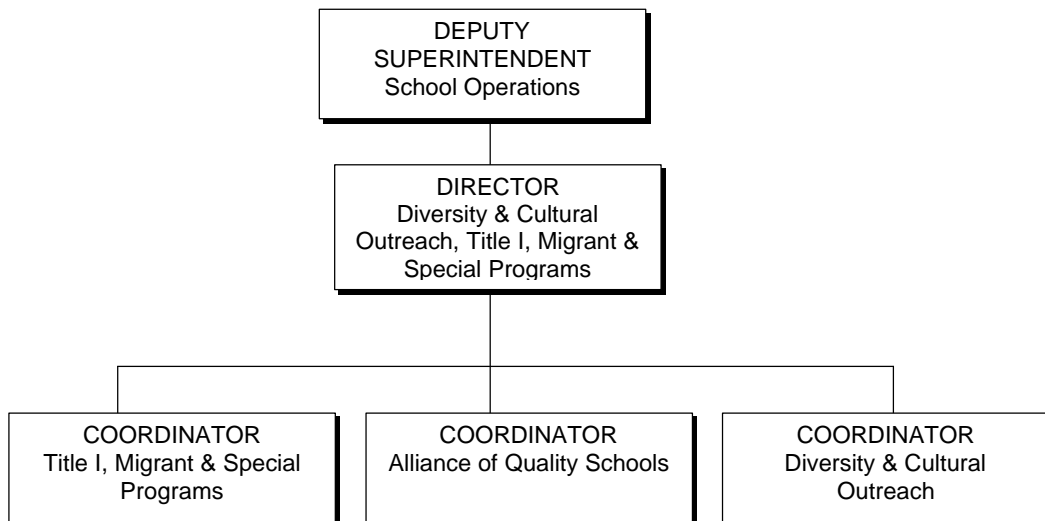
As seen in Chapter 2.0, Broward County is one of the most culturally-diverse school districts in the state of Florida with students born in at least 164 countries, speaking 53 different languages. Approximately 26,500 students in the district are foreign-born. The percentage of Whites is decreasing while the percentage of other ethnic groups is increasing. In 1992-93, 45 percent of the total number of students enrolled were of an

ethnicity other than White/non-Hispanic and in 1997-98 that number increased to 54 percent.

This subsection first discusses the Diversity and Cultural Outreach function, then Title I (regular, migrant and Indian), and concludes with the remainder of special programs.

The Diversity, Cultural Outreach, Title I, Migrant, Indian Education and other Special Programs Department is currently in the Division of School Operations. The organization of this department is displayed in Exhibit 5-21.

**EXHIBIT 5-21
ORGANIZATIONAL STRUCTURE OF THE
DIVERSITY, CULTURAL OUTREACH, TITLE I, MIGRANT
AND SPECIAL PROGRAMS DEPARTMENT
1998-99**



Source: Broward County School District, Division of School Operations, 1998.

The Broward County School District has adopted “diversity” as one of its nine major system priorities. In September 1996, the Board established the Office of Diversity and Cultural Outreach and combined this function with Title I, Migrant, Indian Education, and other Special Programs under one director. The mission of this office is to assist in ensuring that all students and staff develop a broader knowledge and appreciation of cultural diversity. This office provides the following services:

- facilitates the Diversity Committee in its mission to ensure students and staff develop a broader knowledge of cultural diversity;
- assists in developing and revising districtwide policies to promote diversity;

- develops ongoing partnerships with community organizations to implement programs in the school related to diversity;
- provides outreach to over 38 African-American, Hispanic, and Haitian churches and reaches out to parents and students;
- develops and disseminates diversity publications;
- conducts diversity sensitivity training;
- serves on textbook adoption committees and provides information to the committee on identifying diversity issues related to textbooks; and
- participates and assists with various community diversity projects.

The cultural outreach component of the Office of Diversity and Cultural Outreach is designed to meet the needs of eligible students and parents by making use of community organizations, schools, and businesses. These programs are implemented at various community sites and have an incentive award system for those students and parents attaining higher academic achievement. These programs include the:

- Postsecondary Assistance Program that focuses on increasing the number of students who enroll in postsecondary institutions;
- Community Cultural Arts Program that focuses on heightening the awareness of cultural differences through arts;
- Test Training Program that focuses on assisting students in improving test scores;
- General Education Training Program that focuses on reducing illiteracy among low-income adults;
- Tutorial Assistance Program that focuses on improving the academic performance of low performing students.
- Supportive Services Outreach Program that focuses on increasing the opportunities for increasing eligible families in attaining additional support and services; and
- Student Foreign Exchange Program that focuses on providing opportunities for students from other countries to spend time in Broward County schools.

The Office of Diversity and Cultural Outreach has developed numerous partnerships with community organizations such as Jewish Women International, National Conference for Community and Justice, and Anti-Defamation League to implement programs in the schools related to diversity.

The Office of Diversity and Cultural Outreach has developed and disseminated several diversity-related publications addressing the needs of the district's culturally-diverse student and employee population including publications such as the *Diversity Best Practices Manual* and the *Postsecondary Assistance Program Resource Guide*.

FINDING

In addition to supervising the Diversity and Cultural Outreach functions, the Director of the Diversity and Cultural Outreach also oversees several other large programs such as the Title I, Migrant, Indian Education, the Alliance of Quality Schools, and other special programs. Title I, Cultural Outreach and Diversity, Migrant, Alliance of Quality Schools and Special Programs are managed by a director and three coordinators and assigned to the School Operations Division with the Director reporting to the Deputy. With so many vast programs under the leadership of one director, the implementation of these programs is fragmented.

The Coordinator of Diversity and Cultural Outreach has similar position requirements and responsibilities as the Director of Diversity and Cultural Outreach, Title I, Migrant and Special Programs. In reviewing the job descriptions of the Director and the Coordinator, out of 14 performance responsibilities of the Coordinator, nine are identical responsibilities as the Director and one is very similar to the Director's responsibility. There exists an internal duplication of effort in this department. Interviews with district personnel and school-level personnel supported this finding.

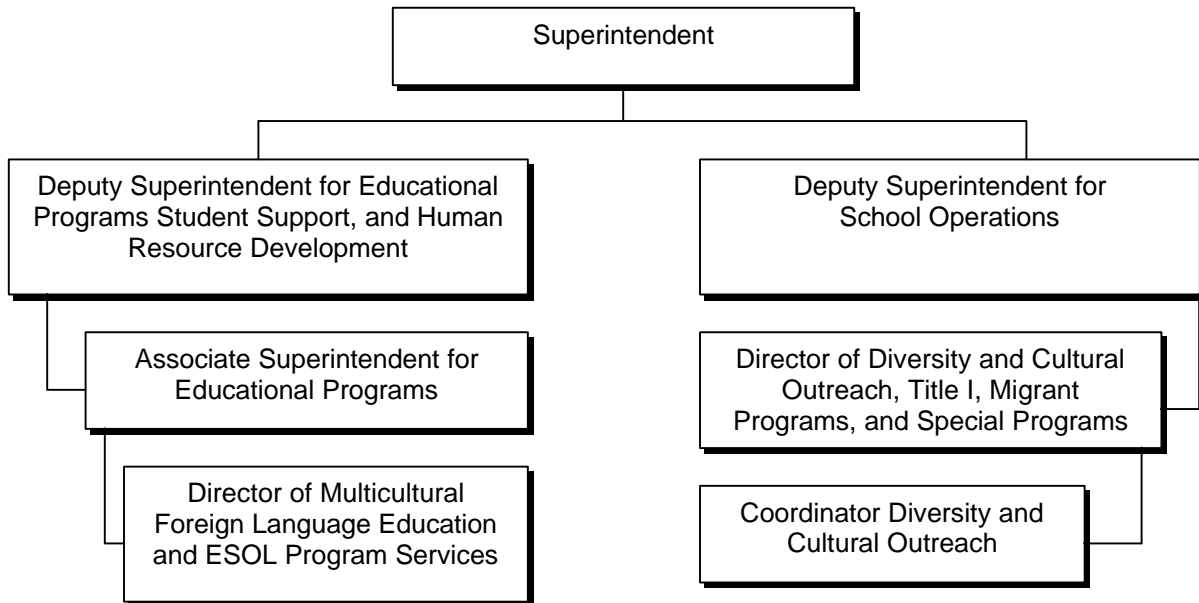
In addition to an internal duplication of efforts, there exists a duplication of services provided by this department and the Multicultural, Foreign Language Education, and ESOL Department within the Division of Educational Programs, Student Support, and Human Resource Development. The Multicultural, Foreign Language Education, and ESOL Department coordinates curriculum and provides instructional support and direct services to schools regarding ESOL, Foreign Language, and Multicultural program implementation. The Department maintains accountability for the quality and content of instruction and instructional materials in ESOL, Foreign Language, and multicultural courses and training, and ensures compliance with federal and state regulations including the META Consent Decree.

The Diversity and Cultural Outreach Office (as does the Office of Multicultural, Foreign language, and ESOL) also provides technical assistance in providing sensitivity training to diverse student populations. In addition, this unit is responsible for developing and providing outreach services to increase the participation of school and community members who are currently not actively involved in the educational process. This Unit reports to the Deputy Superintendent for School Operations.

Exhibit 5-22 was created by MGT to show the organizational structure of the two units that oversee the district's multicultural and diversity programs. Although the two units communicate regarding programs and initiatives, the current organizational structure does not provide for an integrated approach to the district's diversity programs. In fact, some functions such as curriculum integration and the identification of culturally-diverse instructional materials are actually duplicated by the two units. Additionally, the Diversity and Cultural Outreach Office is responsible for involving school and

community members from culturally-diverse backgrounds in partnerships to support diversity initiatives which are important components in improving student achievement and providing program support. The Department outreach programs are not organizationally linked to the Department of Community Relations that reports to the Associate Superintendent of District Administration. It is critical that these units work in coordination and collaboration if effective community relations with diverse populations are to be fostered and maintained.

**EXHIBIT 5-22
ORGANIZATIONAL STRUCTURES OF CULTURAL DIVERSITY PROGRAMS IN
THE BROWARD COUNTY SCHOOL DISTRICT**



Functions:

- Curriculum Development
- Technical Assistance
- Multicultural sensitivity
- Teaching Strategies and Implementation Technical Assistance
- Textbook and Instructional Materials Review
- Foreign Student Exchange Program

Functions:

- Postsecondary Assistance Program
- Community Cultural Arts Program
- Multicultural Sensitivity
- Tutorial Assistance Programs
- Support Services Outreach Program
- Community Cultural Arts Program
- General Education Training Program
- Test Training Program
- Textbook and Instructional Materials Review

Source: Created by MGT of America, 1998.

Although diversity, multicultural programs, and cultural outreach are important goals for the Broward County School District, the implementation of these programs is fragmented in the current organizational structure. The curricular aspects of diversity and multicultural education should be centralized within the unit of Multicultural,

Foreign Language and ESOL in the Educational Programs and Services Division. Functions such as multicultural sensitivity training, the Diversity Committee function, and diversity publications should be centralized in one Multicultural Programs Department. The community outreach, and partnership functions should be coordinated with the Department of Community Relations.

RECOMMENDATION

Recommendation 5-12:

Merge the cultural diversity function under one unit and reassign the functions to the newly realigned Division of Educational Programs and Services in the Department of Special Programs.

Implementation of this recommendation should include the elimination of the Coordinator of Diversity and Cultural Outreach position (refer to Exhibit 5-10 for the proposed realignment of this function).

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should recommend the reorganization of the district's cultural diversity programs and the elimination of the Coordinator of Diversity and Cultural Outreach position. May 1999
2. The Board should approve the organizational changes and elimination of the position. Summer 1999
3. The Deputy Superintendent for Educational Programs, Student Support, and Human Resources Development, and the Associate Superintendent for Administration should ensure that the new functions are implemented in the new organizational structure. Beginning
Fall 1999
and Ongoing

FISCAL IMPACT

Eliminating the position of Coordinator of Cultural Diversity and Outreach will result in an annual savings of about \$69,300 based on a base salary of \$52,346 and a 33 percent benefits package. This salary is prorated for the 1999-2000 school year.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Eliminate the Coordinator of Diversity and Cultural Outreach	\$46,200	\$69,300	\$69,300	\$69,300	\$69,300

5.3.5 Title I - (Regular, Migrant, and Indian Education Programs)

CURRENT SITUATION

In October 1994, the federal Title I program's name was changed from the Education Consolidation Improvement Act (ECIA) Chapter 1 to Elementary and Secondary Education Act (ESEA) Title I. It is important to remember that both names refer to the program currently called Title I.

Title I is a program that provides ancillary support services for students who need extra assistance in reaching academic and social goals. The children that the program serves reside in school attendance areas with high concentrations of children from low income families. The federal government provides funds for the program and are in addition to the funding received by the district. All services students would receive in the absence of Title I funds must be in place before Title I funds are used. A school is selected to receive Title I services when the school's levels of economic deprivation (percentage of students on free/reduced meals) exceeds the county average.

The Title I program goals in the Broward County School District are to enable schools to provide opportunities for children to acquire knowledge by:

- ensuring high standards for all students;
- providing an enriched and accelerated education program through a schoolwide program;
- promoting schoolwide reform;
- upgrading the quality of instruction;
- affording parents opportunities to participate;
- distributing resources to areas where needs are the greatest;
- improving accountability; and
- providing greater decision making and flexibility to schools.

Broward's Title I program staff provides assistance and support to approximately 150 administrators, 300 teachers, and 400 paraprofessionals in 74 public schools, 13 nonpublic schools, and 22 institutions for the neglected and delinquent. Title I staff currently serves about 49,800 students. Additionally, the duties of the Title I staff include ensuring compliance with local, state, and federal laws, rules and regulations.

Title I staff provides services to Title I Schoolwide Project Schools by:

- assisting schools with budgetary matters, planning and implementation of activities, compliance, monitoring and parent involvement;

- attending Open Houses, Parent Teacher Association and Advisory meetings to share information about Title I, assisting in recruiting Parent Training Academy representatives and documenting each school's Annual Public Meeting;
- assisting Title I teachers and students in low performing schools;
- reviewing School Improvement Plans and assisting schools in areas identified by the school;
- planning and conducting an interactive Math Challenge Competition for teams of Title I students to compete in solving math problems via the Broward Educational Community Network (BECON);
- providing workshops for Title I school-based principals, bookkeepers, Title I contact persons, and community liaisons;
- providing training for principals, teachers and paraprofessionals of Title I private schools, and institutions for the neglected and delinquent;
- presenting workshops for Title I teachers and parents through Innovation Zones and Volunteers in Partnership;
- serving on School Improvement Teams;
- attending Innovation Zones meetings and participating in Zone activities;
- working collaboratively with the curriculum departments and attending meetings;
- attending New American Schools meetings and serving as district liaison for the following design models: Co-NECT, Modern Red Schoolhouse and Roots and Wings;
- conducting parent training through the Parent Training Academy which offers strategies for helping parents help their children with age appropriate reading, writing and mathematics activities that support student achievement;
- offering additional parent training through MegaSkills, Family Math, Parents Sharing Books, and Computer Literacy classes;
- providing opportunities for parents to check out materials from the Title I Center for Parent Involvement during the day and participate in GED classes in the evening;
- conducting parent workshops at two Homeless Family Centers;

- providing a Community Outreach Program through the use of the Title I Parent Centers on Wheels which are scheduled at schools, apartment complexes, and homeless family centers in each of the three geographic areas. These services give parents the opportunity to check out materials for helping their children at home; and
- planning and conducting a districtwide Title I Parent Seminar annually for approximately 400 parents and guests.

The Title I and Migrant grant funds awarded for the 1997-98 and 1998-99 are displayed in Exhibit 5-23.

**EXHIBIT 5-23
TITLE I, MIGRANT (PART C), MIGRANT (EARLY CHILDHOOD)
AND INDIAN GRANT FUNDING FOR 1997-99**

CATEGORY	1997-98	1998-99
TITLE I FUNDING	\$23,523,942.00	\$23,816,832.00
Migrant (Part C) Funding	\$452, 281.00	\$264,260.00
Migrant (Early Childhood	\$ 99,751.00	\$49,748.00
Indian Education	\$11,049.00	\$11,202.00

Source: Broward County School District, Title I Program Guide, 1998

A minimum of one percent of the Title I budget must be allocated to parent involvement activities. The projected expenditures for the 1998-99 Title I allocation are as follows:

<u>Budget Item</u>	<u>Percentage of Projected Budget</u>
Direct/Indirect Funds to Schools	85%
Salaries/Operations Costs	10%
Indirect Cost to General Funds	5%

Each eligible school has an individual Title I budget. The 1998-99 per pupil allocations are:

- \$410.00 per pupil - elementary schools with 75 percent or more free/reduced price lunch students.
- \$340.00 per pupil - elementary schools with 74-50 percent free/reduced price lunch students.
- \$320.00 per pupil - middle schools with 75 percent or more free/reduced priced lunch students.
- \$290.00 per pupil - middle schools with 74-50 percent free/reduced lunch students.

Exhibit 5-24 provides a list of Title I schools and institutions supported by Title I funds. The Alliance for Quality Schools programs are marked with an asterisk and the status of this special program will be discussed in the next section.

**EXHIBIT 5-24
TITLE I SCHOOLS AND INSTITUTIONS**

ELEMENTARY SCHOOLWIDE PROJECTS	
<ol style="list-style-type: none"> 1. Bennett* 2. Bethune 3. Broadview* 4. Broward Estates 5. Castle Hill* 6. Castle Hill Annex* 7. Colbert 8. Collins 9. Cresthaven 10. Croissant Park 11. Cypress* 12. Dania* 13. Davie 14. Deerfield Park* 15. Dilliard* 16. Drew, Charles* 17. Driftwood 18. Fairway 19. Forster, Stephen 20. Hallandale 21. Hollywood Central 22. Hollywood Park 23. King, Martin Luther* 24. Lake Forest 25. Larkdale* 26. Lauderdale Manors* 27. Lauderhill Paul Turner* 28. Lloyd Estates 29. Markham, Robert C.* 	<ol style="list-style-type: none"> 30. Marshall Thurgood* 31. Meadowbrook* 32. Mirama 33. North Fork * 34. North Lauderdale 35. North Side* 36. Oakland Park 37. Oakridge* 38. Orange Brook* 39. Oriole* 40. Palmview 41. Park Ridge* 42. Perry, Annable C* 43. Plantation* 44. Pompano Beach 45. Riverland* 46. Rock Island* 47. Royal Palm* 48. Sanders Park* 49. Sheridan Hills 50. Sunland Park* 51. Sunshine 52. Tedder* 53. Village 54. Walker* 55. Watkins 56. West Hollywood* 57. Westwood Heights* 58. Wilton Manors*
*Alliance of Quality Schools - 35	
MIDDLE SCHOOL SCHOOLWIDE PROJECTS Grades 6-8	
<ol style="list-style-type: none"> 1. Attucks 2. Crystal Lake Community* 3. Dandy, William 4. Deerfield Beach 5. Driftwood 6. Lauderdale Lakes* 7. Lauderhill* 8. McNicol 	<ol style="list-style-type: none"> 9. New River* 10. Olson 11. Parkway 12. Perry, Henry D.* 13. Pompano Beach 14. Richards* 15. Silver Lakes 16. Sunrise
*Alliance of Quality Schools - 6	

Source: Broward County School District, Title I Program Manual, 1998.

**EXHIBIT 5-24 (Continued)
TITLE I SCHOOLS AND INSTITUTIONS**

NONPUBLIC SCHOOLS Grades 1-8	
<ol style="list-style-type: none"> 1. Annunciation 2. Little Flower 3. Nativity 4. Our Lady Queen of Martyrs 5. Ambrose 6. St. Bartholomew 	<ol style="list-style-type: none"> 7. St. Clement 8. St. Coleman 9. St. Elizabeth 10. St. Helen 11. St. Jerome 12. St. Stephen 13. Phyl's Academy
INSTITUTIONS FOR NEGLECTED STUDENTS Grades 2-12	
<ol style="list-style-type: none"> 1. The Chord I 2. Twig House 3. Lake House 4. Kids in Distress 5. Brookwood East 6. The Starting Place 7. SOS Children's Village 8. Soloman Center for Girls 9. Broward Group Treatment Home - Boys 10. Broward Group Treatment Home - Girls 	<ol style="list-style-type: none"> 11. Berger House 12. Einsten House 13. Liroff House 14. SAIL Program 15. Dodge House
INSTITUTIONS FOR DELINQUENT STUDENTS Grades 6-12	
Broward County Sheriff's Center for Juveniles Broward Intensive Halfway House Pembroke Park Group Treatment Home Personal Enrichment Through Mental Health Services Pompano Academy Sankofa House Spectrum Programs, Inc.	

Source: Broward County School District, Title I Program Manual, 1998.

Exhibit 5-25 provides the 1998 Stanford Achievement Test Scores of Broward County School District's Title I schools. Exhibit 5-26 provides the 1998 Florida Writes scores of all Broward County Title I schools.

**EXHIBIT 5-25
TITLE I
STANFORD ACHIEVEMENT TEST+, EIGHTH EDITION*
ELEMENTARY SCHOOLS
1997-98**

DISTRICT	GRADE 2		GRADE 3		GRADE 4		GRADE 5	
	READ	MATH	READ	MATH	READ	MATH	READ	MATH
Bennett*	33	30	32	47	32	47	35	45
Bethune	32	32	40	59	36	49	38	47
Broadview*	41	40	24	42	30	46	32	44
Broward Estates	30	40	32	41	36	56	45	59
Castle Hill Annex*	26	20	27	57	40	61	26	41
Castle Hill*	37	40	26	31	35	43	31	48
Colbert	41	41	18	43	34	40	35	51
Collins*	30	51	17	46	31	46	27	63
Cresthaven	39	48	28	47	31	41	39	51
Croissant Park	39	52	41	65	36	61	35	54
Cypress*	32	37	18	34	28	37	31	58
Dania*	39	41	32	50	34	61	44	58
Davie	36	51	43	69	45	68	44	71
Deerfield Park*	31	38	15	37	29	45	22	38
Dillard*	21	14	19	27	22	31	23	34
Drew, Charles*	24	31	15	28	22	35	12	30
Driftwood	43	49	30	58	54	70	28	48
Fairway	36	45	28	45	46	74	34	44
Foster, Stephen	53	74	26	42	47	66	39	52
Hallandale	31	41	26	61	43	66	29	50
Hollywood Central	46	51	35	50	48	57	50	56
Hollywood Park	32	38	30	47	32	45	32	47
King, Martin Luther*	38	54	39	55	42	55	29	47
Lake Forest	39	56	40	67	34	62	35	56
Larkdale*	34	34	16	30	29	42	20	38
Lauderdale Manors*	42	50	27	38	37	49	16	38
Lauderhill, P.T. *	47	49	30	44	42	56	28	58
Lloyd Estates	34	32	21	37	30	46	26	46
Markham*	38	22	22	28	11	36	16	30
Meadowbrook*	36	25	25	40	35	39	32	47
Miramar	32	30	30	52	40	56	31	53
North Fork*	25	14	14	27	19	29	20	36
North Lauderdale	35	33	33	40	36	44	30	37
North Side*	23	18	18	38	33	49	21	39
Oakland Park	36	26	26	42	38	57	33	49
Oakridge	28	29	29	50	39	61	34	50
Orange Brook	44	28	28	49	35	63	35	62
Oriole*	36	24	24	41	31	47	19	34
Palmview	27	22	22	33	23	53	22	50
Park Ridge*	28	27	27	56	35	59	27	51
Perry, A. C.*	34	44	25	46	38	54	27	62
Plantation	31	26	29	54	37	51	24	34
Pompano Beach	39	48	45	58	43	56	39	41
TOTAL	48	58	41	62	50	66	46	64

Source: Broward County School District, Department of School Improvement and Accountability, 1998.

*Alliance 1997-98.

+Norm-referenced test. Norm-referenced tests compare student performance to the performance of thousands of other students who have taken the same test. The results for norm-referenced tests describe student achievement relative to other students' results. For example, the national average score for the Stanford at the 50 percentile.

**EXHIBIT 5-25 (Continued)
TITLE I
STANFORD ACHIEVEMENT TEST, EIGHTH EDITION*
ELEMENTARY SCHOOLS
1997-98**

DISTRICT	GRADE 2		GRADE 3		GRADE 4		GRADE 5	
	READ	MATH	READ	MATH	READ	MATH	READ	MATH
Riverland*	29	38	23	38	27	50	28	41
Rock Island*	26	30	22	39	27	43	20	30
Royal Palm *	33	27	19	32	28	44	21	40
Sanders Park*	35	50	15	46	30	48	31	45
Sheridan Hills	38	58	31	52	48	70	46	65
Sunland Park*	21	14	17	14	20	27	20	37
Sunshine	44	45	36	45	45	52	42	57
Teddar*	36	44	20	38	33	51	20	47
Thurgood Marshall*	23	19	16	27	26	36	18	23
Village	38	44	35	55	35	55	31	47
Walker*	34	47	28	42	26	52	29	52
Watkins	33	39	20	38	36	53	36	54
West Hollywood*	40	28	29	54	41	55	35	60
Westwood Heights*	26	21	25	33	25	41	20	31
Wilton Manors*	42	48	34	49	38	49	30	43
AVERAGE	48	58	41	62	50	66	46	64

**MIDDLE SCHOOLS
1997-98**

DISTRICT	GRADE 6		GRADE 7		GRADE 8	
	READ	MATH	READ	MATH	READ	MATH
Attucks	43	49	45	47	41	41
Crystal Lakes	40	45	31	42	34	42
Dandy, William C.	21	34	30	39	31	34
Deerfield Beach	29	43	41	50	35	38
Lauderdale Lakes	24	29	24	35	27	33
Lauderhill*	20	27	25	29	26	23
McNicol	26	42	36	45	36	36
New River	37	42	30	36	25	29
Olsen	43	52	44	47	36	42
Parkway	35	61	41	47	16	36
Perry, Henry D.*	30	37	30	39	32	36
Pompano Beach	34	49	35	53	35	53
Richards*	43	52	42	67	47	58
Silver Lakes	36	48	49	58	51	54
Sunrise	29	36	38	39	34	33
AVERAGE	47	59	50	58	49	56

Source: Broward County School District, Department of School Improvement and Accountability, 1998.

*Alliance 1997-98.

**EXHIBIT 5-26
TITLE I
ELEMENTARY SCHOOLS
FLORIDA WRITING ASSESSMENT+**

	1996	1997	1998	1996	1997	1998	1996	1997	1998
	EXPOSITORY AVERAGE			NARRATIVE AVERAGE			TOTAL		
STATE	2.2	2.5	3.0	2.8	2.8	3.1	2.5	2.6	3.0
DISTRICT	2.3	2.5	3.1	2.8	2.7	3.1	2.5	2.6	3.1
Bennett*	1.8	2.5	2.7	2.4	2.7	2.8	2.1	2.6	2.7
Bethune, Mary M	2.1	2.2	2.6	2.5	2.4	2.7	2.3	2.3	2.6
Broadview*	1.8	2.2	2.8	2.4	2.2	2.6	2.1	2.2	2.7
Broward Estates	1.8	2.6	3.2	2.1	2.3	3.1	2.0	2.5	3.2
Castle Hill Annex***	2.1	2.0	3.1	2.5	2.3	3.2	2.3	2.2	3.1
Castle Hill***	N/S	2.3	2.9	N/S	2.2	3.2	N/S	2.2	3.1
Colbert	2.4	2.5	2.9	2.6	2.6	2.8	2.5	2.5	2.8
Collins***	1.9	2.1	2.8	2.3	2.2	2.7	2.1	2.1	2.7
Cresthaven	2.0	1.8	2.5	2.5	2.1	2.5	2.2	1.9	2.5
Croissant Park	2.2	2.0	2.7	2.9	2.5	2.8	2.5	2.3	2.7
Cypress**	2.0	2.3	2.8	2.4	2.2	2.8	2.2	2.2	2.8
Dania***	2.6	2.5	3.5	2.6	2.6	3.1	2.6	2.6	3.3
Davie	2.3	2.2	2.9	3.0	2.4	3.2	2.7	2.3	3.0
Deerfield Park*	1.5	2.2	2.8	1.9	2.0	2.8	1.7	2.1	2.8
Dillard***	2.1	2.3	2.7	2.6	2.0	2.5	2.4	2.1	2.6
Drew***	2.1	1.9	2.8	2.2	2.2	2.2	2.2	2.0	2.5
Driftwood	2.4	2.3	3.2	2.9	2.8	3.3	2.7	2.5	3.2
Fairway	2.5	2.7	2.8	2.9	2.7	3.1	2.7	2.7	3.0
Foster, Stephen	2.4	2.2	2.9	3.0	2.3	2.8	2.7	2.3	2.9
Hallandale	2.3	2.7	3.3	2.6	3.0	2.9	2.5	2.8	3.1
Hollywood Central	2.1	2.0	3.2	2.4	2.5	3.4	2.3	2.2	3.3
Hollywood Park	2.0	2.6	3.0	2.2	2.7	2.7	2.1	2.6	2.8
King, Martin Luther****	2.7	2.6	2.6	2.7	2.4	2.6	2.7	2.5	2.6
Lake Forest	1.7	2.5	3.0	2.3	2.7	2.8	2.0	2.6	2.9
Larkdale****	1.9	2.1	3.2	2.2	2.4	3.0	2.1	2.2	3.1
Laudedale Manors***	2.0	2.4	3.2	2.4	2.1	2.9	2.2	2.2	3.0
Lauderhill, P.T. ***	2.3	2.7	3.2	2.5	2.7	2.8	2.4	2.7	3.0
Lloyd Estates	2.1	2.3	3.2	2.5	2.5	3.0	2.3	2.4	3.1
Markham, Robert C***	1.5	2.3	2.7	1.6	2.2	2.7	1.6	2.2	2.5
Marshall, Thurgood***	2.2	2.3	3.1	2.1	2.3	3.1	2.1	2.3	3.1
Meadowbrook*	2.0	2.2	2.5	2.6	2.0	2.8	2.4	2.1	2.7
Miramar	2.0	2.3	3.0	2.7	2.3	2.8	2.4	2.3	2.9
North Fork*****	1.7	2.1	2.5	1.9	2.0	2.8	1.8	2.1	2.7
North Lauderdale	1.7	2.3	2.3	2.3	2.2	2.5	2.0	.2	2.4
North Side****	1.9	2.6	2.9	1.9	2.9	3.2	1.9	2.8	3.1
Oakland Park	2.3	2.0	2.8	2.8	2.3	3.0	2.5	2.2	2.9
Oakridge	2.2	2.4	2.9	2.9	2.8	2.9	2.5	2.6	2.9
Orange Brook	1.9	2.1	2.8	2.2	.5	3.0	2.1	2.3	2.9

Source: Broward County Schools, Department of School Improvement and Accountability, 1998.

*Alliance School 1998

**Alliance School 1997, 1998.

***Alliance School 1996, 1997, 1998

****Alliance School, 1995, 1996, 1997, 1998

+Criterion-referenced (content-referenced test). Criterion-referenced test compare student performance to a standard that has been established for a particular set of questions. For example, in the Florida Writes, the acceptable standard is three out of a possible zero to six. While most classroom tests are criterion-referenced tests, most standardized test are norm-referenced.

**EXHIBIT 5-26 (Continued)
TITLE I
ELEMENTARY SCHOOLS
FLORIDA WRITING ASSESSMENT**

	1996	1997	1998	1996	1997	1998	1996	1997	1998
	EXPOSITORY AVERAGE			NARRATIVE AVERAGE			TOTAL		
STATE	2.2	2.5	3.0	2.8	2.8	3.1	2.5	2.6	3.0
DISTRICT	2.3	2.5	3.1	2.8	2.7	3.1	2.5	2.6	3.1
Oriole****	2.1	2.3	2.8	.6	2.4	2.8	2.4	2.4	2.8
Palmview	1.9	2.1	3.0	2.6	2.2	2.7	2.3	2.1	2.8
Park Ridge*****	2.1	2.2	3.0	2.6	2.3	3.1	2.3	2.2	3.0
Perry, A. C.*	2.0	2.6	3.0	2.3	2.4	3.0	2.2	2.5	3.0
Plantation	2.4	1.7	2.8	2.4	2.0	2.8	2.4	1.8	2.8
Pompano Beach	2.1	2.1	2.6	2.3	2.6	2.5	2.2	2.3	2.5
Riverland****	2.2	2.8	3.2	2.4	2.6	3.1	2.3	2.7	3.1
Rock Island****	2.0	2.2	3.3	2.5	2.2	3.0	2.3	2.2	3.1
Royal Palm ****	2.2	2.2	3.0	2.5	2.2	2.7	2.3	2.2	2.8
Sanders Park***	2.3	1.9	2.8	2.6	2.2	3.0	2.4	2.0	2.9
Sheridan Hills	2.4	1.8	3.0	2.7	1.7	3.0	2.5	1.7	3.0
Sunland Park***	1.8	2.3	2.7	2.2	1.9	2.5	2.0	2.1	2.6
Sunshine	2.1	2.2	3.0	2.4	2.5	3.1	2.3	2.4	3.0
Teddar**	1.8	2.2	2.6	2.4	2.1	2.6	2.1	2.2	2.6
Village	1.9	2.2	3.2	2.5	2.6	3.3	2.2	2.4	3.3
Walker**	1.5	2.9	3.0	2.1	2.6	2.9	1.8	2.8	2.9
Watkins	1.9	2.2	3.3	2.3	2.0	3.4	2.1	2.1	3.4
West Hollywood***	2.2	2.8	3.1	2.5	2.7	3.1	2.4	2.7	3.1
Westwood Heights****	1.8	1.9	2.8	2.3	2.2	2.9	2.0	2.1	2.8
Wilton Manors***	2.2	2.5	2.9	2.6	2.0	2.7	2.4	2.30	2.8

MIDDLE SCHOOLS

	1996	1997	1998	1996	1997	1998	1996	1997	1998
	EXPOSITORY AVERAGE			NARRATIVE AVERAGE			TOTAL		
STATE	2.2	2.5	3.0	2.8	2.8	3.1	2.5	2.6	3.0
DISTRICT	2.3	2.5	3.1	2.8	2.7	3.1	2.5	2.6	3.1
Attucks	3.6	3.5	3.5	3.6	3.3	3.2	3.6	3.4	3.4
Crystal Lakes	3.4	3.1	3.1	3.1	3.0	3.0	3.3	3.1	3.1
Dandy, William C.	3.4	3.2	2.9	3.3	3.0	2.8	3.4	3.1	2.8
Lauderdale Lakes*	3.0	2.8	2.7	2.7	2.8	2.7	2.8	2.8	2.7
Lauderhill*	3.3	3.3	2.8	2.8	3.1	2.7	3.2	3.2	2.8
McNicol	3.1	3.0	3.0	3.3	3.1	2.9	2.9	3.0	3.0
New River	3.4	2.9	2.9	3.2	2.9	2.9	3.4	2.9	2.9
Olsen	3.4	3.4	3.2	2.8	3.1	3.0	3.3	3.2	3.1
Parkway	3.0	3.1	3.1	3.1	3.1	3.1	2.9	3.1	3.1
Perry, Henry D.*	3.2	2.9	3.0	3.1	3.0	2.8	3.2	3.0	2.9
Pompano Beach	2.1	3.2	3.3	3.3	3.2	3.1	3.2	3.2	3.2
Richards*	3.0	3.5	3.4	3.1	3.3	3.0	3.5	3.4	3.2
Sunrise	2.9	3.2	3.1		3.2	3.0	3.3	3.2	3.0

Source: Broward County Schools, Department of School Improvement and Accountability, 1998.

*Alliance School 1998

**Alliance School 1997, 1998.

***Alliance School 1996, 1997, 1998

****Alliance School, 1995, 1996, 1997, 1998

The Title I Migrant staff provides the following services:

- identifying and recruiting migrant families on an ongoing basis;
- providing college assistance (scholarships and financial assistance) for eligible migrant students;
- providing social service assistance for migrant families. Parents receive clothing for their children through community agencies, churches, and other organizations;
- providing assistance to migrant parents in enrolling their children in school (completing registration forms and other school-related paperwork);
- assisting Spanish speaking parents in making appointments at the Health Department and Sunshine Clinic. Interpreters enable parents to obtain their children's physical exams and help in completing the forms for school enrollment;
- monitoring migrant students' attendance and contacting parents to verify reasons for absence. Assisting with returning students to school, when necessary; and
- providing social services assistance through referral of migrant families to the Piper High School student Activities Committee and Markham Elementary School.

The district receives migrant Title I funds based on the number of migrant families the "identifier recruiters" identify. Currently, the district has 800 migrant families. At Markham Elementary School, there are 45 three-year-old migrant children receiving migrant services. This includes making the necessary referrals for students to receive needed health, social, and nutritional services.

The Indian Education Programs funding by Title I provide tutoring for Indian students at various sites several days a week. Additionally, Indian students in grades K-12 participate in an after-school homework assistance/tutorial program in 10 of the district's schools.

FINDING

Survey results indicate that 15 percent of the district's principals surveyed believe that the district's federal program coordinator needs major improvement. Interviews with administrative personnel supported by data at the school level, indicate that while there are numerous support positions assigned to the Title I programs, there exists a need for more direct assistance to the schools for the Title I program. During on-site visits, MGT carefully assessed the deployment of personnel and other resources to schools.

The Deputy Superintendent for School Operations, in addition to responsibilities for four area superintendents and their respective school zones, has the responsibility for Dropout Prevention, Area Exceptional Student Education, Area Student Services School Assignment, and Diversity and Cultural Outreach along with Title I, Migrant, and Special Programs. The Deputy Superintendent for Educational Programs, Student Support and Human Resource Development has the responsibility for a number of related district-level services to schools functions including multicultural, foreign language education, and ESOL Program services. The coordination among the programs between the two divisions is fragmented due to the number of administrative tiers between the Deputy and the specific function. Once again, as stated in previous recommendations, this situation could be dealt with through recommendations associated with reorganizing functions and their alignment.

The district's organizational chart depicts administrative positions dedicated to Title I; however, numerous other positions (not shown on the organizational chart) are currently assisting the Department of Diversity and Cultural Outreach, Title I, Migrant and Special Programs. These include the following positions and their classifications as it relates to Title I:

- two Teachers on Special Assignment-Migrant Education
- eight Teachers on Special Assignment- Title I
- 10 Clerical (8 for Title I, 1 for Migrant, and 1 for Special Programs)
- two custodians
- four Community Liaisons
- three Paraprofessionals
- four Identity Recruiters
- one Records Clerk
- two full-time Bus Operators (Parent Centers on Wheels)
- five Program Specialists

The district serves as fiscal agents for the Region V Title I staff. Additionally, the district provides support for three state database managers who assist all eight districts in the region.

Ideally, the allocation and monitoring of federal funds should be the responsibility of central office personnel. Schools, in turn, should be held accountable for implementing programs and services with the additional resources. Area administrators should ensure that programs and services purchased with federal funds are results-driven and clearly meet the needs of the designated special population of students. Area office administrators should play a technical assistance role that improves school effectiveness, in general, regardless of the funding source.

RECOMMENDATION

Recommendation 5-13:

Transfer oversight responsibility for Title I, Migrant, Indian Education, and other special programs to the Division of Educational Programs and Services under the Director of Special Programs.

Exhibit 5-10 provides the organizational structure for the proposed realignment of this department.

Under one unit, the Associate Superintendent of Educational Programs should be able to ensure a comprehensive approach to educational service delivery of the Title I, Migrant, Indian Education, and Special Programs.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should recommend the reorganization. May 1999
2. The Board should approve the organizational changes. June 1999
3. The Associate Superintendent should ensure that the federal programs are integrated and monitored with district standards and priorities. Ongoing

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

RECOMMENDATION

Recommendation 5-14:

Evaluate Title I, Migrant, and Special Programs' deployment of personnel to schools with a goal of providing more direct support to schools.

This assessment should include an analysis of the percent of time dedicated to the direct delivery of services to clients. Data examined and interviews conducted by MGT consultants reveal that the level, quantity, and quality of services rendered to clients by Title I, Migrant, and Special Programs has not included the percent of time committed to direct services. Furthermore, school-level personnel consistently voice concerns related to quantity of services.

A comprehensive evaluation may result in the reassignment of teachers on special assignment and program specialist positions from the district level to schools and other cost centers serving clients. This may eliminate persistent problems associated with the availability of personnel at school sites.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Associate Superintendent for Educational Programs and the Director of Title I should develop a plan for the reassignment of a minimum 9 teachers on special assignment and five program specialists to appropriate school and cost centers that provides services to schools. May 1999

2. The Deputy Superintendent for Educational Programs, Student Support Services, and Human Resource Development should review and approve the plan. July 1999
3. The Associate Superintendent for Educational Programs and the Director of Title I should implement the provisions of the plan. October 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources. When implemented, Title I services will be more appropriately directed to the schools.

5.3.6 Alliance of Quality Schools

CURRENT SITUATION

The Alliance of Quality Schools (AQS) is a comprehensive program that provides learner-verified, research-based components to 72 schoolwide Title I schools (See Exhibit 5-24 for a list of schools served) in the areas of reading, writing, mathematics, social behaviors, and parent involvement. Assessment data are used extensively in planning and implementing this program (refer to Exhibits 5-25 and 5-26 to review the achievement levels of the AQS schools on the SAT and Florida Writes Tests). Direct instruction, individualized instruction, computer-assisted instruction, and a strong emphasis on teacher training are the key elements of the program. Alliance schools use instructional approaches to teaching and learning that have proved to be successful.

Exhibit 5-27 explains the specific features of the AQS Program.

Fifteen (15) districts have visited the Broward County School District to review the AQS Program in order to replicate the program in their respective districts. Other states/districts that have visited the district and are currently using the AQS Program include:

- St. John's County, Florida
- Miami-Dade County, Florida
- Baltimore, Maryland
- Philadelphia, Pennsylvania
- Seattle, Washington
- Kentucky

FINDING

As seen in Exhibits 5-25 and 5-26, test scores indicate an increase in student achievement (in the Florida Writes and the mathematics portion of the SAT) in the AQS program primarily at the elementary school level. Currently, the Alliance Program is being implemented in six middle schools (Lauderhill, Perry, and Rickards, New River, Crystal Lake, and Lauderdale Lakes).

**EXHIBIT 5-27
KEY COMPONENTS OF THE ALLIANCE FOR QUALITY SCHOOLS PROGRAM**

- School must vote and have an 80% agreement to apply for a partnership with the AQs. Currently, there are partnerships with 34 elementary schools and 6 middle schools.
- All staff members are provided two days of inservice on the Reading Mastery or the Corrective Reading Program along with inservice on the Write Track Writing Program.
- The integration of Reading Mastery and Distar Language in kindergarten to develop oral language, comprehension, and instructionally appropriate reading instruction.
- Reading Mastery I and II are systematically integrated into grades 1 and 2 to offer explicit phonics reading instruction for students whose learning assessment details such a program is needed.
- The assessment of students in reading in grades 2-5. Students are diagnosed with an informal reading inventory and reading program placement tests. Based upon these results, academically deficient students are remediated using Reading Mastery or Corrective Reading, Students on level or provided reading instruction through a balanced reading program.
- The teacher ("coach") is provided 2.5 days per week for each Alliance school to provide on-site modeling, feedback, and inservice.
- Regrouping of student according to increases in reading achievement occurs quarterly.
- All classrooms are provided with supported reading materials to provide a balanced-reading program and to assist with generalization of reading skills.
- The teaching of the writing process occurs daily in grades K-5.
- Daily openers in mathematics and content area challenges are provided to engage students in instructional activities that call for the application of information.
- A family component is provided to 18 of the elementary schools with the highest degree of free and reduced lunch to provide an increase in parent involvement and home-school connection.

Source: Broward County Schools, Alliance of Quality Schools Program Manual, 1998.

COMMENDATION

The Broward County School District and Coordinator of the Alliance of Quality Schools are commended for implementing a program that increases student achievement as indicated by recent test scores (Florida Writes and the mathematics portion of the SAT) and used as an exemplary model for other school districts.

FINDING

The Alliance of Quality Schools, as previously described, is an educational program assisting low achieving schools. Currently, the program is located in the Division of School Operations and the coordinator of the Alliance of Quality Schools reports directly to the Director of Diversity and Cultural Outreach, Title I, Migrant, and Special Programs. The program should be more appropriately aligned with other instructional

programs. The Director's oversight of such a wide array of programs has caused fragmentation in the delivery of services to students. Additionally, programs (such as the Alliance) should be placed under the Director of School Improvement and Innovation in a department overseeing other innovative programs (see Exhibit 5-10 for the proposed realignment).

RECOMMENDATION

Recommendation 5-15:

Reassign the Alliance for Quality Schools Program to the newly proposed Division of Educational Programs and Services under the Director of School Improvement and Innovation (see Exhibit 5-10 for the proposed realignment of this program).

The Alliance of Quality School is a program that identifies and validates effective, exemplary, and/or innovative educational programs. The program should fall under the leadership of the proposed Deputy Superintendent for Educational Programs and services. This new alignment should ensure that the educational program areas develop an active role in dissemination of proven practices and programs.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-----------|
| 1. The Superintendent should include this organization change in the proposal recommended for School Board action. | May 1999 |
| 2. The School Board should approve the Superintendent's recommendation. | June 1999 |
| 3. The Superintendent and Executive Staff should implement the approved reorganization plan. | July 1999 |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

Test scores for students (attending schools that were formerly "low performing" schools) who are participating in the Alliance of Quality Schools indicate significant improvement in their Florida Writes score and the mathematics portion of the SAT scores. Currently, the program is only being implemented in six of the district's middle schools. The district should consider duplicating the program for other lower performing middle schools.

RECOMMENDATION

Recommendation 5-16:

Develop and implement a strategy for expanding the Alliance of Quality Schools Program at the middle school level.

The Broward County School District no longer has any schools on the state's "Critically Low Performing" list. According to internal district evaluations, progress toward this accomplishment has been due in a large part to the implementation of the Alliance of Quality Schools Program. Since the Alliance of Quality Schools Program had such a positive impact on increased student achievement for 1997-98 (i.e., second grade students had the highest increase in IRI reading level, followed by fifth grade students who achieved a gain of 1.15 in reading levels), the district should expand this program to reach a larger number of middle school students.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Services, and Human Resource Development should prepare a plan for expanding the Alliance of Quality Schools Program to other middle schools and submit the plan to the Superintendent and Executive staff for review and approval. January 2000

2. Following approval by the Superintendent and Executive Staff, the Coordinator of the Alliance for Quality Schools should implement the plan within existing budget allocations. July 2000

3. The Director of Research and Evaluation should evaluate each school's participation in the Alliance. Annually
Commencing
June 2001

FISCAL IMPACT

This recommendation can be implemented using existing program resources.

5.3.7 Magnet Programs

CURRENT SITUATION

The Broward County School District currently offers 47 magnet programs offered in 37 schools (14 elementary, 12 middle, and 11 high schools). The goals of the district's magnet schools include:

- expanding the educational choices for students;
- promoting diversity; and
- setting high expectations for all students to improve student achievement.

Magnet schools are open to qualified students on a districtwide basis. At the secondary level, academic/talent entrance criteria have been established for admission to each magnet program in the district. The magnet programs consist of three types of programs or schools (magnet program, controlled choice magnet, and theme schools).

FINDING

In an effort to more efficiently offer classes taught in foreign languages, the International Affairs and Business High School Magnet Programs, in collaboration with the Instructional Television Department, are creating an implementation plan to begin a Latin and Japanese distance learning class. This reduces the cost of hiring additional teachers to instruct these classes.

COMMENDATION

The Magnet Schools Program is commended for planning the implementation of instruction via distance learning that extends beyond the traditional methods of instruction and offers unique courses in a cost-efficient manner.

5.3.8 Multicultural, Foreign Language Education and English for Speakers of other Languages (ESOL)

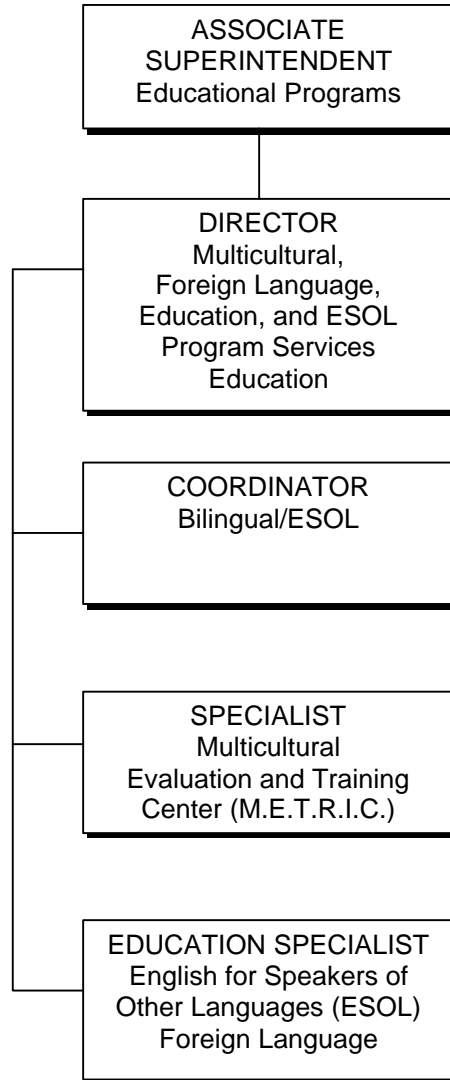
CURRENT SITUATION

This Department is composed of programs which assist students in communicating, orally and in writing, in English and in another language with proficiency proportionate to their level, age, and interest. The goals of the program are:

- **Goal I:** All students who are of limited English proficiency participate in the English/Language Arts through the ESOL program which is designed to enable students to communicate and function successfully in their English speaking environment.
- **Goal II:** All students have the opportunity and are strongly urged to participate in programs designed to enable students to communicate and function successfully in an environment where foreign languages are used.
- **Goal III:** All students have the opportunity and are strongly urged to participate in programs using a language other than English as the medium of instruction to the that such participation is consistent with the learning needs of the students and the interests of the students and parents.
- **Goal IV:** All students are provided opportunities which promote the recognition, understanding, and acceptance of individual uniqueness, interdependence, and cultural diversity within a pluralistic society.

Exhibit 5-28 displays the organization of the Office of Multicultural, Foreign Language, Education, and English for Speakers of other Languages (ESOL). In addition to the positions shown on the organizational chart, the office has a bilingual guidance counselor, a psychologist, six teachers on special assignment, and three support staff funded by the district. Additionally, there are eight teachers on special assignment and one support staff that are funded by grants.

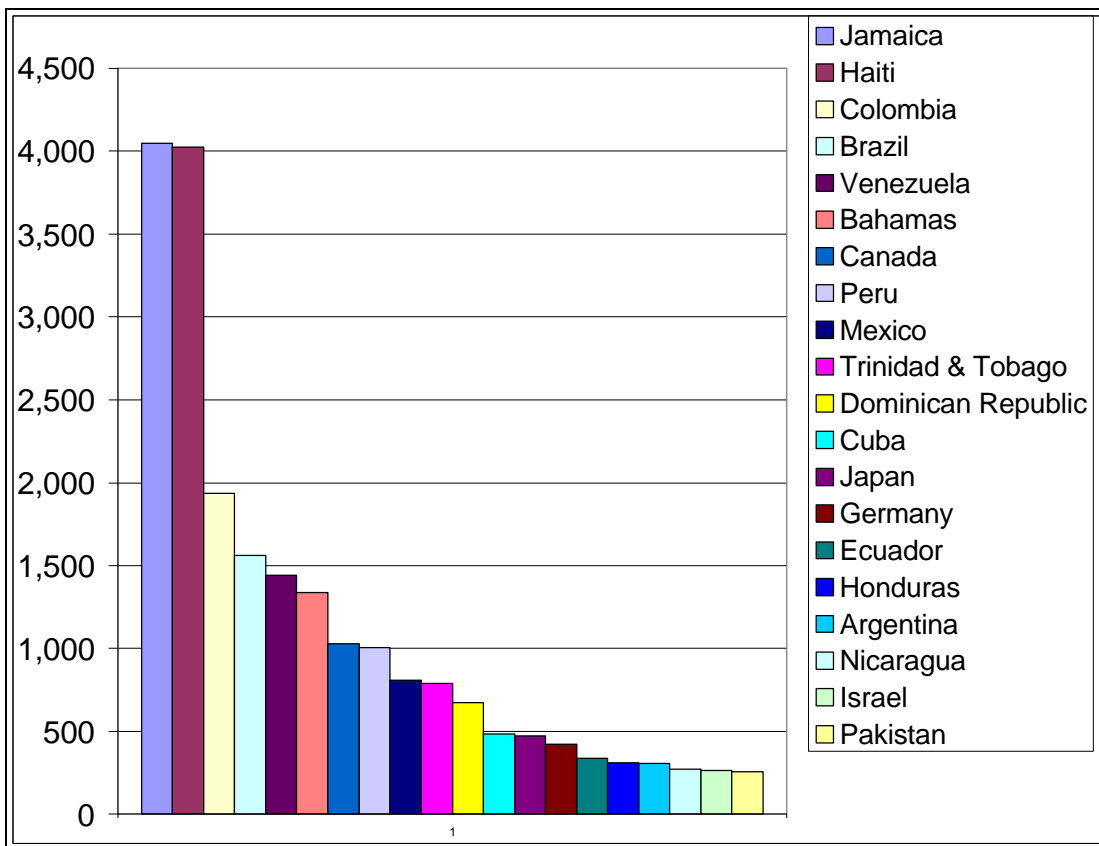
**EXHIBIT 5-28
CURRENT ORGANIZATION OF THE OFFICE OF
MULTICULTURAL, FOREIGN LANGUAGE EDUCATION, AND ENGLISH
FOR SPEAKERS OF OTHER LANGUAGES
1998-99**



Source: Broward County School District, Division of Education Programs, Student Support, and Human Resource Development, 1998.

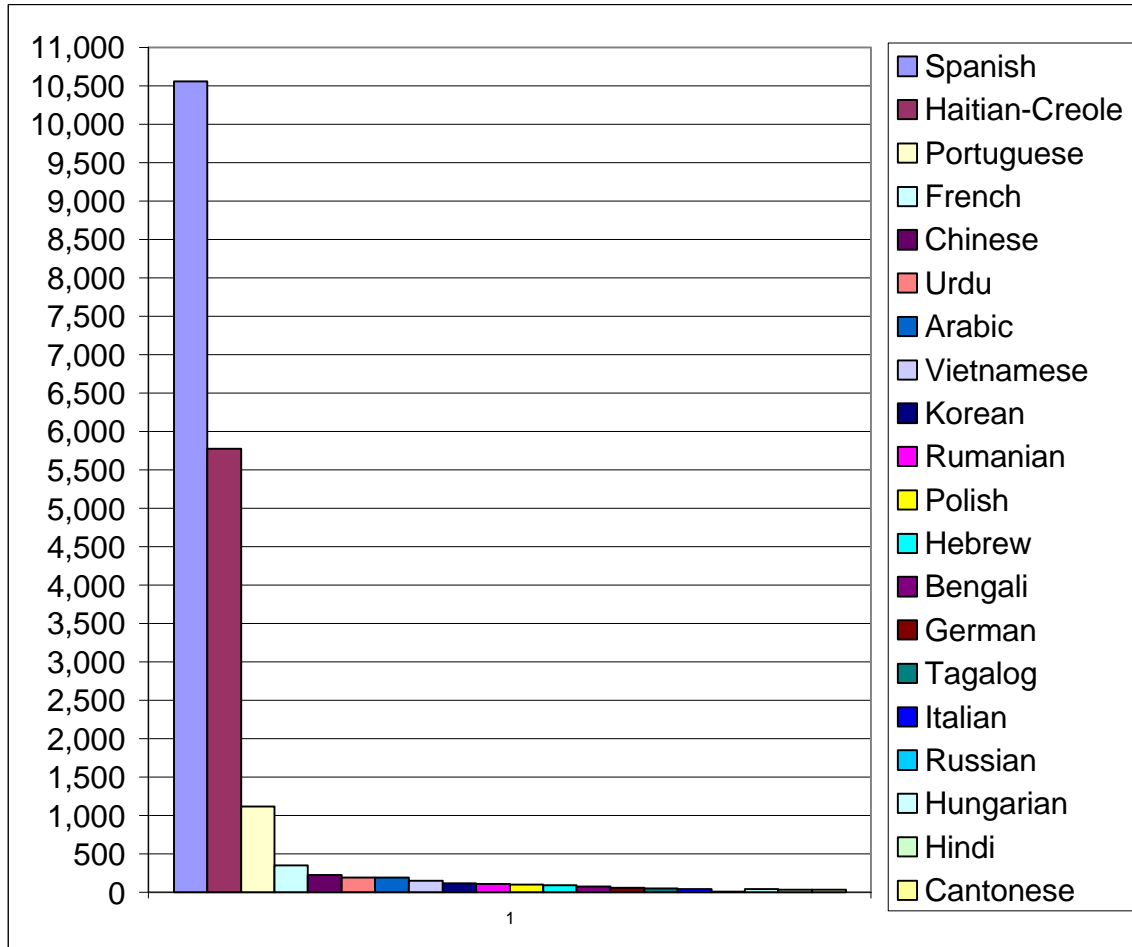
Diversity is a broad concept that includes such factors as linguistic differences, gender, race, ethnicity, variations of talents, abilities, and special needs. Exhibit 5-29 displays the diversity of the student population being served in Broward County by showing the number of students who are foreign born and the top 20 countries of their origin. Additionally, Exhibit 5-30 displays the top 20 spoken languages of students enrolled in pre-kindergarten through 12th grade.

EXHIBIT 5-29
MULTICULTURAL/FOREIGN LANGUAGE/ESOL EDUCATION
FOREIGN BORN GRADES PK-12/TOP TWENTY COUNTRIES/OCTOBER 1998



Source: Broward County School District, Multicultural, Foreign Language Education and ESOL Program Guide, 1998.

**EXHIBIT 5-30
 MULTICULTURAL/FOREIGN LANGUAGE/ESOL EDUCATION
 LIMITED ENGLISH PROFICIENT STUDENT ENROLLMENT
 TOP TWENTY LANGUAGES GRADES PK-12/OCTOBER 1998**



Source: Broward County School District, Multicultural, Foreign Language Education and ESOL Program Guide, 1998.

Exhibit 5-31 displays the district’s guidelines for determining the directions of the Multicultural, Foreign Language Education, and English for Speakers of other Languages (ESOL) programs. Programs of Multicultural/Foreign Language/ESOL Education fall into two categories: 1) Programs for English –speaking students, and 2) Programs for students classified as limited English proficient (LEP).

**EXHIBIT 5-31
GUIDELINES FOR PROGRAMS OF THE MULTICULTURAL/FOREIGN
LANGUAGE/ESOL EDUCATION DEPARTMENT**

1. Special instruction in English/Language Arts through ESOL services is the emphasis at both the elementary and secondary levels. Such emphasis reflects the School Board position that developing competency in English is one of the highest priorities for students of limited English proficiency.
2. The programs implemented for limited English proficient (LEP) students meet requirements of Florida Statutes, State Board of Education rules, and the League of United Latin American Citizens (LULAC) et al. Vs. Florida State Board of Education (SBE) Consent Decree. These include the use in elementary and secondary schools of the students' home language as a medium of instruction as may be necessary to help ensure maintenance of academic achievement while the student is learning English.
3. A concerted effort is made to reduce fragmentation of the curriculum for elementary and secondary students of limited English proficiency, particularly in those schools which have high concentrations of such students at the same grade level.
4. The use of ESOL instructional strategies is required to all grade levels with LEP students when providing instruction in social studies, science, mathematics, and computer literacy.
5. Programs in Spanish as a Foreign Language are offered in various elementary schools. Three elementary schools and a middle school provide bilingual programs in which Spanish as a Second Language and Spanish for Spanish Speakers are taught. In addition, three elementary Magnet schools provide daily instruction of Spanish, French, and Japanese. Haitian-Creole for Haitian-Creole Speakers is provided at the elementary level at one of the above-mentioned magnet schools.
6. In secondary schools, foreign language offerings consist of programs in a wide range of languages, such as French, German, Haitian-Creole, Hebrew, Italian, Latin, Chinese, Russian, Japanese, Spanish and American Sign Language. In the case of Spanish, two distinct types of programs are offered: (1) Spanish as a Foreign Language (Spanish FL) for English-speaking students, and (2) Spanish for Spanish Speakers (Spanish S) for students who are native speakers of the language or other students who proficiency in Spanish allows them to profit from the program. All modern language courses emphasize functional communication skills with contexts appropriate to the culture.
7. The Multicultural Infusion Program aims at helping all students in the development of knowledge, skills, and attitudes that they will need to survive and function effectively in a culturally-diverse society.

Source: Broward County School District, Multicultural, Foreign Language Education and ESOL Program Guide, 1998.

The Broward County School District offers the following programs to meet the linguistic, educational, and cultural needs of both the other-than-English language origin and the English language origin students:

- English for Speakers of Other Languages
- Spanish for Spanish Speakers and Haitian-Creole for Haitian Creole Speakers
- Elementary Foreign Language Program
- Secondary Language Program
- Bilingual Educational Program
- Multicultural Infusion Program

FINDING

The district has organized a community-based Desegregation/Diversity Task Force representing all segments of the population. Recently the Task Force and district, in partnership with Time Life Corporation, held its First Annual African and African American History Conference.

More than 1,000 Broward teachers, administrators, and community members participated in the African and African American Conference on September 18, 1998. This conference confirmed the district's commitment to address diversity issues by integrating African and African American history into instruction. The Multicultural/Foreign Language/ESOL Education Department has developed the manual *African Americans: A Journey through Time*. The manual is being used by schools to provide sample lessons for the infusion of African and African American history into several subject areas.

The Broward County School District's Multicultural/Foreign Language/ESOL Education Department developed a high school orientation handbook in English, Spanish, Haitian-Creole, Portuguese and French for LEP parents and students and currently provides multilingual presentations to provide multicultural parents and students information related to the school system, high school program and course offerings.

COMMENDATION

The Broward County School District's Multicultural/Foreign Language/ESOL Education Department is commended for addressing the issues of the increasingly diverse student population and implementing programs and materials that integrate multicultural instruction into the district's curriculum and instruction.

FINDING

The proliferation of ESOL programs throughout all schools and centers serving students in the district has created a need for school-based employees who serve as curriculum-contact designees. Presently, this need is filled by employees on a voluntary basis. While each of these volunteers is to be commended for their professional commitment to student needs, there remains a need to stabilize the curriculum contact designee in each of the schools.

While the Department of Multicultural/Foreign Language/ESOL Education is appropriately placed within the Division of Educational Programs Student Support Services, and Human Resource Development, the department would be more appropriately placed reporting to the Director of Special Programs as opposed to its current position of reporting to the Associate Superintendent of Educational Programs. As was displayed previously in Exhibit 5-22, there exists some duplication of services in the department of Multicultural, Foreign Language Education and ESOL and the Department of Diversity and Cultural Outreach, Title I Migrant, and Special Programs. The realignment of this Department under the newly proposed Director of Special Programs would assist in strengthening the program's service by placing all special programs under the leadership of one Director.

RECOMMENDATION

Recommendation 5-17:

Reassign the Department of Multicultural, Foreign Language Education, and ESOL to report directly to the Director of Special Programs within the newly created Division of Educational Programs and Services.

(See Exhibit 5-10 for the proposed realignment of this program.)

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-----------|
| 1. The Superintendent should include this organization change in the proposal to be recommended for Board action. | May 1999 |
| 2. The Board should approve the Superintendent's recommendation. | June 1999 |
| 3. The Superintendent and Executive Staff should implement the approved reorganization plan. | July 1999 |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

5.3.9 School-to-Work and Tech Prep Programs

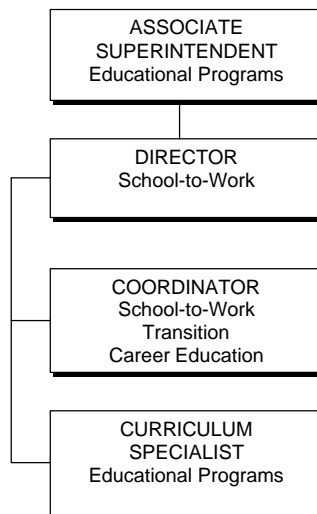
CURRENT SITUATION

The major focus of the Broward County's School-to-Work Program is to provide a system that ensures a quality program that prepares students to be successful in high skill/high wage jobs. The principles of this program include: integrating academic and vocational technical education to facilitate a real world understanding of the marketplace, utilizing innovative instructional methodologies to embrace all learning styles of students, and integrating career goals with school curriculum. Six focus committees are charged with overseeing the program implementation strategies and ensuring that program goals and objectives are in alignment.

FINDING

The School-to-Work Program was recently moved from reporting to the Director of Vocational, Adult, and Community Education to the Associate Superintendent for Educational Programs, Student Support, and Human Resource Development. Exhibit 5-32 displays the organization of the School-to-Work Department. As seen, the Director of School-to-Work has limited oversight and responsibility, supervising only two positions. A review of the program and the job description of the Director indicates that a director's position is unwarranted. The program is not well integrated with career development and other vocational programs.

**EXHIBIT 5-32
CURRENT ORGANIZATION
OF THE SCHOOL-TO-WORK DEPARTMENT
1998-99**



Source: Broward County School District, Division of Educational Programs, Student Support, and Human Resource Development, 1998.

Dollars are allocated to schools and Innovation Zones based on submission of a comprehensive implementation plan for their sites. In year one, school/innovation zones receive the greatest number of dollars. These funds are used for:

- professional development and training
- development of a comprehensive marketing plan
- development of guidance program and related training
- curriculum integration writing teams
- development of work-based training components for partners
- continuance and expansion of the Tech Prep program
- training and integration of technology
- development of elementary School-to-Work tool kits for all school sites
- distance learning instruction in all aspects of work-based learning
- development and implementation curriculum

The Tech Prep Program is a coordinated program beginning in high school and leading to a certificate, associate degree, or a bachelor's degree. The Tech Prep Program was developed to respond to business and industry's need for employees with greater competence in math, science, and communications. The School Board of Broward County and Broward County Community College have been in a Tech Prep partnership since 1991. Currently, there are 33 articulation agreements and eight Tech Prep Program areas.

The Tech Prep student enrollment has increased since 1994 from 3,062 students to 9,045 student in 1998. The number of Tech Prep graduates for 1998 totaled 1,090 students.

The School-to-Work and Tech Prep programs have provided numerous on-site work experiences for students including work-based experience at the Agribusiness Science Cooperative Learning Center, Home Depot, Broward Employment and Training Administration, Miller's Construction (architectural firm), and the Chamber of Commerce. The students spend a varying amount of time on-site at these businesses being mentored and instructed in various skills.

Note: As stated previously in Recommendation 5-9, the current organizational structure of the vocational, School-to-Work, adult, and alternative education programs is fragmented and does not provide for a functional alignment. The current organizational structure does not integrate an important function of the district's vocational and adult programs. Refer to Recommendation 5-9 for additional information related to vocational and School-to-Work recommendations.

The Director has oversight of two positions--the Coordinator of School-to-Work Transition/Career Education and a curriculum specialist for educational programs. This limited oversight does not warrant a Director's position given the scope of the program. While the Director of School-to-Work meets regularly with personnel from the vocational and secondary education programs, the unit should be more closely aligned with the other district's vocational programs (see Recommendation 5-10 to see the new alignment of this department under the leadership of the newly created Director of Career Development and Planning.) This realignment recommendation should serve the dual purpose of reducing administrative expenses and providing the coordination that ensures that there would be no unwarranted duplication of services or programs.

5.4 Exceptional Student Education

Exceptional Student Education (ESE) is provided to students who require modifications in general education services in order to benefit from instruction. As defined by federal statutes and corresponding state regulations in Florida, students who are eligible for ESE services may have special instructional needs as a result of a disabling condition or exceptional abilities. ESE services must be designed to meet the specific needs of each eligible student as indicated in an Individualized Education Plan (IEP). All programs must be provided in the least restrictive environment. In Section 5.4.1 which follows we address students with special needs and in Section 5.4.2 we address the Advanced Academic Programs provided for gifted students.

5.4.1 Students with Special Needs

CURRENT SITUATION

The Department of Student Support Services and Exceptional Student Education (ESE) reports directly to the Deputy Superintendent of Educational Programs, Student Support, and Human Resource Development. The department's goals include:

- providing support and program information to student services practitioners in relation to the District's priorities and Florida's Blueprint 2000;
- working cooperatively with other agencies such as the hospital districts, the Department of Health, Broward County, Department of Children and Families (HRS), and other family and student service providers to ensure maximum use of available resources;
- supporting initiatives to increase the capacity of schools to solve problems through integrated services models and other appropriate interventions;
- coordinating the districtwide implementation of the new state FEFP funding system;
- coordinating the development and implementation of a continuum of programs and services for autistic students; and

- identifying speech/language delivery systems and methods that meet the needs of students and can be operated in a cost-effective manner.

The department provides leadership and supervision to programs that provide psychological, physical, social, emotional and educational support to students and their families. The department's programs emphasize prevention services to at-risk students as well as direct services. Exhibits 5-33 provide an overview of the organizational structure of the Department of Student Services and Exceptional Student Education.

In order to provide a seamless continuum of services to students, the Division of Educational Programs, Student Support, and Human Resources Department recently merged Exceptional Student Education and Student Support Services under one Director. The Exceptional Student Education Unit has oversight responsibility over the district's services for students with disabilities. The unit also ensures that services for gifted and talented students meet state compliance requirements. The ESE Unit has three primary goals for the 1998-99 school year:

- coordinating the districtwide implementation of the new state FEFP funding system by providing matrix training for selected staff in all schools;
- coordinating the development and implementation of a continuum of programs and services for autistic students; and
- **identifying speech/language delivery systems and methods which meet the needs of students and can be operated in a cost-effective manner.**

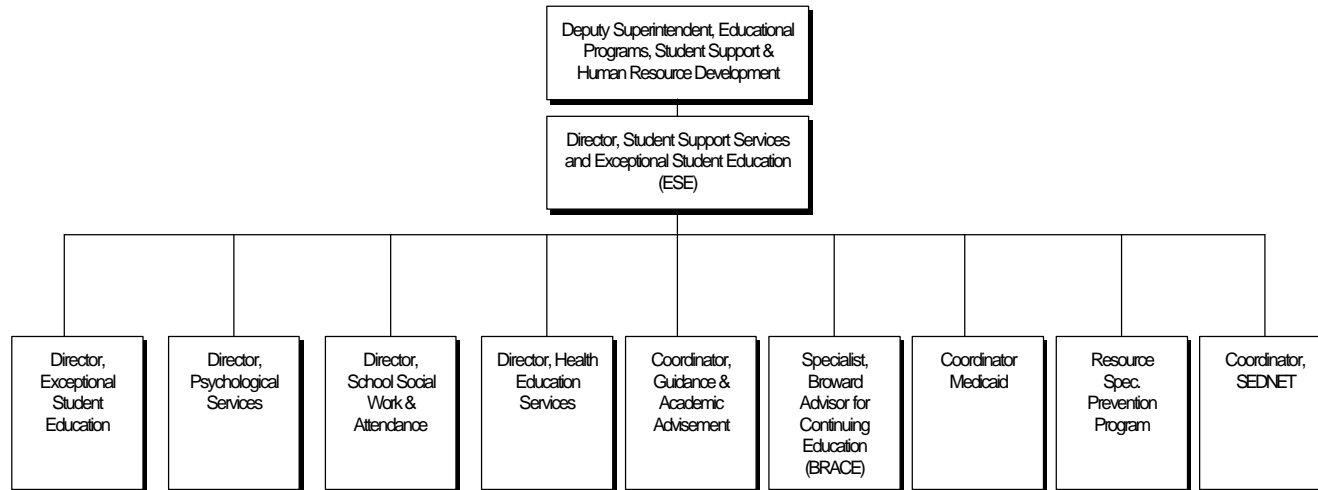
Exhibits 5-34 shows the organizational structure of the Exceptional Student Education Unit.

The mission of Exceptional Student Education is to create a learning environment that is accepting of and responsive to learners with diverse needs and to promote the development and use of appropriate educational strategies. The department strives to provide leadership and support to schools and families and build the capacity of school-based personnel to ensure that all children learn. This includes building partnerships with community agencies, parents, and advocacy groups who serve students with exceptional needs.

Ongoing activities conducted by the department include:

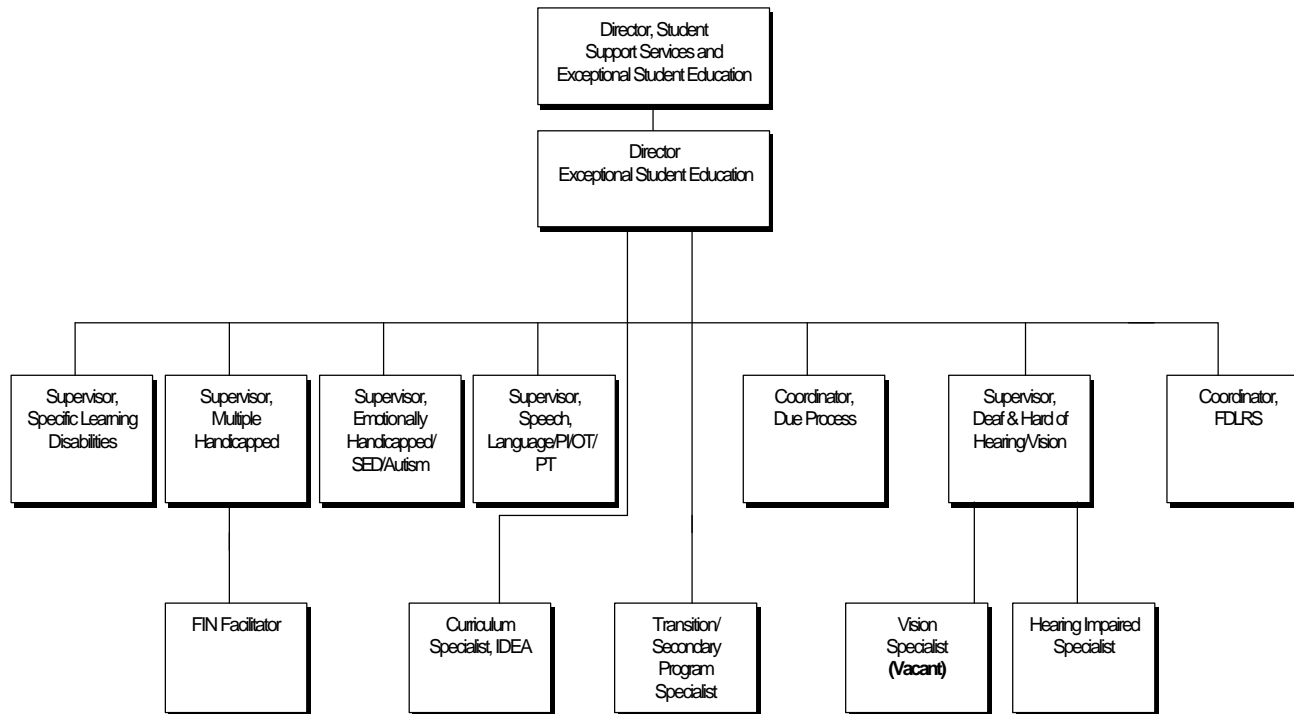
- coordinating policy development and contracts related to exceptional students (expulsion, graduation, procedural safeguards, interagency agreements, contracts for specialized services, etc.);
- developing and supporting instructional models and delivery systems (co-teaching, support facilitation, learning lab, community-based instruction, performance-based education);

**EXHIBIT 5-33
ORGANIZATIONAL STRUCTURE
STUDENT SUPPORT SERVICES AND EXCEPTIONAL STUDENT EDUCATION**



Source: Broward County School District, Student Support Services and Exceptional Student Education Section, 1998.

EXHIBIT 5-34
EXCEPTIONAL STUDENT EDUCATION ORGANIZATIONAL CHART
1998-1999



Source: Broward County School District, Exceptional Student Education Unit, 1998.

- providing training in behavior strategies, crisis intervention; learning strategies, inclusion and other instructional arrangements that can be used to improve student achievement;
- coordinating the Community Technology Center with the Public Library System;
- seeking additional resources and revenues such as Medicaid reimbursement and grant funding;
- providing access to and training related to assistive/adaptive technology; and
- providing program support to students in low incidence programs such as autism, vision, hearing, and physically impaired.

This unit also provides extensive consultation with individual parents, parent support groups, and school staff.

Exhibit 5-35 shows the ESE student population for the Broward County School District and five peer school districts. Broward County is serves a smaller percentage of students in ESE programs than any of the five peer districts.

EXHIBIT 5-35
PERCENTAGE OF ESE STUDENTS IN THE
BROWARD COUNTY SCHOOL DISTRICT AND FIVE PEER DISTRICTS
1996-97

ESE CATEGORY	BROWARD	MIAMI-DADE	DUVAL	HILLSBOROUGH	ORANGE	PALM BEACH
Educable Mentally Handicapped	.75%	.79%	1.48%	1.38%	1.75%	1.01%
Trainable Mentally Handicapped	.27%	.34%	.50%	.45%	.47%	.29%
Physically Handicapped	.27%	.21%	.53%	.22%	.25%	.16%
Physical Therapy and Occupational Therapy Part-Time						
Speech/Language Handicapped	.04%	.00%	.01%	.01%	.03%	.02%
Visual Handicapped	5.14%	1.73%	3.82%	3.95%	3.63%	4.31%
Emotionally Handicapped	.02%	.04%	.08%	.06%	.05%	.02%
Specific Learning Disabled	.40%	.88%	1.50%	1.45%	.86%	.97%
Gifted Part-Time	3.10%	5.03%	6.75%	4.46%	5.48%	5.84%
Hospital and Homebound Part-Time	2.41%	4.43%	2.83%	4.95%	2.96%	4.62%
Profoundly Handicapped						
	.07%	.07%	.11%	.12%	.09%	.08%
	.58%	.63%	.50%	.73%	.36%	.36%
TOTAL	13.05%	14.15%	18.11%	17.77%	15.93%	17.67%

Source: Statistical Report, Profiles of Florida School Districts, January 1998.

Exhibit 5-36 provides an overview of the Exceptional Student Education Centers operated by the Broward County School District.

**EXHIBIT 5-36
EXCEPTIONAL STUDENT EDUCATION CENTERS IN THE
BROWARD COUNTY SCHOOL DISTRICT**

School	Number of Students	Area Location	Type of Disability
Exceptional Centers in the Broward County School District	1,191	----	----
Bright Horizons	195	North	Mentally Disabled*
Cross Creek School	165	North	Severely Emotionally Disturbed
Sunset School	200	Central	Severely Emotionally Disturbed
The Quest Center	197	South	Mentally Disabled*
Whispering Pines School	210	South	Severely Emotionally Disturbed
Wingate Oaks Center	224	Central	Mentally Disabled*

Source: Broward County School District, ESE Department Records, 1997.

*Educable Mentally Handicapped (EMH), Trainable Mentally Handicapped (TMH), Profoundly Mentally Handicapped (PMH), Physically Impaired (PI) and Autistic students.

As required by the state, students with mild disabilities and Severely Emotionally Disturbed (SED) students are expected to achieve the general education standards and participate in the Broward County testing program with appropriate testing accommodations. Students with moderate to profound disabilities also participate in the district's annual testing cycle; however, testing standards are usually modified to accommodate the student's level of performance. Alternate assessment instruments used by the district include the Woodcock Johnson-Revised (WJ-R) and the Brigance Inventories.

Exhibit 5-37 provides an overview of the performance of ESE students on the SAT-8 between 1995-96 and 1997-98. Exhibit 5-38 compares ESE student scores to the average scores of general education students in the district.

The exhibit illustrates the performance of ESE students tested on grade level. A comparison of the ESE scores with the scores of general education students yields a large discrepancy in scores. District SAT-8 scores ranged around 50 to 60 percentile points, while ESE scores fell in the 10 to 20 percent range.

Comparisons in Exhibit 5-38, however, indicate that ESE student Total Mathematics scores increase from Grade 2 through 4, then stabilized and fell in the later grades. Total reading scores are more unstable.

District results may be further disaggregated by the three district Areas: North, Central, South, and Centers. Exhibit 5-39 depicts 1998 ESE test scores for the three geographic areas including the number of students tested.

**EXHIBIT 5-37
BROWARD STANFORD ACHIEVEMENT TEST, EIGHTH EDITION, ESE
TOTAL MATHEMATICS AND TOTAL READING
1995-96 THROUGH 1997-98**

Grade	Total Mathematics						Total Reading					
	1995-96		1996-97		1997-98		1995-96		1996-97		1997-98	
	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score
2	323	19	875	20	528	14	300	10	836	18	510	13
3	527	24	421	30	901	21	497	12	396	15	870	11
4	588	27	473	31	1,119	24	589	17	476	21	1,134	15
5	720	24	493	27	1,219	19	719	14	497	17	1,231	10
6	645	22	406	27	1,201	21	650	19	432	20	1,261	13
7	570	20	429	23	1,160	19	599	16	451	20	1,221	13
8	615	19	415	22	1,059	17	629	17	427	19	1,114	12
9	562	16	594	20	874	19	544	13	581	14	835	12

Source: Broward County School District, 1998.

**EXHIBIT 5-38
BROWARD STANFORD ACHIEVEMENT TEST, EIGHTH EDITION,
COMPARISON OF DISTRICT TO ESE SCORES
TOTAL MATHEMATICS AND TOTAL READING
1997-98**

Grade	Total Mathematics				Total Reading			
	District		ESE		District		ESE	
	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score
2	323	19	875	20	528	14	300	10
3	527	24	421	30	901	21	497	12
4	588	27	473	31	1,119	24	589	17
5	720	24	493	27	1,219	19	719	14
6	645	22	406	27	1,201	21	650	19
7	570	20	429	23	1,160	19	599	16
8	615	19	415	22	1,059	17	629	17
9	562	16	594	20	874	19	544	13

Source: Broward County School District, ESE Records, 1998.

**EXHIBIT 5-39
TOTAL MATHEMATICS AND TOTAL READING SCORES BY AREA
FOR ESE STUDENTS
1997-98**

Grade	Total Mathematics						Total Reading					
	North		Central		South		North		Central		South	
	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score
2	175	16	170	12	182	13	169	14	164	12	176	13
3	215	24	260	18	317	21	299	13	250	09	314	10
4	353	28	295	23	452	23	354	19	304	14	454	13
5	427	22	325	17	448	18	429	14	331	08	451	09
6	406	24	300	19	455	21	420	16	325	11	466	12
7	334	22	307	17	446	19	350	15	325	10	462	13
8	317	21	282	15	386	16	333	15	304	11	394	10
9	204	23	247	16	296	22	188	14	224	11	294	13

Source: Broward County School District, ESE Records, 1998.

Exceptional Education students comprise one segment of the diverse student population for which the Broward County School District is accountable for ensuring student achievement. Historically students in this population, tend to perform poorly on standardized tests and therefore, require test administration accommodations in order to accurately assess their achievement. Test administration accommodations permit most ESE students to participate in testing at their grade level. Testing is typically conducted by professional staff under the direction of the ESE teacher in the student's classroom. Students may also be tested individually or in small groups as determined by the Individual Educational Plan (IEP). However, ESE students who are working towards a standard high school diploma are expected to participate in districtwide testing utilizing the Stanford Achievement Test-Eighth Edition (SAT-8) with the accommodations specified in their IEP. Testing accommodations available to ESE students include:

- flexible setting
- flexible scheduling
- flexible timing
- flexible presentation
- flexible responding

FINDING

To ensure that students with disabilities are included in the district's reform and accountability effort, and to provide strategies for measuring the performance of ESE students, district staff are focusing on a testing program that provides information relevant to planning, policy making, and the delivery of services to ESE students. Test scores for ESE students (except Speech and Language and Gifted) are reported separately and are not part of any average scores reported for the school or the district. Instead, beginning in the 1996 school year, a second districtwide report was initiated that summarizes the standardized test results for ESE students taking the SAT-8 at their grade level and the WJ-R. The information provided in this report and the individual school results may be used by Broward County School District's staff to examine trends in scores at the district level and at each school site; plan appropriate instructional strategies; and incorporate the data in program improvement plans.

The previous analysis of ESE testing results conducted by the district provides staff with the ability to identify trends that may aid in evaluating instructional strategies and determining student, classroom, and school progress. To assist in the interpretation of scores, separate records of the conditions of testing and test administration, accommodations are kept at the school.

Extensive information on ESE student performance appears in the district's report card of student achievement. The results of ESE student performance are reported by grade level and several comparisons are made with districtwide general education student achievement reports. Area comparisons of reading achievement are also summarized to track ESE student achievement. The information provided by the Student Assessment Unit assist educators in examining the results of testing for this student population.

COMMENDATION

The Broward County School District is commended for publishing the testing and accountability measures for ESE students and providing detailed comparisons that assist educators in examining testing results.

FINDING

While the ESE Department is appropriately placed within the Division of Educational Programs, Student Support, and Human Resource Development, the Department is not in alignment with other Exceptional Education Student services located in the area offices. Under the current organizational structure, the work of area ESE personnel is monitored by the Directors of Exceptional Student Education located in the South, Central, and North Areas. Additionally, an Area Superintendent provides over sight to the Special Education Centers. Because the school-based implementation of ESE programs and central office administration of ESE programs report to two different Deputy Superintendents, coordination of total program activities has been fragmented. This fragmentation can result in a loss of program direction and an inefficient use of funds and delivery of services.

Variations in workload assignments among the three area offices were identified as an issue by ESE staff during on-site interviews. While some areas have adequate staffing during peak evaluation and placement times, other areas face temporary backlogs. Similarly, areas appear to have different implementation strategies for some services. As a result, parents and staff who transfer among areas report inconsistencies.

RECOMMENDATION

Recommendation 5-18:

Improve coordination of central office and Area ESE services.

Enhanced coordination of services will ensure efficient operation of programs.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-------------|
| 4. The Deputy Superintendents should assign a task force to develop a plan to enhance ESE coordination. | May 1999 |
| 5. The Director of Student Services and ESE should ensure that the task force identifies coordination issues and develop action strategies. | July 1999 |
| 6. The Deputy Superintendents and key ESE staff should implement the approved coordination plan. | August 1999 |

FISCAL IMPACT

This recommendation can be implemented using existing resources.

FINDING

Beginning in February 1998, Broward County implemented a program for accessing Medicaid reimbursements for health-related services provided to students. The Medicaid Certified School Match Program established by federal and corresponding state legislation provides for administrative claim and fee-for-service reimbursements. Administrative claim reimbursements allow districts to recover a portion of their overall funding for school-based health and outreach services such as referral for Medicaid eligibility determination, coordination, and monitoring of health-related services, interagency coordination, and the provision of information. Broward County contracts with Cost Management Services, Inc. through a collaborative service agreement with the Hillsborough County School District. In October 1998, the district received \$1,186,998 for Medicaid reimbursable administrative claim services provided during the first quarter of 1998.

The second component of the Medicaid Certified School Match Program is the fee-for-service program. For students who qualify for both Medicaid and special education programs under the Individuals with Disabilities Act (IDEA), school districts can receive reimbursement for health-related services such as nursing, speech therapy, physical therapy, counseling and occupational therapy. To access reimbursement for these services, individualized service records must be maintained on each student who is Medicaid eligible. The Broward County School District is planning to implement fee-for-service claims for Medicaid- and IDEA- eligible students within the next two years. During this delay, however, the district is not generating all of the potential Medicaid revenues.

RECOMMENDATION

Recommendation 5-19:

Accelerate the implementation of fee for service claims for Medicaid eligible special education students.

The Broward County School District should be able to generate additional revenues to support ESE services as a result of the implementation of this recommendation.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should instruct the Deputy Superintendent of Educational Programs, Student Support, and Human Resources Department to accelerate the process. May 1999
2. The Deputy Superintendent should ensure that fee-for-service reporting begins. September 1999

FISCAL IMPACT

Based on present Medicaid eligibility rates, the district should anticipate reimbursements for two percent of the direct school-based costs (two percent of \$9,598,149).

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Accelerate Medicaid Reimbursement Reporting	\$96,000	\$192,000	\$192,000	\$192,000	\$192,000

5.4.2 Advanced Academic Program

The Advanced Academic Programs Unit reports to the Director of Secondary Programs. The unit provides direction, supervision and coordination of all accelerated programs throughout the district, for grades kindergarten-12. In addition, the Unit, with input from school-based personnel, designs delivery options, special education models and program services appropriate for gifted and talented learners. The department also assists with the development of accelerated programs and courses as a result of articulation agreements between the district and area community colleges and universities. The unit strives to provide a variety of educational opportunities, resources, and encouragement for all students.

The Advanced Academic Programs unit provides the following services:

- assistance to schools and teachers in meeting the needs of the gifted student by providing a framework from which schools can design and implement services that meet the needs of the gifted and talented population;
- training in the identification of gifted students as well as curriculum content that is rigorous and challenging;
- assistance in the development of a cooperative partnership between home and school that includes providing information on the understanding of giftedness, children's needs, and identifying children for the gifted program; and
- assistance with providing gifted children the appropriate affective services including gifted focused counseling interventions and career development guidance programs.

The services provided help to develop a positive and healthy environment for learning in which all students have the opportunity to learn the skills, acquire the knowledge and develop the attitude, necessary for them to reach their full potential as citizens who can meet the challenges of a changing global society.

The goals and objectives of the Advanced Academic Programs include:

- promoting the development of a challenging curriculum to better meet the needs of gifted students;
- assisting schools in fostering a climate where the talent and potential of high ability learners is valued and nurtured;
- providing accelerated programs with numerous course options to students including gifted, highly gifted, honors, advanced placement, dual enrollment, and international baccalaureate courses;
- meeting instructional needs of students with high level potential and who require accelerated and enriched in-depth instruction;
- establishing and maintain a successful parent advisory group; and
- providing teacher training in competencies, strategies and gifted add-on certification courses.

As reported in the March 1996 Research Brief, "How Some High School Students Accelerate Through College Coursework: A Review of the Advanced Placement Program, 1990-95," the Broward County School District provides outstanding educational opportunities equivalent to college study to thousands of high school students each year. One of the ways that this is evidenced is through the Advanced Placement (AP) program. The decision to offer AP coursework at individual schools is based upon student interest as well as the availability of qualified teachers. Further, AP offerings are offered in light of the availability of dual enrollment at each school. If students have access to coursework through college enrollment while in high school, school staff may offer AP courses in areas that supplement college coursework.

Exhibit 5-40 shows the percentage of students scoring three or above on AP courses for Broward, the state, and several peer districts. The percentage of Broward students passing AP exams scored at three and above (out of four) exceeds those of the state, Miami-Dade, Hillsborough and Palm Beach County School Districts while dipping below the Orange County School District scores.

**EXHIBIT 5-40
PERCENTAGE OF ADVANCED PLACEMENT STUDENTS SCORING THREE AND
ABOVE IN BROWARD COUNTY SCHOOL DISTRICT
FOUR PEER DISTRICTS AND THE STATE**

State		Broward		Miami-Dade		Palm Beach		Hillsborough		Orange	
Mean Score	% Pass	Mean Score	% Pass	Mean Score	% Pass	Mean Score	% Pass	Mean Score	% Pass	Mean Score	% Pass

Educational Service Delivery

2.79	55.6%	2.86	58.3%	2.56	45.7%	2.84	59%	2.81	58.1%	3.24	71.6%
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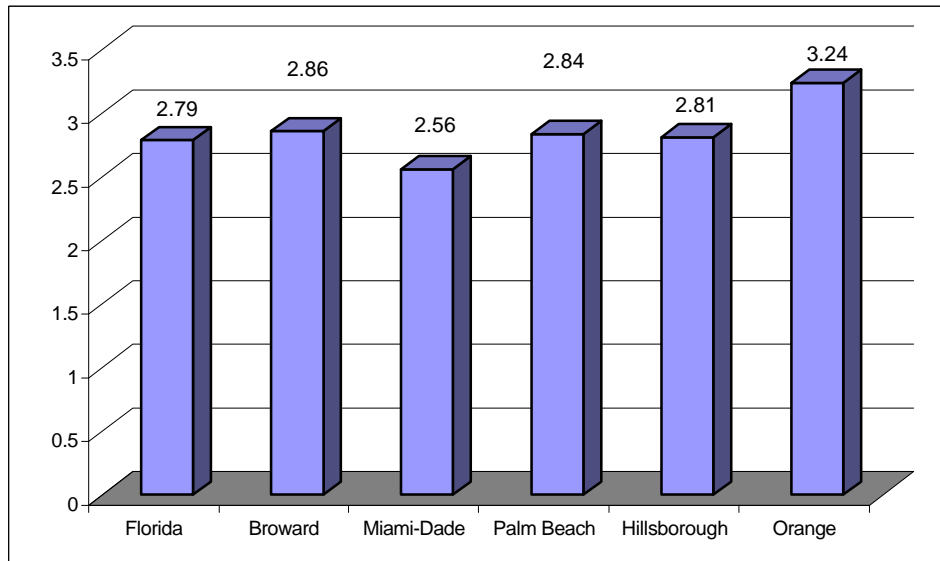
Source: Statistical Report, Profiles of Florida School Districts, 1998.

COMMENDATION

The Broward County School District is commended for its efforts in advanced placement education.

The scores in Exhibit 5-40 are graphically displayed in Exhibit 5-41.

**EXHIBIT 5-41
1998 COMPARISON OF ADVANCED PLACEMENT MEAN SCORES FOR
THE BROWARD COUNTY SCHOOL DISTRICT, THE STATE, AND FOUR PEER
DISTRICTS**



Source: Statistical Report, Profiles of Florida School Districts, 1998.

5.5 Program Evaluation and Student Assessment

To accomplish effective program planning evaluation, decisions that impact the education service delivery system and its resource allocation must be based on comprehensive data analyses and a systematic planning process. For example, effective planning of education programs must consider the specific needs of the students served by the school district and the multiple resources available to meet student needs. To determine if resources are used effectively, school districts must establish a clear basis for evaluating the impact of their educational programs. This section addresses the research, evaluation, and accountability functions of the Broward County School District.

5.5.1 Program Evaluation

CURRENT SITUATION

As previously illustrated in Exhibit 5-9, the accountability, strategic planning, research and evaluation functions in Broward County School District are administered by an Associate Superintendent for Accountability, Technology, Strategic Planning and School Improvement. This division has oversight responsibility for the coordination of research and evaluation, management information services, telecommunications, computer technology, strategic planning and accountability, and learning resources.

A Director of Research and Evaluation reports directly to the Associate Superintendent. The Director supervises two units—Student Assessment and Research Services. The primary function of the Research and Evaluation Department is to produce evaluation reports and present performance information on schools and programs in the Broward County School District. Evaluation information is prepared for the Superintendent, the School Board, federal/state/private grant funding agencies, district administrators and other audiences as directed by the Associate Superintendent.

The Research and Evaluation Department is responsible for the data collection and analysis necessary to implement the Board's Accountability policy. The major goals of the department include:

- implementing districtwide assessments such as the Stanford Achievement Test and alternative norm-referenced tests for ESE and LEP students, the Florida Writing Assessment, the Florida Competency Assessment Test (FCAT), Advanced Placement, Career Assessment, and Credit by Competency;
- providing analysis of student assessment results to schools and departments;
- completing 10 program evaluations and presenting the results to the Board annually;
- preparing and disseminating six research briefs annually;
- conducting four research studies including critical incident and customer surveys each year; and
- developing and/or identifying assessment instruments as directed by the Superintendent to meet school and student needs including "Algebra for All" testing, alternative assessments for special populations, and selected criterion-referenced testing instruments by June of each year.

A primary function of the Research and Evaluation Department is to provide information to decision-makers that will facilitate the improvement of student achievement and school effectiveness. To accomplish this, Research and Evaluation conducts studies to determine the effectiveness of various programs and examines policy issues that are high priority to the district. The department also oversees the districtwide testing and assessment program. The department has 23 positions that perform the following duties:

- developing a calendar for program evaluations, research and districtwide testing;
- providing and implementing procedures related to program evaluation and outside requests to conduct research;
- collaborating with personnel in planning and implementing selected evaluations and research;

- assisting building administrators and teachers in assessing and improving instruction by providing evaluation, research and testing/assessment results for schools, classes, and students;
- **planning, coordinating and implementing the districtwide testing and assessment program as well as state and national assessment programs for regular, exceptional and limited English proficient students, grades K-12; and**
- interpreting and reporting assessment results to school personnel, the community, and other stakeholder groups.

FINDING

The Research and Evaluation Department provides the necessary information and data to determine when program continuation, discontinuation, or revisions need to occur. This department also works closely with the schools to provide guidance and direction in data analysis and interpretation. The department produces district reports and updates a website regularly to provide each school with multiple ways of looking at and using data to support school-based decision making. School administrators are able to use annual assessment reports to summarize trends by grade and teacher, and to determine if particular groups of students are making improvements. School-based administrators and department personnel are also able to make comparisons to other schools, districts, and states. The multiple forms of comparative student data assist principals and teachers in determining strengths and weaknesses of curriculum and in developing action plans to remedy problem areas. To assist schools in interpreting results, the department also provides training to area directors and school-based administrators.

COMMENDATION

The Department of Research and Evaluation is commended for providing thorough assessment data and support to schools.

FINDING

Evaluation is an important function of any school system. To make critical decisions regarding resource management, program continuance, and new initiatives, the Board and school system managers must have easy access to up-to-date, integrated program evaluation and planning information. To be effective, a school system must link the ongoing evaluation of programs and fiscal resources to the school system's strategic directions. Exhibit 5-42 provides a list of recent evaluations conducted by the Department of Research and Evaluation.

The Broward County School District anticipates a continued increase in the evaluation reports requested by schools during the 1998-99 school year. As schools have expanded efforts to enhance students achievement through the school improvement planning process, evaluation has become an important tool for determining the status of school performance and assessing progress in implementing School Improvement

Plans. In addition, as the district has expanded its efforts to make decisions based on

EXHIBIT 5-42

LIST OF RECENT EVALUATION REPORTS

Evaluation Report	Completion Dates
Fort Lauderdale High School Prerequisite Academy	August 1998
Pre-First Program Evaluation	July 1998
Pace setter English, Pace setter Mathematics Evaluation Report	August 1998
NOVA Center for Applied Research and Professional Development	March 1998
New Jersey Writing Project Review	February 1998
Mileage Grouping at NOVA Blanch Forman	August 1998
HOSTS (Helping Students to Succeed) Program	June 1998
Alliance of Quality Schools	September 1998
Alternatives to External Suspension Program	September 1997
Alternatives to External Suspension	August 1998
Block Scheduling	October 1997
Coalition of Essential Schools	July 1998
Distance Learning	September 1998

Source: Broward County School District, Department of Research and Evaluation, 1998.

data, a comprehensive plan for collecting benchmarks for evaluating schools and programs has been created. Exhibit 5-43 provides a summary of Broward County benchmarks report indicators.

The Department of Research and Evaluation employs a relatively small staff. To meet additional demands for evaluation, the department contracts with a large number of consultants. Expenditures for evaluation consultants increased from \$41,078 in 1996-97 to \$75,663 in 1998-99. Although the use of contracted services provides the district with considerable flexibility in assigning evaluation studies to experts in each field being evaluated, the department still appears to be understaffed. Interviews indicate that the district's demands for research-based decision making and ongoing evaluation have escalated. In fact, the Exceptional Student Education Unit has hired an additional research specialist to assist in meeting the specialized evaluation demands in this program area. Interviews with area directors and school-based staff indicate that schools have an increased need for assistance in interpreting data. This need is due, at least in part, to more emphasis by the state and district officials on data-driven decision-making. As schools increased their focus on monitoring student achievement, nationally, school-based staff have required additional data to evaluate programs.

RECOMMENDATION

Recommendation 5-20:

Hire one evaluation specialist to meet the growing demands for program evaluation and training.

The Research and Evaluation Department provides valuable information on schools and programs. This increase in staff will assist the district in continuing its research-based approach to decision making. Additional specialized evaluations should continue to be contracted outside of the district.

EXHIBIT 5-43

SUMMARY OF BROWARD COUNTY SCHOOL DISTRICT
BENCHMARK REPORT INDICATORS

INDICATORS		
Student Profile: <ul style="list-style-type: none"> ■ Enrollment PreK-12 ■ Diversity – by race, ethnicity and gender ■ Percent receiving free/reduced lunch ■ Percent enrolled in ESE ■ Percent of LEP students 	American College Test <ul style="list-style-type: none"> ■ Average score for all public high school students, ■ Percent of public high school graduates taking test, ■ Number of all public high school students taking ACT 	Employer satisfaction by survey , degree of employer satisfaction with work preparation, work habits, and overall occupational preparation <ul style="list-style-type: none"> ■ Recent graduates public high school ■ Postsecondary vocational program grads and Assoc. of Science degree candidates
<u>Vocational and Adult Education Programs</u> <ul style="list-style-type: none"> ■ Vocational Programs enrollment ■ Community Education Programs enrollment 	Advanced Placement – percent AP exams taken by students (replace <u>seniors</u> with students) who passed with 3.0 or higher	Readiness for Kindergarten - percent of students meeting state <ul style="list-style-type: none"> ■ Readiness requirements
International Baccalaureate diplomas number, number per 1,000	Florida Writes average (Grades 4, 8, 10) <ul style="list-style-type: none"> ■ Percentage scoring above 3.0 (Grades 4, 8, 10) 	Public Satisfaction survey – percent rating job of public school as good or excellent
<u>Preschool attendance</u> <ul style="list-style-type: none"> ■ Number of low-income preschool students (3 and 4 yr. Olds) attending BCPS preschool programs ■ Number of low-income preschool students who were unserved due to inadequate federal/state funding 	Scholastic Assessment Test <ul style="list-style-type: none"> ■ Average score for al public high school students, ■ Percent of public high school graduates taking test, ■ Number of all public high school students taking SAT 	Job Placement for Job training graduates <ul style="list-style-type: none"> ■ percent of adults who enroll in and complete <ul style="list-style-type: none"> – an occupational completion point or – the program completion point for a – Workforce Development funded program
Kindergarten – percent of kindergartners promoted to 1 st grade	Algebra Completion – proportion of graduating seniors meeting requirements	Students taking upper-level courses (Level 3 courses)
FCAT – Reading Grades 4, 8, 10	FCAT – Mathematics Grades 5, 8, 10	High School Dropout Rate
Entry Level Placement Tests <ul style="list-style-type: none"> ■ Number of public high school students taking entry level college/university placement tests in all 3 subject areas ■ Percent of public high school students ready for college ■ Mathematics ■ Writing ■ Reading ■ All subjects 	Job Training <ul style="list-style-type: none"> ■ Percent of people completing job training <ul style="list-style-type: none"> – Program employed within 1 year – Adults, youth, laid-off workers ■ Percentage of people completing job training <ul style="list-style-type: none"> – program who got jobs related to their field of training (postsecondary adult vocational program graduates, adults who complete an occupational completion point 	Employment and education after graduation <ul style="list-style-type: none"> ■ percent of public high school graduates <ul style="list-style-type: none"> – working and continuing education – working only – continuing education only – percent of postsecondary adult voc. graduates – working and continuing education – working only – continuing education only
Stanford Achievement Test – % scoring above national average <ul style="list-style-type: none"> ■ Math Applications – Grades 4, 8 ■ Reading Comprehension – Grades 4, 8 	BCPS Teacher Survey percent responding “always” or “usually” <ul style="list-style-type: none"> ■ “Race relations among students are positive at my school.” ■ “Race relations among school staff are positive at my school” 	High School Competency Test – 11 th grade students passing on first try <ul style="list-style-type: none"> ■ Communication ■ Mathematics
Total expenditures per student average amount spent per preK-12 student	High School Graduation Rate “present” calculation (“new” calculation when available)	Flow of dollars to the classroom percentage of dollars spent on classroom
School Performance <ul style="list-style-type: none"> ■ Number schools per level for all 5 categories ■ Percent of critically low by level (elementary, middle, high) 	Public satisfaction with workforce preparation survey - percent of residents who thought educational system doing good or excellent job developing workforce needed in future	BCPS Parent Survey percent responding “always” or “usually” <ul style="list-style-type: none"> ■ “I feel good about the things my child does at school”
BCPS Student Survey percent responding “always” or “usually” <ul style="list-style-type: none"> ■ “I like going to this school” 	Work-Based Learning <ul style="list-style-type: none"> ■ Student internships at private businesses 	BCPS Student Survey percent responding “always” or “usually”

Educational Service Delivery

	■ Teacher internship positions	■ "My teachers do a good job teaching me"
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EXHIBIT 5-43 (Continued)

**SUMMARY OF BROWARD COUNTY SCHOOL DISTRICT
BENCHMARK REPORT INDICATORS**

INDICATORS		
Literacy of Young Adults (19 – 24) Prose, Quantitative, Document	Literacy of Adults Ages (25 – 64) Prose, Quantitative, Document	Adult ESOL percent of adults who enroll in and complete the Advanced ESOL Program
Adult Basic Education (ABE) percent of adults who enroll in and complete the Functional Literacy Level (Level 4) in Mathematics, Reading, and language of the Adult Basic Education courses of instruction	BCPS Parent Survey percent responding “always” or “usually” <ul style="list-style-type: none"> ■ “the teachers are doing a good job teaching my child” 	Volunteers in BCPS <ul style="list-style-type: none"> ■ Number of volunteers ■ Volunteer hours per student PreK-12 students ■ Number hours per volunteer
General Education Development (GED) percent of adults who enroll in GED Preparation Classes and receive a GED diploma	Adults with Disabilities percent of adults who enroll in and complete the Workforce Development Level 3 of the Adults with Disabilities Workforce Development Program	Family Literacy percent of adults who enroll in and complete the Intermediate Literacy Level 3 of the ABE Program
Wages for recent graduates <ul style="list-style-type: none"> ■ public high school ■ postsecondary adult voc. 	Suspensions 6 – 12 percent by level <ul style="list-style-type: none"> ■ In-school suspensions ■ Out-of-school suspensions 	Teacher Profile: <ul style="list-style-type: none"> ■ Race, ethnicity, gender, attendance, advanced degrees
Teachers K-3 <ul style="list-style-type: none"> ■ number of teachers needed to achieve goal of 20 students per classroom ■ average cost of teachers salary plus benefits 	Facilities capacity <ul style="list-style-type: none"> ■ Building capacity ■ Portable capacity ■ Student enrollment 	School Advisory Councils (SAC) <ul style="list-style-type: none"> ■ Team composition ■ Attendance at meetings (employees and parent/Community)
Class Size K-3 percent of single K-3 classrooms that have <ul style="list-style-type: none"> ■ 20 or fewer students ■ 21-25 students ■ 26-29 students ■ 30 or more Average class size <ul style="list-style-type: none"> ■ Elementary ■ Middle – Math, Science, Social Studies, Language Arts ■ High – Math, Science, Social Studies, Language Arts 	Parental Involvement (Customer Survey Questions) – Parents <ul style="list-style-type: none"> ■ “I feel welcome when I visit my child’s school.” ■ “The school staff wants me to be involved at school.” ■ “The school staff tells me about their activities such as parent meetings, student performances, etc.” ■ “When I have asked for information at my child’s school, the staff responded promptly.” ■ “My child’s school has asked me to share my ideas and/or concerns about the school.” 	Capital needs <ul style="list-style-type: none"> ■ Number of student workstations needed to meet enrollment ■ Cost of needed workstations ■ Cost of needed schools ■ percentage over capacity (school by school and districtwide)
Overenrolled schools percent of schools with enrollments over capacity	Employer Involvement Mentoring, Internships, Scholarship, Junior Achievement	Average daily attendance – by level
Student Attendance percent of public school students absent 21 or more days – by level	Truancy percent students with 15 or more unexcused absences	Critical incidents number of critical incidents among public school students K-12, including centers
Violence violent critical incidents (battery) reported by public schools K-12 – number by level	Drugs and alcohol drugs and alcohol critical incidents reported by public schools k-12 number by level	Partnerships in BCPS number of Partner in Education partnerships
School perception of parental involvement (Customer Survey Questions – Teachers) <ul style="list-style-type: none"> ■ “I can rely on parents to help when achievement or behavior problems occur with their children.” ■ “I encourage parents to be involved at school.” 	Teacher Development Program %of classroom teachers annually engaged in professional development courses in area of expertise or teaching discipline.	Expulsions 6 – 12 – number

Source: 1998 GAP Report From Broward Business Coalition for Education (BBCE).

IMPLEMENTATION STRATEGIES AND TIMELINES

- | | |
|---|-------------|
| 1. The Associate Superintendent for Accountability, Technology, Strategic Planning, and School Improvement should instruct the Research and Evaluation Department to prepare a job description for an Evaluation Specialist position. | June 1999 |
| 2. The Associate Superintendent for Accountability, Technology, Strategic Planning, and School Improvement should recommend the job description to the Superintendent for approval by the Board. | July 1999 |
| 3. The Board should approve the position. | August 1999 |
| 4. The Associate Superintendent for Accountability, Technology, Strategic Planning, and School Improvement should secure a person to fill the position. | July 1999 |

FISCAL IMPACT

An Evaluation Specialist will cost the district about \$52,346 in base salary and \$16,957 in benefits (\$69,303). Based on MGT's workload analysis, the Department should anticipate decreasing its contractual services by 20 percent (\$15,132). The overall cost of this position will be about \$54,000.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Hire an Evaluation Specialist	(\$54,000)	(\$54,000)	(\$54,000)	(\$54,000)	(\$54,000)

FINDING

The Broward County School District does not currently conduct comprehensive school-based studies that integrate data collected on student performance with non-biased observations of the educational service delivery models implemented at each school. This type of study is typically conducted by a multi-disciplinary team of professionals, sometimes called an Instructional Design Team or School Quality Review Team. The team provides schools with additional in-depth planning information. The purpose of these school-based studies is to assist schools in determining long-range priorities by targeting the critical areas where student performance and classroom instruction need to be improved. Instructional design studies are typically conducted by a cross-disciplinary team consisting of professionals from other schools or departments within the system or professionals in neighboring school systems. Frequently, these studies include interviews and classroom observation-evaluation techniques. Instructional design studies provide specific improvement suggestions to principals and school-based professionals. In most cases, the review team works collaboratively with school-based personnel to develop strategies for school improvement.

The Broward County School District is beginning to develop a process to monitor the many school reform and school improvement initiatives. Through stringent monitoring and support, Broward County has assisted several schools in making the necessary improvements in student performance so that the schools are no longer classified as “critically low” by the Florida Department of Education. The Florida Department of Education will continue to monitor districts statewide to determine if a school falls into the critically low category. Consequently, the district must closely scrutinize and assess how it currently allocates additional resources to schools, and the extent to which these resources actually contribute to improvements in student and school performance. The new School Improvement Unit assigned to the Associate Superintendent of Accountability, Technology Strategic Planning and School Improvement has begun to design a process to continually assess the progress of schools who may potentially be classified as “critically low.”

Similarly, the Division of Educational Programs is developing and implementing curriculum assessments. During the first year of implementation, the curriculum assessments were conducted prior to a new principal beginning an assignment at a school. Interviews with central office and area personnel indicate that the curriculum assessment process have provided valuable insight into the level of implementation of districtwide curriculum initiatives at the school level. The assessment process also provides a constructive forum for discussing implementation issues and focusing school-based and central office staff. In addition, this process identifies the next steps that need to be taken in order to achieve a quality curriculum at each school.

The two processes currently in place for evaluating school-wide performance and assisting schools in improving these approaches to educational service delivery are limited to schools who are assigned a new principal. While the curriculum assessment provides an overview of the curriculum aspects of delivery, other educational programs and approaches to innovation and reform are not assessed.

Developing a comprehensive model for evaluation that includes an Instructional Design Team approach will assist the Broward County School District in enhancing accountability. Intense study of individual schools will assist school system officials in allocating resources to those programs that have proven to be effective in enhancing student performance.

RECOMMENDATION

Recommendation 5-21:

Develop and implement school-based instructional design studies as a tool for assessing instruction and programs that contribute to the school improvement process in schools.

To enhance accountability for school reform and school improvement programs, the Office of Research and Evaluation and must clearly develop a process for assisting all schools in using data and evaluation information available to improve instruction and plan school-based initiatives. An Instructional Design Study Plan should have clear criteria for holding schools accountable for implementing study results.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent, in conjunction and the Associate Superintendent, should develop and implement a plan for conducting Instructional Design Studies. Fall 1999
2. The Deputy Superintendent should ensure that a plan for Instructional Design Studies is implemented annually through combined efforts of the Division for Educational Programs, Student Services, and Human Resources Development and the Division of Accountability. Commencing in January 2000 and Ongoing

FISCAL IMPACT

The Broward County School District has many highly qualified professionals who could serve on Instructional Design Study Teams on a rotating basis. This recommendation can be accomplished within existing resources using internal staff members from schools and the central office.

5.5.2 Student Assessment

Student assessment is a vital component to every school district. Parents, students, school district employees, and community stakeholders expect appropriate learning to occur within classrooms. Florida's Accountability Plan requires an emphasis on student outcomes, making it extremely important for support to be provided in the area of testing analysis and interpretation.

CURRENT SITUATION

The Broward County School District makes extensive use of a variety of student achievement measures to assess, compare and improve student performance. District-level and school-based administrators monitor student achievement closely and extensive remediation is provided to students showing inadequate performance. Exhibit 5-44 shows the tests used in the Broward County School District.

The Florida Comprehensive Assessment Test (FCAT) is based on the knowledge and skills contained in Florida's Sunshine State Standards which were approved by the State Board of Education in May 1996. This statewide assessment tool is designed to measure how well students were achieving based on the standards set by the state of Florida. The FCAT questions measure content defined by the state's curriculum frameworks in Language Arts and Mathematics.

The FCAT was field-tested in Spring 1997 using 11 different forms and 1,200 questions to determine specifications for format, length, and other design elements of the test. The questions used on the FCAT were created by the Florida Department of Education (DOE) contractor, CTB/McGraw-Hill Publishing Company. The questions were written by professional item writers and DOE staff coordinated their review by committees of Florida educators and citizens. Most test items are multiple-choice. However, some items are product-oriented and require the students to write an answer, solve a problem, give a lengthy explanation, or draw a geometric sketch.

**EXHIBIT 5-44
TESTS USED IN THE**

BROWARD COUNTY SCHOOL DISTRICT

STATE AND LOCAL ASSESSMENTS				
TEST	GRADES	SUBJECTS	EXEMPTIONS	REQUIRED
Stanford Achievement Test, Eighth Edition	2-9	<ul style="list-style-type: none"> ■ 2-5: Reading, Mathematics ■ 6-7: Reading, Mathematics, Language Mechanics, Spelling, Study Skills, Listening ■ 8: Reading, Mathematics, Language Mechanics, Spelling, Study Skills, Listening, Social Sciences ■ 9: Reading, Mathematics, English, Spelling, Study Skills 	<ul style="list-style-type: none"> ■ ESE students who meet all Florida Department of Education exemption criteria and are typically working on alternate standards ■ LEP students in an approved LEP program two years or less may be exempted on an individual basis if recommended by the school LEP committee and documented on Limited English Proficient Student Education Plan Folder 	Yes
Metropolitan Achievement Test, Seventh Edition (for ESOL students in an ESOL program 2 years or less)	2-12	<ul style="list-style-type: none"> ■ 2-3: Reading, Mathematics ■ 4-9: Reading, Mathematics, Language ■ 10-12: Reading, Language 		Yes
Woodcock-Johnson Revised (alternate assessments for selected ESE students typically working on alternate standards)	7-8	<ul style="list-style-type: none"> ■ Reading, Mathematics, Writing 		Yes
Credit by Examination	7-8	<ul style="list-style-type: none"> ■ Foreign Languages: Spanish, Japanese, French ■ Mathematics: Algebra, Plane Geometry 		Yes
PreHSCT	9-10	<ul style="list-style-type: none"> ■ Communications, Mathematics 	<ul style="list-style-type: none"> ■ ESE students who meet all Florida Department of Education exemptions criteria and are typically working on alternate standards ■ LEP students in an approved LEP program two years or less may be exempted on an individual basis if recommended by the school LEP committee and documented on Limited English Proficient Student Education Plan Folder 	Yes
Algebra Competency Test	9-12	<ul style="list-style-type: none"> ■ Algebra 		Yes
Florida Comprehensive Assessment Test (FCAT)	4,8,10 5,8,10	<ul style="list-style-type: none"> ■ Reading ■ Mathematics 	<ul style="list-style-type: none"> ■ ESE students who meet all Florida Department of Education exemption criteria and are typically working on alternate standards ■ LEP students in an approved LEP program two years or less may be exempted on an individual basis if recommended by the school LEP committee and documented on Limited English Proficient Student Education Plan Folder 	Yes
Florida Writing Assessment Program	4,8,10	Writing	<ul style="list-style-type: none"> ■ ESE students who meet all Florida Department of Education exemption criteria and are typically working on alternate standards ■ LEP students in an approved LEP program two years or less may be exempted on an individual basis if recommended by the school LEP committee and documented on Limited English Proficient Student Education Plan Folder 	Yes
Career Assessment	8			Yes

Educational Service Delivery

High School Competency Test (HSCT)	11,12	<input checked="" type="checkbox"/> Communications <input checked="" type="checkbox"/> Mathematics	No exemptions for students pursuing a standard high school diploma	Yes
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Overall, Broward students demonstrate achievement commensurate with students across the state. Highlights reported by the Broward County School District indicate:

- Broward students perform similarly with students statewide.
- Broward mathematics scores are consistent with large districts across the state.
- Broward students consistently score higher than students in nearly all of Florida's large districts in reading.

As seen in Exhibit 5-45, the subcategory percentages in mathematics closely reflected those statewide. Similarly, Exhibit 5-46 shows FCAT Reading Scores for the Broward School District are comparable to students around the state.

Exhibit 5-47 reports FCAT scores for students statewide and in large Florida school districts for 1997-98.

EXHIBIT 5-45

FLORIDA COMPREHENSIVE ASSESSMENT TEST

DISTRICT AND STATE TOTAL MATHEMATICS SCORES

1997-98

GRADE	COUNTY OR STATE	TOTAL MATH	NUMBER SENSE, CONCEPTS & OPERATIONS	MEASUREMENT	GEOMETRY AND SPATIAL SENSE	ALGEBRAIC THINKING	DATA ANALYSIS & PROBABILITY
5	Broward	299	56%	40%	55%	48%	58%
	State	300	56%	40%	56%	48%	58%
8	Broward	299	47%	45%	42%	53%	39%
	State	299	47%	45%	42%	53%	40%
10	Broward	297	60%	42%	39%	46%	39%
	State	301	61%	43%	41%	47%	41%

Source: Broward County School District, 1998.

EXHIBIT 5-46

**FLORIDA COMPREHENSIVE ASSESSMENT TEST
DISTRICT AND STATE TOTAL READING SCORES
1997-98**

GRADE	COUNTY OR STATE	TOTAL READING SCORE	CONSTRUCTS MEANING FROM INFORMATIONAL TEXT	CONSTRUCTS MEANING FROM LITERATURE
4	Broward	292	48%	56%
	State	294	49%	56%
8	Broward	295	53%	56%
	State	298	54%	57%
10	Broward	294	52%	64%
	State	299	54%	65%

Source: Broward County School District, 1998.

**EXHIBIT 5-47
FLORIDA COMPREHENSIVE ASSESSMENT TEST RESULTS
IN LARGE DISTRICTS**

1997-98

SCHOOL DISTRICT	GRADE 4	GRADE 5	GRADE 8		GRADE 10	
	READING	MATH	READING	MATH	READING	MATH
Broward	292	299	295	299	294	297
Miami-Dade	276	282	282	282	285	286
Hillsborough	294	304	296	297	300	309
Orange	289	296	299	299	302	303
Palm Beach	290	302	301	304	302	306
State Average	294	300	298	299	299	301

Source: Broward County School District, 1998.

The purpose of state and local testing programs is to gather data about student achievement. As a result of Blueprint 2000, students in Florida are expected to *successfully compete at the highest levels nationally and internationally and be prepared to make well-reasoned, thoughtful, and healthy lifelong decisions*. This is consistent to one of the Broward County School District's Major System Priorities which is to improve student achievement and school effectiveness.

The data collected by the Florida Writing Assessment is one indicator used to assist in the evaluation of student progress, curriculum effectiveness, and program implementation. The Florida Writing Assessment is implemented in Grades 4, 8, and 10 as required by state regulations. The assessment is designed to measure student proficiency in writing responses on assigned topics within a designated testing period. The Florida Writing Assessment requires students to produce a writing sample within established guidelines parameters. Each student receives a writing folder containing one writing topic with two-lined pages for the written response. Students are given 45 minutes to read the topics independently, plan their responses, and write their responses in the folders. Florida Writing Assessment samples are then sent to the Florida Department of Education for scoring by outside, trained evaluators. Trained readers independently score the sample for overall quality considering four elements: focus, organization, support, and conventions.

Highlights of the Florida Writing Assessment results reported by the district include:

- Total writing scores for elementary schools increased 0.5 overall to 3.1. Individual schools reported varied gains with over half (67 out of 121) schools reporting gains of 0.5. Five elementary schools increased their assessment scores by a full 1.0 or more.
- Middle school scores were consistent with statewide trends declining by 0.2 to 3.2. Over 81 percent of Broward students; however, continue to exceed the 3.0 standard of writing.
- Broward students at Grade 10 demonstrate the most significant gains last year with overall results to 3.5. All Broward high schools

have reached, or exceeded, the 3.0 writing standard set by the district.

Exhibit 5-48 displays the Broward County School District and state results on the Florida Writing Assessment and Exhibit 5-49 provides a comparison of the Broward County School District and five peer school districts.

The High School Competency Test (HSCT) is another state indicator developed to measure the minimum performance skills expected of Florida high school graduates. All students must pass both the mathematics and communications sections of the HSCT to receive a standard Florida high school diploma. The HSCT is consistent with district's standards (School Board Policy 6000.1).

Changes to the scoring of the HSCT were made by the Florida Department of Education staff in 1996. These changes raised the level of performance that Florida students are expected to demonstrate in order to meet minimum competency standards. In addition, new skills were added to the assessment increasing the expectation for students to perform on a broader range of tasks.

**EXHIBIT 5-48
FLORIDA WRITING ASSESSMENT DISTRICT AND STATE AVERAGES
1995-95, 1996-97, and 1997-98**

GRADE	1995-96	1996-97	1997-98	1995-96	1996-97	1997-98	1995-96	1996-97	1997-98
Grade 4	Expository			Narrative			Total		
Broward	2.3	2.5	3.1	2.8	2.7	3.1	2.5	2.6	3.1
Florida	2.2	2.5	3.0	2.8	2.8	3.1	2.5	2.6	3.0
Grade 8	Expository			Persuasive			Total		
Broward	3.6	3.4	3.3	3.3	3.3	3.2	3.5	3.4	3.2
Florida	3.7	3.4	3.4	3.3	3.3	3.2	3.5	3.4	3.3
Grade 10	Expository			Persuasive			Total		
Broward	3.2	3.6	3.5	3.3	3.5	3.4	3.3	3.6	3.5
Florida	3.2	3.7	3.6	3.4	3.5	3.5	3.3	3.6	3.6

Source: Broward County School District, 1998.

**EXHIBIT 5-49
FLORIDA WRITING ASSESSMENT FOR
BROWARD COUNTY AND FIVE PEER DISTRICTS
1997-98**

SCHOOL DISTRICT	GRADE 4			GRADE 8			GRADE 10		
	Explain	Narrative	Total	Persuasiv e	Narrative	Total	Persuasiv e	Narrative	Total
Broward	3.1	3.1	3.1	3.3	3.2	3.2	3.5	3.4	3.5
Miami-Dade	3.0	3.0	3.0	3.3	3.2	3.3	3.5	3.4	3.5
Hillsborough	3.2	3.3	3.3	3.6	3.5	3.5	3.9	3.8	3.8
Orange	2.8	2.9	2.9	3.2	3.1	3.2	3.6	3.4	3.5
Palm Beach	2.9	3.0	3.0	3.4	3.3	3.3	3.6	3.5	3.6
State	3.0	3.1	3.0	3.4	3.2	3.3	3.6	3.5	3.6

Source: Broward County School District, 1998.

Exhibits 5-50 and 5-51 provide an overview of HSCT for the Broward County School District, the state, and several peer districts.

Exhibit 5-52 provides a summary of student performance on the SAT and ACT nationally and for the state of Florida and the Broward County School District.

**EXHIBIT 5-50
HSCT PASSING RATE FOR BROWARD COUNTY SCHOOL DISTRICT
AND THE STATE**

1996-97 AND 1997-98

DISTRICT OR STATE	1996-97				1997-98			
	Communications		Mathematics		Communications		Mathematics	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Broward	10,669	72%	10,767	71%	10,945	74%	10,981	71%
State	104,806	77%	106,466	75%	107,263	78%	107,657	75%

Source: Broward County School District, 1998.

**EXHIBIT 5-51
HSCT SKILLS
NUMBER AND PERCENT IN COMPARISON SCHOOL DISTRICTS AND THE STATE**

1996-97 AND 1997-98

SCHOOL DISTRICT	1996-97				1997-98			
	COMMUNICATIONS		MATHEMATICS		COMMUNICATIONS		MATHEMATICS	
	# Tested	% Passing	# Tested	% Passing	# Tested	% Passing	# Tested	% Passing
Broward	10,669	72%	10,767	71%	10,945	74%	10,981	71%
Miami-Dade	13,732	67%	14,193	66%	13,669	69%	13,629	69%
Palm Beach	6,236	77%	6,299	76%	6,678	78%	6,696	78%
Orange	5,910	78%	6,027	76%	5,708	76%	5,769	71%
State	104,806	77%	106,466	75%	107,263	78%	107,657	75%

Source: Broward County School District, 1998.

**EXHIBIT 5-52
SUMMARY OF SAT AND ACT RESULTS
FOR THE NATION, STATE AND THE BROWARD COUNTY SCHOOL
DISTRICT,
1990-91 TO 1994-95**

CATEGORY	SCHOLASTIC ASSESSMENT TEST				AMERICAN COLLEGE TESTING PROGRAM				
	Year	Verbal	Math	Total	English	Math	Reading	Science Reasoning	Composite
National	90-91	422	474	896	20.3	20.0	21.2	20.7	20.6
	91-92	423	476	899	20.2	20.0	21.1	20.7	20.6
	92-93	424	478	902	20.3	20.1	21.2	20.8	20.7
	93-94	423	479	902	20.3	20.2	21.2	20.9	20.8
	94-95	428	482	910	20.3	20.2	21.3	21.0	20.8
Florida	90-91	416	466	882	20.3	20.3	21.2	20.4	20.7
	91-92	416	468	884	20.3	20.4	21.1	20.4	20.7
	92-93	416	466	882	20.3	20.4	21.2	20.5	20.7

	93-94	413	466	879		20.2	20.5	21.3	20.6	20.8
	94-95	420	469	889		20.0	20.4	21.2	20.6	20.7
Broward	90-91	409	463	872		20.4	20.7	21.2	20.2	20.7
	91-92	411	473	884		20.0	20.5	20.8	20.1	20.5
	92-93	409	468	877		19.9	20.7	20.8	20.3	20.6
	93-94	407	471	878		20.1	21.0	21.0	20.3	20.7
	94-95	411	476	887		19.7	20.9	20.8	20.4	20.6

Source: Broward County School District, 1998.

FINDING

The Broward County School District produces a *Districtwide Testing Handbook*. The handbook provides detailed descriptions of state and local testing programs and updates on testing policies. The 1998 *Districtwide Testing Handbook*, for example, outlined the following expectations for the FCAT being considered by state officials:

- Include the FCAT as a criterion to earn a College-Ready Diploma from a Florida high school.
- Incorporate the FCAT as an accountability measure for school performance and determination of Critically Low Performing Schools. The FCAT will replace several different norm-referenced tests currently used by school districts throughout the state. The two-year phase-in begins with the administration of the 1999 FCAT. The 1999 school performance reports will reflect both norm-referenced test scores and FCAT scores for reading and mathematics. The year 2000 school performance reports will use the FCAT scores as measures of reading and math, replacing the norm-referenced test scores.
- Incorporate administration of the Florida Writing Assessment into FCAT, establishing one assessment for reading, writing, and mathematics to streamline test administration costs and reduce students' test-taking time.
- Use FCAT as one important indicator when determining which schools are recognized for significant improvement or sustained excellence.

The District Testing Handbook is an excellent procedural resource that ensures consistent operating procedures among schools within Broward County School District.

COMMENDATION

The Broward County Schools District is commended for the development and use of a *Districtwide Testing Handbook*.

FINDING

The Student Assessment Unit provides for comprehensive management of the Broward County School District's assessment program and the collection of indicators that can be used to determine school-based and program accountability. Although accountability for testing results is an important priority, the primary mission of the district should be clearly established so that students spend maximum time focused on curriculum and instructional activities.

In addition to state-required assessments, the Broward County School District tests students in grades kindergarten-12 on nationally standardized exams. Although these tests are not required, the testing program allows school-based administrators and department personnel in the district to compare local results to national results. As shown previously in Exhibit 5-44, fourth and eighth graders take the Stanford Achievement Test in addition to Florida Comprehensive Assessment Test (FCAT) and the Florida Writing Assessment Program.

During our on-site review, we found that students spend several weeks preparing for and taking exams. The department currently budgets \$681,113 in test purchases alone. Printing and processing expenses exceed \$195,000. Additionally, on-site interviews found that parents and staff are concerned about the amount of instructional time used for extensive test preparation and test-taking. As shown previously in Exhibit 5-44, fourth graders take the Stanford Achievement Test in addition to the Florida Comprehensive Assessment Test and the Florida Writing Assessment Program.

RECOMMENDATION

Recommendation 5-22:

Assign a task force to review the district's needs for local testing and reduce testing purchasing and processing by a minimum of 15 percent.

The district should set a goal to reduce testing by a minimum of 15 percent. A fifteen percent reduction in local testing should assist teachers in reducing time spent in test preparation rather than in direct instruction. Many school districts do not require national comparisons necessary at all grade levels annually. Grade levels could rotate the use of non-required standardized tests. Rotating testing requirements ensure accountability without excessive time being spent on test preparation.

IMPLEMENTATION STRATEGIES AND TIMELINE

The Associate Superintendent should assign a Task Force to review the testing program.	Summer 1999
The Task Force should review the testing program.	October – December 1999
The Task Force should present recommendations for modifications to the testing program to the Superintendent.	January 2000

The Superintendent, in conjunction with other key staff, should review the recommendations and present the report to the Board.

February 2000

The Board should approve the recommendations.

March 2000

FISCAL IMPACT

Savings will vary depending on the recommendations of the Task Force. The Task Force should strive to increase the efficiency of the testing program by least 15 percent based on MGT's analysis of the current testing program. A 15 percent reduction in the testing program would result in a savings of \$131,250 annually.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Reduce Purchases of Tests	\$131,250	\$131,250	\$131,250	\$131,250	\$131,250

5.6 Grants Administration

CURRENT SITUATION

The Grants Administration Unit reports to the Associate Superintendent for Educational Programs. The unit is comprised of positions including a grants administrator, grants planner, and two grants specialists. The major goal of the Grants Administration Department is to increase the amount and diversity of grant funding awarded to the Broward County School District. Grant funds are used to provide additional resources for initiatives and projects that support school improvement goals and other priority projects initiated by the district. The Grant Administration Unit performs the following functions:

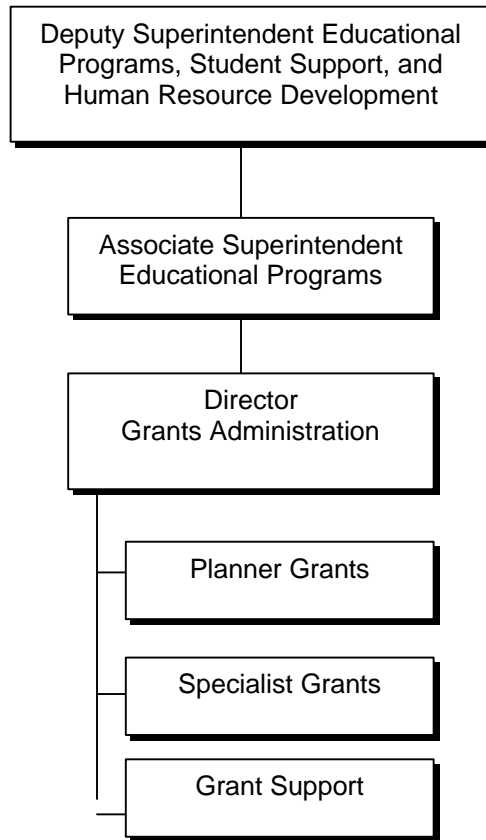
- identifying and researching public and private sources of potential grant revenues;
- disseminating information of potential grant opportunities to schools and departments;
- conducting training in grant writing for school and departmental employees;
- assisting schools and school districts in developing and producing competitive grant proposals;
- participating in grant negotiations with funding agencies;
- providing post award assistance to schools and departments in meeting grant requirements; and
- managing certain district grant programs and activities such as the Impact Aid Survey and Services to nonpublic Schools.

Exhibit 5-53 displays the current organizational structure of the Grants Administration Department.

The Grants Administration Unit's major objective is to increase the amount and diversity of grant funding awarded to the school district through both public and private funding sources. Prior to seeking new funds, the Grants Administration Department ensures that the funds support initiatives and projects that meet major system priorities and school improvement goals. Grant funding is used by schools and departments to

supplement state and local funding to develop methods and models for improving student, teacher, and school performance.

EXHIBIT 5-53
DEPARTMENT OF GRANTS ADMINISTRATION



Source: Broward County School District, Division of Educational Programs, Student Support, and Human Resource Development, 1998.

The Grants Administration Unit provides training and technical assistance to school and district personnel in all facets of grant development and procurement, collects data, serves as a clearinghouse for grants information in the school district, and tracks legislative and regulatory developments that affect grant funding and grant project operations. Competitive grant projects include initiatives for:

- intensive staff training;
- partnership development between the district and community organizations and businesses;
- magnet programs; multicultural and bilingual education programs;
- technology utilization; and
- school improvement projects.

FINDING

According to Broward County School District records between 1989-90 and 1994-95, competitive grant funding received by the school district increased 149 percent. Between July 1995 and April 1996, the Grants Administration Department assisted with the development of 94 competitive grant applications --- 75 from schools and 19 from departments. To date, 18 of the grant proposals have been awarded for a funding total of \$5,736,159. Forty-seven (47) proposals are currently pending and 29 have been denied. During the same period, the department provided more than 885 hours of grants training to 325 staff members from 87 district schools and centers.

Exhibit 5-54 provides a summary of the grants funds provided to Broward County School District during 1997-98. The exhibit shows that the district has continued to maximize grant resources with a total of \$76,376,909 in grant funds.

COMMENDATIONS

The Broward County School District is commended for its proactive approach in seeking additional grant funds.

The additional funds have assisted many schools and programs in supporting student achievement.

FINDING

The Grants Administration Unit identifies and researches public and private sources of financial support; disseminates funding information to schools and departments; conducts formal grants training for school and department personnel; assists schools and district departments in developing and producing competitive grant proposals; participates in grant negotiations with funding agencies; and provides post award assistance to schools and departments in meeting grant regulations. The unit also directly manages certain district grant programs and activities related to Impact Aid Survey and Services to nonpublic schools.

The Grants Administration Unit is responsible for the following sources:

- reviews and sends out information each year to schools and departments;
- conducts routine technical assistance workshops for schools for specific RFPs and review drafts proposals from schools and suggest improvements;
- provides accounting assistance, when requested by schools or departments; and
- reviews the budget page for most state grants (signature required) and other budgets upon request, (but many grant budgets are submitted without the accounting review which has led to errors.)

The Grants Administration Unit is not responsible for monitoring or implementing most of the grant programs. As shown in Exhibit 5-55, since 1992 the Broward County School District has returned \$2,093,019 in unused grant funds.

**EXHIBIT 5-54
SUMMARY OF GRANTS ADMINISTERED BY BROWARD COUNTY SCHOOL DISTRICT
1997-98**

TITLE	DEPARTMENT	FUNDING AGENCY	AMOUNT FUNDED
Adult Education, Section 322	Vocational, Adult and Community Education	Florida Department of Education	\$1,033,719
Adult Education, Section 322-Corrections	Vocational, Adult and Community Education	Florida Department of Education	\$25,000
Break the Mold – Whole Village Technology	Strategic Planning & Accountability		\$98,300
Break the Mold – Whole Village Technology	Strategic Planning & Accountability		\$98,300
Broward Beautiful Community Grant Program	Sawgrass Springs and Margate Middle	Broward Beautiful	\$8,750
Broward County Sheriff's Office – Project ACES	Whiddon-Rogers Education Center	Broward County Sheriff's Office	\$141,393
Broward Employment and Training Administration Summer Academic Remediation Program	Vocational, Adult and Community Education		\$103,789
Broward Workforce Development Board/WAGES Coalition – "Destination Self-Sufficiency" - STRIVE	Vocational, Adult and Community Education	Broward Workforce Development Board	\$541,845
Challenge Grant Programs for the Gifted	Advanced Academic Programs		\$14,000
Children's Services Board – Various	Various	Broward County – Human Services Department – Children's Services	\$819,067
City of Coral Springs – Innovative At-Rise Youth Programs	2 Middle and 3 Elementary	City of Coral Springs	\$10,214
City of Coral Springs Trees 4 Schools Program	Adopt-A-Mile in partnership with Coral Springs Elementary	City of Coral Springs	\$10,000
Connecting Teachers with Technology Award Program	Markham Elementary	US West and Media One	\$23,000
Dan Marino Foundation	Deerfield Beach Middle	Dan Marino Foundation	\$5,000
Danforth Foundation: Successful Schools Initiative: Co-Learning Assures Secure Partnerships	Parkway Middle		\$20,000
Diana Wasserman Minigrants	Bright Horizons, Coral Springs High, Quiet Waters Elem		\$1,310
Early Childhood Regional Technical Assistance Project	Early Childhood Education	Florida Department of Education	\$94,573
Early Head Start Program	Early Childhood Education	United States Department of Health and Human Services	\$703,964
Education Now and Babies Later (ENABL)	Health Education	March of Dimes	\$6,197
Education of Homeless Children and Youth	School Social Work	Florida Department of Education	\$57,200
Elementary School Technology (EDS)	Welleby and Pinewood	Electronic Data Systems (EDS)	\$2,600

Educational Service Delivery

Environmental Education Grants Program	Elementary Whiddon-Rogers Education Center		\$4,933
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**EXHIBIT 5-54 (Continued)
SUMMARY OF GRANTS ADMINISTERED BY BROWARD COUNTY SCHOOL DISTRICT
1997-98**

TITLE	DEPARTMENT	FUNDING AGENCY	AMOUNT FUNDED
Extended Access to Library Media Services	Learning Resources ELEM: Miramar, Oakland Park, Tedder		\$58,440
Family Preservation Program at Drew Family Resource Center	Drew, Charles Family Resource	Department of Children and Families	\$106,875
Florida Compact Grant	Ely High	Florida Department of Education	\$25,000
Florida Department of Children and Families – ALPHA	Secondary Education	Department of Children and Families	\$235,438
Florida Department of Children and Families Contract for Mental Health Services for Severely Emotionally Disturbed Students (SED) for 1997-98	Whispering Pines	Department of Children and Families	\$207,663
Florida Department of Children and Families – Targeted Assistance Program	Vocational, Adult and Community Education		\$515,315
Florida Department of Corrections – Even Start Family Literacy Program	Vocational, Adult and Community Education		\$140,451
Florida Department of Education School-To-Work	Vocational, Adult and Community Education	Florida Department of Education	\$500,000
Florida Department of Juvenile Justice – Community Apprentice Program	Deerfield Beach Middle	State of Florida, Department of Juvenile Justice	\$43,147
Florida Diagnostic and Learning Resources System (FDLRS) – Assistive Technology Educational Network	Exceptional Student Education	Florida Department of Education	\$56,000
Florida Diagnostic and Learning Resources System (FDLRS) – General Revenue	Exceptional Student Education	Florida Department of Education	\$80,535
Florida Diagnostic and Learning Resources System (FDLRS) – Preschool	Exceptional Student Education	Florida Department of Education	\$113,310
Florida Diagnostic and Learning Resources System (FDLRS) – REACH	Exceptional Student Education	Florida Department of Education	\$725,147
Florida First Start Program	Early Childhood Education	Florida Department of Education	\$290,662
Florida Incentive Planning Challenge Grant – Fine Tuning Assessment	Riverglades Elementary	Florida Department of Education	\$5,000
Florida Incentive Planning Challenge Grant – Pathways for Success	Fort Lauderdale High	Florida Department of Education	\$20,000
Florida Learn and Serve America – The Literacy Club	Driftwood Elementary	Florida Department of Education	\$2,278
Goals 2000: Broward Educational Curriculum Planning Tool – Sunshine Standards & FCAT	Nova Center	Florida Department of Education	\$270,000
Goals 2000: Local Education Reform Grant Program	Dillard Innovation Zone	Florida Department of Education	\$150,000

Educational Service Delivery

Goals 2000: Professional Development Distance Learning Technology Grant	Nova Center	Florida Department of Education	\$440,000
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EXHIBIT 5-54 (Continued)
SUMMARY OF GRANTS ADMINISTERED BY BROWARD COUNTY SCHOOL DISTRICT
1997-98

TITLE	DEPARTMENT	FUNDING AGENCY	AMOUNT FUNDED
Goals 2000: Secondary Technique Accelerated Reading	Secondary Education	Florida Department of Education	\$235,000
GTE Growth Initiatives for Teachers	Hallandale Adult & Community Center	GTE Foundation	\$12,000
Head Start – Basic	Early Childhood Education	United States Department of Health and Human Services	\$7,995,972
Heritage Panel Program – National Conference of Christians and Jews	Diversity and Cultural Outreach		\$3,500
IBM – Reinventing Education	Strategic Planning & Accountability	International Business Machines	\$400,000
IDEA, Discretionary Fund Supplement Grant	Exceptional Student Education	Florida Department of Education	\$355,200
IDEA, Part B, Individuals with Disabilities Education Act	Exceptional Student Education	Florida Department of Education	\$10,226,873
IDEA, Part B, Severely Emotionally Disturbed Network (SEDNET)	Exceptional Student Education	Florida Department of Education	\$85,358
IDEA, Part B, Severely Emotionally Disturbed Network (SEDNET), General Revenue	Exceptional Student Education	Florida Department of Education	\$32,992
IDEA, Part B, Special Project: Florida Inclusion Network Grant	Exceptional Student Education	Florida Department of Education	\$250,000
IDEA, Preschool Grant for Children with Disabilities Aged 3-5	Exceptional Student Education	Florida Department of Education	\$1,259,688
Impact Aid	Grant Administration		\$27,532
Innovation zone Artist Residency Grant – Acts of Kindness “A OK”	Silver Ridge Elementary	Broward Cultural Affairs Council	\$5,000
Innovation zone Artist Residency Grant – Blended Voices in America	Dilliard High	Broward Cultural Affairs Council	\$5,000
Innovation zone Artist Residency Grant – We’ve Got the Power to Make a Difference: Through the Arts	Hallandale Adult & Community Center	Broward Cultural Affairs Council	\$5,000
JTPA Title IIA, Section 123	Vocational, Adult and Community Education	Florida Department of Education	\$273,415
Magnet Schools Assistance Program	Attucks Middle, Parkway Middle, New River Middle, Driftwood		\$1,776,643
MegaSkills Urban Initiative for Parent Involvement	ESEA Title 1	MegaSkills Education Center – The Home and School Institute	\$20,000
Miami HEAT/HIP Community Service Grant	ELEM: Colbert, Eagle Point, Embassy Creek, Fairway, J.S. Hunt	HIP Health Plan of Florida, Inc.	\$10,000
National Science Foundation – Mathematics & Science Teacher Enhancement through Chaos and Fractals	Educational Prog/Student Support/HRD-Deputy	Florida Atlantic University for National Science Foundation	\$245,657
Parents To Kids Home-Based Reading Instruction program	Early Childhood Education	Florida Department of Education	\$99,829
Performance Assessment System for Students with Disabilities	Wingate Oak Center		\$6,371
Performance Assessment System for Students with Disabilities	The Quest Center		\$5,000

Educational Service Delivery

Performance Assessment System for Students with Disabilities	Bright Horizons Center		\$15,000
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EXHIBIT 5-54 (Continued)
SUMMARY OF GRANTS ADMINISTERED BY BROWARD COUNTY SCHOOL DISTRICT
1997-98

TITLE	DEPARTMENT	FUNDING AGENCY	AMOUNT FUNDED
Performance Based Incentive Funding Alternative Use Plan	Vocational, Adult and Community Education	Enterprise Agency	\$74,591
Pre-Kindergarten Early Intervention Program	Early Childhood Education		\$8,601,809
Professional Pathways	Magnet Programs	Panasonic Foundation, Inc.	\$125,000
Quick Response Training	Sheridan Vocational Technical	Enterprise Florida, Inc.	\$15,806
Safe and Drug-Free Schools Program and Communities	Health Education	Florida State Department of Education	\$1,168,970
Safe and Drug-Free Schools – Set Aside	Health Education Dilliard Innovation Zone	United States Department of Education	\$1,400,055
School Health Programs to Prevent Serious Health Problems and Improve Education	Health Education	Department of Health and Human Services	\$244,252
School-To-Work Urban/Rural Opportunities – High Poverty	Vocational, Adult and Community Education Dilliard Innovation Zone	U.S. Department of Education	\$487,500
South Florida Annenberg Challenge (Exploratory)	Various Schools	South Florida Annenberg Challenge, Inc.	\$66,693
South Florida Regional Planning Council/Florida Gold Coast Clean Cities Coalition Grant—VACE Electric Vehicle	Vocational, Adult and Community Education	South Florida Regional Planning Council	\$55,000
Student Enrichment in Arts and Science (SEAS Program)	Child Development	Florida Department of State-Division of Cultural Affairs	\$10,348
Thurgood Marshall Elementary School's Critically Low Student Performance Project	Marshall, Thurgood Elementary		\$26,000
Title I 1997-98 Capital Expenses for services to Private School Children	Special Programs	United States Department of Education	\$158,138
Title I Delinquent or At-Risk Students	Special Programs	United States Department of Education	\$143,297
Title I Migrant Education, Migrant General Revenue, and Region V Migrant Supportive Services and Data Center	Special Programs	Florida Department of Education	\$452,281
Title I Targeted Assistance and Schoolwide Project	Special Programs	United States Department of Education	\$23,523,942
Title II – Eisenhower Professional Development	Educational Programs	Florida Department of Education	\$964,393
Title VI—Innovative Education Program Strategies	Strategic Planning & Accountability	Florida Department of Education	\$1,279,853
Title VII, Part C, Emergency Immigrant Education Program	Multicultural/Foreign Language/ESOL Education	Florida Department of Education	\$3,762,167
Title VII – Project I Decide. . . I Succeed . . . I Lead	Multicultural/Foreign	Florida Department of Education	\$144,788

Educational Service Delivery

	Language/ESOL Education		
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EXHIBIT 5-54 (Continued)
SUMMARY OF GRANTS ADMINISTERED BY BROWARD COUNTY SCHOOL DISTRICT
1997-98

TITLE	DEPARTMENT	FUNDING AGENCY	AMOUNT FUNDED
Title VII—Empowering the Language Minority Population with Educational Reform (Project EMPOWER)	Multicultural/Foreign Language/ESOL Education	United States Department of Education	\$330,951
Title VII—Project Ansanm - Togetherness	Multicultural/Foreign Language/ESOL Education	United States Department of Education	\$62,051
Title VII—Project Tomodachi – Friends through Languages	Multicultural/Foreign Language/ESOL Education	United States Department of Education	\$89,973
Title VII—Project Unidos	Multicultural/Foreign Language/ESOL Education	United States Department of Education	\$86,882
Tobacco Prevention/Intervention Teacher Training Project	Health Education		\$29,945
Toyota Families for Learning Partnership	Vocational, Adult and Community Education	National Center for Family Literacy	\$9,550
Toyota Time—Seeing the Word of Algebra Through Technology (SWATT)	Ely High		\$10,000
Vision and Eye Examination Program	Health Education	Florida Department of Education	\$119,439
Vocational and Applied Technology Education-Gender Equity, Section 222	Vocational, Adult and Community Education	Florida Department of Education	\$70,878
Vocational and Applied Technology Education-Project ACCEPT-Single Parent/Displaced Homemaker, Section 221B	Vocational, Adult and Community Education	Florida Department of Education	\$38,879
Vocational and Applied Technology Education-Project Reward-Single Parent/Displaced Homemaker, Section 221	Vocational, Adult and Community Education	Florida Department of Education	\$149,178
Vocational and Applied Technology Education-Secondary Education, Section 231	Vocational, Adult and Community Education	Florida Department of Education	\$1,358,182
Vocational and Applied Technology Education-Tech Prep., Section 341	Vocational, Adult and Community Education	Florida Department of Education	\$156,673
Total			\$76,376,909

Source: Broward County School District, Department of Grants Administration Unit, 1998.

EXHIBIT 5-55

**SCHOOL BOARD OF BROWARD COUNTY
FEDERAL FUNDS ANALYSIS SUMMARY
FOR 1992-93 THROUGH 1996-97**

SCHOOL YEAR	TOTAL GRANT AMOUNT	TOTAL EXPENDITURES	TOTAL UNSPENT	PERCENT SPENT	TOTAL CARRY FORWARD AMOUNT ⁽¹⁾	AMOUNT RETURNED/ UNSPENT	PERCENT RETURNED/ UNSPENT
1992-93	45,371,348	39,747,975	5,623,373	88%	5,037,005	586,368	1.29%
1993-94	53,069,544	50,466,190	2,603,354	95%	2,137,722	465,632	0.88%
1994-95	52,762,991	49,817,951	2,945,040	94%	2,024,941	920,099	1.74%
1995-96	54,704,288	51,785,458	2,918,830	95%	2,797,910	120,920	0.22%
1996-97	58,238,481	50,542,152	7,696,329	87%	TBD	TBD	
Five-Year Average	\$52,829,330	\$48,471,945	\$4,357,385	92%	2,999,395	2,093,019	1.02%

Source: Broward County School District, Grants Administration Unit, 1998.

⁽¹⁾ Amount to be carried forward to next fiscal year; total amount is average of four years. TBD: to be determined after all grants are closed after June 30, 1998.

Grant awards tend to be addressed to the Superintendent or directly to the department that submitted the grant -- not to the Grants Administration Department. Copies of awards are received only after requesting them from the 10th floor receptionist, schools, or departments – which can take weeks. When award letters are not received by accounting, there is sometimes a delay in setting up the account. No assistance can be provided until accounting learns of the grant award.

Additionally, accounting only tracks funded grants. Due to the large volume, the accounting section does not issue reminders for spending funds and no database is available for historical data.

Budget printouts are used to report budget information, but there are no reports generated for management above the school or department levels. It is difficult to distribute printouts to schools and departments in a timely manner because of the large volume of printouts. They are often obsolete by the time they are received at the school or department.

RECOMMENDATION

Recommendation 5-23:

Expand the role of Grants Administration Unit to improve accountability for grant administration and reassign the unit to the Director of Grants and Administrative Services in the newly created Division of Educational Programs and Services. (See Exhibit 5-10 for the proposed realignment of this Department.)

This reorganization will enhance the unit's processing and information management capacity and centralize the coordination and monitoring of the unit's reporting requirements. Under the new structure, the Director of Grants and Administrative Services would have primary responsibility for:

- grants administration;
- financial monitoring;
- data management and reporting; and
- compliance monitoring.

The implementation plan should carefully examine the functions assigned to this unit. Services that are not within the scope of an administrative service role should be reassigned to the appropriate units and monitored.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent, in conjunction with key department personnel, should establish a plan to implement the merger of administrative grant functions. June 1999

2. The Deputy Superintendent should ensure that the merger is implemented. August 1999

FISCAL IMPACT

This reorganization can be accomplished within existing resources. The improved lines of authority should increase the efficiency of grants administration. On average, \$523,254 in grant funds are returned annually. By improving the administrative role of the Grants Administration Unit in monitoring grant budgets, the Board should hold the Department accountable for avoiding at least 75 percent of this loss. As administrative practices improve, the Board should raise the 75 percent performance standard to 90 percent. Based on MGT's experience with other school districts, these standards are reasonable goals for improving organizational efficiency.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Improve Accountability for Grants Administration	\$330,000	\$330,000	\$330,000	\$330,000	\$330,000

5.7 Student Support Services

Student Support Services are provided in addition to curriculum and instructional services to students, families, and staff to support all areas of child development that will enhance student success in school.

CURRENT SITUATION

The Broward County School District provides an array of student support services (psychological, guidance, social workers, and health services) in addition to the district curriculum and instructional programs. The mission of the Student Support Services and Exceptional Student Education (ESE) Department is to provide a personalized, coordinated, and culturally-sensitive support system for students and their families in collaboration with community partners.

Exhibit 5-56 displays the organizational structure of the Department of Psychological Services/School Social Work and Attendance/Health Education Services. The Department uses the Standards of Student Services as the guidance document governing its goals, services, and initiatives. The Standards of Student Services (SOSS) set an expectation for a personalized support system for students and their families which organizes and utilizes internal and external services in a process that focuses on student academic, social, and health-related growth.

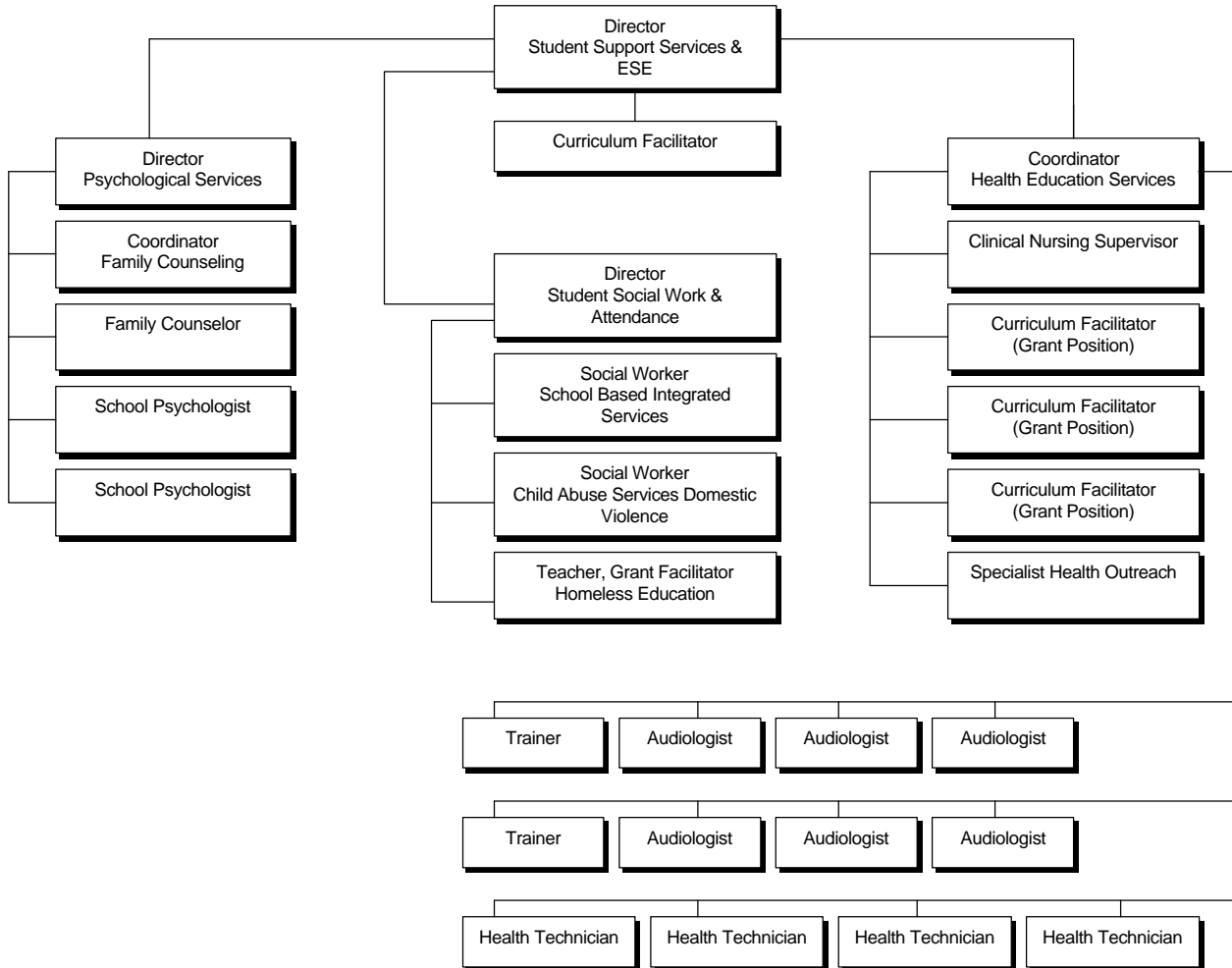
The services of school psychologists, guidance counselors, social workers, and other support personnel focus the delivery of services to students based on the needs of each individual school. The integrated delivery of these services is based on the district's Standards of Student Services.

The 1998-99 major goals and initiatives of the Student Support Services and ESE Education Department are:

- Field test new zone-based student services delivery systems which align with the Standards of Student Service policy by coordinating the staff development, planning, and technical assistance for six innovation zones which volunteered to adopt or develop new systems and field-test accountability indicators by June 30, 1999.
- Continue (for the second year) to implement the Medicaid Administrative Outreach Program and, in addition, establish pilot programs for school-based fee-for-service Medicaid programs in order to determine, by June 1999, which fee-for-service programs are cost-effective and beneficial for students and should therefore be implemented systemwide in 1999-2000.
- Develop a support system to meet the unique needs of foster care and homeless students by establishing written procedures related to stabilizing their school environments by creating individualized academic plans and assigning surrogate parents for students identified as ESE.
- Evaluate the impact of the funding concept (developed in 1997-98) which provides additional school psychologists, social workers, and or other support personnel for zones with the largest growth in student enrollment and for zones which have more than 65 percent of their students on free/reduced lunch. Complete analysis by May 1999 to coincide with development of budget guidelines for 1999-2000.
- Expand the "full service school" concept by establishing a "full service school" site at Deerfield Beach High School, including the development of specifications for architectural plans and creation of contracts with community partners to staff the center with medical, dental, and mental health personnel. Specifications to be

completed by December 1998 and partnerships clearly defined by March 1999.

**EXHIBIT 5-56
 PSYCHOLOGICAL SERVICES/SCHOOL SOCIAL WORK AND ATTENDANCE/
 HEALTH EDUCATION SERVICES
 ORGANIZATIONAL CHARTS
 1998-99**



Source: Broward County School District, Department of Student Support Services and ESE, 1998.

- As part of the Coordinating Council of Broward, provide leadership for the school district's completion of provider profiles to support the Broward Information Network by creating a technology-based system for completing profiles which minimizes the impact on staff's time yet provides the information needed for county-wide multiagency planning and budget development. Complete the development of the system and submit at least 10 provider profiles by June 1999.

- Coordinate the information and activities of an Ad Hoc Committee on Family Counseling for the purpose of clearly defining the existing services which are being provided in many forms and locations throughout the district and making recommendations to improve and/or enhance services for students and families. Recommendations (at least some of which have no cost impact) are to be completed by February 28, 1999.

The Broward County School District has collaborated with other county-based health education and social service agencies and designed a countywide information sharing system called "The Broward Information Network" (BIN). By interconnecting the telecommunications networks of the various partners, a database of client information is being assembled. This database will maintain the security and need-to-know authorization necessary to enable an interchange of records among the various health agencies.

Recognizing the importance of early intervention and the critical role of schools addressing health-related issues, the North Broward Hospital District and the Broward County School Board joined in a partnership to improve student health services. This partnership has given students, their families, and local community members access to necessary health care.

Prior to this collaborative project, studies conducted by the 1995 Community Resources Coordinating Council, indicated that approximately 10 percent of Broward County's student population had not seen a doctor in two years and 35 percent had never seen a dentist. Also according to the 1995 Center for Disease Control (CDC) Youth Risk Behavior Survey, adolescents in Broward County had the highest rate of gonorrhea than any other age group (6.6 per 100), as well as the second highest rate of infectious syphilis.

The School Health Program was established in 1994 for the purpose of creating full-service primary health care centers in Broward County's most impoverished schools. Located in medically underserved, low income areas, these Centers offer a wide range of primary care services. The services provided by these centers emphasize health education, adolescent health services, and pregnancy prevention. Below is a list of the current health centers:

- Lauderhill Middle Community School Health Center
- Seagull School Health Center
- Pompano Multi-Purpose School health Center

- Stranahan High School Health Center
- Ely High School Health Center
- William B. Dandy Middle School Health Center
- Charles R. Drew Family Resource Health Center
- Crystal Lake Middle School Health Center
- Deerfield Beach High School Health Center

In the last two years, the North Broward Hospital District has logged over 95,000 patient visits. Approximately 85 percent of the patients were uninsured. Additionally, the North Broward Hospital District provided the supervision and training of the Broward County School Board athletic trainers at all high schools in the district. For the 1997-98 fiscal year, operating expenses for all school health programs were approximately \$1.7 million.

The District has developed programs that address the incidence of repeat teen pregnancies and sexually transmitted diseases. In collaboration with the Broward County School Board and with supplemental funding from the Broward County Children's Services Board, the district has provided health care services and case management to pregnant and parenting teens at the three Broward Teen Parent Education sites (Seagull, Hallandale Adult and Pompano Schools) and to teen parents enrolled at Stranahan High School, Ely High School and Dillard High School. Services provided at Hallandale are in collaboration with Memorial Healthcare System. This program has served over 976 adolescents. Of those students participating, 97 percent were without a repeat pregnancy and 96 percent without repeat STD infection. On follow-up 180 days after leaving this program, the participants reported no repeat STDs and a 96 percent without a repeat pregnancy.

COMMENDATION

The Broward County School District and the staff of the school health program are commended for the important strides they have made in delivering and providing important health services to students.

FINDING

Services rendered by the social workers include serving on diagnostic and crisis intervention teams, family counseling, parent education, conducting family assessments, providing consultation for teachers, and case management. Specific programs established and implemented by the School Social Work Office include child abuse services, homeless education program, school-based integrated services program, teen parent services (home school), and a graduate social work internship program.

The districts school social work services which include assessing the needs of students and families and providing the professional services to overcome any obstacles to student educational success are insufficient. Broward County has a total of 72 social workers (all possessing master's degrees) divided among the south, central, and north areas. MGT consultants conducted a focus group of 25 principals and asked them to rate various student support services provided by the district. Fifty-five percent of the

responses from principal focus group sessions conducted by MGT indicated the need to increase the quantity of social worker services. The ratio of social workers to students in Broward County School District is 3,116:1. The ratio of students to social workers is somewhat higher compared to some other comparison districts. For example, Miami-Dade County School District has a ratio of 3,039:1 and Orange County School District has a ratio of 3,080:1.

The district requires that social workers must possess a master's degree in their field. This practice is driven by Medicaid requirements when certain procedures are carried out and the district seeks reimbursement. However, many tasks assigned to social workers are not related to this requirement.

RECOMMENDATION

Recommendation 5-24:

Hire an additional four social worker assistants annually through the year 2003-04.

An acceptable practice used by other districts is to employ social worker assistants under a social worker's direction, therefore, reducing the cost of delivering services and increasing the level of services by employing additional personnel. In an effort to increase the quantity of social worker services, the district could employ social worker assistants with the ultimate goal of one assistant to each social worker. This process is justified because it should reduce the cost of rendering certain types of social work services without sacrificing quality.

IMPLEMENTATION STRATEGIES AND TIMELINE

4. The Deputy Superintendent for Educational Programs, Student Services, and Human Resource Development should provide leadership for the preparation of a plan designed to implement this recommendation. May 1999

5. The Director of Student Services and ESE, in collaboration with the Director of Personnel, should hire an additional four social worker assistants and revise current social worker job descriptions and prepare job descriptions for social worker assistants in accord with the approved plan. June 1999

6. The Superintendent should recommend to the School Board approval of the social worker assistance positions and appropriate job description. July 1999

7. The Director of Student Services and ESE should implement the plan. September 1999

FISCAL IMPACT

The average social worker assistant's salary plus 33 percent benefits is \$21,881 per year times four positions equals a cost to the district of about \$87,525 per year. Based on attrition and program growth, it is recommended that an additional four social worker

assistants be hired each year until the ultimate goal of a ratio of one assistant to one social work is attained.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Hire Four Social Worker Assistants Annually	(\$87,525)	(\$175,050)	(\$262,575)	(\$351,100)	(\$437,625)

FINDING

The school district possesses a comprehensive student database system called the Total Education Resource Management System (TERMS). However, interviews with personnel, a review of the student support services program goals, objectives, and accomplishments as well as a review of the information provided by ETS, indicate that social workers are currently not entering information related to student interventions into a well-established database system. The TERMS software does permit the additional data to be entered into the system. By integrating the intervention information with the district's database system, the social workers can foster better communications with other personnel who are working with those particular students as well as it should permit more effective and efficient utilization of time for school social workers.

RECOMMENDATION

Recommendation 5-25:

Establish and implement a process to enable social workers to enter appropriate student information into the Total Education Resource Management System (TERMS).

The integration of the social work database and the student database will enable social workers, teachers, administrators, and staff to quickly furnish and receive appropriate and meaningful information related to students, student interventions, and status of assistance being offered.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Director of Social Work and Attendance and the Director of Education Technology Services should prepare a plan including recommendations designed to ensure appropriate access to technology, therefore, permitting social workers effective and efficient fulfillment of their responsibilities. | July 1999 |
| 2. The Director of Education Technology Services should implement the approved plan. | August 1999 |

FISCAL IMPACT

This recommendation can be accomplished through existing resources.

FINDING

The district's school psychological services mission statement is to "provide services that support the school community in meeting the educational, emotional, and social needs of all students." Currently, the Broward County School District is being served by 78 psychologists. A majority of the staff have specialist degrees and another 18 percent hold doctorates. All psychologists hold certificates from the Department of Education and several hold the credential of Nationally Certified School Psychologist (NCSP). The department is striving to adapt its services to the needs of a rapidly growing and diverse student population.

The Broward County school psychologists work as members of support teams in delivering services to students. They have various physical location assignment areas such as an area office, innovation zone, or a district department team. Each school can minimally access the services of one psychologist to address the needs of its students.

Interviews and a review of documents provided by the Department of Psychological Services indicate that the Broward County School psychologists, in collaboration with the reading curriculum specialists, have developed training for psychologists which links assessment to strategies for effective reading instruction.

COMMENDATION

The Broward County School District's Psychological Services Department is commended for collaboratively developing training which links assessment to strategies for effective reading instruction.

FINDING

In a review of documents supplied by the Department of Student Support Services and in interviews conducted with district personnel, no specific procedures were identified to ensure the clear delineation of responsibilities between psychological services and the Equal Opportunity Office as related to issues associated with Section 504 matters. This subject should receive high priority since confusion in this area of responsibility could result in significant non-compliant issues.

RECOMMENDATION

Recommendation 5-26:

Establish clear lines of responsibilities with regard to Section 504 responsibilities and provide the necessary staff training.

Implementation of this recommendation should assist the district in maintaining adequate and efficient compliance with the Equal Opportunity Office as it relates to Section 504. Implementing specific procedures should limit potential litigation related to non-compliance.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Education Programs, Student Support and Human Resource Development in collaboration with the Director of Student Support Services and ESE and the Director of Psychological Services/504 should develop a plan to ensure the clear delineation of responsibilities in all matters related to Section 504 matters and relationships with the Equal Opportunity Office. May 1999
2. The Deputy Superintendent for Educational Programs, Student Support and Human Resource Development, the Director of Student Support Services and ESE, and the Director of Psychological Services/504 should present the plan to the Superintendent and Executive Staff for review and final approval. June 1999
3. The Deputy Superintendent for Educational Programs, Student Support and Human Resource Development, the Director of Student Support Services and ESE should implement the approved plan. July 1999

FISCAL IMPACT

This recommendation can be implemented without the need for additional resources and could contribute to reducing the district's liability for errors that may occur in the handling of Section 504 issues.

5.8 Staff Development

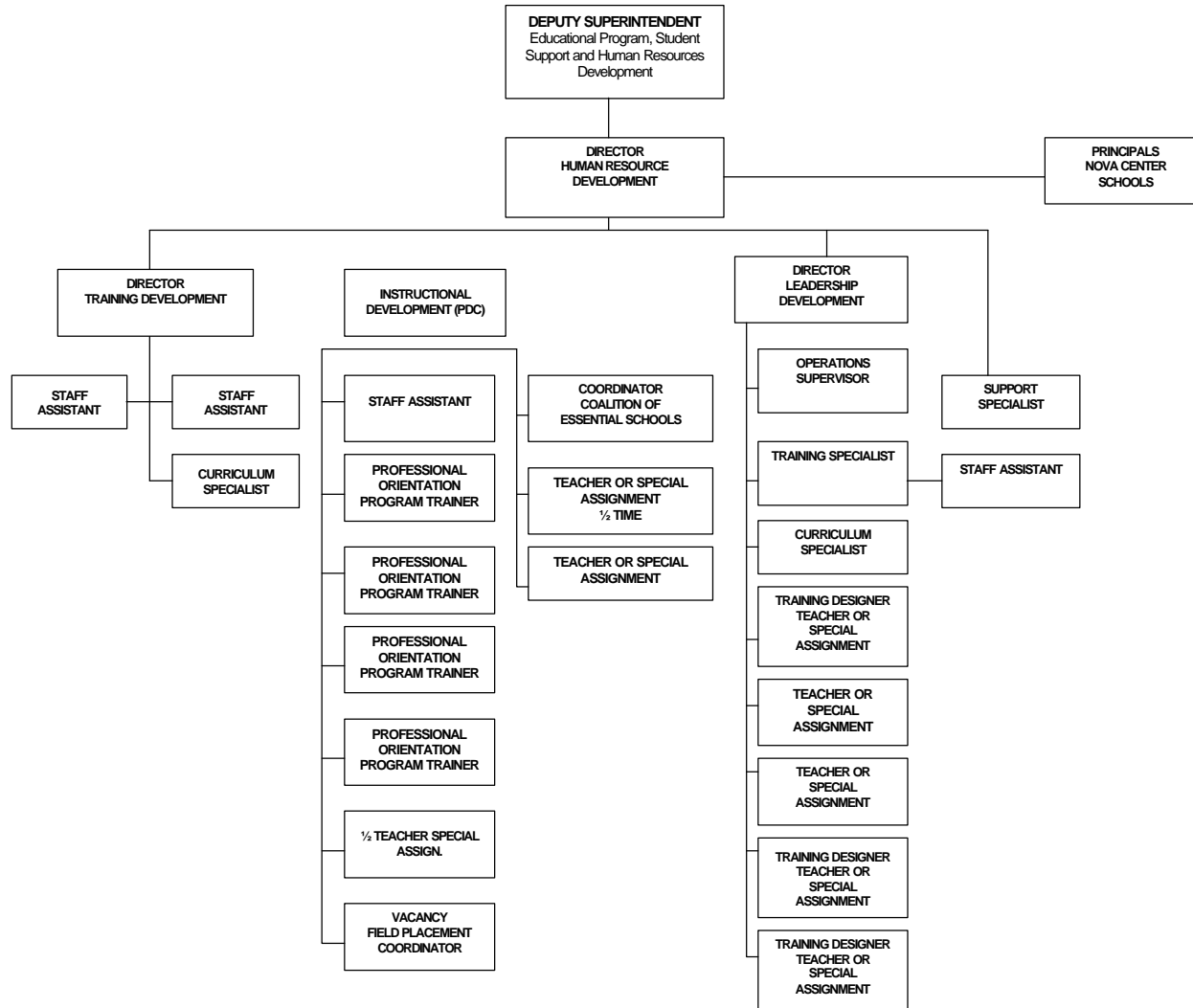
An effective staff development program must initiate and assume responsibility for developing materials and training which respond to the district's strategic plan. This section is subdivided into the following subsections: 5.8.1 addresses the overall staff development in the district, 5.8.2 discusses the Professional Orientation Program, and subsection 5.8.3 refers to the Nova Centers.

5.8.1 Overall Staff Development Program

CURRENT SITUATION

The Department of Staff Development is currently combined with the Educational Programs and Student Support Services. As seen in the Exhibit 5-57, the department is organized into three units: Training and Development, Instructional Development and Zone Support, and Leadership Development. Often the terms Staff Development and Human Resource Development are interchanged, but the reader should be cognizant that in the Broward County School District they are one in the same.

**ORGANIZATIONAL CHART FOR THE DEPARTMENT OF HUMAN RESOURCE DEVELOPMENT
1998-99**



Source: Broward County School District, Department of Human Resource Development, 1998.

This year, Human Resource Development added a staff development position (teacher on special assignment) to each of the 23 Innovation Zones in an effort to coordinate training opportunities.

According to the Florida Department of Education's 1997 *Human Resource Management Development HRMD) Program Approval Report* conducted by a State on-site team, Broward County has a "rich history of HRMD initiatives. The district has piloted objective selection systems and internships for school principals in the early 1980s and has since, served as a model for other districts in the state. Two previous visits in 1986 and 1990 by on-site teams resulted in full approval of the HRMD Plan."

In 1996, the Broward County School District adopted the Professional Pathways Policy which emphasized the need for schools to develop their staff development plans that are directly linked to increased student achievement. Thus, the district has embarked on a staff development plan that is referred to as results-driven staff development. The following language has been added to the district's Accountability Policy:

All staff should have access to results-driven professional development and training which is aligned with the major system priorities and appropriate plans. The major system priorities must be supported by a coordinated system of staff development which is standards-based, job embedded, collaborative adult learning, and which builds a culture that ensures continuous improvement.

The goals of results-driven staff development include:

- staff development as the responsibility of all individuals in the district. Both the learner and the staff development provider must be committed to continuous improvement;
- action research among various forms of learning are recognized as effective methodologies;
- all initiatives and training must meet the district's standards and include follow-up activities; and
- the success of the training is measured by the impact on student achievement.

Exhibit 5-58 explains the department's newly developed paradigm shift.

According to those interviewed and a review of documents provided by the Department of Human Resource Development, the department is in a state of transition for the 1998-99 school year. The staff is establishing criteria for skill development and quality training that is aimed at being in alignment with the newly created Critical Content Guides and Essential Teacher Knowledge. The district currently has an ad hoc committee charged with the continuous development and refinement of a strategic plan for staff development for the Broward County School District.

**EXHIBIT 5-58
DEPARTMENT OF HUMAN
RESOURCE DEVELOPMENT'S PARADIGM SHIFT**

FROM	TO
Individual development	Individual development and organizational development
Fragmented, piecemeal improvement efforts	Staff development driven by a clear, coherent strategic plan for the school district, each school, and the departments that serve schools
District-focused	School-focused approaches to staff development
Focus on adult needs	Focus on student needs and learning outcomes
Training that one attends away from the job as the primary delivery system for staff development	Multiple forms of job-embedded learning
Orientation toward the transmission of knowledge and skills to teachers by "experts"	Study by teachers of the teaching and learning processes
Focus on generic instructional skills	Combination of generic and content-specific skills
Staff developers who function primarily as trainers	Those who provide consultation, planning and facilitation services, as well as training
Staff development provided by one or two departments	Staff development as a critical function and major responsibility performed by all administrators and teacher leaders
Teachers as the primary recipients of staff development	Continuous improvement in performance for everyone who affects student learning
Staff development as a "frill" that can be cut during difficult financial times	Staff development as an essential and indispensable process without which schools cannot hope to prepare young people for citizenship and productive employment

Source: Policy Handbook of the School Board of Broward County, 1998.

This year, the district has implemented an updated Administrator Performance Planning and Appraisal System (APPAS) for school-based and district-level administrators. A review of the documents, responses from focus groups, and one-on-one interviews indicate that the appraisal process an improvement over previous processes because it is more focused on increased student achievement and the district's strategic plan.

Various staff development programs have been designed and are being implemented by the district's Staff Development/HRD Department to support the staff development's paradigm shift as outlined in Exhibit 5-58. They include:

- **Broward County Educational Consortium**—The Consortium is designed to collaborate with higher educational institutions to

discuss ways the institutions can meet some of the staff development needs of the school district.

- **Clearinghouse Information Center**—This Center is a digital resource for school board employees to access information on the support and staff development initiatives being offered in the district.
- **Focus on Professional Pathways**—This monthly publication informs the district personnel of the various workshops and training being offered in the district.
- **Myron Ashmore Professional Resource Center**—This Center serves as an educational technology clearinghouse and resource room. Employees may access a list of resources housed in the Center via Intranet.
- **Professional Development Coordinating Council (PDCC)** —The HRD department coordinates meetings with the PDCC who are representatives from each of the district's departments for the purpose of designing, delivering, and evaluating staff development offerings.
- **Zone Coach**—Each Zone has selected one coach (teachers of special assignment) to assist the zone facilitator with issues dealing with staff development. This is a new position for the 1998-99 school year and is designed to assist in the coordinating and delivering of staff development activities.
- **New Educator Support System (NESS)**—It is the intent of this program to assist new teachers in succeeding during their first teaching experience in the district. Assistance is provided by a variety of mentors (innovation zone staff, area office staff, and university personnel).

According to the district, the objectives of the program are to:

- maintain a system of observation and support;
- improve classroom performance;
- encourage reflective practice; and
- promote collegiality.

FINDING

Currently, the Department of Human Resource Development is placed within the Division of Educational Programs, Student Support, and Human Resource Development and the Director reports directly to the Deputy Superintendent for Educational Programs, Student Support and Human Resources Development. This organizational structure results in diffusing the focus of the Deputy Superintendent from the primary responsibility for program and policy development.

RECOMMENDATION

Recommendation 5-27:

Reassign the Department of Human Resource and Development to report directly to the Associate Superintendent for Education within the newly created Division of Educational Programs and Services. (See Exhibit 5-10 for the proposed reorganization of this department.)

Under the proposed reorganization, this department would be more appropriately placed under the direct supervision of the Associate Superintendent for Education Programs. This realignment should result in permitting the Deputy Superintendent to concentrate on her primary responsibilities related to policy and program development.

The realignment of this department should provide a continuum of staff development services delivered in a more efficient and effective manner.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Superintendent should include this organization change in the proposal to be recommended for School Board action. | May 1999 |
| 2. The School Board should approve the Superintendent's recommendation. | July 1999 |
| 3. The Superintendent and Executive staff should implement the approved reorganization. | August 1999 |

FISCAL IMPACT

This recommendation can be implemented using existing resources.

FINDING

Interview data at the district and school level and survey data of teachers, principals, and district administrators indicate that the quality of staff development is generally high. As previously stated in Chapter 3.0, the principal, teacher and administrator surveys conducted by MGT indicate that employees are generally satisfied with the quality of staff development in the Broward County School District. For example, 56 percent of the district's administrators rate staff development as either adequate or outstanding; nineteen percent of administrators indicate that staff development needs major improvement. Twenty percent of the principals rated staff development as outstanding and 59 percent of the teachers rated staff development as adequate or outstanding.

The Staff Development Department displays a notable commitment to the development of school leadership by providing the following programs to aspiring leaders:

- LEAD Program

- Leadership Development Activities for Experience Leaders
- Interim Assistant Principal Program
- Interim Principal Program
- Intern Principal Program

COMMENDATION

The Broward County School District is commended for its strong commitment of having a clearly defined and fluent support for professional development.

FINDING

MGT consultants reviewed documents and interviewed personnel within and outside of the Human Resources Development Department. Based on our analysis, we found that various inequities in workload assignments and position compensation exist between the directors and the training specialist who is responsible for management and skills development. Research in management has shown that morale problems and efficiency and effectiveness can emerge within an organization that does not continuously adjust for these types of inequities.

RECOMMENDATION

Recommendation 5-28:

Examine the responsibilities assigned to each director within the Human Resources Development Department and equalize assignments and compensation.

The district was unable to provide information to justify the continuation of the identified inequities. The inequities were not related to skill, training, education, or tenure of the individuals filling these positions.

Implementing this recommendation should assist in clarifying job responsibilities among the three existing units in the Department of Human Resource Development and increase the efficiency and effectiveness of the services rendered.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Support and Human Resources Development and the Director of Human Resources Development review and evaluate the job responsibilities of each position within the Human Resources Department with the objective of equalizing responsibilities and workloads, and preparing appropriate compensation recommendations. May 1999
2. The recommendation adjustments should be presented to the Superintendent and Executive Staff for review and approval. June 1999

3. The Superintendent should secure Board approval if the recommendations require Board action. July 1999
4. The Superintendent should implement the plan as approved. August 1999

FISCAL IMPACT

The analysis of job descriptions and position classifications within the HRD Department can be conducted with existing resources.

FINDING

Currently the management/skills development function is assigned to a training specialist who reports directly to the Director of Professional Development Training who, in turn reports to the Director for Human Resources Development. Furthermore, two additional directors report, along with the training specialist position, to the Director of Professional development/Training. Based on our functional analysis, the management/skills development training function has an inextricable relationship with the leadership development function and, therefore, should be more closely aligned.

RECOMMENDATION

Recommendation 5-29:

Reassign the Management/Skills Development training function and associated personnel to the Director of Leadership Development and provide the Director the flexibility to assign responsibilities in accord with critical training needs.

The reassignment of the management/skills development training function to the Director of Leadership Development should enable the director to strengthen the training offered by more closely aligning these two areas for increased training effectiveness and to reduce any duplication.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Support and Human Resources Development and the Director of Human Resources Development should assign the Management/Skills Development training function to the Director of Leadership Development and provide the Director with the necessary flexibility to manage this function. July 1999
2. The Deputy Superintendent for Educational Programs, Student Support and Human Resources development and the Director of Human Resource Development should evaluate this assignment for improved efficiency and effectiveness. July 2000

FISCAL IMPACT

This recommendation can be implemented using existing resources and it should result in a more efficient departmental operation.

FINDING

MGT consultants examined documents related to training that is provided for new district office employees. During this examination, it was noted that employees who are either new hires to district-level positions or newly reassigned to the district-level are not provided an orientation program designed to acquaint them with district-level organization, procedures, and other pertinent matters that could expedite their familiarity with the system, and, consequently, enhance immediate effectiveness. It is a common practice in other districts to provide an employee orientation to new employees.

RECOMMENDATION

Recommendation 5-30:

Design and implement a comprehensive orientation program for new hires to the district-level and newly reassigned district-level employees.

The district is a large organization with many divisions and departments within the divisions. Many large corporations provide an orientation program for new hires to ensure employees work more effectively and efficiently and have a general understanding of standard policies and procedures. MGT reviewed the district's training calendar and although a calendar exists which designates training opportunities available in the district, it is incomplete and does not show all training opportunities.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|--------------------------|
| 1. The Director of Human Resources Development should prepare a comprehensive program for orientation of new district-level employees. | October 1999 |
| 2. The Deputy Superintendent for Educational Programs, Student Support, and Human Resources Development should review and approve the program. | November 1999 |
| 3. The District of Human Resources Development should implement the new program. | January 2000 and ongoing |

FISCAL IMPACT

This recommendation can be implemented by existing staff in the Human Resource Department.

FINDING

While the district has begun developing a long-term, systematic process for aligning all staff development training and initiatives with the Critical Content Guides and Essential Teacher Knowledge as well as with the Major System Priorities, it is lagging behind district needs.

Opinions varied on the quality of staff development from the respondents in the MGT survey conducted. Twenty (20) percent of the principals rated staff development as outstanding and 19 percent of administrators indicated that staff development was in need of major improvement. Thirty-nine (39) percent of the administrators rated staff development as either needing some improvement or major improvement. Many administrators and teachers interviewed by MGT indicated that the training calendars provided to them by staff development are not all inclusive of the training being offered in the district and that some schools are hiring outside consultants for various training without staff development being aware if the training is in alignment with the Critical Content Guides. A review of training offerings, other various documents provided by staff development, and interviews with many district personnel indicate that a defined clearing house of training and how it is directly linked to the Critical Content guides has not been established.

RECOMMENDATION

Recommendation 5-31:

Focus training resources on those initiatives related to the Critical Content Guides that are concentrating on improving student achievement.

This recommendation should include a periodic executive review of training initiatives to ensure that the needs emphasized through strategic planning are appropriately addressed and that unwarranted duplication of training does not occur. This long-range planning process would facilitate the access to districtwide staff development by schools and individual employees. The Department of Human Resources Development should be responsible for coordinating the planning process and monitoring the plans.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Support and Human Resources Development should review and evaluate the current training initiatives and develop a system to ensure resources in the Human Resources Development Department are focused on prioritized areas within the Critical Content Guides, Essential Teacher Knowledge, and Major System Priorities. Fall 2000
2. The Deputy Superintendent for Educational Programs, Student Support and Human Resources Development should review and evaluate the training being offered to ensure the focus and effectiveness of training activities. Annually commencing June 2000

FISCAL IMPACT

This recommendation can be accomplished with existing staff development resources.

FINDING

The Director of Human Resource Development does not currently serve on the Superintendents' Cabinet. Other directors, including the Directors of Risk Management, Educational Technology, Diversity, Cultural Outreach, Title I, Migrant, Management/ Facilities, School Boundaries, Charter Schools, Personnel, and Community Relations, are on the Cabinet and are responsible for addressing the major system priorities. It is evident that staff development should be an integral part of the Cabinet.

Having the Director of Staff Development serve on the Superintendent's Cabinet could enhance the ability of achieving the goal set forth in the accountability policy by increasing communications.

RECOMMENDATION

Recommendation 5-32:

Appoint the Director for Human Resource Development to the Superintendent's Cabinet.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should notify and appoint the Director of Human Resource Development to the Superintendent's Cabinet. May 1999

FISCAL IMPACT

This recommendation can be implemented using existing resources and should provide for greater senior staff focus on staff development programs and training.

5.8.2 The Professional Orientation Program

CURRENT SITUATION

The Professional Orientation Program (POP) was a program designed to train new teachers and was removed from statutory requirements by the Florida Legislature in 1997. The POP was eliminated as a prerequisite for professional teacher certification. The Legislature replaced the POP with legislation that establishes two district-level methods of documenting professional education competence. The first method is optional and the second is required.

- The first method states that each school district may develop and maintain an alternative certification program for the district's instructional staff. The state board must set program standards and guidelines.

- The second program is required and it states that each district must develop and maintain a system for the district's instructional staff to document professional education competencies. All district instructional staff hired after July 1997 must demonstrate mastery within the first year of employment, unless they have completed an approved teacher education program in the state, completed a teacher education program and at least two years of successful full-time teaching experience in another state, or are participating in the district's alternative certification program. The Florida Department of Education must approve programs and the system developed to demonstrate professional education competence.

The Broward County School District responded to this change in legislation by creating the New Educator Support System (NESS). Objectives of the first few months of the 1998-99 school year were to:

- provide immediate and appropriate support for new educators;
- assign an instructional coach to new educators as soon as possible;
- complete all new educators FPMS screening observations within the first three weeks of school; and
- initiate new educators learning communities.

The purpose of the instructional coaches are to assist new educators in developing their individual learning plans. The coach uses the FPMS screening and the new educators' self-assessment as data to help the new teachers design their individual learning plans. Also the coaches help the new teachers as they document their state competencies. According to the district personnel interviewed, the purpose (or focus) of the NESS Program is to assist new teachers in building effective classroom procedures and to assist them in the implementation of those procedures with the students.

FINDING

The additional statutory change resulted in reducing the initial probationary period for teaching personnel to 90 days. The need for this additional training is not necessary if effective pre-employment screening practices are utilized and the district fulfills necessary the state's requirements for the program.

Other large school districts in Florida have either terminated the POP in an effort to redirect resources to instructional programs or they have chosen to keep the program intact by meeting the State's requirements with substantially reduced funding. For example, Hillsborough County School District has a similar program called Preparing New Educators (PNE), and this program is being implemented with a budget of \$49,000.

MGT surveyed other comparison districts and found that Duval has replaced the POP requirements with a program called Teacher Induction Program (TIP) and the budget for the TIP Program is \$350,000. The Palm Beach County School District is implementing its teacher preparation program for less than \$100,000. Broward County School District's NESS Program has a 1997-98 budget of \$1,833,389.

RECOMMENDATION

Recommendation 5-33:

Eliminate the New Educator Support System (NESS) Program and implement an alternate program that will satisfy the state's required program.

Newly hired teachers have successfully completed teaching internship programs under the guidance of veteran, successful teachers. Consequently, serious questions are raised regarding the necessity for expending large quantities of district funds for training which simply repeats prior experiences.

The district should either research a similar program such as the programs being implemented in Palm Beach, Duval, or Hillsborough School Districts for substantially less money, or develop a school-based mentoring program that is designed by a group of school-based personnel and implemented through the individual school's administration with nominal remuneration provided to mentors.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Support, and Human Resources Development, in collaboration with the Deputy Superintendent of School Operations should establish a program design committee composed of school-based administrative and instructional personnel to develop a school-based mentoring program (or alternate program) tailored to the needs of inexperienced, newly employed teachers or other alternate program. May 1999
2. The committee should prepare and present the proposed mentoring program (or alternate program) to the Superintendent and Executive Staff for review and approval. December 1999
3. The Superintendent should secure school board approval. March 2000
4. The Deputy Superintendent for Educational Programs, Student Support, and Human Resource Development should begin implementing the program. July 2000

FISCAL IMPACT

The net effect of this recommendation is to provide the district the opportunity to reallocate resources to satisfy the requirements of the present law and shift resources to the needs in the Innovative Zone Support Training. The current NESS program is costing the district \$1,833,389 per year and the implementation of a new, less expensive program is estimated at \$400,000 per year. The estimated net savings per year is \$1,433,000.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Replace the NESS Program	\$0	\$1,433,000	\$1,433,000	\$1,433,000	\$1,433,000

5.8.3 The Nova Centers

The Nova Center for Applied and Professional Development was established in 1996 to be the district's center for piloting new staff development practices and disseminating those practices to other schools. The mission of the Nova Center is to:

- establish a personalized learning community;
- develop and demonstrate high quality results-driven professional development models; and
- identify and disseminate best practices.

According to those interviewed, the intent of the Nova schools is to reduce the ratio of support staff and staff to the number of students attending the schools while providing academic programs, action research, and professional development opportunities which may be transferable systemwide.

Twenty-three Nova team leaders (teachers on special assignment) provide additional services to students above those services rendered to the other district's schools. In addition to receiving an average salary of \$58,711 (which includes benefits), the Nova team leaders receive an \$800.00 stipend for district-level assignments. Also, recently the Board approved \$283,744 to support additional media services for the Nova schools.

The Nova schools consist of two elementary schools, one middle, school and one high school. The progress of the Nova schools towards their ultimate objective of becoming innovative, researched-based institutions has been evaluated and reviewed by the district on numerous occasions.

FINDING

MGT consultants, after reviewing district data, interviewing key personnel, and examining both the Board-approved recommendations in 1996 and the Program Evaluation, Research Brief, and Selected Reports September 1997 - August 1998 Volume 4 find that the Nova schools primarily remain traditional, have not established a

common shared vision, and have not made adequate progress in implementing a distinct set of Board-approved recommendations. In the *Nova Design Status Report* approved by the Board on February 6, 1996, its states on the front cover of the report that "Taking the opportunity to revisit the Nova Design Study with specific focus on the applicability and appropriateness of each of the 58 recommendations is critical to the fulfillment of this mission."

Eight of the 58 recommendations eventually were not approved by the Board and the report states that only seven of the recommendations have been fully implemented. Interviews indicated that the goal this year is limited to focusing on only 13 out of the remaining 43 recommendations.

Over the last few years, the district has invested considerable resources in this initiative and (according to those interviewed and a review of the Board minutes) it has been an item of discussion at many Board meetings. In 1995, the Board approved the implementation of the Nova Ad Hoc Committee's recommendations with a budget of \$160,858 from the General Fund. The designing expenses for the Centers for 1996-97 totaled \$682,985 which included the support of 23 Nova Team leaders (teachers on special assignment) positions. In a traditional high school (the same size as the Nova High School), there is one Guidance Counseling Director and six guidance counselors serving students. At the Nova High School, there is one Counseling Director and seven guidance counselors. No teachers on special assignment are serving as guidance counselors at the Nova high school level.

On the other hand, a similar sized traditional middle school has one Guidance Director and 2 guidance counselors while the Nova Middle School has one Guidance Director and five teachers on special assignment who are serving a guidance counselors. Two of the teachers on special assignment positions would not be eliminated as a result of this recommendation as they are needed to fulfill the guidance services for the school.

Similarly, at a traditional elementary school there is one guidance counselor per school. At the Nova Elementary school there is one teacher on special assignment who is fulfilling all of the guidance duties; this teacher on task assignment position is not affected by this recommendation.

RECOMMENDATION

Recommendation 5-34:

Return all Nova schools to the classification of schools with identified student boundaries.

This recommendation includes the elimination of the Nova Centers and the reallocation of the additional redesign costs. The district has committed to a large sum of funds to the redesign of the Nova Centers. Yet, over a period of years, systemic organizational changes have not been implemented. These funds would be better invested in districtwide school improvement initiatives.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent and Executive Staff should prepare for School Board approval of a plan to convert the Nova schools to a classification of schools with identified student assignment boundaries and eliminate special funding.

Summer 1999

- | | |
|---|-----------------------|
| 2. The Board should act to approve the Superintendent's recommendation and set the public hearing date to approve the necessary attendance zones. | Fall 1999 |
| 3. The School Board should establish new attendance zones. | January 2000 |
| 4. The Board should reclassify the Nova schools as regular schools. | 2000-2001 school year |

FISCAL IMPACT

This recommendation includes the elimination of 20 of the 23 Nova teachers on special assignment. As stated previously, three guidance counselor positions will be needed (two at the elementary and one at the middle school), therefore the total cost savings from 20 teacher positions is being proposed. The 20 Nova teachers on special assignment cost the district an average of \$59,511 per 20 teachers and the additional funding allotted to Media Team Leaders for the amount of \$283,744. This amounts to a savings to the district of approximately \$1,473,964 per year.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Reclassify Nova Schools	\$0	\$1,473,964	\$1,473,964	\$1,473,964	\$1,473,964

5.0 EDUCATIONAL SERVICE DELIVERY

This chapter reviews the most important function of Broward County School District, the delivery and evaluation of services to students. The chapter examines the educational delivery system to determine if programs that serve students are efficient, effective, and equitable. The broad-based review includes an analysis of documents as well as focus group, interview, and survey responses from many employees who participated in the study.

The chapter is divided into eight sections, each providing an overview of specific educational service delivery functions that are critical to effective programs and services for students. The eight sections include:

- 5.1 Organization and Management of Instruction
- 5.2 Curriculum and Instruction Services
- 5.3 Special Programs
- 5.4 Exceptional Student Education
- 5.5 Program Evaluation and Student Assessment
- 5.6 Grants Administration
- 5.7 Student Support Services
- 5.8 Staff Development

A cost-effective educational delivery system is one that is accountable for student achievement without unnecessary expenditures. For effective management of instructional programs, planning and budgeting must be interrelated. In addition, the district must provide a clearly focused mission supported by measurable goals and objectives. In a large district such as Broward County School District, maintaining a clear focus and direction for instruction requires extensive coordination of multiple units. The processes and outcomes in all facets of the organization must be monitored and evaluated to ensure the district's focus is maintained on student learning and achievement.

According to recent statistics, there are approximately 229,600 pre-kindergarten through 12th grade students attending Broward County schools. The district operates 23 senior high schools (Grades 9-12), 33 middle high school, 132 elementary, seven exceptional student education centers, three alternative adult high schools, three vocational-technical centers, and 21 adult and community schools. Exhibit 5-1 shows the number of schools and approximate enrollment at each school level.

Magnet programs offer educational choice to parents and students in the Broward County School District. Although similar courses and programs are available in the traditional comprehensive schools, magnet programs attract students by offering unique opportunities for in-depth study in specific areas of interest. Each magnet program emphasizes a specialized theme that corresponds with the district's goal to create educational interests, celebrate cultural and ethnic diversity, and foster student achievement. The Broward County School District also sponsors six charter schools that further enhance educational choice for parents through nontraditional programs. Special programs are also provided through the district's six adult/vocational centers

and 11 special centers. The Broward County School District is one of the fastest growing districts in the nation, enrolling between 6,000 and 7,000 new students each school year. During the 1998-99 school year, the district opened five new elementary schools to accommodate the growth in student enrollment. Rapid growth in enrollment provides a major challenge to the district in providing quality instructional services.

**EXHIBIT 5-1
NUMBER OF SCHOOLS AND ENROLLMENT IN THE
BROWARD COUNTY SCHOOL DISTRICT
1998-99**

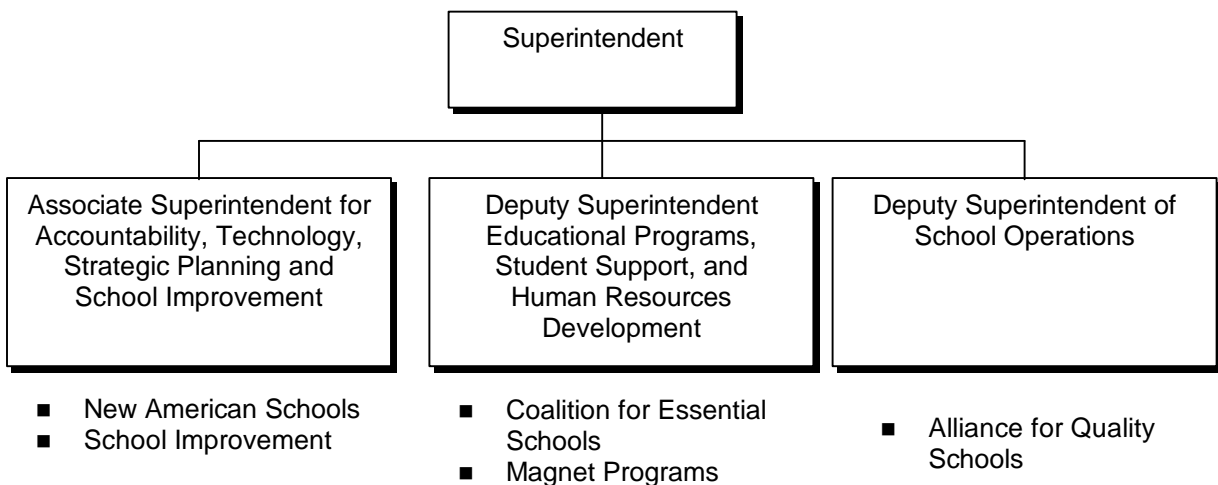
Type School	Number of Schools	Enrollment
Elementary School	127	113,007
Middle School	33	53,935
High School	24	57,504
Special Centers	11	5,152
Adult/Vocational*	6	*
Total	201	229,598

Source: *About Broward County Public Schools*, 1998.

*Students attending centers are frequently enrolled at the high school level.

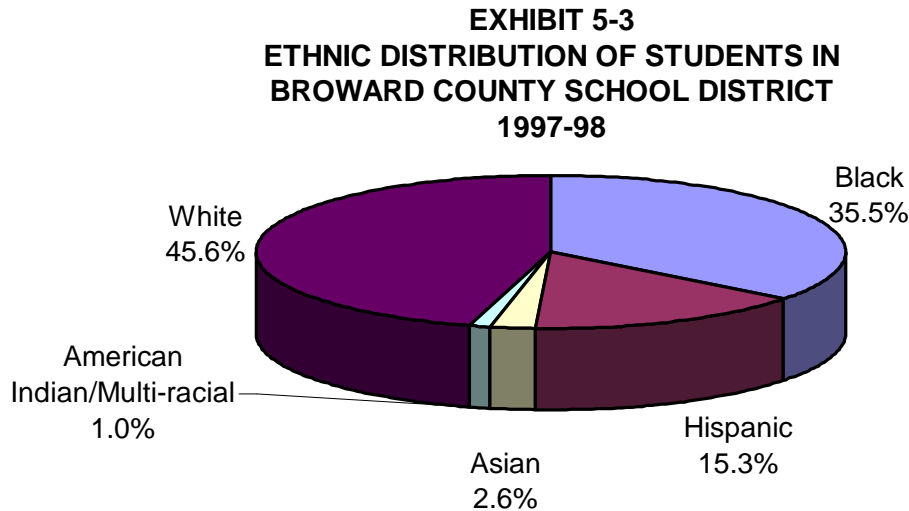
Exhibit 5-2 displays the current organizational structure of various programs and services that impact educational services delivery.

**EXHIBIT 5-2
ORGANIZATIONAL STRUCTURES OF BROWARD COUNTY SCHOOL DISTRICT
INNOVATION AND IMPROVEMENT INITIATIVES**



Source: Created by MGT, 1998.

A major factor in providing a quality instructional delivery system is understanding the student population served and how resources are distributed based on student needs. The Broward County School District has adopted a districtwide philosophy of “unequal resources for unequal needs.” This philosophy helps the district in directing more intensive supplemental resources to students who require additional support to meet the district’s achievement standards. Exhibit 5-3 displays the ethnic distribution of the Broward County School District.



Source: Broward County School District, 1998.

The district also serves a large number of students with special instructional needs. In 1997-98, there were more than 31,195 students served by Exceptional Student Education (ESE) programs including 6,688 students attending gifted programs. Exhibit 5-4 shows the number of ESE students in 1996-97 in the Broward County School District and five peer districts.

In addition, the Broward County School District serves students from a broad array of multicultural and multi-ethnic backgrounds. The district enrolls students from 164 countries, speaking 54 different languages. There are approximately 17,500 students of the district’s 229,600 students identified as Limited English Proficient (LEP) or English for Speakers of Other Language (ESOL) students. Special programs are provided in the district for those identified students. Exhibit 5-5 shows the number and percentage of ESOL students in the Broward County School District, five peer districts, and the state of Florida.

In the 1996-97 school year, 38.6 percent of the student population qualified for free or reduced price lunches. Exhibit 5-6 displays the number and percentage of students who receive either free or reduced price lunches. Although Broward County’s population is increasing, the district serves fewer students from low socioeconomic families than the state percentage and most of the peer districts.

**EXHIBIT 5-4
NUMBER OF ESE STUDENTS IN THE
BROWARD COUNTY SCHOOL DISTRICT AND FIVE PEER DISTRICTS
1996-97**

ESE PROGRAM	BROWARD	MIAMI -DADE	DUVAL	HILLSBOROUGH	ORANGE	PALM BEACH
Educable Mentally Handicapped	1,616	2,682	1,871	2,043	2,259	1,397
Trainable Mentally Handicapped	592	1,168	630	660	606	400
Physically Handicapped	590	712	671	330	324	216
Physical Therapy and Occupational Therapy Part-Time	85	15	15	13	37	34
Speech/Language Handicapped	11,075	5,916	4,820	5,837	4,690	5,927
Visual Handicapped	43	129	100	84	61	31
Emotionally Handicapped	866	2,985	1,890	2,149	1,111	1,330
Specific Learning Disabled	6,682	17,169	8,511	6,601	7,076	8,037
Gifted Part-Time	5,197	15,100	3,571	7,320	3,821	6,358
Hospital and Homebound Part-Time	149	244	133	173	113	106
Profoundly Handicapped	1,244	2,134	632	1,078	470	495
TOTAL	28,139	48,254	22,841	26,288	20,568	24,331

Source: Statistical Report, Profiles of Florida School Districts, January 1998.

**EXHIBIT 5-5
NUMBER AND PERCENTAGE OF LIMITED ENGLISH PROFICIENCY STUDENTS
IN THE BROWARD COUNTY SCHOOL DISTRICT,
FIVE PEER DISTRICTS, AND THE STATE
1996-97**

SCHOOL DISTRICT	NUMBER OF LEP STUDENTS	PERCENT OF TOTAL ENROLLMENT
Broward	17,552	8.1
Miami-Dade	55,841	16.4
Duval	1,489	1.2
Hillsborough	14,256	9.6
Orange	8,646	6.7
Palm Beach	16,382	11.9
State	143,545	6.4

Source: Statistical Report, Profiles of Florida School Districts, January 1998.

**EXHIBIT 5-6
STUDENTS AND PERCENTAGE OF STUDENTS IN FREE/REDUCED LUNCH
PROGRAM IN THE BROWARD COUNTY SCHOOL DISTRICT, FIVE PEER
DISTRICTS, AND THE STATE
1996-97**

SCHOOL DISTRICT	NUMBER OF STUDENTS	PERCENT OF TOTAL ENROLLMENT
Broward	79,303	38.6
Miami-Dade	202,065	59.2
Duval	58,507	46.4
Hillsborough	71,889	48.6
Orange	57,277	44.4
Palm Beach	40,409	29.4
State	974,496	43.5

Source: Statistical Report, Profiles of Florida School Districts, January 1998.

5.1 Organization and Management of Instruction

This section discusses two factors related to the organization and management of instruction: the organization and management among divisions and the organization and management of the Division of Educational Programs, Student Support, and Human Resource Development.

CURRENT SITUATION

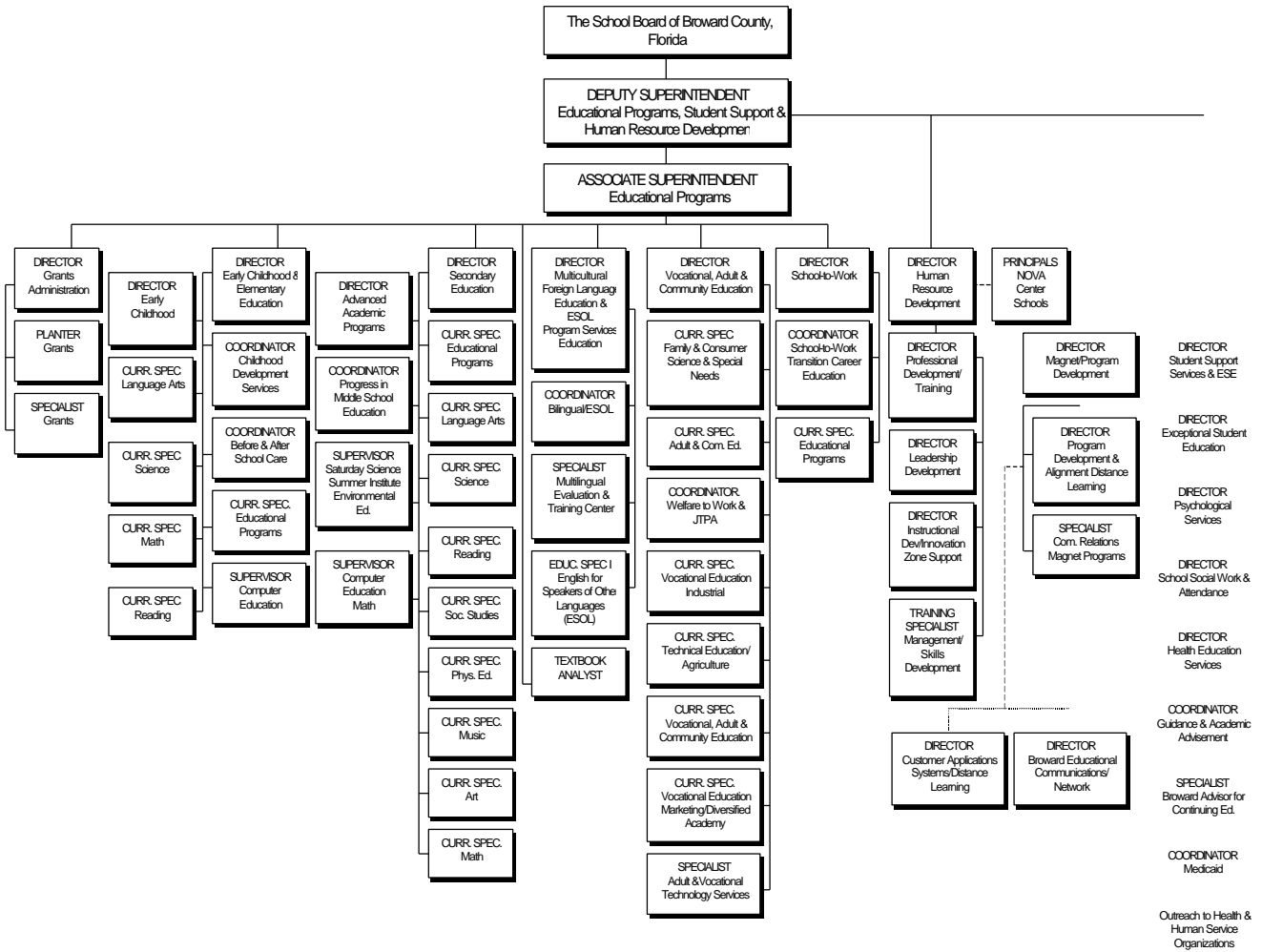
The Broward County School District provides general education services, student support services, and school support services primarily through two central office divisions --- Division of School Operations and the Division of Educational Programs, Student Support, and Human Resource Development. A third division, the Division of Accountability, Technology, Strategic Planning and School Improvement, has oversight for a few of the district's special programs.

Two Deputy Superintendents administer the Divisions of School Operations and Educational Programs, Student Support, and Human Resource Development. An Associate Superintendent administers the Division of Accountability, Technology, Strategic Planning, and School Improvement.

The goals and objectives guiding the functions of the Educational Programs, Student Support, and Human Resource Division are to provide support for *higher, more rigorous foundations in reading, writing, mathematics, and the 21st Century Core Competencies*. The 21st Century Core Competencies are competencies that Broward uses to prepare the district's students for the various skills needed to succeed in their chosen professions.

Exhibit 5-7 displays the current organizational chart for the Division of Educational Programs, Student Support, and Human Resource Development.

**EXHIBIT 5-7
ORGANIZATIONAL CHART FOR THE DIVISION OF EDUCATIONAL PROGRAMS,
STUDENT SUPPORT, AND HUMAN RESOURCE DEVELOPMENT
1998-99**



Source: Broward County School District, Division of Educational Programs, Student Support, and Human Resource Development, 1998-99.

The division's belief statement expresses the following:

- all students can learn to use their minds creatively;
- there is a common set of skills, knowledge, and core curricular competencies essential to the development of all Broward County School District students;
- these skills, knowledge, and competencies define a set of expectations that all students can achieve regardless of individual learning rates and styles; and
- achievement of these standards will enable our graduates to create and reach their goals and be active lifelong learners.

As shown in Exhibit 5-8, the second division, the Division of School Operations, provides oversight and coordination of the four Area Offices and the School Boundaries, Student Assignment, Summer School, and Year-Round Schools, and Diversity and Cultural Outreach Departments. The goals and objectives guiding the functions of this division include:

- assisting low-achieving schools in improving in specified areas of student achievement; and
- developing effective districtwide strategies and initiatives to reduce and deter youth crime and violence in schools.

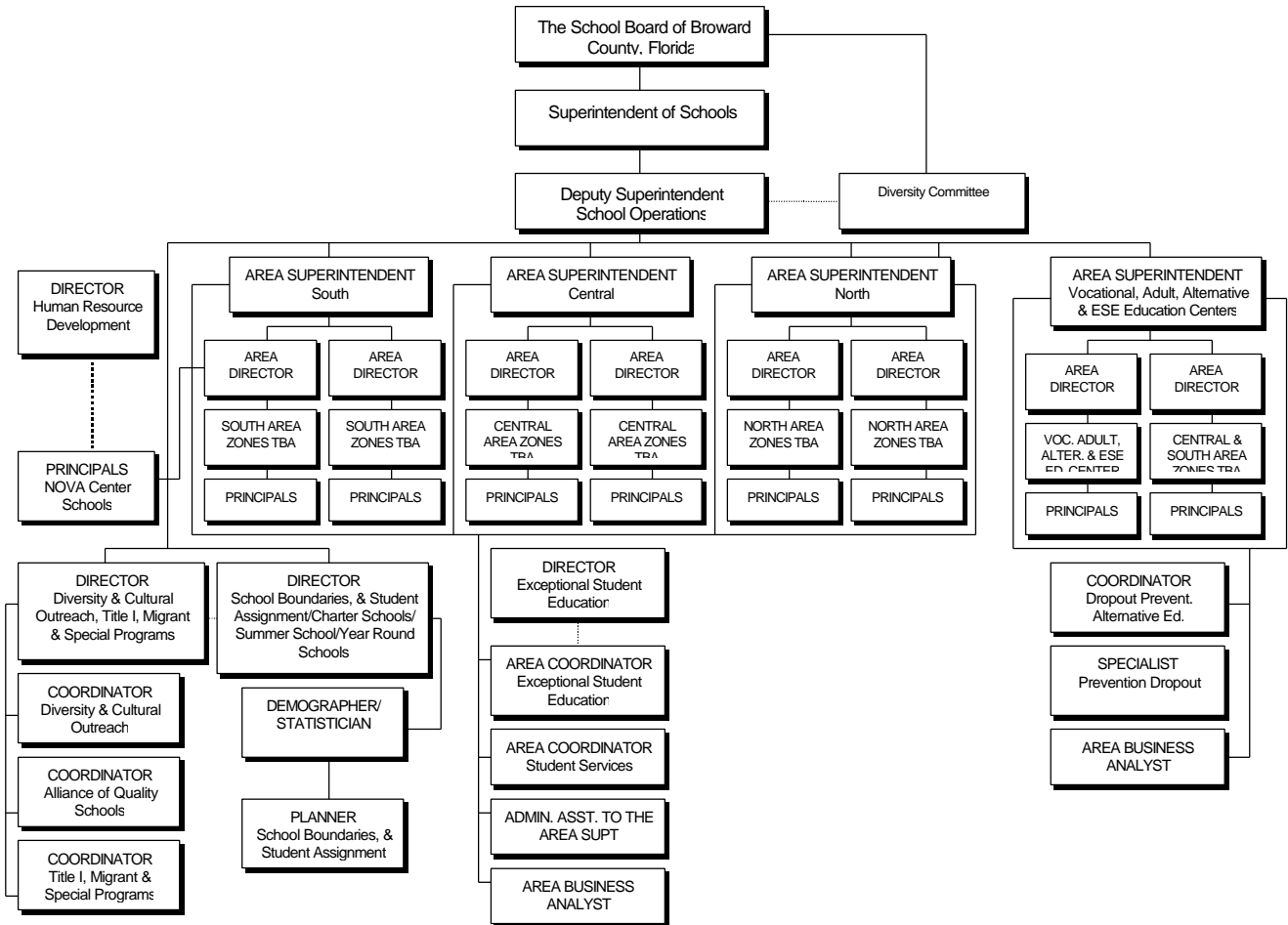
The third division, the Division of Accountability, Technology, Strategic Planning and School Improvement, provides oversight and coordination of strategic planning, school improvement and accountability, educational technology services, and research and evaluation. Within this division is a recently created Director for School Improvement and Accountability position. The primary responsibility of this director is the oversight of the Level A-E (potential critically low schools). Exhibit 5-9 shows the current organizational chart for this division. The goals and objectives of the division include:

- streamlining telecommunications, information services, and computer services;
- evaluating major district initiatives; and
- implementing the accountability policy and accompanying indicators.

As seen in Exhibit 5-7, under the current structure, the Deputy Superintendent for Educational Programs, Student Support, and Human Resources Development oversees four units:

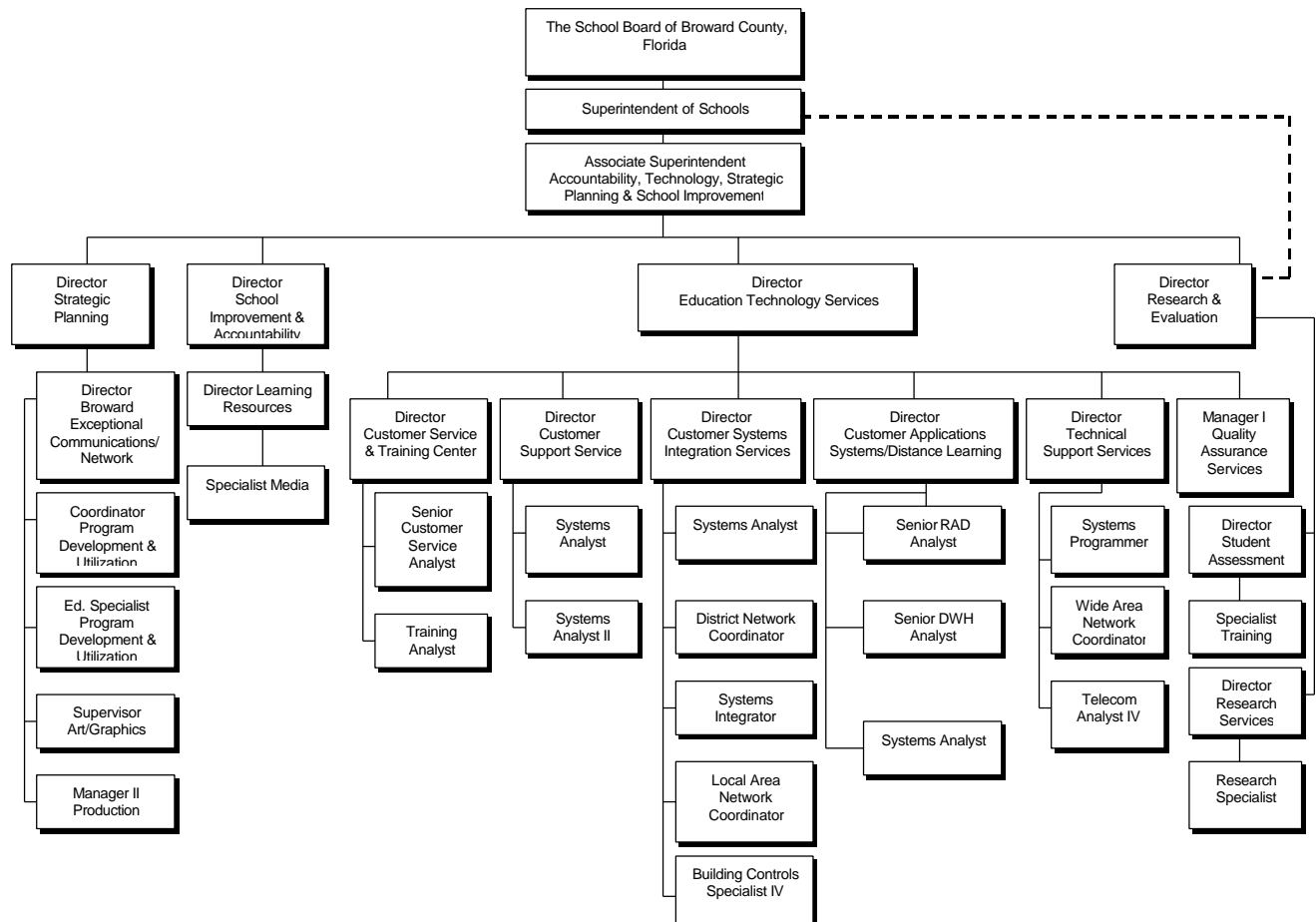
- Educational Programs;

**EXHIBIT 5-8
ORGANIZATIONAL CHART FOR THE DIVISION OF SCHOOL OPERATIONS
1998-99**



Source: Broward County School District, Division of School Operations, 1998-99.

**EXHIBIT 5-9
ORGANIZATIONAL CHART FOR THE DIVISION OF ACCOUNTABILITY,
TECHNOLOGY, STRATEGIC PLANNING, AND SCHOOL IMPROVEMENT
1998-99**



Source: Broward County School District, Division of Accountability, Strategic Planning and School Improvement, 1998-99.

- Student Support Services, and Exceptional Student Education (ESE);
- Magnet; and
- Human Resource Development.

An Associate Superintendent oversees the Educational Programs Department. The Educational Programs Department has six units including:

- Instructional Materials
- Multicultural/Foreign Language/ESOL
- Grants Administration
- Vocational, Adult, and Community Education
- Early Childhood and Elementary Education
- Secondary Education

Directors supervise the remaining departments reporting to either the Deputy Superintendent or the Associate Superintendent based on the respective division.

The Educational Programs, Student Support, and Human Resource Development Division's philosophy is to respect and have high expectations for all students (pre through adult), teachers, and staff. The division encourages community participation and partnerships that support the educational process. The division strives to facilitate equal access to a quality education for a diverse, multicultural student population.

The Educational Programs, Student Support, and Human Resource Division provides technical assistance to district and school-based initiatives that are consistent with the design, development, implementation, and evaluation of curricular opportunities in keeping with national, state, and local goals, performance standards, and accountability initiatives.

FINDING

As can be seen in Exhibits 5-7, 5-8, and 5-9, various educational programs and services are dispersed among three different divisions. Interviews with district-level and school administrators, as well as a review of the organizational charts and a review of various documents indicate that programs are often transferred from one division to another division when an administrator is transferred. Reportedly, the reason for this practice is that the originators or "masterminds" of the programs have the inclination to keep the programs within their span of control.

Survey results (as depicted in Exhibit 3-7) assist in confirming the findings of the lack of instructional services and program coordination. When asked to rate the quality of various programs in the three divisions housing educational programs, 36 percent of the teacher survey responses indicated that the instructional coordination and supervision in the district needs some or major improvement. Additionally, 36 percent of the teacher survey responses indicated that federal programs (e.g., Title I, Special Education) coordination in the district needs some or major improvement. Various

areas of program fragmentation are further discussed in Section 5.3 through 5.7 of this chapter.

To provide effective services, each unit delivering educational services to students must have a clear mission and support similar functions. In general, the current structure of educational services delivery in the Broward County School District is fragmented and does not provide for a functional alignment of the district's educational programs and services. Programs and services are primarily diffused throughout two divisions---the Division of Educational Programs, Student Support, and Human Resource Development and the Division of School Operations. Additionally, a third division (the Division of Accountability, Technology, Strategic Planning, and School Improvement) also oversees some of the district's special programs such as the New American Schools Program.

The Elementary Programs and Secondary Program units both have adequate spans of control and the units are focused on comprehensive services in these areas. In comparison, the Multicultural, Foreign Language, and ESOL Unit combines several of the district's special programs, but does not have a large span of control. In fact, only three staff report to this director. The role of this director could be broadened to supervise more special programs. Each of these divisions and the programs currently assigned to the three divisions will be discussed in the sections which follow in this chapter. The analysis in this section is limited to the overall organization of educational service delivery.

RECOMMENDATION

Recommendation 5-1:

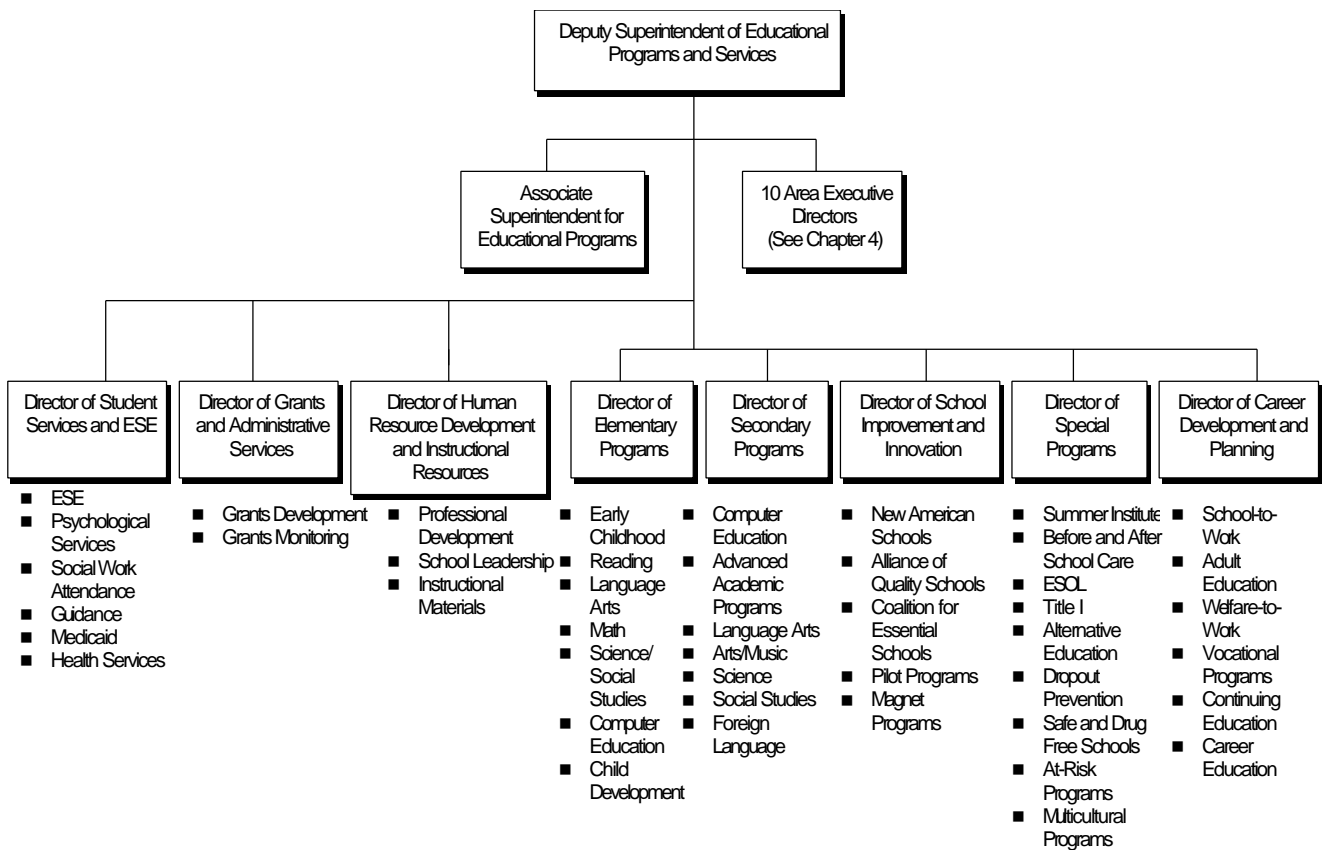
Restructure the Division of Educational Programs, Student Support, and Human Resource Development and the Division of School Operations and create the Division of Educational Programs and Services to consolidate educational programs and services.

The new division should be headed by a Deputy Superintendent. Directly reporting to the Deputy will be an Associate Superintendent of Education and 10 Area Executive Directors (see Chapter 4).

The following five functional areas should report to the Associate Superintendent of Education: Elementary Programs, Secondary Programs, School Improvement and Innovation, Special Programs, and Career Development and Planning. In addition, three services --- Student Support Services and ESE, Grants Administration, and Human Resource and Development and Instructional Resources should also report to the Associate Superintendent for Education (see Chapter 4.0 for additional information).

Exhibit 5-10 displays the proposed reorganization for educational service delivery in the new division.

**EXHIBIT 5-10
PROPOSED ORGANIZATIONAL CHART
DIVISION OF EDUCATIONAL PROGRAMS AND SERVICES**



Source: Created by MGT of America, 1998.

In any large school system, communication among central office departments, area offices, and schools is a complex task. A well-integrated continuum of services for students will most effectively address the Board's mission to serve diverse student needs and focus on high academic achievement. Educational programs should not accompany cross-divisional personnel changes, but remain in a centralized, cohesive unit. Further, it is not a common practice for a school district to have the oversight of educational programs under the same umbrella as the very same personnel who must also evaluate the programs as is currently the case with the Division of Accountability, Technology, Strategic Planning, and School Improvement. For example, this division administers and evaluates the New American Schools Program. The school improvement function will be moved to the new division. By creating a new department under the Superintendent for Research and accountability as described in Chapter 4, these functions can be separated.

The realignment and the corresponding communication structures should enhance the effectiveness of the educational service delivery system and ultimately result in management and resource efficiencies. In an integrated system, key instructional service initiatives that promote a strong continuum of services and programs for students can be effectively supported by the training and implementation strategies necessary to provide a clear and consistent vision of the Board's overall goals and objectives for students.

Specific findings and justifications for the proposed realignment of the Division of Educational Programs and Services will follow in Sections 5.2 through 5.8 in this chapter.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should direct the restructuring of the division to be overseen by the Deputy Superintendent. May 1999
2. The Deputy Superintendent should lead key departmental personnel in developing a comprehensive plan for integrating operations. July 1999
3. The Deputy Superintendent, in conjunction with key departmental personnel, should ensure that position titles and job descriptions are updated to reflect changes resulting from the proposed changes. August 1999

FISCAL IMPACT

The specific fiscal impact for this proposed reorganization is discussed under the unit recommendations that follow in specific sections.

FINDING

The majority of educational services are currently concentrated in the Division of Educational Programs, Student Support, and Human Resources Development. Several programs that provide services to schools including the Alliance for Quality

Schools, the Coalition for Essential Schools, Magnet programs, and the New American Schools Initiative are scattered throughout the central office organization. These programs provide non-traditional approaches to instruction, and/or school operation, that are developed to meet specific goals established by the district or school. Several programs provide schoolwide models for educational reform while others promote instructional themes.

The New American Schools and oversight for School Improvement is assigned to the Associate Superintendent for Accountability, Technology, Strategic Planning and School Improvements. The Coalition for Essential Schools and Magnet programs is in the Division of Educational Programs, Student Support and Human Resources Development. Conversely, the Alliance for Quality Schools is assigned to the Deputy Superintendent for School Operations.

The Broward County School District's Accountability Policy 1403 addresses the Board's mission and beliefs in setting high expectations and world class standards for all students. This policy specifies that the school improvement process should be a framework for change. The policy requires all schools to select a theme or focus that would facilitate whole school reform. To this end, schools are invited to choose from nationally known and tested, research-based models of school reform.

The goal of the Alliance of Quality Schools, for example, is to provide materials, inservice, and on-site follow-up to school staff members in reading, writing, and mathematics. The major goal of the program is to enhance and support student achievement in all academic areas.

Magnet programs also provide unique services to some students. Magnet programs have specialized curriculum and facilities or equipment, with an emphasis on instruction that is different from other programs offered in the school district.

The New American School Program provides several approaches to school improvement. These models included Atlas, Co-NECT, Modern Red Schoolhouse, Paideia, and Roots and Wings.

- The Atlas model engages teachers, parents, and administrators to collaboratively work together to set and maintain sound management policies.
- The Co-NECT model promotes technology as a vehicle to enhance every aspect of teaching, learning, professional development, and school management.
- The Modern Red Schoolhouse model emphasizes a standards-driven curriculum, the use of traditional and performance-based assessments, professional development programs, and effective community involvement.
- Paideia is a rigorous, liberal arts program that allows graduates to have the skills necessary to live, think, and act critically and to continue to educate themselves as learners.

- Roots and Wings builds upon the Success for All direct instruction reading program. The program incorporates science, history, and mathematics to achieve a comprehensive academic program. Twenty-six schools have chosen these five New American Schools designs to bring about whole school reform.
- Coalition of Essential Schools, a national school restructuring movement, is used in 18 member schools in Broward County School District

Still, other schools began the task of creating their own version of school renewal based on what works best with their students.

The Broward County School District innovation and improvement models are outlined in Exhibit 5-11.

The district's unique instructional models, magnet programs and reform initiatives should be centralized under one director. The director should report to the Associate Superintendent for Educational Programs as shown previously in Exhibit 5-10.

RECOMMENDATION

Recommendation 5-2:

Reassign the Director of School Improvement and Accountability currently located in the Division of Accountability, Technology, Strategic Planning, and School Improvement to the newly created Division of Educational Programs and Services Division to oversee all school innovation and improvement functions and create an Advisory Committee to assist schools in choosing and implementing school innovation and improvement models.

The director's title will be changed to the Director of School Improvement and Innovation. In a large organization, responsibilities for functional areas should be placed under the leadership and direction of one position that can be held specifically accountable for the program's proper functioning. Within a division, specialized managerial positions should be designed and filled with personnel reflecting the area(s) of specialization and possessing the expertise to manage. Permitting an area as important as education service delivery to be diffused among three divisions creates a significant opportunity for confusion in policy implementation and inadequate coordination of major program implementation and assessment initiatives, and can ultimately, jeopardize the ability of the Superintendent to efficiently and effectively provide the executive leadership necessary in delivering a well-integrated continuum of services to students (refer to Chapter 4, School District Organization and Management for additional information related to reorganization for educational service delivery).

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should recommend the reorganization and consolidation of the monitoring of all school improvement and innovative programs and models. May 1999

**EXHIBIT 5-11
SUMMARY OF BROWARD COUNTY SCHOOL DISTRICT'S
INNOVATION AND IMPROVEMENT MODELS**

ATLAS Communities (K-12) centers upon pathways – Innovation Zone feeder patterns. Teams of teachers from each pathway design curriculum and assessment standards. Teachers, parents, and administrators form a learning community to work together to set and maintain sound management policies.

Audrey Cohen College (K-12) focuses student learning on the study and achievement of “meaningful purposes” for each semester’s academic goals. Students plan, execute, and evaluate their constructive actions by using their knowledge to benefit the community. Leadership is emphasized; all students are expected to meet high academic standards.

Co-NECT Schools (K-12) uses technology to enhance every aspect of teaching, learning, professional development, and school management. A team of educators and parents sets goals. Small clusters of students are taught by a cross-disciplinary team, usually for a two-year duration. Teaching and learning centers on interdisciplinary projects that promote critical thinking and academic understanding.

Expeditionary Learning (K-12) operates on the belief that learning is an expedition into the unknown and draws on purposeful, intellectual investigations (learning expeditions) to improve achievement and to build character. Students and teacher work together for more than one year, both inside and outside the classroom, through academically rigorous interdisciplinary study teams, team teaching, and shared planning.

Modern Red Schoolhouse (K-12) strives to help students achieve high standards through the construction of a standards-driven curriculum, employment of traditional and performance-based assessments, professional-development programs, and effective community-involvement strategies. The rigorous curriculum develops and transmits a common culture, and promotes the principles of democracy.

Roots and Wings (K-6) builds upon the Success for All direct instruction reading program incorporating science, history, and mathematics to achieve a comprehensive academic program. Further, the design premise is that schools do whatever it takes to make sure students succeed. Realignment of resources eliminates obstacles to success, guaranteeing that all students receive the necessary services to become successful learners.

Paideia Program (K-12) is a rigorous, liberal arts education that allows graduates to have the skills necessary to live, think, and act critically and to continue to educate themselves as learners. The program employs the didactic mode, the coaching aspect, and the seminar component as teaching techniques to ensure both educational quality and equality.

Coalition of Essential Schools (K-12) is a national school restructuring movement based on a set of Ten Common Principles. The Coalition’s Common Principles call for schools to set clear and simple goals about the intellectual skills and knowledge to be mastered by all students; to personalize teaching and curriculum; make student work the center of classroom activity; to assess student achievement based on an exhibition of mastery; and to create an atmosphere of trust and respect for the school, faculty, students, and parents.

Alliance of Quality Schools (K-8) is designed as a comprehensive program that provides learner-verified research-based components to schools in the areas of reading, writing, mathematics, social behaviors, and parental involvement. The Alliance program addresses prevention and immediate intensive-corrective intervention for students based upon assessment data and enrichment activities.

High Schools That Work (9-12) is a national effort to combine challenging academic courses and modern vocational studies to raise the achievement of high school students. The High Schools That Work Consortium is a partnership of states, school systems, and school sites. Superintendents, principals, teachers, and counselors in the multi-state network are actively involved in making dramatic changes in the way they prepare students for work and further education in the 21st Century. Students at these schools are completing challenging tasks, solving real-life problems, and creating products and performances demonstrating academic and vocational skills.

Source: Broward County School District, Division of Educational Programs, Student Support, and Human Resource Development 1998.

2. The Board should approve the reorganization. June 1999
3. The Associate Superintendent, in conjunction with the Deputy Superintendent, should ensure that the new functions are implemented in the new organizational structure. September 1999

FISCAL IMPACT

This recommendation may be implemented using existing resources.

5.2 Curriculum and Instruction Services

CURRENT SITUATION

The Division of Educational Programs, Student Support, and Human Resource Development provides services to district and school-based initiatives to assist in the design, development, implementation, and evaluation of curriculum and instruction. The goals and objectives of the division include a commitment to a philosophy of respect and high expectations for all students (pre-kindergarten through adult), teachers and staff, and provide programs to support the district's diverse, multicultural student population by ensuring equal access to a quality education.

The Department of Educational Programs located within the Division of Educational Programs, Student Support, and Human Resource Development functions to support rigorous academic standards for all students and continued emphasis on reading, writing, and mathematics. The department also provides support for curriculum development and implementation that includes the integration of technology and School-to-Work skills.

The current organizational structure of the Department of Educational Programs was previously shown in Exhibit 5-7. The Elementary Education and Secondary Education sections will be discussed in this part of the report. Special programs such as the vocational, adult and community education, School-to-Work, and multicultural and foreign language programs will be addressed in Section 5.3 of this chapter.

Exhibit 5-12 displays the goals and objectives of the Department of Elementary Education. This department provides support services to elementary schools to assist in the design, development, implementation, and evaluation of curricular initiatives in keeping with national, state, and local goals, performance standards, and accountability issues. The Department of Secondary Education provides similar support services to middle and high schools.

**EXHIBIT 5-12
GOALS AND OBJECTIVES OF THE ELEMENTARY EDUCATION DEPARTMENT**

GOAL	TO IMPROVE KNOWLEDGE-BASE OF TEACHERS AND ADMINISTRATORS IN THE IMPLEMENTATION OF THE STANDARDS OF SERVICE.
Objective 1:	Provide training in newly adopted reading series to all affected teachers by 1/99.
Objective 2:	To provide training in mathematics application strategies to K-5 teachers by 5/99.
Objective 3:	To provide a series of training sessions for administration in the implementation of Standards of Service by 6/99.
Objective 4:	To provide training and implementation assistance to all K-5 teachers in the new elementary assessment instruments.
GOAL	TO UPDATE AND REVISE CONTENT CURRICULUM GUIDES AND REPORTING MECHANISMS IN THE CONTENT AREAS BY 6/99.
Objective 1:	To review all curriculum guides, resource manuals, and reporting instruments by 10/98.
Objective 2:	To discard, revise, or create appropriate curriculum support materials by 6/99.
Objective 3:	To finalize the alternative report card format for use in all elementary schools by 6/99.
GOAL	TO PROVIDED DIRECT ASSISTANCE AND SUPPORT TO CRITICALLY LOW ACHIEVING SCHOOLS.
Objective 1	To coordinate efforts of curriculum supervisors with Title I and Alliance of Quality Schools personnel to provide focused, quality support to CLA schools - 10/98.
Objective 2	To develop instructional strategies that will improve student achievement in reading comprehension, writing, and mathematics applications by 1/99.
Objective 3	To develop alternative assessment strategies for teachers to better monitor student progress by 11/98.

Source: Broward County School District, Department of Educational Programs, 1998.

In 1994, the Broward County School District began the implementation of a standards-driven educational system which functions to align curriculum, standards, and assessment. The purpose of this system is to remove the ambiguity about what is expected from students, teachers, schools, and parents. The system identifies district standards, state-level performance standards, and an accountability system to ensure students and adults master these standards. The district's goal is to have all of the district's key components (accountability, standards of service for student achievement, standards of student services, and standards of professional development) interrelated and focused on the mastery of the district and state-level standards. All stakeholder groups in the district have identified roles and responsibilities supporting the standards-driven system (see Exhibit 5-13).

The Broward County School District was recently selected as one of only seven districts in the United States by the Urban Institute as making significant progress towards becoming a standards-driven system.

**EXHIBIT 5-13
ROLES AND RESPONSIBILITIES OF STAKEHOLDERS IN THE
IMPLEMENTATION OF THE DISTRICT STANDARDS-DRIVEN SYSTEM**

STUDENTS	CLASSROOM TEACHERS	PRINCIPALS	AREA-BASED ADMINISTRATORS	INNOVATION ZONES (LEADERSHIP TEAM)	SUPPORT PERSONNEL SCHOOL/AREA/DISTRICT
<ul style="list-style-type: none"> ■ Understand standards. ■ Understand their gap in relation to mastery of standards. ■ Taking responsibility for own learning. ■ Use technology to improve their own learning. ■ Master content standards and core curriculum competencies at appropriate proficiency levels, as evidenced by scores on norm-referenced tests and other appropriate assessments. ■ Work and learn collaboratively with others, including students and other people of varying age levels, and business and community partners. ■ Participate in and create a classroom environment in which students can learn and teachers can teach. ■ Make appropriate choices based on diploma requirements and Student Code of Conduct. ■ Self-assess progress towards mastery. 	<ul style="list-style-type: none"> ■ Know content standards and core curriculum competencies at appropriate levels. ■ Diagnose student needs using data. ■ Prescribe appropriate strategies to teach content standards, core curriculum competencies and self-assessment. ■ Develop an instructional management plan that moves a diverse student population toward mastery and integrate appropriate technologies. ■ Assess for mastery. ■ Records and report student progress toward mastery. ■ Implement Sunshine State Standards. ■ Create learning climate that is safe, orderly and responsive to student needs. ■ Implement an individual professional development plan as an integral part of teacher work and determined through an individual needs assessment. ■ Demonstrate proficiency in knowledge and skills linked to increased student achievement and job performance. 	<ul style="list-style-type: none"> ■ Know current standards and core curriculum competencies at appropriate levels. ■ Know appropriate strategies. ■ Diagnose student teacher needs based on data. ■ Analyze student data to determine mastery of student outcomes. ■ Allocate resources to support standards implementation. ■ Create an effective school culture focused on implementation of standards. ■ Develop an adult learning plan which organizes time, opportunity and resources to provide job embedded professional development. ■ Provide ongoing teacher feedback linked to assessment based on quality implementation of standards. ■ Form partnerships to enhance student mastery of standards. ■ Provide daily leadership, support, and oversight/monitoring. ■ Ensure that instructional management plan and SIP move students toward mastery. 	<ul style="list-style-type: none"> ■ Know content standards and core curriculum competencies at appropriate levels. ■ Analyze schools' progress toward standards. ■ Allocate resources to support standards implementation. ■ Create an effective area culture focused on implementation of standards. ■ Organize personnel to facilitate a coordinated, Zone-based support system. ■ Participate in training on results-driven professional development. ■ Provide daily leadership, support oversight and monitoring. ■ Monitor implementation of results-driven professional development. ■ Provide ongoing feedback linked to assessment based on quality implementation of standards. ■ Ensure that principals implementing a standards-driven system through a direct link to professional development and evaluation. 	<ul style="list-style-type: none"> ■ Develop a system to define a common commitment to rigorous performance outcomes, analyze and disaggregate data, diagnose gaps, and formulate plans to address standards of service and increase achievement for all students pre K-adult. ■ Create a learning community with a commitment to clearly defined standards and high expectations. ■ Maintain a safe and orderly learning environment in which teachers can teach and students can learn. ■ Develop school, parent, and community partnerships which support readiness to learn and provide enhanced learning opportunities. ■ Establish the Community Initiatives for Families' concept for Level I, II, and III support for students and families throughout the Innovation Zones. ■ Establish effective leadership that develops ownership in Zone initiatives for all stakeholders and improves student achievement and school effectiveness. ■ Initiative and refine Innovation Zone strategic planning in order to establish a constancy of purpose and provide a quality education for all students, pre K-adult. ■ Integrate technology to provide a seamless pre-K through adult learning process. 	<ul style="list-style-type: none"> ■ Coordinate the development of rigorous standards and periodic revision. ■ Define Mastery. ■ Communicate standards to all stakeholders. ■ Align assessments with standards. ■ Align results-driven staff development with standards. ■ Align resources to support mastery of standards. ■ Use a technology to provide data on achievement of standards and support instructional management. ■ Monitor the implementation of the standards based curriculum.

Source: School Board of Broward County, 199

EXHIBIT 5-13 (Continued)
ROLES AND RESPONSIBILITIES OF STAKEHOLDERS IN THE
IMPLEMENTATION OF THE DISTRICT STANDARDS-DRIVEN SYSTEM

INSTITUTIONS OF HIGHER LEARNING (EDUCATIONAL CONSORTIUM)	BUSINESS/ COMMUNITY	PARENTS/ COMMUNITY	SUPERINTENDENT	SCHOOL BOARD	MEDIA
<ul style="list-style-type: none"> ■ Assign field experience students to school-based on an agreement between partners to maximize teaching and learning. ■ Recruit under represented groups. Develop programs in critical shortage areas. ■ Collaborate in grant development and implementation. ■ Assess professional development needs of university students and develop a professional development plan. ■ Ensure teacher mastery of strong content knowledge and pedagogy. 	<ul style="list-style-type: none"> ■ Know and understand the standards-driven system and how it is applicable to education and applies to real world problems. ■ Endorse standards as meaningful outcomes. ■ Provide work based educational experiences for students as part of school to career. ■ Participate and communicate through appropriate structures, such as School Advisory Council, vocational and adult advisory boards, and systemic partnerships to assist the schools in implementing a standards-driven system. ■ Provide health and human services in or in close proximity to schools. ■ Jointly plan and deliver health and human services through the Community Initiatives for Families (CIF). ■ Provide release time for employees to volunteer or to participate in their child's education. ■ Assist with the development of appropriate training. ■ Provide work experiences for teachers. 	<ul style="list-style-type: none"> ■ Know and understand the standards-driven system and how it is applicable to the education of their child(ren). ■ Provide home environment which supports student learning. ■ Engage in dialogue about teaching and learning. ■ Collaborate with school personnel in mastery of standards for their child(ren). ■ Participate and communicate through appropriate structures, such as School Advisory Council, PTA, parent conferences. 	<ul style="list-style-type: none"> ■ Sets clear and rigorous expectations for a standards-driven system for all students and staff, supported by a well-defined accountability system. ■ Establishes a focus on teaching and learning and climate of accountability-based on standards. ■ Recommends policies and performance standards. – Standards of Practice – Standards of Service for Student Achievement – Standards of Student Services – Accountability – Public Engagement ■ Recommends and implements organizational structures and systemic partnerships which support a standards-driven system. ■ Recommends budget allocation and manages resources to support standards-driven system. ■ Define critical shortage areas. ■ Effects change to support standards-driven system. ■ Develops legislative program to recommend to the Board and advocates on behalf of that program. ■ Engages the public and communicates standards-driven system to community-at-large. 	<ul style="list-style-type: none"> ■ Adopt policies which support a standards-driven system. ■ Adopt performance standards and assessment policy for triad and standards. ■ Organize system to provide zone support. ■ Allocate resources to support a standards-driven system. ■ Approve partnerships which enhance student mastery of standards. ■ Encourage institutions of higher learning to adopt policies and support standards. ■ Initiate legislation to support standards-driven system. <p>State/Federal</p> <ul style="list-style-type: none"> ■ Define national/state goals and standards. ■ Encourage and provide support for local educational agencies to implement standards. ■ Align Federal/state programs to support student mastery of standards. ■ Provide resources and support for all mandates. ■ Require research-based pedagogy for instructional material adoption. ■ Generate public support for challenging educational standards. ■ Provide leadership on assessment issues by establishing performance standards. 	<ul style="list-style-type: none"> ■ Know and understand school/district challenges and issues and their impact on the community. ■ Communicate important information to the community concerning school/district challenges and accomplishments. ■ Work with school/district staff to obtain and communicate accurate information. ■ Respect and abide by school/district policies and procedures which protect student and staff safety, welfare and privacy. ■ Report on local, state and national educational issues on a regular and consistent basis. ■ Track and correlate educational information, trends and challenges and their relevancy to Broward County Public Schools and Broward County. ■ Base reporting on accurate data, information, and impartial observation. ■ Evaluate reporting regularly based on the highest professional standards and community expectations.

Source: School Board of Broward County, 199

FINDING

The Broward County School District has implemented rigorous standards for institutionalizing world class standards for students and staff. The first phase of implementing the standards-driven system was defining the district's standards and accountability. In phase two, the district ensured the standards, curriculum, and assessment were aligned. The third phase (1998-99 school year) consists of refining the standards, connecting them to the required teacher knowledge, results-driven staff development, and making the standards readily available to include in teacher lesson plans through the use of an electronic planning tool. This system provides administrators, teachers, and staff with clear information on what students need to know and be able to do at each grade (proficiency) level.

The Critical Content Guides for writing, reading, and mathematics were developed to clearly define what every student needs to learn and know in order to be successful from pre-kindergarten through the 12th grade. These Critical Content Guides also give specific information and skills that students need to know and be able to do in order to meet the Sunshine State Standards and be prepared to take the Florida Comprehensive Assessment Test and Standard Achievement Test.

The Critical Content Guides are divided into standards, benchmarks, student performance indicators, assessment, and proficiency levels and also include what the district calls Essential Teacher Knowledge. Essential Teacher Knowledge is the specific curriculum and instruction (by subject area and course) that teachers must know and be able to instruct in order to teach content and skills mastery to their students.

Exhibit 5-14 displays the various strands in the critical content area of mathematics, reading, and writing.

COMMENDATION

The Broward County School District is commended for clarifying the roles and responsibilities of all stakeholders in the implementation of the district's standards-driven system and for defining rigorous student performance standards, aligning the new standards with curriculum and assessment in the form of user-friendly Critical Content Guides, and its strong focus on institutionalizing the world class standards for students and staff.

FINDING

The Electronic Curriculum Planning Tool (ECPT) is a lesson planning software developed by the Florida Department of Education which is designed to allow teachers and other educators to either enter activities or select activities from a master database of activities. The activities in each master database are correlated with the Sunshine State Standards benchmarks and not only allows easy correlation with the Sunshine State Standards, but also with the Goal 3 Standards of Florida's System of School Improvement and Accountability. The ECPT is available in 11 different subject areas and allows the teacher to input appropriate assessments for the lesson and allows the teacher to print lesson plans in a variety of formats.

**EXHIBIT 5-14
STRANDS IN THE CRITICAL CONTENT AREAS**

There are five strands in the critical content area of mathematics: <ul style="list-style-type: none">■ number of sense■ measurement■ geometry/spatial sense■ algebraic thinking■ data collection and proficiency
The four strands in the critical content area for reading are: <ul style="list-style-type: none">■ comprehension■ vocabulary■ work identification■ literary concepts
The five strands in the critical content area of writing are: <ul style="list-style-type: none">■ pre-writing■ drafting■ revision■ editing■ publishing

Source: Broward County School District, Division of Educational Programs, Student Support, and Human Resource Development, 1998.

The teachers have the option to sign up for the ECPT training sessions and according to the Staff Development Department, the Broward County School District has taken the initial steps in the utilization of the Electronic Curriculum Planning Tool (ECPT) by training approximately 30 percent of the district's teachers in the use of the tool.

RECOMMENDATION

Recommendation 5-3:

Take immediate actions to expedite the training of all teachers in the use of the Electronic Curriculum Planning Tool.

The district could enhance the training of the lesson planning software that allows teachers to either enter activities or select activities from a master database of activities. To facilitate the planning of lessons, the district could include all of the strands, standards, and benchmarks in the planning tool.

The continued training for teachers using the electronic tool should have the potential to significantly reduce teacher planning time and paperwork. Acting upon this recommendation should assist the district in the implementation of its standards-driven educational system.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent of Educational Programs, Student Support, and Human Resources Development, in collaboration with the Director of Education Technology Services, should develop a plan designed to implement this recommendation. May 1999

2. The Associate Superintendent for Educational Programs should commence implementation of the plan.

July 1999

FISCAL IMPACT

This recommendation can be implemented through existing resources.

FINDING

The Broward County School District has recently approved a new set of benchmarks called "Our Learning Benchmarks." These revised benchmarks were a result of initiatives of the Broward Business Coalition for Education. The benchmarks have been reviewed and recommended by the district's Quality of Life and Steering Committees and the School Board of Broward County.

COMMENDATION

The Broward County School District is commended for initiating a broad-based collaboration process in the continuous refinement of student achievement benchmarks.

FINDING

The Division of Educational Programs, Student Support, and Human Resources Development provides the curriculum and instruction support for each of the district's schools and is responsible for overseeing the development and implementation of the schools' school improvement plans. The district has provided each of the schools with a revised 1998-99 School Improvement Plan Procedures Packet (which includes both hard copy as well as an electronic copy) for the use by each school advisory council in developing and implementing the school's curriculum and instruction as it relates to school improvement and student achievement. The plans request schools to address the site-based management concept of, "Every student a choice...Every school a specialized educational focus," which encourages them to select and implement a minimum of one whole school reform initiative based on the unique needs of the school. Also the district requires the schools to include at least one comprehensive reading objective. The Title I Plan, ESOL Plan, and ESE Plan are incorporated into one comprehensive school improvement plan.

The district is implementing a well-established school improvement plan procedure which requires schools to include a needs assessment, analysis of aggregated data, and other specific planning and implementation requirements as related to the curriculum and instructional needs of the school.

The district recently had more than 2,000 students receive the Department of Education Gold Seal Endorsement and Scholarship Award. These honor students can receive scholarships to pay for 75 percent of their total cost of postsecondary education.

COMMENDATIONS

The Broward County School District is commended for implementing comprehensive procedures for the development and implementation of school improvement plans. (For additional information related to the school improvement, see Chapter 4.4).

The Broward County School District is commended for having a high number of students receive the Florida Department of Education Gold Seal Endorsement and Scholarship Award.

FINDING

To strengthen the Innovation Zone concept, the district implements exemplary practices throughout an entire Innovation Zone to strengthen curriculum and instructional initiatives so there is continuity within the district's feeder schools. (See Chapter 4 for more information on the Innovation Zone concept). Examples include:

- Stranahan Zone - Through Break the Mold funding, the Zone provides after-school tutoring for students using a computerized curriculum program.
- Plantation Zone - This Zone developed a pre-kindergarten through adult integrated curriculum for communication skills. This curriculum emphasizes the skills of reading, writing, and public speaking as it relates to School-to-Work transition.
- Boyd Anderson Zone - This Zone has developed a zone-wide corrective reading program which provides direct instruction in reading in grades kindergarten through grade 12. The reading instruction provides a sequenced, comprehensive delivery system starting at kindergarten through 5th grade and continuing through middle and high school.

COMMENDATION

The Broward County School District is commended for its practice of implementing and disseminating curriculum and instruction initiatives throughout each Innovation Zone.

FINDING

The schools that were removed from the State's "Critically Low Performing List" are now called Schools in Need of Assistance (SINA) in Broward County School District. Schools in Need of Assistance are identified by the following:

- Level A - schools which have been critically low achieving for at least two years, have had intensive district support, have had additional district funding, have been members of the Alliance for

Quality Schools for at least two years (except for middle and high schools), and are not making adequate progress (three year trend). The district currently has 15 Level A schools.

- Level B - schools are schools which have been critically low achieving for at least two years and have made inconsistent progress (no steady upward trend line), or schools which have a critical indicator in the area of reading. The district currently has 20 Level B schools.
- Level C - schools which have not been on the critically low achieving list but show consistent downward achievement trends or schools which will become Critically Low achieving if scores do not improve in 1998-99. The district currently has four Level C schools.
- Level D - schools which are high schools which have four or more critical indicators and have the greatest achievement gaps to overcome, and have other indicators which make them fragile. The district currently has 12 Level D schools.
- Level E - schools which have been on the Critically Low Achieving List or meet high diversity profiles and have made substantial, consistent achievement gains in a least two areas, schools which can serve as models to others, and administrators who can serve as mentors to others. The district currently has 12 Level E schools.

The district supplies each principal of a Level A - E school with an electronic version of a yearly summary report that the administrator and School Advisory Council must complete and submit to the district. The report is comprehensive, including school improvement plan objectives, Whole School Reform progress, needs and curriculum assessment, budget information, standardized test data, plan for implementing the critical content, and the tangible impact on school improvement.

The district has a curriculum and instruction assessment procedure including, district-level teams which conduct on-site visits for assisting schools with curriculum and instruction initiatives in schools that have newly assigned principals; however, there is no similar process for schools identified as a Level A-E school unless the school has a newly assigned principal.

RECOMMENDATION

Recommendation 5-4:

Utilize a process similar to the current curriculum and instruction assessment procedure for schools with newly assigned principals to assist Level A-E schools.

The Broward County School District has committed considerable resources to developing and implementing the curriculum and instruction assessment procedure that

includes on-site visit support teams. However, this strategy was designed for schools with newly assigned principals. A district-level support team concept, based on the current model should be organized for delivering technical assistance and support to Level A-E schools. This approach offers the advantage of providing technical support through existing resources and utilizing proven support strategies. This recommendation should assist those schools which were recently removed from the State's Critically Low Performing List to render the additional technical support necessary to remain off the list.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of School Improvement and Accountability should review the existing process that is utilized for assisting schools with newly assigned principals. May 1999
2. The Director of School Improvement and Accountability should create a plan which utilizes the applicable features of the current curriculum and instruction procedure to assist Level A-E schools in the same manner. July 1999
3. The Director of School Improvement and Accountability should implement the plan as prepared. September 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources in accord with present staffing practices. Criteria should be established for prioritizing site visits to schools requiring the additional support teams' assistance. The teams should schedule site visits in accordance with the recognized criteria.

FINDING

The district has, in its curriculum and instruction staffing plan, numerous curriculum positions assigned responsibilities for providing technical assistance services directly to schools. There is a discrepancy between the goals and objectives set for these positions and the amount of time that is dedicated to direct involvement at the school level.

The curriculum specialists interviewed specified that approximately 10 percent of their time is actually spent on-site assisting schools. Additionally, in focus group interviews, school-based personnel responded that they "rarely" receive on-site assistance from the district curriculum specialists. This finding is also supported by the survey responses of the teachers. Teachers were given a list of 25 school district programs or functions, and were asked to rate the programs with descriptions ranging from should be eliminated to outstanding. According to survey results, instructional support was considered one of the five programs to be in need of major improvement with 21 percent of teachers reporting accordingly (See Chapter 3.3 for additional teacher survey results).

RECOMMENDATION

Recommendation 5-5:

Require that personnel filling curriculum support positions dedicate a minimum of 50 percent of their time delivering assigned services at schools.

The purpose of curriculum and instruction support positions is to provide schools and instructional personnel support and technical assistance in the defined areas of expertise held by district-level professional personnel. Given the increased pressures on schools to produce measurable student learning outcomes, it becomes more imperative that district-level personnel commit energy and time to delivering direct services to schools. Therefore, specific benchmarks should be incorporated to assist in assessing the district's curriculum and instructional delivery system. Implementation of this recommendation should allow schools to receive the direct, hands-on technical assistance needed to enhance the delivery of curriculum and instruction to students.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Support, and Human Resources Development should review all duties assigned to those positions to ensure alignment of actual duties with their goals and objectives. May 1999
2. The Deputy Superintendent for Educational Programs, Student Support, and Human Resources Development should prepare a plan for appropriate reassignment of personnel. July 1999
3. The Deputy Superintendent for Educational Programs, Student Support and Human Resources Development should submit the plan to the Superintendent and Cabinet staff for review and final approval. August 1999
4. The Deputy Superintendent should implement the plan as approved. September 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources and should increase the efficiency and effectiveness of the delivery of curriculum and instructional services to schools.

FINDING

The district is implementing several initiatives related to the utilization of technology to improve student achievement, assist curriculum and instruction development, and increase productivity and efficiency. For example, the district has authorized a comprehensive study by the Center for Educational Leadership in Technology (CELT)

to assist in the development of a districtwide technology policy that specifically emphasizes the use of technology in instruction as well as in other areas of the district.

Every school is required to design a technology component in its School Improvement Plan that addresses the school's use of technology for curriculum and instruction.

COMMENDATION

The Broward County School District is commended for placing a strong emphasis on requiring schools to address and integrate the most appropriate use of technology into their school improvement plans as a means of assisting the development of innovative curriculum and instruction efforts.

FINDING

The Broward County School District has begun the process of incorporating distance learning into the curriculum and instructional processes. Exhibit 5-15 explains the current status of the number of courses and students taking courses via distance learning as well as a report on their academic progress. This information was obtained through a recent survey sent to the distance learning teachers for each class. As can be seen, only three advanced placement distance learning courses are currently being offered to Broward County students through the BECON Department.

Currently, the district has three instructional distance learning teachers who are paid by the district and three distance learning facilitating teachers who are paid by the schools. All high schools have the necessary equipment to receive distance learning courses, while only three middle schools and five elementary schools are fully equipped to receive distance learning.

The district has made progress in identifying distance learning programming and teleconferencing for students, teachers, and administrators; however, it does not appear that the district has clear goals and objectives for the use of distance learning as it relates to curriculum and instructional initiatives. The implementation of this approach will enable various discontinued courses to continue and avoid the excessive personnel costs as reported in the Distant Learning section of the Program Evaluation, Research Briefs, and Selected Reports (September 1997 - August 1998, Volume 4).

RECOMMENDATION

Recommendation 5-6:

Expand and clarify the use of distance learning technology to meet instructional delivery system needs.

The implementation of this recommendation should expand the district's distance learning system so more course offerings can be made available to students, thus reducing the number of specialized teachers employed at individual schools.

**EXHIBIT 5-15
STATUS OF BROWARD COUNTY SCHOOL DISTRICT'S
DISTANCE LEARNING PROGRAM
COURSES 1998**

Advanced Placement Art History:

8:40 AM – 9:40 AM, Rotating Schedule, 2 semesters

Instructional School: Dillard H.S.
Instructional Teacher: Ms. Barbara Mazur
Students: 13

Facilitated School: Nova H.S.
Facilitating Teacher: Ms. Debbie Fisher
Students: 11

Attendance for first 9 weeks:

# of students with 0-3 absences	<u>8</u>	# of students with 0-3 absences	<u>10</u>
# of students with 4-6 absences	<u>4</u>	# of students with 4-6 absences	<u>0</u>
# of students with 7-10 absences	<u>1</u>	# of students with 7-10 absences	<u>0</u>
# of students with >10 absences	<u>0</u>	# of students with >10 absences	<u>1</u>

Grades:

#A 1 #B 4 #C 2 #D 5 #F 1 #A 8 #B 1 #C 1 #D 0 #F 1

Advanced Placement English Literature and Composition:

7:40 AM – 9:10 AM, 4 x 4 Block, 1 semester

Instructional School: Coral Springs H.S.
Instructional Teacher: Ms. Valerie Arena
Students: 1

Facilitated School: Hallandale H.S.
Facilitating Teacher: Mr. Jim Hester
Students: 9

Attendance for first 9 weeks:

# of students with 0-3 absences	<u>1</u>	# of students with 0-3 absences	<u>8</u>
# of students with 4-6 absences	<u>0</u>	# of students with 4-6 absences	<u>1</u>
# of students with 7-10 absences	<u>0</u>	# of students with 7-10 absences	<u>0</u>
# of students with >10 absences	<u>0</u>	# of students with >10 absences	<u>0</u>

Grades:

#A 1 #B 0 #C 0 #D 0 #F 0 #A 2 #B 7 #C 0 #D 0 #F 0

**EXHIBIT 5-15 (Continued)
STATUS OF BROWARD COUNTY SCHOOL DISTRICT'S
DISTANCE LEARNING
COURSES 1998**

Advanced Placement Environmental Science:

1:40 PM – 3:30 PM, 4 x 4 Block, 2 semesters, paired with Advanced Physical Science to provide time for laboratory and field work

Instructional School: Taravella H.S.	Facilitated School: Ely H.S.
Instructional Teacher: Ms. Lynn Sweetay	Facilitating Teacher: Ms. D. Richburg
Students: 23	Students: 5

Attendance for first 9 weeks:

# of students with 0-3 absences	<u>22</u>	# of students with 0-3 absences	<u>5</u>
# of students with 4-6 absences	<u>1</u>	# of students with 4-6 absences	<u>0</u>
# of students with 7-10 absences	<u>0</u>	# of students with 7-10 absences	<u>0</u>
# of students with >10 absences	<u>0</u>	# of students with >10 absences	<u>0</u>

Grades:

#A <u>8</u>	#B <u>9</u>	#C <u>3</u>	#D <u>1</u>	#F <u>2</u>	#A <u>5</u>	#B <u>0</u>	#C <u>0</u>	#D <u>0</u>	#F <u>0</u>
-------------	-------------	-------------	-------------	-------------	-------------	-------------	-------------	-------------	-------------

Other Outcomes:

These observations and concerns were also reported by teachers who responded to the survey:

- One teacher noted that the mentoring experience under a master AP teacher provided the opportunity to learn and build the confidence to be the Advanced Placement teacher in subsequent years.
- All (6 out of 6) teachers responding want to teach/facilitate a Distance Learning class again.
- All teachers responding agreed that the audio and video quality was good, but that improvements could be made.
- Prior preparation for Advanced Placement coursework varied considerably from school to school. This resulted in a difference in the baseline for students taking the courses at the schools.
- One of the facilitating teachers provided additional coursework for the students at the facilitated site. The intent was to give students the opportunity to raise their grades based on the assignments given by the instructional teacher. This may alter the indication of likelihood for passing the national Advanced Placement Exam for the students at that school.

Source: Broward County School District, BECON Department, 1998.

Additionally, implementation of this recommendation should enhance the educational offerings and permit students to take certain classes without being required to be physically present in the same location as the instructor. Present technology has reduced the costs, increased the availability, and broadened the thinking about the utilization of distance learning applications.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Support and Human Resources Development, the Associate Superintendent for Educational Programs, the Associate Superintendent for Accountability, Technology, Strategic Planning and School Improvement, and the Coordinator of Distance Learning should prepare a draft plan for accomplishing this recommendation. May 1999
2. The Associate Superintendent for Educational Programs should commence implementation upon approval of the plan by the Board. August 1999

FISCAL IMPACT

The implementation of this recommendation should permit the continuation of valued programs that were recommended for termination. There will be no cost to implement this recommendation in those schools that are equipped to receive distance learning courses.

FINDING

After interviews with administrators, teachers, students, and district personnel responsible for textbook policies, and a review of documents related to textbook adoption and expenditures, MGT consultants found that teachers do not, in numerous instances, utilize the full contents of expensive textbooks and other curriculum and instructional materials acquired through textbook funds.

For example, the high school oceanography, history, and science textbooks are supplemented with a variety of other instructional materials and do not contain all of the instructional information that is in alignment with the Critical Content Guides and the Sunshine State Standards. One textbook used in teaching the high school Integrated Science I course, entitled Science Interactions by GLENCOE/McGraw-Hill has four out of seven units (Units 1, 4, 6, and 7) that do not correspond with the integrated curriculum and the Critical Content Guides. Exhibit 5-16 displays the table of contents of this textbook and indicates which units do not correspond with the Critical Content Guides.

**EXHIBIT 5-16
TABLE OF CONTENTS
HIGH SCHOOL INTEGRATED SCIENCE I TEXTBOOK**

*Unit 1 Storms		Unit 5 Shelter	
1	Weather Prediction	15	Earth's Crust in Motion
	Chapter Review.....		Chapter Review.....
	Chapter Test.....		Chapter Test.....
	5		89
	7		91
2	Severe Weather	16	Structures and Materials
	Chapter Review.....		Chapter Review.....
	Chapter Test.....		Chapter Test.....
	11		95
	13		Chapter Test 9
3	The Effects of Storm	17	Forces and Machines in Building
	Chapter Review.....		Chapter Review.....
	Chapter Test.....		Chapter Test 1
	17		101
	19		Chapter Test 1
Unit 2 Ecology		18	Transfer of Thermal Energy
4	Biotic and Abiotic Factors		Chapter Review.....
	Chapter Review.....		Chapter Test.....
	Chapter Test.....		
	23		107
	25		109
5	Cycling of Matter and Energy	19	Electrical Energy
	Chapter Review.....		Chapter Review.....
	Chapter Test.....		Chapter Test.....
	29		113
	31		115
6	Changes in Ecosystems	*Unit 6 Disease	
	Chapter Test.....	20	Types of Disease
	35		Chapter Review.....
	47		Chapter Test.....
Unit 3 Food			119
			121
7	Biochemistry	21	Preventing and Treating Disease
	Chapter Review.....		Chapter Review.....
	Chapter Test.....		Chapter Test.....
	41		125
	43		127
8	Photosynthesis	22	Detecting Disease
	Chapter Review.....		Chapter Review.....
	Chapter Test.....		Chapter Test.....
	41		131
	49		133
9	Soil Formation	*Unit 7 Flight	
	Chapter Review.....	23	Physics of Flight
	Chapter Test.....		Chapter Review.....
	53		Chapter Test.....
	55		
10	Chemistry of Food	24	Structures of Flight
	Chapter Review.....		Chapter of Review.....
	Chapter Test.....		Chapter Test.....
	59		143
	61		145
*Unit 4 Resources		25	Physics of Space Flight
11	Resources		Chapter Review.....
	Chapter Review.....		Chapter Test.....
	Chapter Test.....		
	65		149
	67		151
12	The Formation of Resources	Units Tests	
	Chapter Review.....	Unit 1 Storms.....	157
	Chapter Test.....	Unit 2 Ecology.....	159
		Unit 3 Food.....	161
		Unit 4 Resources.....	163
		Unit 5 Shelter.....	165
		Unit 6 Disease.....	167
		Unit 7 Flight.....	171
		Answers.....	171
13	Petroleum Chemistry		
	Chapter Review.....		
	Chapter Test.....		
	77		
	79		
14	Recycling		
	Chapter Review.....		
	Chapter Test.....		
	83		
	85		

The * indicates the four units that do not correspond with the Critical Content Guides and suggested Integrated Science I Curriculum.

Source: GLENCOE/McGraw-Hill Textbook, 1996.

RECOMMENDATION

Recommendation 5-7:

Require textbook publishers to respond to clearly articulated curriculum needs.

The implementation of this recommendation should reduce the amount of funds the district is spending for textbooks that include extraneous chapters that are unrelated to the Critical Content Guides and the Sunshine State Standards.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|---------------|
| 1. The Associate Superintendent for Educational Programs should establish Subject Area Committees with the assigned responsibility of identifying textbooks and other instructional materials containing a large quantity of contents that are not utilized. | June 2000 |
| 2. The Associate Superintendent should identify publishing companies that may have an interest in meeting the identified publishing needs of the district. | July 2000 |
| 3. The Subject Area Committees should also identify materials that can be developed and published or by an identified publishing company. | December 2000 |

FISCAL IMPACT

While it is not feasible to draw any definitive conclusions based on the several examples shown to MGT consultants regarding the textbook not being fully utilized by teachers and students in several courses in the district, the signs point to the district spending excessive amounts of funds on textbooks which are not being fully utilized. The district spent \$14.3 million on purchasing new textbooks for the 1997-98 school year. Based on reviews MGT has conducted in other school districts, MGT conservatively estimates that this recommendation may reduce the district's textbook expenditures by as much as 10 percent.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Require Textbook Publishers to Respond to Specific Curriculum Needs	\$0	\$1,430,000	\$1,430,000	\$1,430,000	\$1,430,000

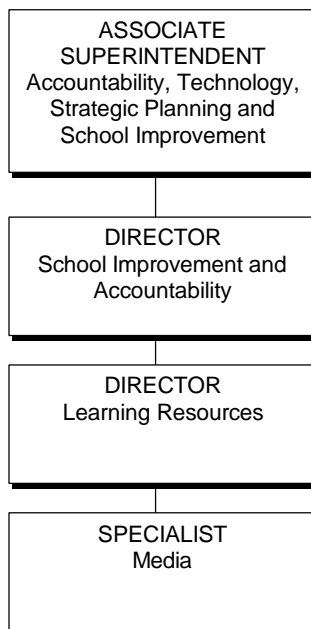
FINDING

The Learning Resources and Media Specialist functions are currently inappropriately assigned to the Director of School Improvement and Accountability within the Accountability, Technology, Strategic Planning and School Improvement Division.

These functions provide leadership and support to the overall library and media programs in the schools and other school support systems.

Based on on-site interviews and a review of the goals and objectives of this section, MGT consultants found that the Learning Resources and Media functions should have a stronger organizational relationship with curriculum and instruction. Exhibit 5-17 displays the Learning Resources and Media Specialist on the current organizational chart.

**EXHIBIT 5-17
LEARNING RESOURCES AND MEDIA SECTION WITHIN
THE BROWARD COUNTY SCHOOL DISTRICT ORGANIZATIONAL CHART**



Source: Broward County School District, Division of Accountability, Technology, Strategic Planning, and School Improvement, 1998

RECOMMENDATION

Recommendation 5-8:

Reassign the Learning Resources and Media Specialist function from the Director of School Improvement and Accountability within the Accountability, Technology, Strategic Planning and School Improvement Division to the newly created Division of Educational Programs and Services.

The reassignment of the Learning Resources Department will enable that Department to have stronger organizational relationship with curriculum and instruction. The reader should refer to Section 5.1 to review the realignment of the overall educational service delivery units.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should direct the reorganization of Learning Resources and Media by the Deputy Superintendent. May 1999
2. The Deputy Superintendent should lead key departmental personnel in developing a comprehensive plan for integrating operations. June 1999
3. The Deputy Superintendent, in conjunction with key departmental personnel, should ensure that position titles and job descriptions are updated to reflect changes resulting from the reorganization. July 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources.

5.3 Special Programs

In the subsections that follow, special programs provided by the district for students who need auxiliary support and services in reaching their academic and social potential are reviewed. Often these special programs receive supplemental funding from the state and federal government. First, the special programs located in the Division of School Operations are discussed and then the special programs located in the Division of Educational Programs, Student Support, and Human Resource Development follows. Exceptional Student Education is addressed in Section 5.4 of this chapter.

5.3.1 Vocational, Adult, and Alternative Education

The goal of a district's vocational education program is to develop the skills necessary for entering and succeeding in the world of work.

CURRENT SITUATION

The Vocational, Adult, and Alternative, and Exceptional Student Education Centers (VAAESEC) Department has been recently restructured. Due to the geographic location of the district's schools and centers, this department services the entire district. The Vocational, Adult, and Community Education Program provides curriculum and instructional support for schools, sixth grade through adult, in the delivery of programs that meet student and workplace needs. Technical assistance is school-based or center-based, and includes such activities as technology updates, teacher inservice, program development, grant facilitation, and facility renovation.

The programs offered are accredited through the Southern Association of Colleges and Schools (SACS), as well as other state, regional, and national accreditation boards for individualized programs. The department's goal is to ensure the accessibility to the best education for the district's special students. Eligible high school students can take

vocational courses one-half of the school day at a center while taking their regular courses the other half of the day at their home school. Many programs offer credit or acceleration towards a two-year degree at a community college. The district provides transportation for eligible students attending vocational centers.

Broward County has the second highest percentage of graduates entering technical school upon graduation among the comparison districts with a total of 4.54 percent as indicated in Exhibit 2-17 of Chapter 2. The district serves approximately 240,000 adults and has a total of six adult/vocational schools and 11 special centers.

Below is a description of the centers and schools.

- **Atlantic Vocational Technical Center** – Coconut Creek (Grades 9 - adult) – This is an adult education center which places its emphasis on the development of occupational training programs. The objectives for the program are based on the needs of business, industry, and the community that Broward serves. Programs include: agribusiness, automotive, building, business technology, cosmetology, family and consumer sciences, food services, health science education, marketing, and technical education.
- **Bright Horizon School** – Pompano Beach (ESE-K-12) – The mission of this school is to offer a comprehensive program including art, basic skills, BOOTS (Bringing Out Optimal Training Strategies), career education, health, music, physical education, speech and language and vocational skills.
- **Cross Creek School** – Pompano Beach (severely emotionally disturbed-pre-kindergarten through grade twelve) – Cross Creek uses a psychoeducational approach to providing a safe and orderly environment for all students enrolled. Students are provided with goal training, counseling for emotional independence, and academic preparation in the least restrictive educational and social environment.
- **Cypress Run Alternative** – Pompano Beach (Alternative/ESE 6-12) – Programs offered include 6-12 academic curriculum, home economics, computer literacy, and Intramural basketball and softball.
- **Hallandale Adult Community Center** – Hallandale (pre-kindergarten through adult) – This center address the needs of the community by providing a variety of programs to students of all ages, abilities, and nationalities. Programs range from on-site day care center to Florida Ocean Sciences Institute Programs.
- **Pine Ridge Center** – Ft. Lauderdale (Alternative kindergarten – 12) – The goal of this school is to provide a behavioral management program focused on the academic achievement of dropout

prevention students, expulsion, special education, and behavior change students. The program includes one main campus and six off-campus sites. These sites are Broward Regional Juvenile Detention Center, Covenant House, New Directions, Y-Chance, Friends of Children, and Sanofa House.

- **Pompano Multi-Purpose Education Center** – Pompano (6 – adult) – This school offers a wide variety of programs, houses district administrative support personnel, and is the home base for several area agencies and organizations. Programs include adult education and teen parenting programs.
- **The Quest Center** – Hollywood (ESE- kindergarten – 12) – The school offers handicapped students opportunities to participate in integrated educational experiences. Curriculum addresses programs for autistic, profound mentally handicapped, trainable mentally handicapped, and educable mentally handicapped.
- **Seagull School** – Fort Lauderdale (ESE-pre-kindergarten-12) – This school provides educational, medical, and social services for very special needs students. The schools student body consists of students who are physically impaired, pregnant teens, parenting teens, their babies, and students who are participating in hospital homebound.
- **Sheridan Vocational Technical Center** – Hollywood (Grades 9 - adult) – This vocational technical center places emphasis on the development and implementation of occupational training programs.
- **Sunset School** – Fort Lauderdale (severely emotionally disturbed – kindergarten – 12) – In addition to regular academic programs, psychiatric, therapeutic services, food services, horticulture, and industrial arts courses are offered.
- **Whiddon-Rogers Education Center** – Fort Lauderdale (alternative/ adult- 6- adult) – This is one of the newest schools in the district which services adult education, education in three jails, Lippman Family Center, Goodwill Industries, and the Broward Convalescent Home.
- **Whispering Pines School** – Miramar (severely emotionally disturbed/ kindergarten-12) – Center provides services to severely emotionally disturbed students. The program involves one main campus and several off-campus adult programs.
- **Wingate Oaks Center** – Fort Lauderdale (ESE- kindergarten – 12) – This school services multi-handicapped students and offers specialized training in a variety of programs.

- **McFatter Vocational Technical Center – Davie** (Grades 9 - adult)
This school offers technical education in over 30 program areas. Programs include courses such as communications technology, culinary arts, commercial vehicle driving, marine technology, and medical technology. The McFatter Technical High School is designed to prepare students with the competencies required for careers and further study in a wide range of occupational fields. The curriculum includes the use of state-of-the-art technology, alternative assessment, and digitized portfolios.

FINDING

The Vocational, Adult, Alternative and ESE Centers Department (VAAESEC) was primarily responsible for creating an on-line student support system designed to assist in the identification and support of students who may need assistance beyond that which is traditionally provided. The electronic system operates by providing school personnel of “at-risk” students information that may affect the student's achievement. The indicators used in the system are grade point average below 2.0, excessive unexcused absences, external suspension, mobility, Department of Juvenile Justice involvement, and test scores below the 50th percentile. This system enables staff to record interventions previously used and informs other staff who may deal with the student at a future date or alternate location. Prior to the implementation of this system, staff had difficulty tracking student interventions.

COMMENDATION

The VAAESEC is commended for the creation and implementation of an electronic student tracking system.

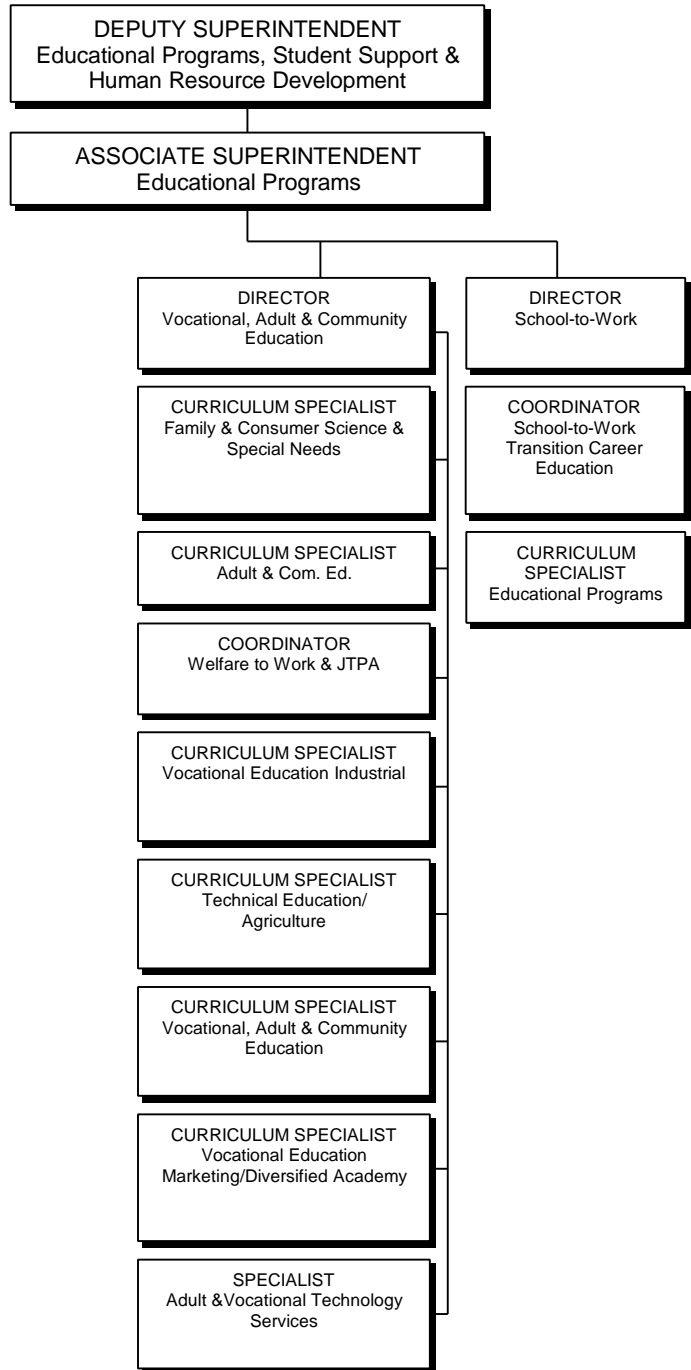
FINDING

As depicted in Exhibit 5-18 and 5-19, the district's services for Vocational, Adult, and Alternative Education currently function under two divisions---School Operations and Educational Programs, Student Support, and Human Resource Development.

The area director, dropout prevention coordinator and specialist, and the area business analyst are located in the Division of School Operations. The curriculum, career development, School-to-Work functions are located in the Division of Educational Programs, Student Support and Human Resource Development.

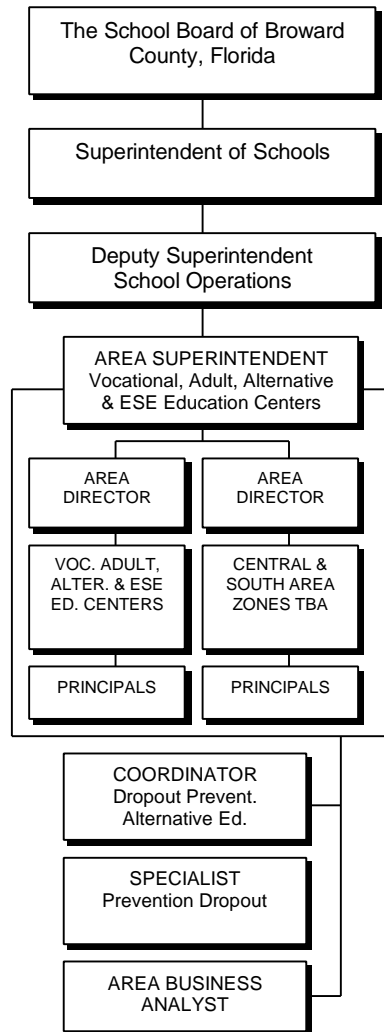
The programs are assigned to the Area Superintendent of Vocational, Adult, Alternative and ESE. The Department of Vocational Adult, and Alternative Education employs 37 positions including one area director, one coordinator, two specialists, and 10 curriculum specialists. Unlike the other three area superintendents who have an administrative assistant, the Vocational, Adult, and Alternative, and ESE Area Superintendent does not. Also the other three area offices (South, Central and North) have two areas directors; this Department has only one. The organizational chart shows two area directors; however, only one area director is currently assigned to this department.

**EXHIBIT 5-18
ORGANIZATIONAL CHART OF THE VOCATIONAL, ADULT, AND COMMUNITY
EDUCATION DEPARTMENT WITHIN THE DIVISION OF EDUCATIONAL
PROGRAMS, STUDENT SUPPORT, AND HUMAN RESOURCE DEVELOPMENT**



Source: Broward County School District, Division of Educational Programs, Student Support, and Human Resource Development, 1998-99.

**EXHIBIT 5-19
ORGANIZATION CHART OF THE VOCATIONAL ADULT, AND COMMUNITY
EDUCATION DEPARTMENT WITHIN THE DIVISION OF SCHOOL OPERATIONS
1998-99**



Source: Broward County School District, Division of School Operations, 1998-99.

Operating under two divisions, the current structure of adult, vocational, and alternative education programs is fragmented and does not provide for a functional alignment. To provide the effective delivery of services, the unit must have a clear mission and support similar functions. The current organizational structure does not integrate an important function of the district's vocational and adult programs, School-to-Work, and career planning and development. The director of School-to-Work has limited oversight and responsibility, supervising only two positions (See Section 5.1 for a review of the overall proposed realignment of the Education Service Delivery System).

As discussed in Chapter 4, the proposed reorganization of the Broward County School District includes the creation of 10 Executive Area Directors reporting to an Associate Superintendent for Schools. Under the proposed reorganization plan, the school principals (including the principals/directors of the 11 special centers and the six audit/vocational schools) will report to the respective executive area director. The reorganization should further enhance the underlying principles of the district's practice of clustering schools into Innovation Zones.

RECOMMENDATION

Recommendation 5-9:

Merge the career development, School-to-Work, vocational, adult and community education functions under one unit and eliminate the School-to-Work Director's position.

This recommendation should provide for a well-integrated career planning and career development program. The realignment structure should enhance the effectiveness of services delivered to students and adults and ultimately result in management and resource efficiencies. See Exhibit 5-10 for the proposed realignment of this function and refer to Section 5.3.9 for additional findings related to the School-to-Work program and the elimination of the School-to-Work Director's position.

IMPLEMENTATION STRATEGIES AND TIMELINE

- 1. The Superintendent should include this organization change in the proposal to be recommended for Board action. May 1999
- 2. The Board should approve the Superintendent recommendation. Summer 1999
- 3. The Superintendent and Executive Staff should implement the approved recommendation plan. December 1999

FISCAL IMPACT

Eliminating the Director of School-to-Work will result in an annual savings of about \$104,500 based on an average salary of \$78,600 and a 33 percent benefits package (\$25,938).

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Eliminate School-to-Work Director	\$52,250	\$104,500	\$104,500	\$104,500	\$104,500

5.3.2 Dropout Prevention Program

CURRENT SITUATION

The district serves a large number of students at risk of dropping out of school in a variety of traditional school-site programs as well as special centers. The Office of Dropout Prevention offers support to students, teachers, parents, and administrators and provides the necessary tools for potential dropout students to succeed. Currently, the Dropout Prevention function resides in the Division of School Operations and reports to the Area Superintendent for Vocational, Adult, Alternative, and ESE as seen in Exhibit 5-20. One area superintendent is responsible for administering these services districtwide. Unlike the other area offices, this administrator must have access to districtwide program implementation and be able to determine the needs of all areas. In effect, this area superintendent is performing a central office function as described previously.

As shown previously in Exhibit 2-19 in Chapter 2, Broward County's high school dropout rate for 1996-97 was 3.17 percent, down from 3.83 percent in 1995-96. The dropout rate for 1996-97 was the lowest among the comparison school districts. Dropout rates in Broward County School District are well below state averages.

FINDING

In addition to the traditional school-based programs, the Dropout Prevention Office provides a variety of programs designed to meet the varied needs of at-risk students. The programs include:

- Educational Alternative Programs
- Disciplinary Programs
- Teen Parent Programs
- Educational Service/Community Based Programs
- Substance Abuse Programs

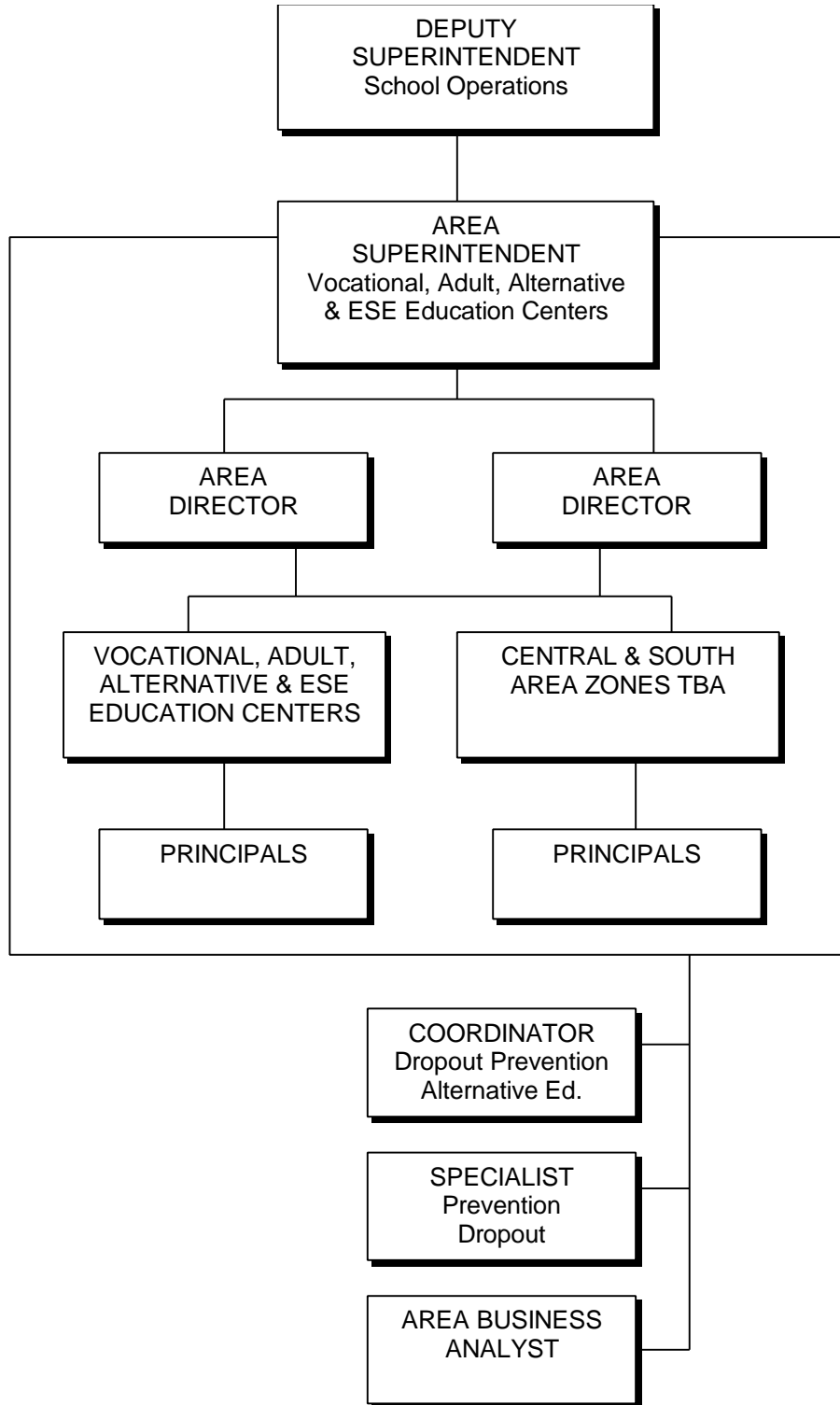
The district has established a partnership with the State's Attorney Office for identification of elementary age youth that have excessive unexcused absences from school. This collaborative effort assists in notifying parents of their legal responsibility to have their child attend school daily.

Dropout programs are funded based on the educational practice of "unequal resources to support unequal needs." Student populations at each school are reviewed to determine the number of students that have multiple at-risk indicators. The district has specific criteria identified as "at-risk" indicators and resources are allocated to schools in a prorated amount of available dropout prevention funding. This formula has been approved by the Florida Department of Education and has been recommended as a model to other districts.

COMMENDATION

The Broward County School District is commended for implementing an exemplary dropout prevention funding formula.

**EXHIBIT 5-20
ORGANIZATIONAL STRUCTURE OF THE OFFICE OF DROPOUT PREVENTION
1998-99**



Source: Broward County School District, Department of Vocational, Adult, Alternative and ESE Centers, 1998.

FINDING

The Dropout Prevention and Alternative Education Program is managed by a coordinator and specialist reporting to the Area Superintendent for Vocational, Adult, Alternative, and ESE Education Centers. MGT consultants found a lack of a coordination between this unit and the Department of Educational Programs in the areas of procedures and practices. For example, when the Department of Educational Programs requests information from the various educational program departments, or program planning functions are performed, dropout prevention as a program is neglected due to not being in alignment with the Division of Educational Programs, Student Support, and Human Resource Development. Additionally, the Dropout Prevention Program has not been an integral part of the Critical Content Roll Out Awareness Sessions.

RECOMMENDATION

Recommendation 5-10:

Reassign the Dropout Prevention Coordinator and Specialist to report directly to the Director of Special Programs in the newly proposed Division of Educational Programs and Services.

In as much as this function serves a districtwide need, the reassignment to the Division of Educational Programs and Services should ensure that the issues of Dropout Prevention are not neglected as being part of the educational programs. Additionally, with the implementation of this recommendation, the Dropout Prevention Program should become a critical component in the Roll Out of the Critical Content Awareness Sessions (See Exhibit 5-10 for the proposed realignment of this Department).

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Support and Human Resources Development, should develop a plan for the implementation of this recommendation. May 1999
2. The Deputy Superintendent should develop an appropriate plan. June 1999
3. The Superintendent and Executive Staff should incorporate the recommendations into the organization plan and present to the Board for approval. July 1999
4. The Deputy Superintendent for Educational Programs, Student Support, and Human Resource Development should implement the approved plan. September 1999

FISCAL IMPACT

This recommendation can be implemented using existing resources.

5.3.3 Charter Schools, Summer Schools, and Year-Round Schools

CURRENT SITUATION

The district has six charter schools operating for the 1998-99 school year. Charter schools are public schools that are privately operated under a contract with the sponsoring district. The six operating charter schools are Charter School of Excellence, Central Charter School, Somerset Neighborhood School, Smart School, City of North Lauderdale Academy High School, and the City of Pembroke Pines. At the time of the site visit, there were no applications on file for additional charter schools

Since the state of Florida no longer provides funding for summer school programs, the district has established three criteria for students who may attend summer school in Broward County School District. The three criteria are:

- ESE, dropout prevention students, and ESOL students;
- students who are recommended for retention; and
- any child who is attending a Level A or Level B school (see Section 5.2 for a description of Level A and B schools).

Every high school and all Level A and B schools are open for summer school. If a child does not fall into one of three categories listed above, he/she can still attend summer school provided the parents arrange for transportation.

Presently there are five schools on year-round calendars: Hallendale Elementary, Colert Elementary, Lake Forest Elementary, Watkins Elementary, and McNicol Middle School. Four of the schools are on single track and one school is on a multi-track program.

At the time of the site visit, there were no districts plans to expand the number of year-round schools for the 1999-2000 school year; however, the district is currently in the process of analyzing the standardized test scores of the students currently attending the five year-round schools.

MGT interviews with district and school-level personnel found that the teachers and parents in the current year-round schools are in support of the continuation of the program even though the original problem of overcrowding no longer exists. It was reported that parent and teacher support is clearly shown in the Innovation Zone quarterly meetings. One Innovation Zone recently produced a year-round school videotape to explain the program's benefits to other schools.

FINDING

The Broward County School District has been experiencing a high rate of pupil growth and a shortfall in funds to provide adequate classroom and related auxiliary space to support the existing educational programs. The use of large numbers of relocatable classrooms and the portable school concept is costly both from a capital as well as operating budget perspective. MGT's extensive work in school facilities has found this to be true (see Chapter 8).

RECOMMENDATION

Recommendation 5-11:

Expand the district's application of the multi-track year-round calendar.

Depending on the configuration of the calendar selected, each school's student capacity can be increased from 20 to over 40 percent. The building capacity is increased depending on the calendar chosen. By having a certain percentage of students out of school for a period of time, the vacated classroom space is then occupied by another teacher with his/her group of pupils. When the next group of students go "off track" (out of school for a period of time), the group that was previously out returns to the newly vacated space. The 60-15 calendar configuration presently employed provides the minimum increase while a 45-15 would provide for a 25 percent increase.

Utilization of the 60-15 calendar in four existing year-round schools would eliminate the need for construction of one additional school. Therefore, the conversion of 25 existing schools would eliminate the need for building five new schools.

IMPLEMENTATION STRATEGIES AND TIMELINE

For information related to implementation strategies and timeline, please refer to Recommendation 8-7 in the Facilities Use and Management (see Chapter 8).

FISCAL IMPACT

For information related to the fiscal impact of this recommendation, please refer to Recommendation 8-7 in the Facilities Use and Management (see Chapter 8).

5.3.4 Diversity and Cultural Outreach

CURRENT SITUATION

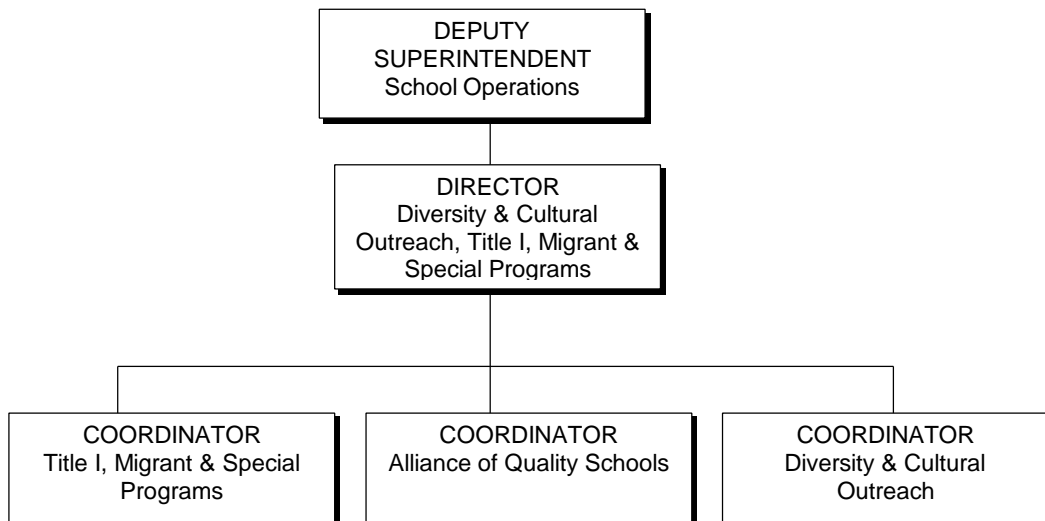
As seen in Chapter 2.0, Broward County is one of the most culturally-diverse school districts in the state of Florida with students born in at least 164 countries, speaking 53 different languages. Approximately 26,500 students in the district are foreign-born. The percentage of Whites is decreasing while the percentage of other ethnic groups is increasing. In 1992-93, 45 percent of the total number of students enrolled were of an

ethnicity other than White/non-Hispanic and in 1997-98 that number increased to 54 percent.

This subsection first discusses the Diversity and Cultural Outreach function, then Title I (regular, migrant and Indian), and concludes with the remainder of special programs.

The Diversity, Cultural Outreach, Title I, Migrant, Indian Education and other Special Programs Department is currently in the Division of School Operations. The organization of this department is displayed in Exhibit 5-21.

**EXHIBIT 5-21
ORGANIZATIONAL STRUCTURE OF THE
DIVERSITY, CULTURAL OUTREACH, TITLE I, MIGRANT
AND SPECIAL PROGRAMS DEPARTMENT
1998-99**



Source: Broward County School District, Division of School Operations, 1998.

The Broward County School District has adopted “diversity” as one of its nine major system priorities. In September 1996, the Board established the Office of Diversity and Cultural Outreach and combined this function with Title I, Migrant, Indian Education, and other Special Programs under one director. The mission of this office is to assist in ensuring that all students and staff develop a broader knowledge and appreciation of cultural diversity. This office provides the following services:

- facilitates the Diversity Committee in its mission to ensure students and staff develop a broader knowledge of cultural diversity;
- assists in developing and revising districtwide policies to promote diversity;

- develops ongoing partnerships with community organizations to implement programs in the school related to diversity;
- provides outreach to over 38 African-American, Hispanic, and Haitian churches and reaches out to parents and students;
- develops and disseminates diversity publications;
- conducts diversity sensitivity training;
- serves on textbook adoption committees and provides information to the committee on identifying diversity issues related to textbooks; and
- participates and assists with various community diversity projects.

The cultural outreach component of the Office of Diversity and Cultural Outreach is designed to meet the needs of eligible students and parents by making use of community organizations, schools, and businesses. These programs are implemented at various community sites and have an incentive award system for those students and parents attaining higher academic achievement. These programs include the:

- Postsecondary Assistance Program that focuses on increasing the number of students who enroll in postsecondary institutions;
- Community Cultural Arts Program that focuses on heightening the awareness of cultural differences through arts;
- Test Training Program that focuses on assisting students in improving test scores;
- General Education Training Program that focuses on reducing illiteracy among low-income adults;
- Tutorial Assistance Program that focuses on improving the academic performance of low performing students.
- Supportive Services Outreach Program that focuses on increasing the opportunities for increasing eligible families in attaining additional support and services; and
- Student Foreign Exchange Program that focuses on providing opportunities for students from other countries to spend time in Broward County schools.

The Office of Diversity and Cultural Outreach has developed numerous partnerships with community organizations such as Jewish Women International, National Conference for Community and Justice, and Anti-Defamation League to implement programs in the schools related to diversity.

The Office of Diversity and Cultural Outreach has developed and disseminated several diversity-related publications addressing the needs of the district's culturally-diverse student and employee population including publications such as the *Diversity Best Practices Manual* and the *Postsecondary Assistance Program Resource Guide* .

FINDING

In addition to supervising the Diversity and Cultural Outreach functions, the Director of the Diversity and Cultural Outreach also oversees several other large programs such as the Title I, Migrant, Indian Education, the Alliance of Quality Schools, and other special programs. Title I, Cultural Outreach and Diversity, Migrant, Alliance of Quality Schools and Special Programs are managed by a director and three coordinators and assigned to the School Operations Division with the Director reporting to the Deputy. With so many vast programs under the leadership of one director, the implementation of these programs is fragmented.

The Coordinator of Diversity and Cultural Outreach has similar position requirements and responsibilities as the Director of Diversity and Cultural Outreach, Title I, Migrant and Special Programs. In reviewing the job descriptions of the Director and the Coordinator, out of 14 performance responsibilities of the Coordinator, nine are identical responsibilities as the Director and one is very similar to the Director's responsibility. There exists an internal duplication of effort in this department. Interviews with district personnel and school-level personnel supported this finding.

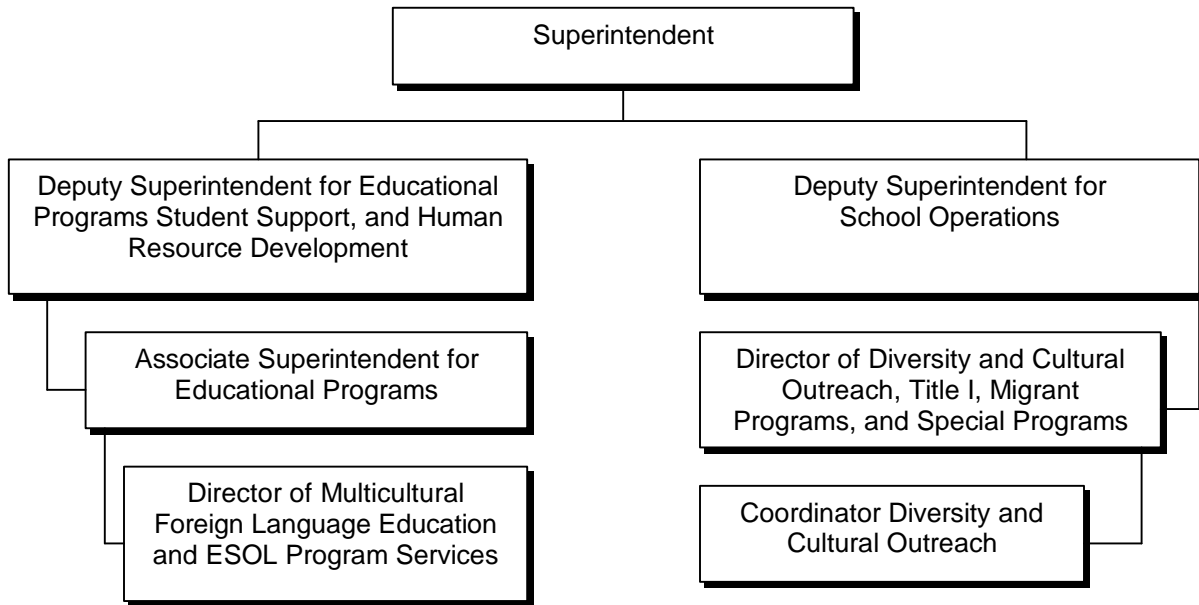
In addition to an internal duplication of efforts, there exists a duplication of services provided by this department and the Multicultural, Foreign Language Education, and ESOL Department within the Division of Educational Programs, Student Support, and Human Resource Development. The Multicultural, Foreign Language Education, and ESOL Department coordinates curriculum and provides instructional support and direct services to schools regarding ESOL, Foreign Language, and Multicultural program implementation. The Department maintains accountability for the quality and content of instruction and instructional materials in ESOL, Foreign Language, and multicultural courses and training, and ensures compliance with federal and state regulations including the META Consent Decree.

The Diversity and Cultural Outreach Office (as does the Office of Multicultural, Foreign language, and ESOL) also provides technical assistance in providing sensitivity training to diverse student populations. In addition, this unit is responsible for developing and providing outreach services to increase the participation of school and community members who are currently not actively involved in the educational process. This Unit reports to the Deputy Superintendent for School Operations.

Exhibit 5-22 was created by MGT to show the organizational structure of the two units that oversee the district's multicultural and diversity programs. Although the two units communicate regarding programs and initiatives, the current organizational structure does not provide for an integrated approach to the district's diversity programs. In fact, some functions such as curriculum integration and the identification of culturally-diverse instructional materials are actually duplicated by the two units. Additionally, the Diversity and Cultural Outreach Office is responsible for involving school and

community members from culturally-diverse backgrounds in partnerships to support diversity initiatives which are important components in improving student achievement and providing program support. The Department outreach programs are not organizationally linked to the Department of Community Relations that reports to the Associate Superintendent of District Administration. It is critical that these units work in coordination and collaboration if effective community relations with diverse populations are to be fostered and maintained.

**EXHIBIT 5-22
ORGANIZATIONAL STRUCTURES OF CULTURAL DIVERSITY PROGRAMS IN
THE BROWARD COUNTY SCHOOL DISTRICT**



Functions:

- Curriculum Development
- Technical Assistance
- Multicultural sensitivity
- Teaching Strategies and Implementation Technical Assistance
- Textbook and Instructional Materials Review
- Foreign Student Exchange Program

Functions:

- Postsecondary Assistance Program
- Community Cultural Arts Program
- Multicultural Sensitivity
- Tutorial Assistance Programs
- Support Services Outreach Program
- Community Cultural Arts Program
- General Education Training Program
- Test Training Program
- Textbook and Instructional Materials Review

Source: Created by MGT of America, 1998.

Although diversity, multicultural programs, and cultural outreach are important goals for the Broward County School District, the implementation of these programs is fragmented in the current organizational structure. The curricular aspects of diversity and multicultural education should be centralized within the unit of Multicultural,

Foreign Language and ESOL in the Educational Programs and Services Division. Functions such as multicultural sensitivity training, the Diversity Committee function, and diversity publications should be centralized in one Multicultural Programs Department. The community outreach, and partnership functions should be coordinated with the Department of Community Relations.

RECOMMENDATION

Recommendation 5-12:

Merge the cultural diversity function under one unit and reassign the functions to the newly realigned Division of Educational Programs and Services in the Department of Special Programs.

Implementation of this recommendation should include the elimination of the Coordinator of Diversity and Cultural Outreach position (refer to Exhibit 5-10 for the proposed realignment of this function).

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should recommend the reorganization of the district's cultural diversity programs and the elimination of the Coordinator of Diversity and Cultural Outreach position. May 1999
2. The Board should approve the organizational changes and elimination of the position. Summer 1999
3. The Deputy Superintendent for Educational Programs, Student Support, and Human Resources Development, and the Associate Superintendent for Administration should ensure that the new functions are implemented in the new organizational structure. Beginning
Fall 1999
and Ongoing

FISCAL IMPACT

Eliminating the position of Coordinator of Cultural Diversity and Outreach will result in an annual savings of about \$69,300 based on a base salary of \$52,346 and a 33 percent benefits package. This salary is prorated for the 1999-2000 school year.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Eliminate the Coordinator of Diversity and Cultural Outreach	\$46,200	\$69,300	\$69,300	\$69,300	\$69,300

5.3.5 Title I - (Regular, Migrant, and Indian Education Programs)

CURRENT SITUATION

In October 1994, the federal Title I program's name was changed from the Education Consolidation Improvement Act (ECIA) Chapter 1 to Elementary and Secondary Education Act (ESEA) Title I. It is important to remember that both names refer to the program currently called Title I.

Title I is a program that provides ancillary support services for students who need extra assistance in reaching academic and social goals. The children that the program serves reside in school attendance areas with high concentrations of children from low income families. The federal government provides funds for the program and are in addition to the funding received by the district. All services students would receive in the absence of Title I funds must be in place before Title I funds are used. A school is selected to receive Title I services when the school's levels of economic deprivation (percentage of students on free/reduced meals) exceeds the county average.

The Title I program goals in the Broward County School District are to enable schools to provide opportunities for children to acquire knowledge by:

- ensuring high standards for all students;
- providing an enriched and accelerated education program through a schoolwide program;
- promoting schoolwide reform;
- upgrading the quality of instruction;
- affording parents opportunities to participate;
- distributing resources to areas where needs are the greatest;
- improving accountability; and
- providing greater decision making and flexibility to schools.

Broward's Title I program staff provides assistance and support to approximately 150 administrators, 300 teachers, and 400 paraprofessionals in 74 public schools, 13 nonpublic schools, and 22 institutions for the neglected and delinquent. Title I staff currently serves about 49,800 students. Additionally, the duties of the Title I staff include ensuring compliance with local, state, and federal laws, rules and regulations.

Title I staff provides services to Title I Schoolwide Project Schools by:

- assisting schools with budgetary matters, planning and implementation of activities, compliance, monitoring and parent involvement;

- attending Open Houses, Parent Teacher Association and Advisory meetings to share information about Title I, assisting in recruiting Parent Training Academy representatives and documenting each school's Annual Public Meeting;
- assisting Title I teachers and students in low performing schools;
- reviewing School Improvement Plans and assisting schools in areas identified by the school;
- planning and conducting an interactive Math Challenge Competition for teams of Title I students to compete in solving math problems via the Broward Educational Community Network (BECON);
- providing workshops for Title I school-based principals, bookkeepers, Title I contact persons, and community liaisons;
- providing training for principals, teachers and paraprofessionals of Title I private schools, and institutions for the neglected and delinquent;
- presenting workshops for Title I teachers and parents through Innovation Zones and Volunteers in Partnership;
- serving on School Improvement Teams;
- attending Innovation Zones meetings and participating in Zone activities;
- working collaboratively with the curriculum departments and attending meetings;
- attending New American Schools meetings and serving as district liaison for the following design models: Co-NECT, Modern Red Schoolhouse and Roots and Wings;
- conducting parent training through the Parent Training Academy which offers strategies for helping parents help their children with age appropriate reading, writing and mathematics activities that support student achievement;
- offering additional parent training through MegaSkills, Family Math, Parents Sharing Books, and Computer Literacy classes;
- providing opportunities for parents to check out materials from the Title I Center for Parent Involvement during the day and participate in GED classes in the evening;
- conducting parent workshops at two Homeless Family Centers;

- providing a Community Outreach Program through the use of the Title I Parent Centers on Wheels which are scheduled at schools, apartment complexes, and homeless family centers in each of the three geographic areas. These services give parents the opportunity to check out materials for helping their children at home; and
- planning and conducting a districtwide Title I Parent Seminar annually for approximately 400 parents and guests.

The Title I and Migrant grant funds awarded for the 1997-98 and 1998-99 are displayed in Exhibit 5-23.

**EXHIBIT 5-23
TITLE I, MIGRANT (PART C), MIGRANT (EARLY CHILDHOOD)
AND INDIAN GRANT FUNDING FOR 1997-99**

CATEGORY	1997-98	1998-99
TITLE I FUNDING	\$23,523,942.00	\$23,816.832.00
Migrant (Part C) Funding	\$452, 281.00	\$264.260.00
Migrant (Early Childhood	\$ 99,751.00	\$49,748.00
Indian Education	\$11,049.00	\$11,202.00

Source: Broward County School District, Title I Program Guide, 1998

A minimum of one percent of the Title I budget must be allocated to parent involvement activities. The projected expenditures for the 1998-99 Title I allocation are as follows:

<u>Budget Item</u>	<u>Percentage of Projected Budget</u>
Direct/Indirect Funds to Schools	85%
Salaries/Operations Costs	10%
Indirect Cost to General Funds	5%

Each eligible school has an individual Title I budget. The 1998-99 per pupil allocations are:

- \$410.00 per pupil - elementary schools with 75 percent or more free/reduced price lunch students.
- \$340.00 per pupil - elementary schools with 74-50 percent free/reduced price lunch students.
- \$320.00 per pupil - middle schools with 75 percent or more free/reduced priced lunch students.
- \$290.00 per pupil - middle schools with 74-50 percent free/reduced lunch students.

Exhibit 5-24 provides a list of Title I schools and institutions supported by Title I funds. The Alliance for Quality Schools programs are marked with an asterisk and the status of this special program will be discussed in the next section.

**EXHIBIT 5-24
TITLE I SCHOOLS AND INSTITUTIONS**

ELEMENTARY SCHOOLWIDE PROJECTS	
<ol style="list-style-type: none"> 1. Bennett* 2. Bethune 3. Broadview* 4. Broward Estates 5. Castle Hill* 6. Castle Hill Annex* 7. Colbert 8. Collins 9. Cresthaven 10. Croissant Park 11. Cypress* 12. Dania* 13. Davie 14. Deerfield Park* 15. Dilliard* 16. Drew, Charles* 17. Driftwood 18. Fairway 19. Forster, Stephen 20. Hallandale 21. Hollywood Central 22. Hollywood Park 23. King, Martin Luther* 24. Lake Forest 25. Larkdale* 26. Lauderdale Manors* 27. Lauderhill Paul Turner* 28. Lloyd Estates 29. Markham, Robert C.* 	<ol style="list-style-type: none"> 30. Marshall Thurgood* 31. Meadowbrook* 32. Mirama 33. North Fork * 34. North Lauderdale 35. North Side* 36. Oakland Park 37. Oakridge* 38. Orange Brook* 39. Oriole* 40. Palmview 41. Park Ridge* 42. Perry, Annable C* 43. Plantation* 44. Pompano Beach 45. Riverland* 46. Rock Island* 47. Royal Palm* 48. Sanders Park* 49. Sheridan Hills 50. Sunland Park* 51. Sunshine 52. Tedder* 53. Village 54. Walker* 55. Watkins 56. West Hollywood* 57. Westwood Heights* 58. Wilton Manors*
*Alliance of Quality Schools - 35	
MIDDLE SCHOOL SCHOOLWIDE PROJECTS Grades 6-8	
<ol style="list-style-type: none"> 1. Attucks 2. Crystal Lake Community* 3. Dandy, William 4. Deerfield Beach 5. Driftwood 6. Lauderdale Lakes* 7. Lauderhill* 8. McNicol 	<ol style="list-style-type: none"> 9. New River* 10. Olson 11. Parkway 12. Perry, Henry D.* 13. Pompano Beach 14. Richards* 15. Silver Lakes 16. Sunrise
*Alliance of Quality Schools - 6	

Source: Broward County School District, Title I Program Manual, 1998.

**EXHIBIT 5-24 (Continued)
TITLE I SCHOOLS AND INSTITUTIONS**

NONPUBLIC SCHOOLS Grades 1-8	
<ol style="list-style-type: none"> 1. Annunciation 2. Little Flower 3. Nativity 4. Our Lady Queen of Martyrs 5. Ambrose 6. St. Bartholomew 	<ol style="list-style-type: none"> 7. St. Clement 8. St. Coleman 9. St. Elizabeth 10. St. Helen 11. St. Jerome 12. St. Stephen 13. Phyl's Academy
INSTITUTIONS FOR NEGLECTED STUDENTS Grades 2-12	
<ol style="list-style-type: none"> 1. The Chord I 2. Twig House 3. Lake House 4. Kids in Distress 5. Brookwood East 6. The Starting Place 7. SOS Children's Village 8. Soloman Center for Girls 9. Broward Group Treatment Home - Boys 10. Broward Group Treatment Home - Girls 	<ol style="list-style-type: none"> 11. Berger House 12. Einsten House 13. Liroff House 14. SAIL Program 15. Dodge House
INSTITUTIONS FOR DELINQUENT STUDENTS Grades 6-12	
Broward County Sheriff's Center for Juveniles Broward Intensive Halfway House Pembroke Park Group Treatment Home Personal Enrichment Through Mental Health Services Pompano Academy Sankofa House Spectrum Programs, Inc.	

Source: Broward County School District, Title I Program Manual, 1998.

Exhibit 5-25 provides the 1998 Stanford Achievement Test Scores of Broward County School District's Title I schools. Exhibit 5-26 provides the 1998 Florida Writes scores of all Broward County Title I schools.

**EXHIBIT 5-25
TITLE I
STANFORD ACHIEVEMENT TEST+, EIGHTH EDITION*
ELEMENTARY SCHOOLS
1997-98**

DISTRICT	GRADE 2		GRADE 3		GRADE 4		GRADE 5	
	READ	MATH	READ	MATH	READ	MATH	READ	MATH
Bennett*	33	30	32	47	32	47	35	45
Bethune	32	32	40	59	36	49	38	47
Broadview*	41	40	24	42	30	46	32	44
Broward Estates	30	40	32	41	36	56	45	59
Castle Hill Annex*	26	20	27	57	40	61	26	41
Castle Hill*	37	40	26	31	35	43	31	48
Colbert	41	41	18	43	34	40	35	51
Collins*	30	51	17	46	31	46	27	63
Cresthaven	39	48	28	47	31	41	39	51
Croissant Park	39	52	41	65	36	61	35	54
Cypress*	32	37	18	34	28	37	31	58
Dania*	39	41	32	50	34	61	44	58
Davie	36	51	43	69	45	68	44	71
Deerfield Park*	31	38	15	37	29	45	22	38
Dillard*	21	14	19	27	22	31	23	34
Drew, Charles*	24	31	15	28	22	35	12	30
Driftwood	43	49	30	58	54	70	28	48
Fairway	36	45	28	45	46	74	34	44
Foster, Stephen	53	74	26	42	47	66	39	52
Hallandale	31	41	26	61	43	66	29	50
Hollywood Central	46	51	35	50	48	57	50	56
Hollywood Park	32	38	30	47	32	45	32	47
King, Martin Luther*	38	54	39	55	42	55	29	47
Lake Forest	39	56	40	67	34	62	35	56
Larkdale*	34	34	16	30	29	42	20	38
Laudedale Manors*	42	50	27	38	37	49	16	38
Lauderhill, P.T. *	47	49	30	44	42	56	28	58
Lloyd Estates	34	32	21	37	30	46	26	46
Markham*	38	22	22	28	11	36	16	30
Meadowbrook*	36	25	25	40	35	39	32	47
Miramar	32	30	30	52	40	56	31	53
North Fork*	25	14	14	27	19	29	20	36
North Lauderdale	35	33	33	40	36	44	30	37
North Side*	23	18	18	38	33	49	21	39
Oakland Park	36	26	26	42	38	57	33	49
Oakridge	28	29	29	50	39	61	34	50
Orange Brook	44	28	28	49	35	63	35	62
Oriole*	36	24	24	41	31	47	19	34
Palmview	27	22	22	33	23	53	22	50
Park Ridge*	28	27	27	56	35	59	27	51
Perry, A. C.*	34	44	25	46	38	54	27	62
Plantation	31	26	29	54	37	51	24	34
Pompano Beach	39	48	45	58	43	56	39	41
TOTAL	48	58	41	62	50	66	46	64

Source: Broward County School District, Department of School Improvement and Accountability, 1998.

*Alliance 1997-98.

+Norm-referenced test. Norm-referenced tests compare student performance to the performance of thousands of other students who have taken the same test. The results for norm-referenced tests describe student achievement relative to other students' results. For example, the national average score for the Stanford at the 50 percentile.

**EXHIBIT 5-25 (Continued)
TITLE I
STANFORD ACHIEVEMENT TEST, EIGHTH EDITION*
ELEMENTARY SCHOOLS
1997-98**

DISTRICT	GRADE 2		GRADE 3		GRADE 4		GRADE 5	
	READ	MATH	READ	MATH	READ	MATH	READ	MATH
Riverland*	29	38	23	38	27	50	28	41
Rock Island*	26	30	22	39	27	43	20	30
Royal Palm *	33	27	19	32	28	44	21	40
Sanders Park*	35	50	15	46	30	48	31	45
Sheridan Hills	38	58	31	52	48	70	46	65
Sunland Park*	21	14	17	14	20	27	20	37
Sunshine	44	45	36	45	45	52	42	57
Teddar*	36	44	20	38	33	51	20	47
Thurgood Marshall*	23	19	16	27	26	36	18	23
Village	38	44	35	55	35	55	31	47
Walker*	34	47	28	42	26	52	29	52
Watkins	33	39	20	38	36	53	36	54
West Hollywood*	40	28	29	54	41	55	35	60
Westwood Heights*	26	21	25	33	25	41	20	31
Wilton Manors*	42	48	34	49	38	49	30	43
AVERAGE	48	58	41	62	50	66	46	64

**MIDDLE SCHOOLS
1997-98**

DISTRICT	GRADE 6		GRADE 7		GRADE 8	
	READ	MATH	READ	MATH	READ	MATH
Attucks	43	49	45	47	41	41
Crystal Lakes	40	45	31	42	34	42
Dandy, William C.	21	34	30	39	31	34
Deerfield Beach	29	43	41	50	35	38
Lauderdale Lakes	24	29	24	35	27	33
Lauderhill*	20	27	25	29	26	23
McNicol	26	42	36	45	36	36
New River	37	42	30	36	25	29
Olsen	43	52	44	47	36	42
Parkway	35	61	41	47	16	36
Perry, Henry D.*	30	37	30	39	32	36
Pompano Beach	34	49	35	53	35	53
Richards*	43	52	42	67	47	58
Silver Lakes	36	48	49	58	51	54
Sunrise	29	36	38	39	34	33
AVERAGE	47	59	50	58	49	56

Source: Broward County School District, Department of School Improvement and Accountability, 1998.

*Alliance 1997-98.

**EXHIBIT 5-26
TITLE I
ELEMENTARY SCHOOLS
FLORIDA WRITING ASSESSMENT+**

	1996	1997	1998	1996	1997	1998	1996	1997	1998
	EXPOSITORY AVERAGE			NARRATIVE AVERAGE			TOTAL		
STATE	2.2	2.5	3.0	2.8	2.8	3.1	2.5	2.6	3.0
DISTRICT	2.3	2.5	3.1	2.8	2.7	3.1	2.5	2.6	3.1
Bennett*	1.8	2.5	2.7	2.4	2.7	2.8	2.1	2.6	2.7
Bethune, Mary M	2.1	2.2	2.6	2.5	2.4	2.7	2.3	2.3	2.6
Broadview*	1.8	2.2	2.8	2.4	2.2	2.6	2.1	2.2	2.7
Broward Estates	1.8	2.6	3.2	2.1	2.3	3.1	2.0	2.5	3.2
Castle Hill Annex***	2.1	2.0	3.1	2.5	2.3	3.2	2.3	2.2	3.1
Castle Hill***	N/S	2.3	2.9	N/S	2.2	3.2	N/S	2.2	3.1
Colbert	2.4	2.5	2.9	2.6	2.6	2.8	2.5	2.5	2.8
Collins***	1.9	2.1	2.8	2.3	2.2	2.7	2.1	2.1	2.7
Cresthaven	2.0	1.8	2.5	2.5	2.1	2.5	2.2	1.9	2.5
Croissant Park	2.2	2.0	2.7	2.9	2.5	2.8	2.5	2.3	2.7
Cypress**	2.0	2.3	2.8	2.4	2.2	2.8	2.2	2.2	2.8
Dania***	2.6	2.5	3.5	2.6	2.6	3.1	2.6	2.6	3.3
Davie	2.3	2.2	2.9	3.0	2.4	3.2	2.7	2.3	3.0
Deerfield Park*	1.5	2.2	2.8	1.9	2.0	2.8	1.7	2.1	2.8
Dillard***	2.1	2.3	2.7	2.6	2.0	2.5	2.4	2.1	2.6
Drew***	2.1	1.9	2.8	2.2	2.2	2.2	2.2	2.0	2.5
Driftwood	2.4	2.3	3.2	2.9	2.8	3.3	2.7	2.5	3.2
Fairway	2.5	2.7	2.8	2.9	2.7	3.1	2.7	2.7	3.0
Foster, Stephen	2.4	2.2	2.9	3.0	2.3	2.8	2.7	2.3	2.9
Hallandale	2.3	2.7	3.3	2.6	3.0	2.9	2.5	2.8	3.1
Hollywood Central	2.1	2.0	3.2	2.4	2.5	3.4	2.3	2.2	3.3
Hollywood Park	2.0	2.6	3.0	2.2	2.7	2.7	2.1	2.6	2.8
King, Martin Luther****	2.7	2.6	2.6	2.7	2.4	2.6	2.7	2.5	2.6
Lake Forest	1.7	2.5	3.0	2.3	2.7	2.8	2.0	2.6	2.9
Larkdale****	1.9	2.1	3.2	2.2	2.4	3.0	2.1	2.2	3.1
Lauderdale Manors***	2.0	2.4	3.2	2.4	2.1	2.9	2.2	2.2	3.0
Lauderhill, P.T. ***	2.3	2.7	3.2	2.5	2.7	2.8	2.4	2.7	3.0
Lloyd Estates	2.1	2.3	3.2	2.5	2.5	3.0	2.3	2.4	3.1
Markham, Robert C***	1.5	2.3	2.7	1.6	2.2	2.7	1.6	2.2	2.5
Marshall, Thurgood***	2.2	2.3	3.1	2.1	2.3	3.1	2.1	2.3	3.1
Meadowbrook*	2.0	2.2	2.5	2.6	2.0	2.8	2.4	2.1	2.7
Miramar	2.0	2.3	3.0	2.7	2.3	2.8	2.4	2.3	2.9
North Fork*****	1.7	2.1	2.5	1.9	2.0	2.8	1.8	2.1	2.7
North Lauderdale	1.7	2.3	2.3	2.3	2.2	2.5	2.0	.2	2.4
North Side****	1.9	2.6	2.9	1.9	2.9	3.2	1.9	2.8	3.1
Oakland Park	2.3	2.0	2.8	2.8	2.3	3.0	2.5	2.2	2.9
Oakridge	2.2	2.4	2.9	2.9	2.8	2.9	2.5	2.6	2.9
Orange Brook	1.9	2.1	2.8	2.2	.5	3.0	2.1	2.3	2.9

Source: Broward County Schools, Department of School Improvement and Accountability, 1998.

*Alliance School 1998

**Alliance School 1997, 1998.

***Alliance School 1996, 1997, 1998

****Alliance School, 1995, 1996, 1997, 1998

+Criterion-referenced (content-referenced test). Criterion-referenced test compare student performance to a standard that has been established for a particular set of questions. For example, in the Florida Writes, the acceptable standard is three out of a possible zero to six. While most classroom tests are criterion-referenced tests, most standardized test are norm-referenced.

**EXHIBIT 5-26 (Continued)
TITLE I
ELEMENTARY SCHOOLS
FLORIDA WRITING ASSESSMENT**

	1996	1997	1998	1996	1997	1998	1996	1997	1998
	EXPOSITORY AVERAGE			NARRATIVE AVERAGE			TOTAL		
STATE	2.2	2.5	3.0	2.8	2.8	3.1	2.5	2.6	3.0
DISTRICT	2.3	2.5	3.1	2.8	2.7	3.1	2.5	2.6	3.1
Oriole****	2.1	2.3	2.8	.6	2.4	2.8	2.4	2.4	2.8
Palmview	1.9	2.1	3.0	2.6	2.2	2.7	2.3	2.1	2.8
Park Ridge*****	2.1	2.2	3.0	2.6	2.3	3.1	2.3	2.2	3.0
Perry, A. C.*	2.0	2.6	3.0	2.3	2.4	3.0	2.2	2.5	3.0
Plantation	2.4	1.7	2.8	2.4	2.0	2.8	2.4	1.8	2.8
Pompano Beach	2.1	2.1	2.6	2.3	2.6	2.5	2.2	2.3	2.5
Riverland****	2.2	2.8	3.2	2.4	2.6	3.1	2.3	2.7	3.1
Rock Island****	2.0	2.2	3.3	2.5	2.2	3.0	2.3	2.2	3.1
Royal Palm ****	2.2	2.2	3.0	2.5	2.2	2.7	2.3	2.2	2.8
Sanders Park***	2.3	1.9	2.8	2.6	2.2	3.0	2.4	2.0	2.9
Sheridan Hills	2.4	1.8	3.0	2.7	1.7	3.0	2.5	1.7	3.0
Sunland Park***	1.8	2.3	2.7	2.2	1.9	2.5	2.0	2.1	2.6
Sunshine	2.1	2.2	3.0	2.4	2.5	3.1	2.3	2.4	3.0
Teddar**	1.8	2.2	2.6	2.4	2.1	2.6	2.1	2.2	2.6
Village	1.9	2.2	3.2	2.5	2.6	3.3	2.2	2.4	3.3
Walker**	1.5	2.9	3.0	2.1	2.6	2.9	1.8	2.8	2.9
Watkins	1.9	2.2	3.3	2.3	2.0	3.4	2.1	2.1	3.4
West Hollywood***	2.2	2.8	3.1	2.5	2.7	3.1	2.4	2.7	3.1
Westwood Heights****	1.8	1.9	2.8	2.3	2.2	2.9	2.0	2.1	2.8
Wilton Manors***	2.2	2.5	2.9	2.6	2.0	2.7	2.4	2.30	2.8

MIDDLE SCHOOLS

	1996	1997	1998	1996	1997	1998	1996	1997	1998
	EXPOSITORY AVERAGE			NARRATIVE AVERAGE			TOTAL		
STATE	2.2	2.5	3.0	2.8	2.8	3.1	2.5	2.6	3.0
DISTRICT	2.3	2.5	3.1	2.8	2.7	3.1	2.5	2.6	3.1
Attucks	3.6	3.5	3.5	3.6	3.3	3.2	3.6	3.4	3.4
Crystal Lakes	3.4	3.1	3.1	3.1	3.0	3.0	3.3	3.1	3.1
Dandy, William C.	3.4	3.2	2.9	3.3	3.0	2.8	3.4	3.1	2.8
Lauderdale Lakes*	3.0	2.8	2.7	2.7	2.8	2.7	2.8	2.8	2.7
Lauderhill*	3.3	3.3	2.8	2.8	3.1	2.7	3.2	3.2	2.8
McNicol	3.1	3.0	3.0	3.3	3.1	2.9	2.9	3.0	3.0
New River	3.4	2.9	2.9	3.2	2.9	2.9	3.4	2.9	2.9
Olsen	3.4	3.4	3.2	2.8	3.1	3.0	3.3	3.2	3.1
Parkway	3.0	3.1	3.1	3.1	3.1	3.1	2.9	3.1	3.1
Perry, Henry D.*	3.2	2.9	3.0	3.1	3.0	2.8	3.2	3.0	2.9
Pompano Beach	2.1	3.2	3.3	3.3	3.2	3.1	3.2	3.2	3.2
Richards*	3.0	3.5	3.4	3.1	3.3	3.0	3.5	3.4	3.2
Sunrise	2.9	3.2	3.1		3.2	3.0	3.3	3.2	3.0

Source: Broward County Schools, Department of School Improvement and Accountability, 1998.

*Alliance School 1998

**Alliance School 1997, 1998.

***Alliance School 1996, 1997, 1998

****Alliance School, 1995, 1996, 1997, 1998

The Title I Migrant staff provides the following services:

- identifying and recruiting migrant families on an ongoing basis;
- providing college assistance (scholarships and financial assistance) for eligible migrant students;
- providing social service assistance for migrant families. Parents receive clothing for their children through community agencies, churches, and other organizations;
- providing assistance to migrant parents in enrolling their children in school (completing registration forms and other school-related paperwork);
- assisting Spanish speaking parents in making appointments at the Health Department and Sunshine Clinic. Interpreters enable parents to obtain their children's physical exams and help in completing the forms for school enrollment;
- monitoring migrant students' attendance and contacting parents to verify reasons for absence. Assisting with returning students to school, when necessary; and
- providing social services assistance through referral of migrant families to the Piper High School student Activities Committee and Markham Elementary School.

The district receives migrant Title I funds based on the number of migrant families the "identifier recruiters" identify. Currently, the district has 800 migrant families. At Markham Elementary School, there are 45 three-year-old migrant children receiving migrant services. This includes making the necessary referrals for students to receive needed health, social, and nutritional services.

The Indian Education Programs funding by Title I provide tutoring for Indian students at various sites several days a week. Additionally, Indian students in grades K-12 participate in an after-school homework assistance/tutorial program in 10 of the district's schools.

FINDING

Survey results indicate that 15 percent of the district's principals surveyed believe that the district's federal program coordinator needs major improvement. Interviews with administrative personnel supported by data at the school level, indicate that while there are numerous support positions assigned to the Title I programs, there exists a need for more direct assistance to the schools for the Title I program. During on-site visits, MGT carefully assessed the deployment of personnel and other resources to schools.

The Deputy Superintendent for School Operations, in addition to responsibilities for four area superintendents and their respective school zones, has the responsibility for Dropout Prevention, Area Exceptional Student Education, Area Student Services School Assignment, and Diversity and Cultural Outreach along with Title I, Migrant, and Special Programs. The Deputy Superintendent for Educational Programs, Student Support and Human Resource Development has the responsibility for a number of related district-level services to schools functions including multicultural, foreign language education, and ESOL Program services. The coordination among the programs between the two divisions is fragmented due to the number of administrative tiers between the Deputy and the specific function. Once again, as stated in previous recommendations, this situation could be dealt with through recommendations associated with reorganizing functions and their alignment.

The district's organizational chart depicts administrative positions dedicated to Title I; however, numerous other positions (not shown on the organizational chart) are currently assisting the Department of Diversity and Cultural Outreach, Title I, Migrant and Special Programs. These include the following positions and their classifications as it relates to Title I:

- two Teachers on Special Assignment-Migrant Education
- eight Teachers on Special Assignment- Title I
- 10 Clerical (8 for Title I, 1 for Migrant, and 1 for Special Programs)
- two custodians
- four Community Liaisons
- three Paraprofessionals
- four Identity Recruiters
- one Records Clerk
- two full-time Bus Operators (Parent Centers on Wheels)
- five Program Specialists

The district serves as fiscal agents for the Region V Title I staff. Additionally, the district provides support for three state database managers who assist all eight districts in the region.

Ideally, the allocation and monitoring of federal funds should be the responsibility of central office personnel. Schools, in turn, should be held accountable for implementing programs and services with the additional resources. Area administrators should ensure that programs and services purchased with federal funds are results-driven and clearly meet the needs of the designated special population of students. Area office administrators should play a technical assistance role that improves school effectiveness, in general, regardless of the funding source.

RECOMMENDATION

Recommendation 5-13:

Transfer oversight responsibility for Title I, Migrant, Indian Education, and other special programs to the Division of Educational Programs and Services under the Director of Special Programs.

Exhibit 5-10 provides the organizational structure for the proposed realignment of this department.

Under one unit, the Associate Superintendent of Educational Programs should be able to ensure a comprehensive approach to educational service delivery of the Title I, Migrant, Indian Education, and Special Programs.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-----------|
| 1. The Superintendent should recommend the reorganization. | May 1999 |
| 2. The Board should approve the organizational changes. | June 1999 |
| 3. The Associate Superintendent should ensure that the federal programs are integrated and monitored with district standards and priorities. | Ongoing |

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

RECOMMENDATION

Recommendation 5-14:

Evaluate Title I, Migrant, and Special Programs' deployment of personnel to schools with a goal of providing more direct support to schools.

This assessment should include an analysis of the percent of time dedicated to the direct delivery of services to clients. Data examined and interviews conducted by MGT consultants reveal that the level, quantity, and quality of services rendered to clients by Title I, Migrant, and Special Programs has not included the percent of time committed to direct services. Furthermore, school-level personnel consistently voice concerns related to quantity of services.

A comprehensive evaluation may result in the reassignment of teachers on special assignment and program specialist positions from the district level to schools and other cost centers serving clients. This may eliminate persistent problems associated with the availability of personnel at school sites.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|----------|
| 1. The Associate Superintendent for Educational Programs and the Director of Title I should develop a plan for the reassignment of a minimum 9 teachers on special assignment and five program specialists to appropriate school and cost centers that provides services to schools. | May 1999 |
|--|----------|

2. The Deputy Superintendent for Educational Programs, Student Support Services, and Human Resource Development should review and approve the plan. July 1999
3. The Associate Superintendent for Educational Programs and the Director of Title I should implement the provisions of the plan. October 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources. When implemented, Title I services will be more appropriately directed to the schools.

5.3.6 Alliance of Quality Schools

CURRENT SITUATION

The Alliance of Quality Schools (AQS) is a comprehensive program that provides learner-verified, research-based components to 72 schoolwide Title I schools (See Exhibit 5-24 for a list of schools served) in the areas of reading, writing, mathematics, social behaviors, and parent involvement. Assessment data are used extensively in planning and implementing this program (refer to Exhibits 5-25 and 5-26 to review the achievement levels of the AQS schools on the SAT and Florida Writes Tests). Direct instruction, individualized instruction, computer-assisted instruction, and a strong emphasis on teacher training are the key elements of the program. Alliance schools use instructional approaches to teaching and learning that have proved to be successful.

Exhibit 5-27 explains the specific features of the AQS Program.

Fifteen (15) districts have visited the Broward County School District to review the AQS Program in order to replicate the program in their respective districts. Other states/districts that have visited the district and are currently using the AQS Program include:

- St. John's County, Florida
- Miami-Dade County, Florida
- Baltimore, Maryland
- Philadelphia, Pennsylvania
- Seattle, Washington
- Kentucky

FINDING

As seen in Exhibits 5-25 and 5-26, test scores indicate an increase in student achievement (in the Florida Writes and the mathematics portion of the SAT) in the AQS program primarily at the elementary school level. Currently, the Alliance Program is being implemented in six middle schools (Lauderhill, Perry, and Rickards, New River, Crystal Lake, and Lauderdale Lakes).

**EXHIBIT 5-27
KEY COMPONENTS OF THE ALLIANCE FOR QUALITY SCHOOLS PROGRAM**

- School must vote and have an 80% agreement to apply for a partnership with the AQs. Currently, there are partnerships with 34 elementary schools and 6 middle schools.
- All staff members are provided two days of inservice on the Reading Mastery or the Corrective Reading Program along with inservice on the Write Track Writing Program.
- The integration of Reading Mastery and Distar Language in kindergarten to develop oral language, comprehension, and instructionally appropriate reading instruction.
- Reading Mastery I and II are systematically integrated into grades 1 and 2 to offer explicit phonics reading instruction for students whose learning assessment details such a program is needed.
- The assessment of students in reading in grades 2-5. Students are diagnosed with an informal reading inventory and reading program placement tests. Based upon these results, academically deficient students are remediated using Reading Mastery or Corrective Reading, Students on level or provided reading instruction through a balanced reading program.
- The teacher ("coach") is provided 2.5 days per week for each Alliance school to provide on-site modeling, feedback, and inservice.
- Regrouping of student according to increases in reading achievement occurs quarterly.
- All classrooms are provided with supported reading materials to provide a balanced-reading program and to assist with generalization of reading skills.
- The teaching of the writing process occurs daily in grades K-5.
- Daily openers in mathematics and content area challenges are provided to engage students in instructional activities that call for the application of information.
- A family component is provided to 18 of the elementary schools with the highest degree of free and reduced lunch to provide an increase in parent involvement and home-school connection.

Source: Broward County Schools, Alliance of Quality Schools Program Manual, 1998.

COMMENDATION

The Broward County School District and Coordinator of the Alliance of Quality Schools are commended for implementing a program that increases student achievement as indicated by recent test scores (Florida Writes and the mathematics portion of the SAT) and used as an exemplary model for other school districts.

FINDING

The Alliance of Quality Schools, as previously described, is an educational program assisting low achieving schools. Currently, the program is located in the Division of School Operations and the coordinator of the Alliance of Quality Schools reports directly to the Director of Diversity and Cultural Outreach, Title I, Migrant, and Special Programs. The program should be more appropriately aligned with other instructional

programs. The Director's oversight of such a wide array of programs has caused fragmentation in the delivery of services to students. Additionally, programs (such as the Alliance) should be placed under the Director of School Improvement and Innovation in a department overseeing other innovative programs (see Exhibit 5-10 for the proposed realignment).

RECOMMENDATION

Recommendation 5-15:

Reassign the Alliance for Quality Schools Program to the newly proposed Division of Educational Programs and Services under the Director of School Improvement and Innovation (see Exhibit 5-10 for the proposed realignment of this program).

The Alliance of Quality School is a program that identifies and validates effective, exemplary, and/or innovative educational programs. The program should fall under the leadership of the proposed Deputy Superintendent for Educational Programs and services. This new alignment should ensure that the educational program areas develop an active role in dissemination of proven practices and programs.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-----------|
| 1. The Superintendent should include this organization change in the proposal recommended for School Board action. | May 1999 |
| 2. The School Board should approve the Superintendent's recommendation. | June 1999 |
| 3. The Superintendent and Executive Staff should implement the approved reorganization plan. | July 1999 |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

Test scores for students (attending schools that were formerly "low performing" schools) who are participating in the Alliance of Quality Schools indicate significant improvement in their Florida Writes score and the mathematics portion of the SAT scores. Currently, the program is only being implemented in six of the district's middle schools. The district should consider duplicating the program for other lower performing middle schools.

RECOMMENDATION

Recommendation 5-16:

Develop and implement a strategy for expanding the Alliance of Quality Schools Program at the middle school level.

The Broward County School District no longer has any schools on the state's "Critically Low Performing" list. According to internal district evaluations, progress toward this accomplishment has been due in a large part to the implementation of the Alliance of Quality Schools Program. Since the Alliance of Quality Schools Program had such a positive impact on increased student achievement for 1997-98 (i.e., second grade students had the highest increase in IRI reading level, followed by fifth grade students who achieved a gain of 1.15 in reading levels), the district should expand this program to reach a larger number of middle school students.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Services, and Human Resource Development should prepare a plan for expanding the Alliance of Quality Schools Program to other middle schools and submit the plan to the Superintendent and Executive staff for review and approval. January 2000

2. Following approval by the Superintendent and Executive Staff, the Coordinator of the Alliance for Quality Schools should implement the plan within existing budget allocations. July 2000

3. The Director of Research and Evaluation should evaluate each school's participation in the Alliance. Annually
Commencing
June 2001

FISCAL IMPACT

This recommendation can be implemented using existing program resources.

5.3.7 Magnet Programs

CURRENT SITUATION

The Broward County School District currently offers 47 magnet programs offered in 37 schools (14 elementary, 12 middle, and 11 high schools). The goals of the district's magnet schools include:

- expanding the educational choices for students;
- promoting diversity; and
- setting high expectations for all students to improve student achievement.

Magnet schools are open to qualified students on a districtwide basis. At the secondary level, academic/talent entrance criteria have been established for admission to each magnet program in the district. The magnet programs consist of three types of programs or schools (magnet program, controlled choice magnet, and theme schools).

FINDING

In an effort to more efficiently offer classes taught in foreign languages, the International Affairs and Business High School Magnet Programs, in collaboration with the Instructional Television Department, are creating an implementation plan to begin a Latin and Japanese distance learning class. This reduces the cost of hiring additional teachers to instruct these classes.

COMMENDATION

The Magnet Schools Program is commended for planning the implementation of instruction via distance learning that extends beyond the traditional methods of instruction and offers unique courses in a cost-efficient manner.

5.3.8 Multicultural, Foreign Language Education and English for Speakers of other Languages (ESOL)

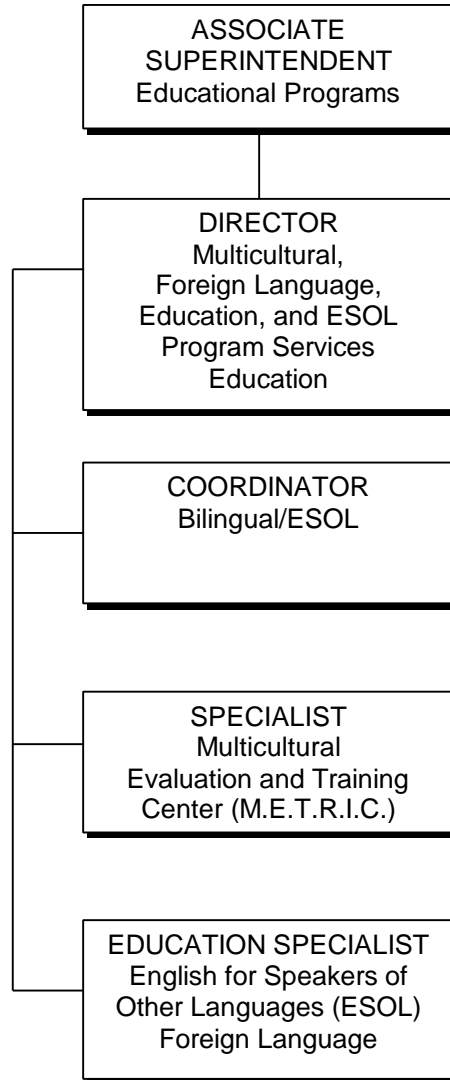
CURRENT SITUATION

This Department is composed of programs which assist students in communicating, orally and in writing, in English and in another language with proficiency proportionate to their level, age, and interest. The goals of the program are:

- **Goal I:** All students who are of limited English proficiency participate in the English/Language Arts through the ESOL program which is designed to enable students to communicate and function successfully in their English speaking environment.
- **Goal II:** All students have the opportunity and are strongly urged to participate in programs designed to enable students to communicate and function successfully in an environment where foreign languages are used.
- **Goal III:** All students have the opportunity and are strongly urged to participate in programs using a language other than English as the medium of instruction to the that such participation is consistent with the learning needs of the students and the interests of the students and parents.
- **Goal IV:** All students are provided opportunities which promote the recognition, understanding, and acceptance of individual uniqueness, interdependence, and cultural diversity within a pluralistic society.

Exhibit 5-28 displays the organization of the Office of Multicultural, Foreign Language, Education, and English for Speakers of other Languages (ESOL). In addition to the positions shown on the organizational chart, the office has a bilingual guidance counselor, a psychologist, six teachers on special assignment, and three support staff funded by the district. Additionally, there are eight teachers on special assignment and one support staff that are funded by grants.

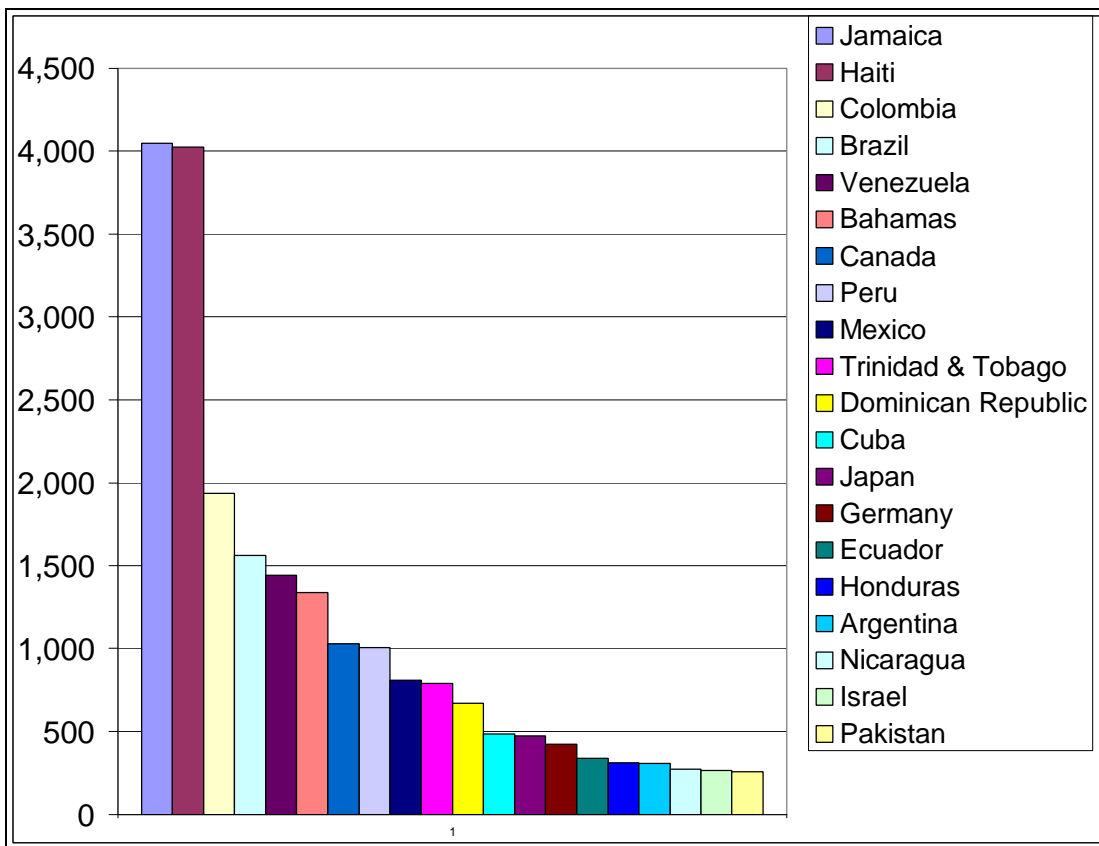
**EXHIBIT 5-28
CURRENT ORGANIZATION OF THE OFFICE OF
MULTICULTURAL, FOREIGN LANGUAGE EDUCATION, AND ENGLISH
FOR SPEAKERS OF OTHER LANGUAGES
1998-99**



Source: Broward County School District, Division of Education Programs, Student Support, and Human Resource Development, 1998.

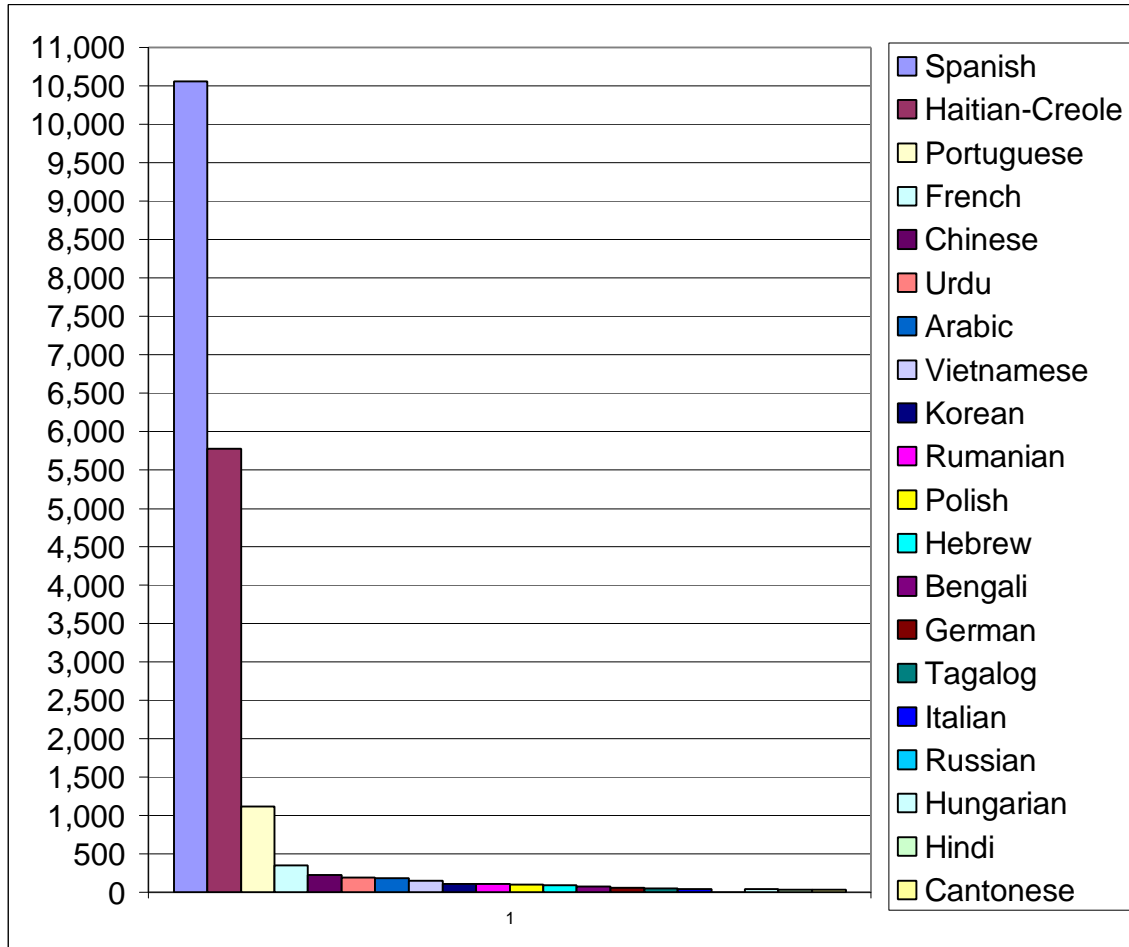
Diversity is a broad concept that includes such factors as linguistic differences, gender, race, ethnicity, variations of talents, abilities, and special needs. Exhibit 5-29 displays the diversity of the student population being served in Broward County by showing the number of students who are foreign born and the top 20 countries of their origin. Additionally, Exhibit 5-30 displays the top 20 spoken languages of students enrolled in pre-kindergarten through 12th grade.

**EXHIBIT 5-29
MULTICULTURAL/FOREIGN LANGUAGE/ESOL EDUCATION
FOREIGN BORN GRADES PK-12/TOP TWENTY COUNTRIES/OCTOBER 1998**



Source: Broward County School District, Multicultural, Foreign Language Education and ESOL Program Guide, 1998.

**EXHIBIT 5-30
 MULTICULTURAL/FOREIGN LANGUAGE/ESOL EDUCATION
 LIMITED ENGLISH PROFICIENT STUDENT ENROLLMENT
 TOP TWENTY LANGUAGES GRADES PK-12/OCTOBER 1998**



Source: Broward County School District, Multicultural, Foreign Language Education and ESOL Program Guide, 1998.

Exhibit 5-31 displays the district’s guidelines for determining the directions of the Multicultural, Foreign Language Education, and English for Speakers of other Languages (ESOL) programs. Programs of Multicultural/Foreign Language/ESOL Education fall into two categories: 1) Programs for English –speaking students, and 2) Programs for students classified as limited English proficient (LEP).

**EXHIBIT 5-31
GUIDELINES FOR PROGRAMS OF THE MULTICULTURAL/FOREIGN
LANGUAGE/ESOL EDUCATION DEPARTMENT**

1. Special instruction in English/Language Arts through ESOL services is the emphasis at both the elementary and secondary levels. Such emphasis reflects the School Board position that developing competency in English is one of the highest priorities for students of limited English proficiency.
2. The programs implemented for limited English proficient (LEP) students meet requirements of Florida Statutes, State Board of Education rules, and the League of United Latin American Citizens (LULAC) et al. Vs. Florida State Board of Education (SBE) Consent Decree. These include the use in elementary and secondary schools of the students' home language as a medium of instruction as may be necessary to help ensure maintenance of academic achievement while the student is learning English.
3. A concerted effort is made to reduce fragmentation of the curriculum for elementary and secondary students of limited English proficiency, particularly in those schools which have high concentrations of such students at the same grade level.
4. The use of ESOL instructional strategies is required to all grade levels with LEP students when providing instruction in social studies, science, mathematics, and computer literacy.
5. Programs in Spanish as a Foreign Language are offered in various elementary schools. Three elementary schools and a middle school provide bilingual programs in which Spanish as a Second Language and Spanish for Spanish Speakers are taught. In addition, three elementary Magnet schools provide daily instruction of Spanish, French, and Japanese. Haitian-Creole for Haitian-Creole Speakers is provided at the elementary level at one of the above-mentioned magnet schools.
6. In secondary schools, foreign language offerings consist of programs in a wide range of languages, such as French, German, Haitian-Creole, Hebrew, Italian, Latin, Chinese, Russian, Japanese, Spanish and American Sign Language. In the case of Spanish, two distinct types of programs are offered: (1) Spanish as a Foreign Language (Spanish FL) for English-speaking students, and (2) Spanish for Spanish Speakers (Spanish S) for students who are native speakers of the language or other students who proficiency in Spanish allows them to profit from the program. All modern language courses emphasize functional communication skills with contexts appropriate to the culture.
7. The Multicultural Infusion Program aims at helping all students in the development of knowledge, skills, and attitudes that they will need to survive and function effectively in a culturally-diverse society.

Source: Broward County School District, Multicultural, Foreign Language Education and ESOL Program Guide, 1998.

The Broward County School District offers the following programs to meet the linguistic, educational, and cultural needs of both the other-than-English language origin and the English language origin students:

- English for Speakers of Other Languages
- Spanish for Spanish Speakers and Haitian-Creole for Haitian Creole Speakers
- Elementary Foreign Language Program
- Secondary Language Program
- Bilingual Educational Program
- Multicultural Infusion Program

FINDING

The district has organized a community-based Desegregation/Diversity Task Force representing all segments of the population. Recently the Task Force and district, in partnership with Time Life Corporation, held its First Annual African and African American History Conference.

More than 1,000 Broward teachers, administrators, and community members participated in the African and African American Conference on September 18, 1998. This conference confirmed the district's commitment to address diversity issues by integrating African and African American history into instruction. The Multicultural/Foreign Language/ESOL Education Department has developed the manual *African Americans: A Journey through Time*. The manual is being used by schools to provide sample lessons for the infusion of African and African American history into several subject areas.

The Broward County School District's Multicultural/Foreign Language/ESOL Education Department developed a high school orientation handbook in English, Spanish, Haitian-Creole, Portuguese and French for LEP parents and students and currently provides multilingual presentations to provide multicultural parents and students information related to the school system, high school program and course offerings.

COMMENDATION

The Broward County School District's Multicultural/Foreign Language/ESOL Education Department is commended for addressing the issues of the increasingly diverse student population and implementing programs and materials that integrate multicultural instruction into the district's curriculum and instruction.

FINDING

The proliferation of ESOL programs throughout all schools and centers serving students in the district has created a need for school-based employees who serve as curriculum-contact designees. Presently, this need is filled by employees on a voluntary basis. While each of these volunteers is to be commended for their professional commitment to student needs, there remains a need to stabilize the curriculum contact designee in each of the schools.

While the Department of Multicultural/Foreign Language/ESOL Education is appropriately placed within the Division of Educational Programs Student Support Services, and Human Resource Development, the department would be more appropriately placed reporting to the Director of Special Programs as opposed to its current position of reporting to the Associate Superintendent of Educational Programs. As was displayed previously in Exhibit 5-22, there exists some duplication of services in the department of Multicultural, Foreign Language Education and ESOL and the Department of Diversity and Cultural Outreach, Title I Migrant, and Special Programs. The realignment of this Department under the newly proposed Director of Special Programs would assist in strengthening the program's service by placing all special programs under the leadership of one Director.

RECOMMENDATION

Recommendation 5-17:

Reassign the Department of Multicultural, Foreign Language Education, and ESOL to report directly to the Director of Special Programs within the newly created Division of Educational Programs and Services.

(See Exhibit 5-10 for the proposed realignment of this program.)

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-----------|
| 1. The Superintendent should include this organization change in the proposal to be recommended for Board action. | May 1999 |
| 2. The Board should approve the Superintendent's recommendation. | June 1999 |
| 3. The Superintendent and Executive Staff should implement the approved reorganization plan. | July 1999 |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

5.3.9 School-to-Work and Tech Prep Programs

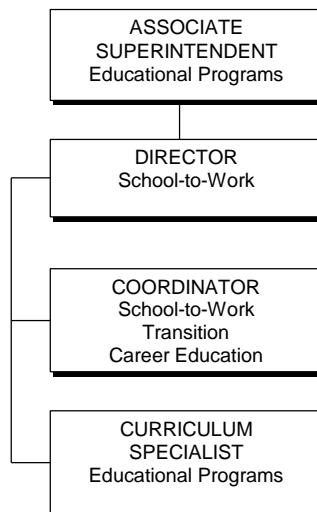
CURRENT SITUATION

The major focus of the Broward County's School-to-Work Program is to provide a system that ensures a quality program that prepares students to be successful in high skill/high wage jobs. The principles of this program include: integrating academic and vocational technical education to facilitate a real world understanding of the marketplace, utilizing innovative instructional methodologies to embrace all learning styles of students, and integrating career goals with school curriculum. Six focus committees are charged with overseeing the program implementation strategies and ensuring that program goals and objectives are in alignment.

FINDING

The School-to-Work Program was recently moved from reporting to the Director of Vocational, Adult, and Community Education to the Associate Superintendent for Educational Programs, Student Support, and Human Resource Development. Exhibit 5-32 displays the organization of the School-to-Work Department. As seen, the Director of School-to-Work has limited oversight and responsibility, supervising only two positions. A review of the program and the job description of the Director indicates that a director's position is unwarranted. The program is not well integrated with career development and other vocational programs.

**EXHIBIT 5-32
CURRENT ORGANIZATION
OF THE SCHOOL-TO-WORK DEPARTMENT
1998-99**



Source: Broward County School District, Division of Educational Programs, Student Support, and Human Resource Development, 1998.

Dollars are allocated to schools and Innovation Zones based on submission of a comprehensive implementation plan for their sites. In year one, school/innovation zones receive the greatest number of dollars. These funds are used for:

- professional development and training
- development of a comprehensive marketing plan
- development of guidance program and related training
- curriculum integration writing teams
- development of work-based training components for partners
- continuance and expansion of the Tech Prep program
- training and integration of technology
- development of elementary School-to-Work tool kits for all school sites
- distance learning instruction in all aspects of work-based learning
- development and implementation curriculum

The Tech Prep Program is a coordinated program beginning in high school and leading to a certificate, associate degree, or a bachelor's degree. The Tech Prep Program was developed to respond to business and industry's need for employees with greater competence in math, science, and communications. The School Board of Broward County and Broward County Community College have been in a Tech Prep partnership since 1991. Currently, there are 33 articulation agreements and eight Tech Prep Program areas.

The Tech Prep student enrollment has increased since 1994 from 3,062 students to 9,045 student in 1998. The number of Tech Prep graduates for 1998 totaled 1,090 students.

The School-to-Work and Tech Prep programs have provided numerous on-site work experiences for students including work-based experience at the Agribusiness Science Cooperative Learning Center, Home Depot, Broward Employment and Training Administration, Miller's Construction (architectural firm), and the Chamber of Commerce. The students spend a varying amount of time on-site at these businesses being mentored and instructed in various skills.

Note: As stated previously in Recommendation 5-9, the current organizational structure of the vocational, School-to-Work, adult, and alternative education programs is fragmented and does not provide for a functional alignment. The current organizational structure does not integrate an important function of the district's vocational and adult programs. Refer to Recommendation 5-9 for additional information related to vocational and School-to-Work recommendations.

The Director has oversight of two positions--the Coordinator of School-to-Work Transition/Career Education and a curriculum specialist for educational programs. This limited oversight does not warrant a Director's position given the scope of the program. While the Director of School-to-Work meets regularly with personnel from the vocational and secondary education programs, the unit should be more closely aligned with the other district's vocational programs (see Recommendation 5-10 to see the new alignment of this department under the leadership of the newly created Director of Career Development and Planning.) This realignment recommendation should serve the dual purpose of reducing administrative expenses and providing the coordination that ensures that there would be no unwarranted duplication of services or programs.

5.4 Exceptional Student Education

Exceptional Student Education (ESE) is provided to students who require modifications in general education services in order to benefit from instruction. As defined by federal statutes and corresponding state regulations in Florida, students who are eligible for ESE services may have special instructional needs as a result of a disabling condition or exceptional abilities. ESE services must be designed to meet the specific needs of each eligible student as indicated in an Individualized Education Plan (IEP). All programs must be provided in the least restrictive environment. In Section 5.4.1 which follows we address students with special needs and in Section 5.4.2 we address the Advanced Academic Programs provided for gifted students.

5.4.1 Students with Special Needs

CURRENT SITUATION

The Department of Student Support Services and Exceptional Student Education (ESE) reports directly to the Deputy Superintendent of Educational Programs, Student Support, and Human Resource Development. The department's goals include:

- providing support and program information to student services practitioners in relation to the District's priorities and Florida's Blueprint 2000;
- working cooperatively with other agencies such as the hospital districts, the Department of Health, Broward County, Department of Children and Families (HRS), and other family and student service providers to ensure maximum use of available resources;
- supporting initiatives to increase the capacity of schools to solve problems through integrated services models and other appropriate interventions;
- coordinating the districtwide implementation of the new state FEFP funding system;
- coordinating the development and implementation of a continuum of programs and services for autistic students; and

- identifying speech/language delivery systems and methods that meet the needs of students and can be operated in a cost-effective manner.

The department provides leadership and supervision to programs that provide psychological, physical, social, emotional and educational support to students and their families. The department's programs emphasize prevention services to at-risk students as well as direct services. Exhibits 5-33 provide an overview of the organizational structure of the Department of Student Services and Exceptional Student Education.

In order to provide a seamless continuum of services to students, the Division of Educational Programs, Student Support, and Human Resources Department recently merged Exceptional Student Education and Student Support Services under one Director. The Exceptional Student Education Unit has oversight responsibility over the district's services for students with disabilities. The unit also ensures that services for gifted and talented students meet state compliance requirements. The ESE Unit has three primary goals for the 1998-99 school year:

- coordinating the districtwide implementation of the new state FEFP funding system by providing matrix training for selected staff in all schools;
- coordinating the development and implementation of a continuum of programs and services for autistic students; and
- identifying speech/language delivery systems and methods which meet the needs of students and can be operated in a cost-effective manner.

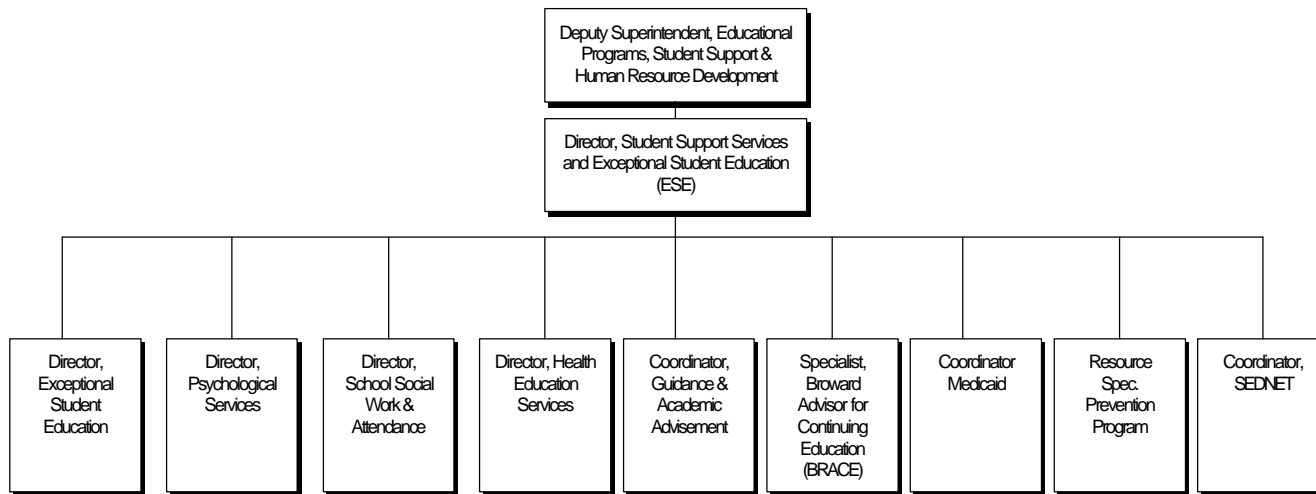
Exhibits 5-34 shows the organizational structure of the Exceptional Student Education Unit.

The mission of Exceptional Student Education is to create a learning environment that is accepting of and responsive to learners with diverse needs and to promote the development and use of appropriate educational strategies. The department strives to provide leadership and support to schools and families and build the capacity of school-based personnel to ensure that all children learn. This includes building partnerships with community agencies, parents, and advocacy groups who serve students with exceptional needs.

Ongoing activities conducted by the department include:

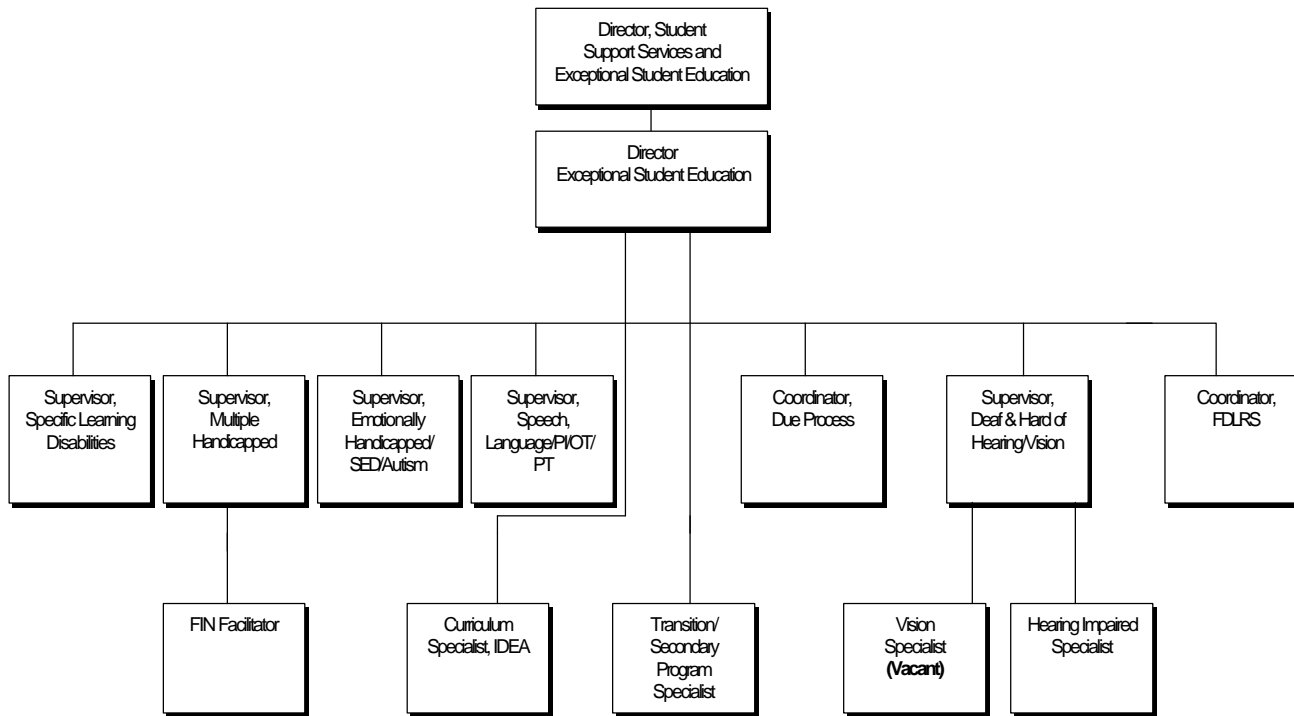
- coordinating policy development and contracts related to exceptional students (expulsion, graduation, procedural safeguards, interagency agreements, contracts for specialized services, etc.);
- developing and supporting instructional models and delivery systems (co-teaching, support facilitation, learning lab, community-based instruction, performance-based education);

**EXHIBIT 5-33
ORGANIZATIONAL STRUCTURE
STUDENT SUPPORT SERVICES AND EXCEPTIONAL STUDENT EDUCATION**



Source: Broward County School District, Student Support Services and Exceptional Student Education Section, 1998.

**EXHIBIT 5-34
EXCEPTIONAL STUDENT EDUCATION ORGANIZATIONAL CHART
1998-1999**



Source: Broward County School District, Exceptional Student Education Unit, 1998.

- providing training in behavior strategies, crisis intervention; learning strategies, inclusion and other instructional arrangements that can be used to improve student achievement;
- coordinating the Community Technology Center with the Public Library System;
- seeking additional resources and revenues such as Medicaid reimbursement and grant funding;
- providing access to and training related to assistive/adaptive technology; and
- providing program support to students in low incidence programs such as autism, vision, hearing, and physically impaired.

This unit also provides extensive consultation with individual parents, parent support groups, and school staff.

Exhibit 5-35 shows the ESE student population for the Broward County School District and five peer school districts. Broward County serves a smaller percentage of students in ESE programs than any of the five peer districts.

**EXHIBIT 5-35
PERCENTAGE OF ESE STUDENTS IN THE
BROWARD COUNTY SCHOOL DISTRICT AND FIVE PEER DISTRICTS
1996-97**

ESE CATEGORY	BROWARD	MIAMI- DADE	DUVAL	HILLSBOROUGH	ORANGE	PALM BEACH
Educable Mentally Handicapped	.75%	.79%	1.48%	1.38%	1.75%	1.01%
Trainable Mentally Handicapped	.27%	.34%	.50%	.45%	.47%	.29%
Physically Handicapped	.27%	.21%	.53%	.22%	.25%	.16%
Physical Therapy and Occupational Therapy Part-Time						
Speech/Language Handicapped	.04%	.00%	.01%	.01%	.03%	.02%
Visual Handicapped	5.14%	1.73%	3.82%	3.95%	3.63%	4.31%
Emotionally Handicapped	.02%	.04%	.08%	.06%	.05%	.02%
Specific Learning Disabled	.40%	.88%	1.50%	1.45%	.86%	.97%
Gifted Part-Time	3.10%	5.03%	6.75%	4.46%	5.48%	5.84%
Hospital and Homebound Part-Time	2.41%	4.43%	2.83%	4.95%	2.96%	4.62%
Profoundly Handicapped	.07%	.07%	.11%	.12%	.09%	.08%
	.58%	.63%	.50%	.73%	.36%	.36%
TOTAL	13.05%	14.15%	18.11%	17.77%	15.93%	17.67%

Source: Statistical Report, Profiles of Florida School Districts, January 1998.

Exhibit 5-36 provides an overview of the Exceptional Student Education Centers operated by the Broward County School District.

**EXHIBIT 5-36
EXCEPTIONAL STUDENT EDUCATION CENTERS IN THE
BROWARD COUNTY SCHOOL DISTRICT**

School	Number of Students	Area Location	Type of Disability
Exceptional Centers in the Broward County School District	1,191	----	----
Bright Horizons	195	North	Mentally Disabled*
Cross Creek School	165	North	Severely Emotionally Disturbed
Sunset School	200	Central	Severely Emotionally Disturbed
The Quest Center	197	South	Mentally Disabled*
Whispering Pines School	210	South	Severely Emotionally Disturbed
Wingate Oaks Center	224	Central	Mentally Disabled*

Source: Broward County School District, ESE Department Records, 1997.

*Educable Mentally Handicapped (EMH), Trainable Mentally Handicapped (TMH), Profoundly Mentally Handicapped (PMH), Physically Impaired (PI) and Autistic students.

As required by the state, students with mild disabilities and Severely Emotionally Disturbed (SED) students are expected to achieve the general education standards and participate in the Broward County testing program with appropriate testing accommodations. Students with moderate to profound disabilities also participate in the district's annual testing cycle; however, testing standards are usually modified to accommodate the student's level of performance. Alternate assessment instruments used by the district include the Woodcock Johnson-Revised (WJ-R) and the Brigance Inventories.

Exhibit 5-37 provides an overview of the performance of ESE students on the SAT-8 between 1995-96 and 1997-98. Exhibit 5-38 compares ESE student scores to the average scores of general education students in the district.

The exhibit illustrates the performance of ESE students tested on grade level. A comparison of the ESE scores with the scores of general education students yields a large discrepancy in scores. District SAT-8 scores ranged around 50 to 60 percentile points, while ESE scores fell in the 10 to 20 percent range.

Comparisons in Exhibit 5-38, however, indicate that ESE student Total Mathematics scores increase from Grade 2 through 4, then stabilized and fell in the later grades. Total reading scores are more unstable.

District results may be further disaggregated by the three district Areas: North, Central, South, and Centers. Exhibit 5-39 depicts 1998 ESE test scores for the three geographic areas including the number of students tested.

**EXHIBIT 5-37
BROWARD STANFORD ACHIEVEMENT TEST, EIGHTH EDITION, ESE
TOTAL MATHEMATICS AND TOTAL READING
1995-96 THROUGH 1997-98**

Grade	Total Mathematics						Total Reading					
	1995-96		1996-97		1997-98		1995-96		1996-97		1997-98	
	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score
2	323	19	875	20	528	14	300	10	836	18	510	13
3	527	24	421	30	901	21	497	12	396	15	870	11
4	588	27	473	31	1,119	24	589	17	476	21	1,134	15
5	720	24	493	27	1,219	19	719	14	497	17	1,231	10
6	645	22	406	27	1,201	21	650	19	432	20	1,261	13
7	570	20	429	23	1,160	19	599	16	451	20	1,221	13
8	615	19	415	22	1,059	17	629	17	427	19	1,114	12
9	562	16	594	20	874	19	544	13	581	14	835	12

Source: Broward County School District, 1998.

**EXHIBIT 5-38
BROWARD STANFORD ACHIEVEMENT TEST, EIGHTH EDITION, COMPARISON
OF DISTRICT TO ESE SCORES
TOTAL MATHEMATICS AND TOTAL READING
1997-98**

Grade	Total Mathematics				Total Reading			
	District		ESE		District		ESE	
	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score
2	323	19	875	20	528	14	300	10
3	527	24	421	30	901	21	497	12
4	588	27	473	31	1,119	24	589	17
5	720	24	493	27	1,219	19	719	14
6	645	22	406	27	1,201	21	650	19
7	570	20	429	23	1,160	19	599	16
8	615	19	415	22	1,059	17	629	17
9	562	16	594	20	874	19	544	13

Source: Broward County School District, ESE Records, 1998.

**EXHIBIT 5-39
TOTAL MATHEMATICS AND TOTAL READING SCORES BY AREA
FOR ESE STUDENTS
1997-98**

Grade	Total Mathematics						Total Reading					
	North		Central		South		North		Central		South	
	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score	# Tested	%tile Score
2	175	16	170	12	182	13	169	14	164	12	176	13
3	215	24	260	18	317	21	299	13	250	09	314	10
4	353	28	295	23	452	23	354	19	304	14	454	13
5	427	22	325	17	448	18	429	14	331	08	451	09
6	406	24	300	19	455	21	420	16	325	11	466	12
7	334	22	307	17	446	19	350	15	325	10	462	13
8	317	21	282	15	386	16	333	15	304	11	394	10
9	204	23	247	16	296	22	188	14	224	11	294	13

Source: Broward County School District, ESE Records, 1998.

Exceptional Education students comprise one segment of the diverse student population for which the Broward County School District is accountable for ensuring student achievement. Historically students in this population, tend to perform poorly on standardized tests and therefore, require test administration accommodations in order to accurately assess their achievement. Test administration accommodations permit most ESE students to participate in testing at their grade level. Testing is typically conducted by professional staff under the direction of the ESE teacher in the student's classroom. Students may also be tested individually or in small groups as determined by the Individual Educational Plan (IEP). However, ESE students who are working towards a standard high school diploma are expected to participate in districtwide testing utilizing the Stanford Achievement Test-Eighth Edition (SAT-8) with the accommodations specified in their IEP. Testing accommodations available to ESE students include:

- flexible setting
- flexible scheduling
- flexible timing
- flexible presentation
- flexible responding

FINDING

To ensure that students with disabilities are included in the district's reform and accountability effort, and to provide strategies for measuring the performance of ESE students, district staff are focusing on a testing program that provides information relevant to planning, policy making, and the delivery of services to ESE students. Test scores for ESE students (except Speech and Language and Gifted) are reported separately and are not part of any average scores reported for the school or the district. Instead, beginning in the 1996 school year, a second districtwide report was initiated that summarizes the standardized test results for ESE students taking the SAT-8 at their grade level and the WJ-R. The information provided in this report and the individual school results may be used by Broward County School District's staff to examine trends in scores at the district level and at each school site; plan appropriate instructional strategies; and incorporate the data in program improvement plans.

The previous analysis of ESE testing results conducted by the district provides staff with the ability to identify trends that may aid in evaluating instructional strategies and determining student, classroom, and school progress. To assist in the interpretation of scores, separate records of the conditions of testing and test administration, accommodations are kept at the school.

Extensive information on ESE student performance appears in the district's report card of student achievement. The results of ESE student performance are reported by grade level and several comparisons are made with districtwide general education student achievement reports. Area comparisons of reading achievement are also summarized to track ESE student achievement. The information provided by the Student Assessment Unit assist educators in examining the results of testing for this student population.

COMMENDATION

The Broward County School District is commended for publishing the testing and accountability measures for ESE students and providing detailed comparisons that assist educators in examining testing results.

FINDING

While the ESE Department is appropriately placed within the Division of Educational Programs, Student Support, and Human Resource Development, the Department is not in alignment with other Exceptional Education Student services located in the area offices. Under the current organizational structure, the work of area ESE personnel is monitored by the Directors of Exceptional Student Education located in the South, Central, and North Areas. Additionally, an Area Superintendent provides over sight to the Special Education Centers. Because the school-based implementation of ESE programs and central office administration of ESE programs report to two different Deputy Superintendents, coordination of total program activities has been fragmented. This fragmentation can result in a loss of program direction and an inefficient use of funds and delivery of services.

Variations in workload assignments among the three area offices were identified as an issue by ESE staff during on-site interviews. While some areas have adequate staffing during peak evaluation and placement times, other areas face temporary backlogs. Similarly, areas appear to have different implementation strategies for some services. As a result, parents and staff who transfer among areas report inconsistencies.

RECOMMENDATION

Recommendation 5-18:

Improve coordination of central office and Area ESE services.

Enhanced coordination of services will ensure efficient operation of programs.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-------------|
| 1. The Deputy Superintendents should assign a task force to develop a plan to enhance ESE coordination. | May 1999 |
| 2. The Director of Student Services and ESE should ensure that the task force identifies coordination issues and develop action strategies. | July 1999 |
| 3. The Deputy Superintendents and key ESE staff should implement the approved coordination plan. | August 1999 |

FISCAL IMPACT

This recommendation can be implemented using existing resources.

FINDING

Beginning in February 1998, Broward County implemented a program for accessing Medicaid reimbursements for health-related services provided to students. The Medicaid Certified School Match Program established by federal and corresponding state legislation provides for administrative claim and fee-for-service reimbursements. Administrative claim reimbursements allow districts to recover a portion of their overall funding for school-based health and outreach services such as referral for Medicaid eligibility determination, coordination, and monitoring of health-related services, interagency coordination, and the provision of information. Broward County contracts with Cost Management Services, Inc. through a collaborative service agreement with the Hillsborough County School District. In October 1998, the district received \$1,186,998 for Medicaid reimbursable administrative claim services provided during the first quarter of 1998.

The second component of the Medicaid Certified School Match Program is the fee-for-service program. For students who qualify for both Medicaid and special education programs under the Individuals with Disabilities Act (IDEA), school districts can receive reimbursement for health-related services such as nursing, speech therapy, physical therapy, counseling and occupational therapy. To access reimbursement for these services, individualized service records must be maintained on each student who is Medicaid eligible. The Broward County School District is planning to implement fee-for-service claims for Medicaid- and IDEA- eligible students within the next two years. During this delay, however, the district is not generating all of the potential Medicaid revenues.

RECOMMENDATION

Recommendation 5-19:

Accelerate the implementation of fee for service claims for Medicaid eligible special education students.

The Broward County School District should be able to generate additional revenues to support ESE services as a result of the implementation of this recommendation.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should instruct the Deputy Superintendent of Educational Programs, Student Support, and Human Resources Department to accelerate the process. May 1999
2. The Deputy Superintendent should ensure that fee-for- service reporting begins. September 1999

FISCAL IMPACT

Based on present Medicaid eligibility rates, the district should anticipate reimbursements for two percent of the direct school-based costs (two percent of \$9,598,149).

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Accelerate Medicaid Reimbursement Reporting	\$96,000	\$192,000	\$192,000	\$192,000	\$192,000

5.4.2 Advanced Academic Program

The Advanced Academic Programs Unit reports to the Director of Secondary Programs. The unit provides direction, supervision and coordination of all accelerated programs throughout the district, for grades kindergarten-12. In addition, the Unit, with input from school-based personnel, designs delivery options, special education models and program services appropriate for gifted and talented learners. The department also assists with the development of accelerated programs and courses as a result of articulation agreements between the district and area community colleges and universities. The unit strives to provide a variety of educational opportunities, resources, and encouragement for all students.

The Advanced Academic Programs unit provides the following services:

- assistance to schools and teachers in meeting the needs of the gifted student by providing a framework from which schools can design and implement services that meet the needs of the gifted and talented population;
- training in the identification of gifted students as well as curriculum content that is rigorous and challenging;
- assistance in the development of a cooperative partnership between home and school that includes providing information on the understanding of giftedness, children's needs, and identifying children for the gifted program; and
- assistance with providing gifted children the appropriate affective services including gifted focused counseling interventions and career development guidance programs.

The services provided help to develop a positive and healthy environment for learning in which all students have the opportunity to learn the skills, acquire the knowledge and develop the attitude, necessary for them to reach their full potential as citizens who can meet the challenges of a changing global society.

The goals and objectives of the Advanced Academic Programs include:

- promoting the development of a challenging curriculum to better meet the needs of gifted students;
- assisting schools in fostering a climate where the talent and potential of high ability learners is valued and nurtured;
- providing accelerated programs with numerous course options to students including gifted, highly gifted, honors, advanced placement, dual enrollment, and international baccalaureate courses;

- meeting instructional needs of students with high level potential and who require accelerated and enriched in-depth instruction;
- establishing and maintain a successful parent advisory group; and
- providing teacher training in competencies, strategies and gifted add-on certification courses.

As reported in the March 1996 Research Brief, "How Some High School Students Accelerate Through College Coursework: A Review of the Advanced Placement Program, 1990-95," the Broward County School District provides outstanding educational opportunities equivalent to college study to thousands of high school students each year. One of the ways that this is evidenced is through the Advanced Placement (AP) program. The decision to offer AP coursework at individual schools is based upon student interest as well as the availability of qualified teachers. Further, AP offerings are offered in light of the availability of dual enrollment at each school. If students have access to coursework through college enrollment while in high school, school staff may offer AP courses in areas that supplement college coursework.

Exhibit 5-40 shows the percentage of students scoring three or above on AP courses for Broward, the state, and several peer districts. The percentage of Broward students passing AP exams scored at three and above (out of four) exceeds those of the state, Miami-Dade, Hillsborough and Palm Beach County School Districts while dipping below the Orange County School District scores.

**EXHIBIT 5-40
PERCENTAGE OF ADVANCED PLACEMENT STUDENTS SCORING THREE AND
ABOVE IN BROWARD COUNTY SCHOOL DISTRICT
FOUR PEER DISTRICTS AND THE STATE**

State		Broward		Miami-Dade		Palm Beach		Hillsborough		Orange	
Mean Score	% Pass	Mean Score	% Pass	Mean Score	% Pass	Mean Score	% Pass	Mean Score	% Pass	Mean Score	% Pass
2.79	55.6%	2.86	58.3%	2.56	45.7%	2.84	59%	2.81	58.1%	3.24	71.6%

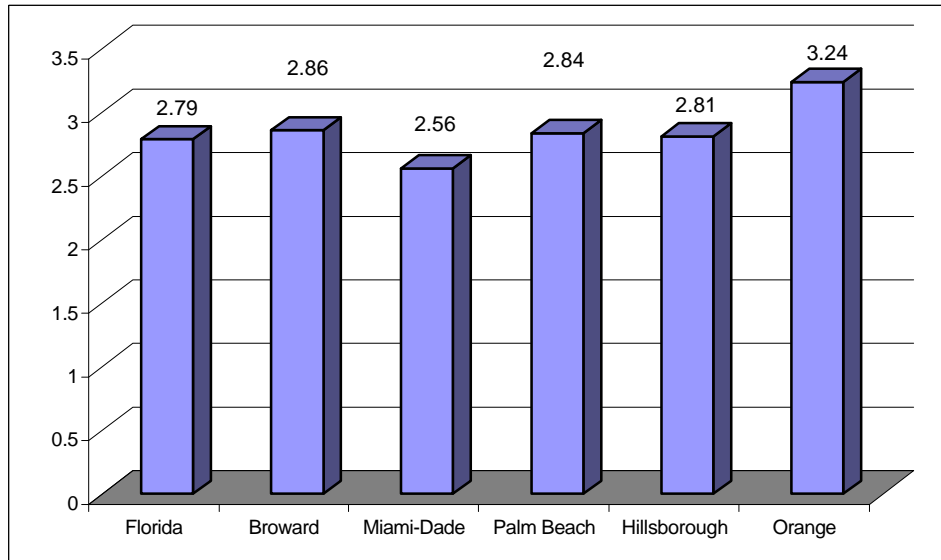
Source: Statistical Report, Profiles of Florida School Districts, 1998.

COMMENDATION

The Broward County School District is commended for its efforts in advanced placement education.

The scores in Exhibit 5-40 are graphically displayed in Exhibit 5-41.

**EXHIBIT 5-41
1998 COMPARISON OF ADVANCED PLACEMENT MEAN SCORES FOR
THE BROWARD COUNTY SCHOOL DISTRICT, THE STATE, AND FOUR PEER
DISTRICTS**



Source: Statistical Report, Profiles of Florida School Districts, 1998.

5.5 Program Evaluation and Student Assessment

To accomplish effective program planning evaluation, decisions that impact the education service delivery system and its resource allocation must be based on comprehensive data analyses and a systematic planning process. For example, effective planning of education programs must consider the specific needs of the students served by the school district and the multiple resources available to meet student needs. To determine if resources are used effectively, school districts must establish a clear basis for evaluating the impact of their educational programs. This section addresses the research, evaluation, and accountability functions of the Broward County School District.

5.5.1 Program Evaluation

CURRENT SITUATION

As previously illustrated in Exhibit 5-9, the accountability, strategic planning, research and evaluation functions in Broward County School District are administered by an Associate Superintendent for Accountability, Technology, Strategic Planning and School Improvement. This division has oversight responsibility for the coordination of research and evaluation, management information services, telecommunications, computer technology, strategic planning and accountability, and learning resources.

A Director of Research and Evaluation reports directly to the Associate Superintendent. The Director supervises two units—Student Assessment and Research Services. The primary function of the Research and Evaluation Department is to produce evaluation reports and present performance information on schools and programs in the Broward County School District. Evaluation information is prepared for the Superintendent, the School Board, federal/state/private grant funding agencies, district administrators and other audiences as directed by the Associate Superintendent.

The Research and Evaluation Department is responsible for the data collection and analysis necessary to implement the Board's Accountability policy. The major goals of the department include:

- implementing districtwide assessments such as the Stanford Achievement Test and alternative norm-referenced tests for ESE and LEP students, the Florida Writing Assessment, the Florida Competency Assessment Test (FCAT), Advanced Placement, Career Assessment, and Credit by Competency;
- providing analysis of student assessment results to schools and departments;
- completing 10 program evaluations and presenting the results to the Board annually;
- preparing and disseminating six research briefs annually;
- conducting four research studies including critical incident and customer surveys each year; and
- developing and/or identifying assessment instruments as directed by the Superintendent to meet school and student needs including "Algebra for All" testing, alternative assessments for special populations, and selected criterion-referenced testing instruments by June of each year.

A primary function of the Research and Evaluation Department is to provide information to decision-makers that will facilitate the improvement of student achievement and school effectiveness. To accomplish this, Research and Evaluation conducts studies to determine the effectiveness of various programs and examines policy issues that are high priority to the district. The department also oversees the districtwide testing and assessment program. The department has 23 positions that perform the following duties:

- developing a calendar for program evaluations, research and districtwide testing;
- providing and implementing procedures related to program evaluation and outside requests to conduct research;
- collaborating with personnel in planning and implementing selected evaluations and research;

- assisting building administrators and teachers in assessing and improving instruction by providing evaluation, research and testing/assessment results for schools, classes, and students;
- planning, coordinating and implementing the districtwide testing and assessment program as well as state and national assessment programs for regular, exceptional and limited English proficient students, grades K-12; and
- interpreting and reporting assessment results to school personnel, the community, and other stakeholder groups.

FINDING

The Research and Evaluation Department provides the necessary information and data to determine when program continuation, discontinuation, or revisions need to occur. This department also works closely with the schools to provide guidance and direction in data analysis and interpretation. The department produces district reports and updates a website regularly to provide each school with multiple ways of looking at and using data to support school-based decision making. School administrators are able to use annual assessment reports to summarize trends by grade and teacher, and to determine if particular groups of students are making improvements. School-based administrators and department personnel are also able to make comparisons to other schools, districts, and states. The multiple forms of comparative student data assist principals and teachers in determining strengths and weaknesses of curriculum and in developing action plans to remedy problem areas. To assist schools in interpreting results, the department also provides training to area directors and school-based administrators.

COMMENDATION

The Department of Research and Evaluation is commended for providing thorough assessment data and support to schools.

FINDING

Evaluation is an important function of any school system. To make critical decisions regarding resource management, program continuance, and new initiatives, the Board and school system managers must have easy access to up-to-date, integrated program evaluation and planning information. To be effective, a school system must link the ongoing evaluation of programs and fiscal resources to the school system's strategic directions. Exhibit 5-42 provides a list of recent evaluations conducted by the Department of Research and Evaluation.

The Broward County School District anticipates a continued increase in the evaluation reports requested by schools during the 1998-99 school year. As schools have expanded efforts to enhance students achievement through the school improvement planning process, evaluation has become an important tool for determining the status of school performance and assessing progress in implementing School Improvement Plans. In addition, as the district has expanded its efforts to make decisions based on

**EXHIBIT 5-42
LIST OF RECENT EVALUATION REPORTS**

Evaluation Report	Completion Dates
Fort Lauderdale High School Prerequisite Academy	August 1998
Pre-First Program Evaluation	July 1998
Pace setter English, Pace setter Mathematics Evaluation Report	August 1998
NOVA Center for Applied Research and Professional Development	March 1998
New Jersey Writing Project Review	February 1998
Mileage Grouping at NOVA Blanch Forman	August 1998
HOSTS (Helping Students to Succeed) Program	June 1998
Alliance of Quality Schools	September 1998
Alternatives to External Suspension Program	September 1997
Alternatives to External Suspension	August 1998
Block Scheduling	October 1997
Coalition of Essential Schools	July 1998
Distance Learning	September 1998

Source: Broward County School District, Department of Research and Evaluation, 1998.

data, a comprehensive plan for collecting benchmarks for evaluating schools and programs has been created. Exhibit 5-43 provides a summary of Broward County benchmarks report indicators.

The Department of Research and Evaluation employs a relatively small staff. To meet additional demands for evaluation, the department contracts with a large number of consultants. Expenditures for evaluation consultants increased from \$41,078 in 1996-97 to \$75,663 in 1998-99. Although the use of contracted services provides the district with considerable flexibility in assigning evaluation studies to experts in each field being evaluated, the department still appears to be understaffed. Interviews indicate that the district's demands for research-based decision making and ongoing evaluation have escalated. In fact, the Exceptional Student Education Unit has hired an additional research specialist to assist in meeting the specialized evaluation demands in this program area. Interviews with area directors and school-based staff indicate that schools have an increased need for assistance in interpreting data. This need is due, at least in part, to more emphasis by the state and district officials on data-driven decision-making. As schools increased their focus on monitoring student achievement, nationally, school-based staff have required additional data to evaluate programs.

RECOMMENDATION

Recommendation 5-20:

Hire one evaluation specialist to meet the growing demands for program evaluation and training.

The Research and Evaluation Department provides valuable information on schools and programs. This increase in staff will assist the district in continuing its research-based approach to decision making. Additional specialized evaluations should continue to be contracted outside of the district.

**EXHIBIT 5-43
SUMMARY OF BROWARD COUNTY SCHOOL DISTRICT
BENCHMARK REPORT INDICATORS**

INDICATORS		
Student Profile: <ul style="list-style-type: none"> ■ Enrollment PreK-12 ■ Diversity – by race, ethnicity and gender ■ Percent receiving free/reduced lunch ■ Percent enrolled in ESE ■ Percent of LEP students 	American College Test <ul style="list-style-type: none"> ■ Average score for all public high school students, ■ Percent of public high school graduates taking test, ■ Number of all public high school students taking ACT 	Employer satisfaction by survey, degree of employer satisfaction with work preparation, work habits, and overall occupational preparation <ul style="list-style-type: none"> ■ Recent graduates public high school ■ Postsecondary vocational program grads and Assoc. of Science degree candidates
Vocational and Adult Education Programs <ul style="list-style-type: none"> ■ Vocational Programs enrollment ■ Community Education Programs enrollment 	Advanced Placement – percent AP exams taken by students (replace <u>seniors</u> with students) who passed with 3.0 or higher	Readiness for Kindergarten - percent of students meeting state <ul style="list-style-type: none"> ■ Readiness requirements
International Baccalaureate diplomas number, number per 1,000	Florida Writes average (Grades 4, 8, 10) <ul style="list-style-type: none"> ■ Percentage scoring above 3.0 (Grades 4, 8, 10) 	Public Satisfaction survey – percent rating job of public school as good or excellent <ul style="list-style-type: none"> ■ Readiness requirements
Preschool attendance <ul style="list-style-type: none"> ■ Number of low-income preschool students (3 and 4 yr. Olds) attending BCPS preschool programs ■ Number of low-income preschool students who were unserved due to inadequate federal/state funding 	Scholastic Assessment Test <ul style="list-style-type: none"> ■ Average score for all public high school students, ■ Percent of public high school graduates taking test, ■ Number of all public high school students taking SAT 	Job Placement for Job training graduates <ul style="list-style-type: none"> ■ percent of adults who enroll in and complete <ul style="list-style-type: none"> – an occupational completion point or – the program completion point for a – Workforce Development funded – program
Kindergarten – percent of kindergartners promoted to 1 st grade	Algebra Completion – proportion of graduating seniors meeting requirements	Students taking upper-level courses (Level 3 courses)
FCAT – Reading Grades 4, 8, 10	FCAT – Mathematics Grades 5, 8, 10	High School Dropout Rate
Entry Level Placement Tests <ul style="list-style-type: none"> ■ Number of public high school students taking entry level college/university placement tests in all 3 subject areas ■ Percent of public high school students ready for college ■ Mathematics ■ Writing ■ Reading ■ All subjects 	Job Training <ul style="list-style-type: none"> ■ Percent of people completing job training <ul style="list-style-type: none"> – Program employed within 1 year – Adults, youth, laid-off workers ■ Percentage of people completing job training <ul style="list-style-type: none"> – program who got jobs related to their – field of training (postsecondary adult – vocational program graduates, adults – who complete an occupational – completion point 	Employment and education after graduation <ul style="list-style-type: none"> ■ percent of public high school graduates <ul style="list-style-type: none"> – working and continuing education – working only – continuing education only – percent of postsecondary adult voc. graduates – working and continuing education – working only – continuing education only
Stanford Achievement Test – % scoring above national average <ul style="list-style-type: none"> ■ Math Applications – Grades 4, 8 ■ Reading Comprehension – Grades 4, 8 	BCPS Teacher Survey percent responding “always” or “usually” <ul style="list-style-type: none"> ■ “Race relations among students are positive at my school.” ■ “Race relations among school staff are positive at my school” 	High School Competency Test – 11 th grade students passing on first try <ul style="list-style-type: none"> ■ Communication ■ Mathematics
Total expenditures per student average amount spent per preK-12 student	High School Graduation Rate “present” calculation (“new” calculation when available)	Flow of dollars to the classroom percentage of dollars spent on classroom
School Performance <ul style="list-style-type: none"> ■ Number schools per level for all 5 categories ■ Percent of critically low by level (elementary, middle, high) 	Public satisfaction with workforce preparation survey - percent of residents who thought educational system doing good or excellent job developing workforce needed in future	BCPS Parent Survey percent responding “always” or “usually” <ul style="list-style-type: none"> ■ “I feel good about the things my child does at school”
BCPS Student Survey percent responding “always” or “usually” <ul style="list-style-type: none"> ■ “I like going to this school” 	Work-Based Learning <ul style="list-style-type: none"> ■ Student internships at private businesses ■ Teacher internship positions 	BCPS Student Survey percent responding “always” or “usually” <ul style="list-style-type: none"> ■ “My teachers do a good job teaching me”

**EXHIBIT 5-43 (Continued)
SUMMARY OF BROWARD COUNTY SCHOOL DISTRICT
BENCHMARK REPORT INDICATORS**

INDICATORS		
Literacy of Young Adults (19 – 24) Prose, Quantitative, Document	Literacy of Adults Ages (25 – 64) Prose, Quantitative, Document	Adult ESOL percent of adults who enroll in and complete the Advanced ESOL Program
Adult Basic Education (ABE) percent of adults who enroll in and complete the Functional Literacy Level (Level 4) in Mathematics, Reading, and language of the Adult Basic Education courses of instruction	BCPS Parent Survey percent responding “always” or “usually” <ul style="list-style-type: none"> ■ “the teachers are doing a good job teaching my child” 	Volunteers in BCPS <ul style="list-style-type: none"> ■ Number of volunteers ■ Volunteer hours per student PreK-12 students ■ Number hours per volunteer
General Education Development (GED) percent of adults who enroll in GED Preparation Classes and receive a GED diploma	Adults with Disabilities percent of adults who enroll in and complete the Workforce Development Level 3 of the Adults with Disabilities Workforce Development Program	Family Literacy percent of adults who enroll in and complete the Intermediate Literacy Level 3 of the ABE Program
Wages for recent graduates <ul style="list-style-type: none"> ■ public high school ■ postsecondary adult voc. 	Suspensions 6 – 12 percent by level <ul style="list-style-type: none"> ■ In-school suspensions ■ Out-of-school suspensions 	Teacher Profile: <ul style="list-style-type: none"> ■ Race, ethnicity, gender, attendance, advanced degrees
Teachers K-3 <ul style="list-style-type: none"> ■ number of teachers needed to achieve goal of 20 students per classroom ■ average cost of teachers salary plus benefits 	Facilities capacity <ul style="list-style-type: none"> ■ Building capacity ■ Portable capacity ■ Student enrollment 	School Advisory Councils (SAC) <ul style="list-style-type: none"> ■ Team composition ■ Attendance at meetings (employees and parent/ ■ Community
Class Size K-3 percent of single K-3 classrooms that have <ul style="list-style-type: none"> ■ 20 or fewer students ■ 21-25 students ■ 26-29 students ■ 30 or more Average class size <ul style="list-style-type: none"> ■ Elementary ■ Middle – Math, Science, Social Studies, Language Arts ■ High – Math, Science, Social Studies, Language Arts 	Parental Involvement (Customer Survey Questions) – Parents <ul style="list-style-type: none"> ■ “I feel welcome when I visit my child’s school.” ■ “The school staff wants me to be involved at school.” ■ “The school staff tells me about their activities such as parent meetings, student performances, etc.” ■ “When I have asked for information at my child’s school, the staff responded promptly.” ■ “My child’s school has asked me to share my ideas and/or concerns about the school.” 	Capital needs <ul style="list-style-type: none"> ■ Number of student workstations needed to meet enrollment ■ Cost of needed workstations ■ Cost of needed schools ■ percentage over capacity (school by school and districtwide)
Overenrolled schools percent of schools with enrollments over capacity	Employer Involvement Mentoring, Internships, Scholarship, Junior Achievement	Average daily attendance – by level
Student Attendance percent of public school students absent 21 or more days – by level	Truancy percent students with 15 or more unexcused absences	Critical incidents number of critical incidents among public school students K-12, including centers
Violence violent critical incidents (battery) reported by public schools K-12 – number by level	Drugs and alcohol drugs and alcohol critical incidents reported by public schools k-12 number by level	Partnerships in BCPS number of Partner in Education partnerships
School perception of parental involvement (Customer Survey Questions – Teachers) <ul style="list-style-type: none"> ■ “I can rely on parents to help when achievement or behavior problems occur with their children.” ■ “I encourage parents to be involved at school.” 	Teacher Development Program %of classroom teachers annually engaged in professional development courses in area of expertise or teaching discipline.	Expulsions 6 – 12 – number

Source: 1998 GAP Report From Broward Business Coalition for Education (BBCE).

IMPLEMENTATION STRATEGIES AND TIMELINES

- | | |
|---|-------------|
| 1. The Associate Superintendent for Accountability, Technology, Strategic Planning, and School Improvement should instruct the Research and Evaluation Department to prepare a job description for an Evaluation Specialist position. | June 1999 |
| 2. The Associate Superintendent for Accountability, Technology, Strategic Planning, and School Improvement should recommend the job description to the Superintendent for approval by the Board. | July 1999 |
| 3. The Board should approve the position. | August 1999 |
| 4. The Associate Superintendent for Accountability, Technology, Strategic Planning, and School Improvement should secure a person to fill the position. | July 1999 |

FISCAL IMPACT

An Evaluation Specialist will cost the district about \$52,346 in base salary and \$16,957 in benefits (\$69,303). Based on MGT's workload analysis, the Department should anticipate decreasing its contractual services by 20 percent (\$15,132). The overall cost of this position will be about \$54,000.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Hire an Evaluation Specialist	(\$54,000)	(\$54,000)	(\$54,000)	(\$54,000)	(\$54,000)

FINDING

The Broward County School District does not currently conduct comprehensive school-based studies that integrate data collected on student performance with non-biased observations of the educational service delivery models implemented at each school. This type of study is typically conducted by a multi-disciplinary team of professionals, sometimes called an Instructional Design Team or School Quality Review Team. The team provides schools with additional in-depth planning information. The purpose of these school-based studies is to assist schools in determining long-range priorities by targeting the critical areas where student performance and classroom instruction need to be improved. Instructional design studies are typically conducted by a cross-disciplinary team consisting of professionals from other schools or departments within the system or professionals in neighboring school systems. Frequently, these studies include interviews and classroom observation-evaluation techniques. Instructional design studies provide specific improvement suggestions to principals and school-based professionals. In most cases, the review team works collaboratively with school-based personnel to develop strategies for school improvement.

The Broward County School District is beginning to develop a process to monitor the many school reform and school improvement initiatives. Through stringent monitoring and support, Broward County has assisted several schools in making the necessary improvements in student performance so that the schools are no longer classified as “critically low” by the Florida Department of Education. The Florida Department of Education will continue to monitor districts statewide to determine if a school falls into the critically low category. Consequently, the district must closely scrutinize and assess how it currently allocates additional resources to schools, and the extent to which these resources actually contribute to improvements in student and school performance. The new School Improvement Unit assigned to the Associate Superintendent of Accountability, Technology Strategic Planning and School Improvement has begun to design a process to continually assess the progress of schools who may potentially be classified as “critically low.”

Similarly, the Division of Educational Programs is developing and implementing curriculum assessments. During the first year of implementation, the curriculum assessments were conducted prior to a new principal beginning an assignment at a school. Interviews with central office and area personnel indicate that the curriculum assessment process have provided valuable insight into the level of implementation of districtwide curriculum initiatives at the school level. The assessment process also provides a constructive forum for discussing implementation issues and focusing school-based and central office staff. In addition, this process identifies the next steps that need to be taken in order to achieve a quality curriculum at each school.

The two processes currently in place for evaluating school-wide performance and assisting schools in improving these approaches to educational service delivery are limited to schools who are assigned a new principal. While the curriculum assessment provides an overview of the curriculum aspects of delivery, other educational programs and approaches to innovation and reform are not assessed.

Developing a comprehensive model for evaluation that includes an Instructional Design Team approach will assist the Broward County School District in enhancing accountability. Intense study of individual schools will assist school system officials in allocating resources to those programs that have proven to be effective in enhancing student performance.

RECOMMENDATION

Recommendation 5-21:

Develop and implement school-based instructional design studies as a tool for assessing instruction and programs that contribute to the school improvement process in schools.

To enhance accountability for school reform and school improvement programs, the Office of Research and Evaluation and must clearly develop a process for assisting all schools in using data and evaluation information available to improve instruction and plan school-based initiatives. An Instructional Design Study Plan should have clear criteria for holding schools accountable for implementing study results.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent, in conjunction and the Associate Superintendent, should develop and implement a plan for conducting Instructional Design Studies. Fall 1999
2. The Deputy Superintendent should ensure that a plan for Instructional Design Studies is implemented annually through combined efforts of the Division for Educational Programs, Student Services, and Human Resources Development and the Division of Accountability. Commencing in January 2000 and Ongoing

FISCAL IMPACT

The Broward County School District has many highly qualified professionals who could serve on Instructional Design Study Teams on a rotating basis. This recommendation can be accomplished within existing resources using internal staff members from schools and the central office.

5.5.2 Student Assessment

Student assessment is a vital component to every school district. Parents, students, school district employees, and community stakeholders expect appropriate learning to occur within classrooms. Florida's Accountability Plan requires an emphasis on student outcomes, making it extremely important for support to be provided in the area of testing analysis and interpretation.

CURRENT SITUATION

The Broward County School District makes extensive use of a variety of student achievement measures to assess, compare and improve student performance. District-level and school-based administrators monitor student achievement closely and extensive remediation is provided to students showing inadequate performance. Exhibit 5-44 shows the tests used in the Broward County School District.

The Florida Comprehensive Assessment Test (FCAT) is based on the knowledge and skills contained in Florida's Sunshine State Standards which were approved by the State Board of Education in May 1996. This statewide assessment tool is designed to measure how well students were achieving based on the standards set by the state of Florida. The FCAT questions measure content defined by the state's curriculum frameworks in Language Arts and Mathematics.

The FCAT was field-tested in Spring 1997 using 11 different forms and 1,200 questions to determine specifications for format, length, and other design elements of the test. The questions used on the FCAT were created by the Florida Department of Education (DOE) contractor, CTB/McGraw-Hill Publishing Company. The questions were written by professional item writers and DOE staff coordinated their review by committees of Florida educators and citizens. Most test items are multiple-choice. However, some items are product-oriented and require the students to write an answer, solve a problem, give a lengthy explanation, or draw a geometric sketch.

**EXHIBIT 5-44
TESTS USED IN THE
BROWARD COUNTY SCHOOL DISTRICT**

STATE AND LOCAL ASSESSMENTS				
TEST	GRADES	SUBJECTS	EXEMPTIONS	REQUIRED
Stanford Achievement Test, Eighth Edition	2-9	<ul style="list-style-type: none"> ■ 2-5: Reading, Mathematics ■ 6-7: Reading, Mathematics, Language Mechanics, Spelling, Study Skills, Listening ■ 8: Reading, Mathematics, Language Mechanics, Spelling, Study Skills, Listening, Social Sciences ■ 9: Reading, Mathematics, English, Spelling, Study Skills 	<ul style="list-style-type: none"> ■ ESE students who meet all Florida Department of Education exemption criteria and are typically working on alternate standards ■ LEP students in an approved LEP program two years or less may be exempted on an individual basis if recommended by the school LEP committee and documented on Limited English Proficient Student Education Plan Folder 	Yes
Metropolitan Achievement Test, Seventh Edition (for ESOL students in an ESOL program 2 years or less)	2-12	<ul style="list-style-type: none"> ■ 2-3: Reading, Mathematics ■ 4-9: Reading, Mathematics, Language ■ 10-12: Reading, Language 		Yes
Woodcock-Johnson Revised (alternate assessments for selected ESE students typically working on alternate standards)	7-8	<ul style="list-style-type: none"> ■ Reading, Mathematics, Writing 		Yes
Credit by Examination	7-8	<ul style="list-style-type: none"> ■ Foreign Languages: Spanish, Japanese, French ■ Mathematics: Algebra, Plane Geometry 		Yes
PreHSCT	9-10	<ul style="list-style-type: none"> ■ Communications, Mathematics 	<ul style="list-style-type: none"> ■ ESE students who meet all Florida Department of Education exemptions criteria and are typically working on alternate standards ■ LEP students in an approved LEP program two years or less may be exempted on an individual basis if recommended by the school LEP committee and documented on Limited English Proficient Student Education Plan Folder 	Yes
Algebra Competency Test	9-12	<ul style="list-style-type: none"> ■ Algebra 		Yes
Florida Comprehensive Assessment Test (FCAT)	4,8,10 5,8,10	<ul style="list-style-type: none"> ■ Reading ■ Mathematics 	<ul style="list-style-type: none"> ■ ESE students who meet all Florida Department of Education exemption criteria and are typically working on alternate standards ■ LEP students in an approved LEP program two years or less may be exempted on an individual basis if recommended by the school LEP committee and documented on Limited English Proficient Student Education Plan Folder 	Yes
Florida Writing Assessment Program	4,8,10	Writing	<ul style="list-style-type: none"> ■ ESE students who meet all Florida Department of Education exemption criteria and are typically working on alternate standards ■ LEP students in an approved LEP program two years or less may be exempted on an individual basis if recommended by the school LEP committee and documented on Limited English Proficient Student Education Plan Folder 	Yes
Career Assessment	8			Yes
High School Competency Test (HSCT)	11,12	<ul style="list-style-type: none"> ■ Communications ■ Mathematics 	No exemptions for students pursuing a standard high school diploma	Yes

Overall, Broward students demonstrate achievement commensurate with students across the state. Highlights reported by the Broward County School District indicate:

- Broward students perform similarly with students statewide.
- Broward mathematics scores are consistent with large districts across the state.
- Broward students consistently score higher than students in nearly all of Florida's large districts in reading.

As seen in Exhibit 5-45, the subcategory percentages in mathematics closely reflected those statewide. Similarly, Exhibit 5-46 shows FCAT Reading Scores for the Broward School District are comparable to students around the state.

Exhibit 5-47 reports FCAT scores for students statewide and in large Florida school districts for 1997-98.

**EXHIBIT 5-45
FLORIDA COMPREHENSIVE ASSESSMENT TEST
DISTRICT AND STATE TOTAL MATHEMATICS SCORES
1997-98**

GRADE	COUNTY OR STATE	TOTAL MATH	NUMBER SENSE, CONCEPTS & OPERATIONS	MEASUREMENT	GEOMETRY AND SPATIAL SENSE	ALGEBRAIC THINKING	DATA ANALYSIS & PROBABILITY
5	Broward	299	56%	40%	55%	48%	58%
	State	300	56%	40%	56%	48%	58%
8	Broward	299	47%	45%	42%	53%	39%
	State	299	47%	45%	42%	53%	40%
10	Broward	297	60%	42%	39%	46%	39%
	State	301	61%	43%	41%	47%	41%

Source: Broward County School District, 1998.

**EXHIBIT 5-46
FLORIDA COMPREHENSIVE ASSESSMENT TEST
DISTRICT AND STATE TOTAL READING SCORES
1997-98**

GRADE	COUNTY OR STATE	TOTAL READING SCORE	CONSTRUCTS MEANING FROM INFORMATIONAL TEXT	CONSTRUCTS MEANING FROM LITERATURE
4	Broward	292	48%	56%
	State	294	49%	56%
8	Broward	295	53%	56%
	State	298	54%	57%
10	Broward	294	52%	64%
	State	299	54%	65%

Source: Broward County School District, 1998.

**EXHIBIT 5-47
FLORIDA COMPREHENSIVE ASSESSMENT TEST RESULTS
IN LARGE DISTRICTS
1997-98**

SCHOOL DISTRICT	GRADE 4	GRADE 5	GRADE 8		GRADE 10	
	READING	MATH	READING	MATH	READING	MATH
Broward	292	299	295	299	294	297
Miami-Dade	276	282	282	282	285	286
Hillsborough	294	304	296	297	300	309
Orange	289	296	299	299	302	303
Palm Beach	290	302	301	304	302	306
State Average	294	300	298	299	299	301

Source: Broward County School District, 1998.

The purpose of state and local testing programs is to gather data about student achievement. As a result of Blueprint 2000, students in Florida are expected to *successfully compete at the highest levels nationally and internationally and be prepared to make well-reasoned, thoughtful, and healthy lifelong decisions*. This is consistent to one of the Broward County School District's Major System Priorities which is to improve student achievement and school effectiveness.

The data collected by the Florida Writing Assessment is one indicator used to assist in the evaluation of student progress, curriculum effectiveness, and program implementation. The Florida Writing Assessment is implemented in Grades 4, 8, and 10 as required by state regulations. The assessment is designed to measure student proficiency in writing responses on assigned topics within a designated testing period. The Florida Writing Assessment requires students to produce a writing sample within established guidelines parameters. Each student receives a writing folder containing one writing topic with two-lined pages for the written response. Students are given 45 minutes to read the topics independently, plan their responses, and write their responses in the folders. Florida Writing Assessment samples are then sent to the Florida Department of Education for scoring by outside, trained evaluators. Trained readers independently score the sample for overall quality considering four elements: focus, organization, support, and conventions.

Highlights of the Florida Writing Assessment results reported by the district include:

- Total writing scores for elementary schools increased 0.5 overall to 3.1. Individual schools reported varied gains with over half (67 out of 121) schools reporting gains of 0.5. Five elementary schools increased their assessment scores by a full 1.0 or more.
- Middle school scores were consistent with statewide trends declining by 0.2 to 3.2. Over 81 percent of Broward students; however, continue to exceed the 3.0 standard of writing.
- Broward students at Grade 10 demonstrate the most significant gains last year with overall results to 3.5. All Broward high schools have reached, or exceeded, the 3.0 writing standard set by the district.

Exhibit 5-48 displays the Broward County School District and state results on the Florida Writing Assessment and Exhibit 5-49 provides a comparison of the Broward County School District and five peer school districts.

The High School Competency Test (HSCT) is another state indicator developed to measure the minimum performance skills expected of Florida high school graduates. All students must pass both the mathematics and communications sections of the HSCT to receive a standard Florida high school diploma. The HSCT is consistent with district's standards (School Board Policy 6000.1).

Changes to the scoring of the HSCT were made by the Florida Department of Education staff in 1996. These changes raised the level of performance that Florida students are expected to demonstrate in order to meet minimum competency standards. In addition, new skills were added to the assessment increasing the expectation for students to perform on a broader range of tasks.

**EXHIBIT 5-48
FLORIDA WRITING ASSESSMENT DISTRICT AND STATE AVERAGES
1995-95, 1996-97, and 1997-98**

GRADE	1995-96	1996-97	1997-98	1995-96	1996-97	1997-98	1995-96	1996-97	1997-98
Grade 4	Expository			Narrative			Total		
Broward	2.3	2.5	3.1	2.8	2.7	3.1	2.5	2.6	3.1
Florida	2.2	2.5	3.0	2.8	2.8	3.1	2.5	2.6	3.0
Grade 8	Expository			Persuasive			Total		
Broward	3.6	3.4	3.3	3.3	3.3	3.2	3.5	3.4	3.2
Florida	3.7	3.4	3.4	3.3	3.3	3.2	3.5	3.4	3.3
Grade 10	Expository			Persuasive			Total		
Broward	3.2	3.6	3.5	3.3	3.5	3.4	3.3	3.6	3.5
Florida	3.2	3.7	3.6	3.4	3.5	3.5	3.3	3.6	3.6

Source: Broward County School District, 1998.

**EXHIBIT 5-49
FLORIDA WRITING ASSESSMENT FOR
BROWARD COUNTY AND FIVE PEER DISTRICTS
1997-98**

SCHOOL DISTRICT	GRADE 4			GRADE 8			GRADE 10		
	Explain	Narrative	Total	Persuasive	Narrative	Total	Persuasive	Narrative	Total
Broward	3.1	3.1	3.1	3.3	3.2	3.2	3.5	3.4	3.5
Miami-Dade	3.0	3.0	3.0	3.3	3.2	3.3	3.5	3.4	3.5
Hillsborough	3.2	3.3	3.3	3.6	3.5	3.5	3.9	3.8	3.8
Orange	2.8	2.9	2.9	3.2	3.1	3.2	3.6	3.4	3.5
Palm Beach	2.9	3.0	3.0	3.4	3.3	3.3	3.6	3.5	3.6
State	3.0	3.1	3.0	3.4	3.2	3.3	3.6	3.5	3.6

Source: Broward County School District, 1998.

Exhibits 5-50 and 5-51 provide an overview of HSCT for the Broward County School District, the state, and several peer districts.

Exhibit 5-52 provides a summary of student performance on the SAT and ACT nationally and for the state of Florida and the Broward County School District.

**EXHIBIT 5-50
HSCT PASSING RATE FOR BROWARD COUNTY SCHOOL DISTRICT
AND THE STATE
1996-97 AND 1997-98**

DISTRICT OR STATE	1996-97				1997-98			
	Communications		Mathematics		Communications		Mathematics	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Broward	10,669	72%	10,767	71%	10,945	74%	10,981	71%
State	104,806	77%	106,466	75%	107,263	78%	107,657	75%

Source: Broward County School District, 1998.

**EXHIBIT 5-51
HSCT SKILLS
NUMBER AND PERCENT IN COMPARISON SCHOOL DISTRICTS AND THE STATE
1996-97 AND 1997-98**

SCHOOL DISTRICT	1996-97				1997-98			
	COMMUNICATIONS		MATHEMATICS		COMMUNICATIONS		MATHEMATICS	
	# Tested	% Passing	# Tested	% Passing	# Tested	% Passing	# Tested	% Passing
Broward	10,669	72%	10,767	71%	10,945	74%	10,981	71%
Miami-Dade	13,732	67%	14,193	66%	13,669	69%	13,629	69%
Palm Beach	6,236	77%	6,299	76%	6,678	78%	6,696	78%
Orange	5,910	78%	6,027	76%	5,708	76%	5,769	71%
State	104,806	77%	106,466	75%	107,263	78%	107,657	75%

Source: Broward County School District, 1998.

**EXHIBIT 5-52
SUMMARY OF SAT AND ACT RESULTS
FOR THE NATION, STATE AND THE BROWARD COUNTY SCHOOL DISTRICT,
1990-91 TO 1994-95**

CATEGORY	SCHOLASTIC ASSESSMENT TEST				AMERICAN COLLEGE TESTING PROGRAM				
	Year	Verbal	Math	Total	English	Math	Reading	Science Reasoning	Composite
National	90-91	422	474	896	20.3	20.0	21.2	20.7	20.6
	91-92	423	476	899	20.2	20.0	21.1	20.7	20.6
	92-93	424	478	902	20.3	20.1	21.2	20.8	20.7
	93-94	423	479	902	20.3	20.2	21.2	20.9	20.8
	94-95	428	482	910	20.3	20.2	21.3	21.0	20.8
Florida	90-91	416	466	882	20.3	20.3	21.2	20.4	20.7
	91-92	416	468	884	20.3	20.4	21.1	20.4	20.7
	92-93	416	466	882	20.3	20.4	21.2	20.5	20.7
	93-94	413	466	879	20.2	20.5	21.3	20.6	20.8
	94-95	420	469	889	20.0	20.4	21.2	20.6	20.7
Broward	90-91	409	463	872	20.4	20.7	21.2	20.2	20.7
	91-92	411	473	884	20.0	20.5	20.8	20.1	20.5
	92-93	409	468	877	19.9	20.7	20.8	20.3	20.6
	93-94	407	471	878	20.1	21.0	21.0	20.3	20.7
	94-95	411	476	887	19.7	20.9	20.8	20.4	20.6

Source: Broward County School District, 1998.

FINDING

The Broward County School District produces a *Districtwide Testing Handbook*. The handbook provides detailed descriptions of state and local testing programs and updates on testing policies. The 1998 *Districtwide Testing Handbook*, for example, outlined the following expectations for the FCAT being considered by state officials:

- Include the FCAT as a criterion to earn a College-Ready Diploma from a Florida high school.
- Incorporate the FCAT as an accountability measure for school performance and determination of Critically Low Performing Schools. The FCAT will replace several different norm-referenced tests currently used by school districts throughout the state. The two-year phase-in begins with the administration of the 1999 FCAT. The 1999 school performance reports will reflect both norm-referenced test scores and FCAT scores for reading and mathematics. The year 2000 school performance reports will use the FCAT scores as measures of reading and math, replacing the norm-referenced test scores.
- Incorporate administration of the Florida Writing Assessment into FCAT, establishing one assessment for reading, writing, and mathematics to streamline test administration costs and reduce students' test-taking time.
- Use FCAT as one important indicator when determining which schools are recognized for significant improvement or sustained excellence.

The District Testing Handbook is an excellent procedural resource that ensures consistent operating procedures among schools within Broward County School District.

COMMENDATION

The Broward County Schools District is commended for the development and use of a *Districtwide Testing Handbook*.

FINDING

The Student Assessment Unit provides for comprehensive management of the Broward County School District's assessment program and the collection of indicators that can be used to determine school-based and program accountability. Although accountability for testing results is an important priority, the primary mission of the district should be clearly established so that students spend maximum time focused on curriculum and instructional activities.

In addition to state-required assessments, the Broward County School District tests students in grades kindergarten-12 on nationally standardized exams. Although these tests are not required, the testing program allows school-based administrators and

department personnel in the district to compare local results to national results. As shown previously in Exhibit 5-44, fourth and eighth graders take the Stanford Achievement Test in addition to Florida Comprehensive Assessment Test (FCAT) and the Florida Writing Assessment Program.

During our on-site review, we found that students spend several weeks preparing for and taking exams. The department currently budgets \$681,113 in test purchases alone. Printing and processing expenses exceed \$195,000. Additionally, on-site interviews found that parents and staff are concerned about the amount of instructional time used for extensive test preparation and test-taking. As shown previously in Exhibit 5-44, fourth graders take the Stanford Achievement Test in addition to the Florida Comprehensive Assessment Test and the Florida Writing Assessment Program.

RECOMMENDATION

Recommendation 5-22:

Assign a task force to review the district's needs for local testing and reduce testing purchasing and processing by a minimum of 15 percent.

The district should set a goal to reduce testing by a minimum of 15 percent. A fifteen percent reduction in local testing should assist teachers in reducing time spent in test preparation rather than in direct instruction. Many school districts do not require national comparisons necessary at all grade levels annually. Grade levels could rotate the use of non-required standardized tests. Rotating testing requirements ensure accountability without excessive time being spent on test preparation.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|----------------------------|
| 1. The Associate Superintendent should assign a Task Force to review the testing program. | Summer 1999 |
| 2. The Task Force should review the testing program. | October –
December 1999 |
| 3. The Task Force should present recommendations for modifications to the testing program to the Superintendent. | January 2000 |
| 4. The Superintendent, in conjunction with other key staff, should review the recommendations and present the report to the Board. | February 2000 |
| 5. The Board should approve the recommendations. | March 2000 |

FISCAL IMPACT

Savings will vary depending on the recommendations of the Task Force. The Task Force should strive to increase the efficiency of the testing program by at least 15 percent based on MGT's analysis of the current testing program. A 15 percent reduction in the testing program would result in a savings of \$131,250 annually.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Reduce Purchases of Tests	\$131,250	\$131,250	\$131,250	\$131,250	\$131,250

5.6 Grants Administration

CURRENT SITUATION

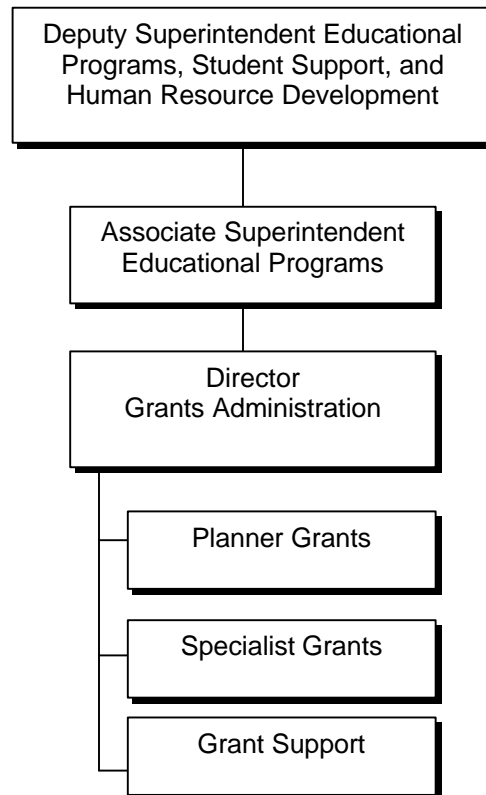
The Grants Administration Unit reports to the Associate Superintendent for Educational Programs. The unit is comprised of positions including a grants administrator, grants planner, and two grants specialists. The major goal of the Grants Administration Department is to increase the amount and diversity of grant funding awarded to the Broward County School District. Grant funds are used to provide additional resources for initiatives and projects that support school improvement goals and other priority projects initiated by the district. The Grant Administration Unit performs the following functions:

- identifying and researching public and private sources of potential grant revenues;
- disseminating information of potential grant opportunities to schools and departments;
- conducting training in grant writing for school and departmental employees;
- assisting schools and school districts in developing and producing competitive grant proposals;
- participating in grant negotiations with funding agencies;
- providing post award assistance to schools and departments in meeting grant requirements; and
- managing certain district grant programs and activities such as the Impact Aid Survey and Services to nonpublic Schools.

Exhibit 5-53 displays the current organizational structure of the Grants Administration Department.

The Grants Administration Unit's major objective is to increase the amount and diversity of grant funding awarded to the school district through both public and private funding sources. Prior to seeking new funds, the Grants Administration Department ensures that the funds support initiatives and projects that meet major system priorities and school improvement goals. Grant funding is used by schools and departments to supplement state and local funding to develop methods and models for improving student, teacher, and school performance.

**EXHIBIT 5-53
DEPARTMENT OF GRANTS ADMINISTRATION**



Source: Broward County School District, Division of Educational Programs, Student Support, and Human Resource Development, 1998.

The Grants Administration Unit provides training and technical assistance to school and district personnel in all facets of grant development and procurement, collects data, serves as a clearinghouse for grants information in the school district, and tracks legislative and regulatory developments that affect grant funding and grant project operations. Competitive grant projects include initiatives for:

- intensive staff training;
- partnership development between the district and community organizations and businesses;
- magnet programs; multicultural and bilingual education programs;
- technology utilization; and
- school improvement projects.

FINDING

According to Broward County School District records between 1989-90 and 1994-95, competitive grant funding received by the school district increased 149 percent. Between July 1995 and April 1996, the Grants Administration Department assisted with the development of 94 competitive grant applications --- 75 from schools and 19 from departments. To date, 18 of the grant proposals have been awarded for a funding total of \$5,736,159. Forty-seven (47) proposals are currently pending and 29 have been denied. During the same period, the department provided more than 885 hours of grants training to 325 staff members from 87 district schools and centers.

Exhibit 5-54 provides a summary of the grants funds provided to Broward County School District during 1997-98. The exhibit shows that the district has continued to maximize grant resources with a total of \$76,376,909 in grant funds.

COMMENDATIONS

The Broward County School District is commended for its proactive approach in seeking additional grant funds.

The additional funds have assisted many schools and programs in supporting student achievement.

FINDING

The Grants Administration Unit identifies and researches public and private sources of financial support; disseminates funding information to schools and departments; conducts formal grants training for school and department personnel; assists schools and district departments in developing and producing competitive grant proposals; participates in grant negotiations with funding agencies; and provides post award assistance to schools and departments in meeting grant regulations. The unit also directly manages certain district grant programs and activities related to Impact Aid Survey and Services to nonpublic schools.

The Grants Administration Unit is responsible for the following sources:

- reviews and sends out information each year to schools and departments;
- conducts routine technical assistance workshops for schools for specific RFPs and review drafts proposals from schools and suggest improvements;
- provides accounting assistance, when requested by schools or departments; and
- reviews the budget page for most state grants (signature required) and other budgets upon request, (but many grant budgets are submitted without the accounting review which has led to errors.)

The Grants Administration Unit is not responsible for monitoring or implementing most of the grant programs. As shown in Exhibit 5-55, since 1992 the Broward County School District has returned \$2,093,019 in unused grant funds.

**EXHIBIT 5-54
SUMMARY OF GRANTS ADMINISTERED BY BROWARD COUNTY SCHOOL DISTRICT
1997-98**

TITLE	DEPARTMENT	FUNDING AGENCY	AMOUNT FUNDED
Adult Education, Section 322	Vocational, Adult and Community Education	Florida Department of Education	\$1,033,719
Adult Education, Section 322-Corrections	Vocational, Adult and Community Education	Florida Department of Education	\$25,000
Break the Mold – Whole Village Technology	Strategic Planning & Accountability		\$98,300
Break the Mold – Whole Village Technology	Strategic Planning & Accountability		\$98,300
Broward Beautiful Community Grant Program	Sawgrass Springs and Margate Middle	Broward Beautiful	\$8,750
Broward County Sheriff's Office – Project ACES	Whiddon-Rogers Education Center	Broward County Sheriff's Office	\$141,393
Broward Employment and Training Administration Summer Academic Remediation Program	Vocational, Adult and Community Education		\$103,789
Broward Workforce Development Board/WAGES Coalition – “Destination Self-Sufficiency” - STRIVE	Vocational, Adult and Community Education	Broward Workforce Development Board	\$541,845
Challenge Grant Programs for the Gifted	Advanced Academic Programs		\$14,000
Children's Services Board – Various	Various	Broward County – Human Services Department – Children's Services	\$819,067
City of Coral Springs – Innovative At-Rise Youth Programs	2 Middle and 3 Elementary	City of Coral Springs	\$10,214
City of Coral Springs Trees 4 Schools Program	Adopt-A-Mile in partnership with Coral Springs Elementary	City of Coral Springs	\$10,000
Connecting Teachers with Technology Award Program	Markham Elementary	US West and Media One	\$23,000
Dan Marino Foundation	Deerfield Beach Middle	Dan Marino Foundation	\$5,000
Danforth Foundation: Successful Schools Initiative: Co-Learning Assures Secure Partnerships	Parkway Middle		\$20,000
Diana Wasserman Minigrants	Bright Horizons, Coral Springs High, Quiet Waters Elem		\$1,310
Early Childhood Regional Technical Assistance Project	Early Childhood Education	Florida Department of Education	\$94,573
Early Head Start Program	Early Childhood Education	United States Department of Health and Human Services	\$703,964
Education Now and Babies Later (ENABL)	Health Education	March of Dimes	\$6,197
Education of Homeless Children and Youth	School Social Work	Florida Department of Education	\$57,200
Elementary School Technology (EDS)	Welleby and Pinewood Elementary	Electronic Data Systems (EDS)	\$2,600
Environmental Education Grants Program	Whiddon-Rogers Education Center		\$4,933

**EXHIBIT 5-54 (Continued)
SUMMARY OF GRANTS ADMINISTERED BY BROWARD COUNTY SCHOOL DISTRICT
1997-98**

TITLE	DEPARTMENT	FUNDING AGENCY	AMOUNT FUNDED
Extended Access to Library Media Services	Learning Resources ELEM: Miramar, Oakland Park, Tedder		\$58,440
Family Preservation Program at Drew Family Resource Center	Drew, Charles Family Resource	Department of Children and Families	\$106,875
Florida Compact Grant	Ely High	Florida Department of Education	\$25,000
Florida Department of Children and Families – ALPHA	Secondary Education	Department of Children and Families	\$235,438
Florida Department of Children and Families Contract for Mental Health Services for Severely Emotionally Disturbed Students (SED) for 1997-98	Whispering Pines	Department of Children and Families	\$207,663
Florida Department of Children and Families – Targeted Assistance Program	Vocational, Adult and Community Education		\$515,315
Florida Department of Corrections – Even Start Family Literacy Program	Vocational, Adult and Community Education		\$140,451
Florida Department of Education School-To-Work	Vocational, Adult and Community Education	Florida Department of Education	\$500,000
Florida Department of Juvenile Justice – Community Apprentices Program	Deerfield Beach Middle	State of Florida, Department of Juvenile Justice	\$43,147
Florida Diagnostic and Learning Resources System (FDLRS) – Assistive Technology Educational Network	Exceptional Student Education	Florida Department of Education	\$56,000
Florida Diagnostic and Learning Resources System (FDLRS) – General Revenue	Exceptional Student Education	Florida Department of Education	\$80,535
Florida Diagnostic and Learning Resources System (FDLRS) – Preschool	Exceptional Student Education	Florida Department of Education	\$113,310
Florida Diagnostic and Learning Resources System (FDLRS) – REACH	Exceptional Student Education	Florida Department of Education	\$725,147
Florida First Start Program	Early Childhood Education	Florida Department of Education	\$290,662
Florida Incentive Planning Challenge Grant – Fine Tuning Assessment	Riverglades Elementary	Florida Department of Education	\$5,000
Florida Incentive Planning Challenge Grant – Pathways for Success	Fort Lauderdale High	Florida Department of Education	\$20,000
Florida Learn and Serve America – The Literacy Club	Driftwood Elementary	Florida Department of Education	\$2,278
Goals 2000: Broward Educational Curriculum Planning Tool – Sunshine Standards & FCAT	Nova Center	Florida Department of Education	\$270,000
Goals 2000: Local Education Reform Grant Program	Dillard Innovation Zone	Florida Department of Education	\$150,000
Goals 2000: Professional Development Distance Learning Technology Grant	Nova Center	Florida Department of Education	\$440,000

**EXHIBIT 5-54 (Continued)
SUMMARY OF GRANTS ADMINISTERED BY BROWARD COUNTY SCHOOL DISTRICT
1997-98**

TITLE	DEPARTMENT	FUNDING AGENCY	AMOUNT FUNDED
Goals 2000: Secondary Technique Accelerated Reading	Secondary Education	Florida Department of Education	\$235,000
GTE Growth Initiatives for Teachers	Hallandale Adult & Community Center	GTE Foundation	\$12,000
Head Start – Basic	Early Childhood Education	United States Department of Health and Human Services	\$7,995,972
Heritage Panel Program – National Conference of Christians and Jews	Diversity and Cultural Outreach		\$3,500
IBM – Reinventing Education	Strategic Planning & Accountability	International Business Machines	\$400,000
IDEA, Discretionary Fund Supplement Grant	Exceptional Student Education	Florida Department of Education	\$355,200
IDEA, Part B, Individuals with Disabilities Education Act	Exceptional Student Education	Florida Department of Education	\$10,226,873
IDEA, Part B, Severely Emotionally Disturbed Network (SEDNET)	Exceptional Student Education	Florida Department of Education	\$85,358
IDEA, Part B, Severely Emotionally Disturbed Network (SEDNET), General Revenue	Exceptional Student Education	Florida Department of Education	\$32,992
IDEA, Part B, Special Project: Florida Inclusion Network Grant	Exceptional Student Education	Florida Department of Education	\$250,000
IDEA, Preschool Grant for Children with Disabilities Aged 3-5	Exceptional Student Education	Florida Department of Education	\$1,259,688
Impact Aid	Grant Administration		\$27,532
Innovation zone Artist Residency Grant – Acts of Kindness “A OK”	Silver Ridge Elementary	Broward Cultural Affairs Council	\$5,000
Innovation zone Artist Residency Grant – Blended Voices in America	Dilliard High	Broward Cultural Affairs Council	\$5,000
Innovation zone Artist Residency Grant – We’ve Got the Power to Make a Difference: Through the Arts	Hallandale Adult & Community Center	Broward Cultural Affairs Council	\$5,000
JTPA Title IIA, Section 123	Vocational, Adult and Community Education	Florida Department of Education	\$273,415
Magnet Schools Assistance Program	Attucks Middle, Parkway Middle, New River Middle, Driftwood		\$1,776,643
MegaSkills Urban Initiative for Parent Involvement	ESEA Title 1	MegaSkills Education Center – The Home and School Institute	\$20,000
Miami HEAT/HIP Community Service Grant	ELEM: Colbert, Eagle Point, Embassy Creek, Fairway, J.S. Hunt	HIP Health Plan of Florida, Inc.	\$10,000
National Science Foundation – Mathematics & Science Teacher Enhancement through Chaos and Fractals	Educational Prog/Student Support/HRD-Deputy	Florida Atlantic University for National Science Foundation	\$245,657
Parents To Kids Home-Based Reading Instruction program	Early Childhood Education	Florida Department of Education	\$99,829
Performance Assessment System for Students with Disabilities	Wingate Oak Center		\$6,371
Performance Assessment System for Students with Disabilities	The Quest Center		\$5,000
Performance Assessment System for Students with Disabilities	Bright Horizons Center		\$15,000

**EXHIBIT 5-54 (Continued)
SUMMARY OF GRANTS ADMINISTERED BY BROWARD COUNTY SCHOOL DISTRICT
1997-98**

TITLE	DEPARTMENT	FUNDING AGENCY	AMOUNT FUNDED
Performance Based Incentive Funding Alternative Use Plan	Vocational, Adult and Community Education	Enterprise Agency	\$74,591
Pre-Kindergarten Early Intervention Program	Early Childhood Education		\$8,601,809
Professional Pathways	Magnet Programs	Panasonic Foundation, Inc.	\$125,000
Quick Response Training	Sheridan Vocational Technical	Enterprise Florida, Inc.	\$15,806
Safe and Drug-Free Schools Program and Communities	Health Education	Florida State Department of Education	\$1,168,970
Safe and Drug-Free Schools – Set Aside	Health Education Dilliard Innovation Zone	United States Department of Education	\$1,400,055
School Health Programs to Prevent Serious Health Problems and Improve Education	Health Education	Department of Health and Human Services	\$244,252
School-To-Work Urban/Rural Opportunities – High Poverty	Vocational, Adult and Community Education Dilliard Innovation Zone	U.S. Department of Education	\$487,500
South Florida Annenberg Challenge (Exploratory)	Various Schools	South Florida Annenberg Challenge, Inc.	\$66,693
South Florida Regional Planning Council/Florida Gold Coast Clean Cities Coalition Grant—VACE Electric Vehicle	Vocational, Adult and Community Education	South Florida Regional Planning Council	\$55,000
Student Enrichment in Arts and Science (SEAS Program)	Child Development	Florida Department of State-Division of Cultural Affairs	\$10,348
Thurgood Marshall Elementary School's Critically Low Student Performance Project	Marshall, Thurgood Elementary		\$26,000
Title I 1997-98 Capital Expenses for services to Private School Children	Special Programs	United States Department of Education	\$158,138
Title I Delinquent or At-Risk Students	Special Programs	United States Department of Education	\$143,297
Title I Migrant Education, Migrant General Revenue, and Region V Migrant Supportive Services and Data Center	Special Programs	Florida Department of Education	\$452,281
Title I Targeted Assistance and Schoolwide Project	Special Programs	United States Department of Education	\$23,523,942
Title II – Eisenhower Professional Development	Educational Programs	Florida Department of Education	\$964,393
Title VI—Innovative Education Program Strategies	Strategic Planning & Accountability	Florida Department of Education	\$1,279,853
Title VII, Part C, Emergency Immigrant Education Program	Multicultural/Foreign Language/ESOL Education	Florida Department of Education	\$3,762,167
Title VII – Project I Decide. . . I Succeed . . . I Lead	Multicultural/Foreign Language/ESOL Education	Florida Department of Education	\$144,788

**EXHIBIT 5-54 (Continued)
SUMMARY OF GRANTS ADMINISTERED BY BROWARD COUNTY SCHOOL DISTRICT
1997-98**

TITLE	DEPARTMENT	FUNDING AGENCY	AMOUNT FUNDED
Title VII—Empowering the Language Minority Population with Educational Reform (Project EMPOWER)	Multicultural/Foreign Language/ESOL Education	United States Department of Education	\$330,951
Title VII—Project Ansanm - Togetherness	Multicultural/Foreign Language/ESOL Education	United States Department of Education	\$62,051
Title VII—Project Tomodachi – Friends through Languages	Multicultural/Foreign Language/ESOL Education	United States Department of Education	\$89,973
Title VII—Project Unidos	Multicultural/Foreign Language/ESOL Education	United States Department of Education	\$86,882
Tobacco Prevention/Intervention Teacher Training Project	Health Education		\$29,945
Toyota Families for Learning Partnership	Vocational, Adult and Community Education	National Center for Family Literacy	\$9,550
Toyota Time—Seeing the Word of Algebra Through Technology (SWATT)	Ely High		\$10,000
Vision and Eye Examination Program	Health Education	Florida Department of Education	\$119,439
Vocational and Applied Technology Education-Gender Equity, Section 222	Vocational, Adult and Community Education	Florida Department of Education	\$70,878
Vocational and Applied Technology Education-Project ACCEPT-Single Parent/Displaced Homemaker, Section 221B	Vocational, Adult and Community Education	Florida Department of Education	\$38,879
Vocational and Applied Technology Education-Project Reward-Single Parent/Displaced Homemaker, Section 221	Vocational, Adult and Community Education	Florida Department of Education	\$149,178
Vocational and Applied Technology Education-Secondary Education, Section 231	Vocational, Adult and Community Education	Florida Department of Education	\$1,358,182
Vocational and Applied Technology Education-Tech Prep., Section 341	Vocational, Adult and Community Education	Florida Department of Education	\$156,673
Total			\$76,376,909

Source: Broward County School District, Department of Grants Administration Unit, 1998.

**EXHIBIT 5-55
SCHOOL BOARD OF BROWARD COUNTY
FEDERAL FUNDS ANALYSIS SUMMARY
FOR 1992-93 THROUGH 1996-97**

SCHOOL YEAR	TOTAL GRANT AMOUNT	TOTAL EXPENDITURES	TOTAL UNSPENT	PERCENT SPENT	TOTAL CARRY FORWARD AMOUNT ⁽¹⁾	AMOUNT RETURNED/ UNSPENT	PERCENT RETURNED/ UNSPENT
1992-93	45,371,348	39,747,975	5,623,373	88%	5,037,005	586,368	1.29%
1993-94	53,069,544	50,466,190	2,603,354	95%	2,137,722	465,632	0.88%
1994-95	52,762,991	49,817,951	2,945,040	94%	2,024,941	920,099	1.74%
1995-96	54,704,288	51,785,458	2,918,830	95%	2,797,910	120,920	0.22%
1996-97	58,238,481	50,542,152	7,696,329	87%	TBD	TBD	
Five-Year Average	\$52,829,330	\$48,471,945	\$4,357,385	92%	2,999,395	2,093,019	1.02%

Source: Broward County School District, Grants Administration Unit, 1998.

⁽¹⁾ Amount to be carried forward to next fiscal year; total amount is average of four years. TBD: to be determined after all grants are closed after June 30, 1998.

Grant awards tend to be addressed to the Superintendent or directly to the department that submitted the grant -- not to the Grants Administration Department. Copies of awards are received only after requesting them from the 10th floor receptionist, schools, or departments – which can take weeks. When award letters are not received by accounting, there is sometimes a delay in setting up the account. No assistance can be provided until accounting learns of the grant award.

Additionally, accounting only tracks funded grants. Due to the large volume, the accounting section does not issue reminders for spending funds and no database is available for historical data.

Budget printouts are used to report budget information, but there are no reports generated for management above the school or department levels. It is difficult to distribute printouts to schools and departments in a timely manner because of the large volume of printouts. They are often obsolete by the time they are received at the school or department.

RECOMMENDATION

Recommendation 5-23:

Expand the role of Grants Administration Unit to improve accountability for grant administration and reassign the unit to the Director of Grants and Administrative Services in the newly created Division of Educational Programs and Services. (See Exhibit 5-10 for the proposed realignment of this Department.)

This reorganization will enhance the unit's processing and information management capacity and centralize the coordination and monitoring of the unit's reporting requirements. Under the new structure, the Director of Grants and Administrative Services would have primary responsibility for:

- grants administration;
- financial monitoring;
- data management and reporting; and
- compliance monitoring.

The implementation plan should carefully examine the functions assigned to this unit. Services that are not within the scope of an administrative service role should be reassigned to the appropriate units and monitored.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Deputy Superintendent, in conjunction with key department personnel, should establish a plan to implement the merger of administrative grant functions. | June 1999 |
| 2. The Deputy Superintendent should ensure that the merger is implemented. | August 1999 |

FISCAL IMPACT

This reorganization can be accomplished within existing resources. The improved lines of authority should increase the efficiency of grants administration. On average, \$523,254 in grant funds are returned annually. By improving the administrative role of the Grants Administration Unit in monitoring grant budgets, the Board should hold the Department accountable for avoiding at least 75 percent of this loss. As administrative practices improve, the Board should raise the 75 percent performance standard to 90 percent. Based on MGT's experience with other school districts, these standards are reasonable goals for improving organizational efficiency.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Improve Accountability for Grants Administration	\$330,000	\$330,000	\$330,000	\$330,000	\$330,000

5.7 Student Support Services

Student Support Services are provided in addition to curriculum and instructional services to students, families, and staff to support all areas of child development that will enhance student success in school.

CURRENT SITUATION

The Broward County School District provides an array of student support services (psychological, guidance, social workers, and health services) in addition to the district curriculum and instructional programs. The mission of the Student Support Services and Exceptional Student Education (ESE) Department is to provide a personalized, coordinated, and culturally-sensitive support system for students and their families in collaboration with community partners.

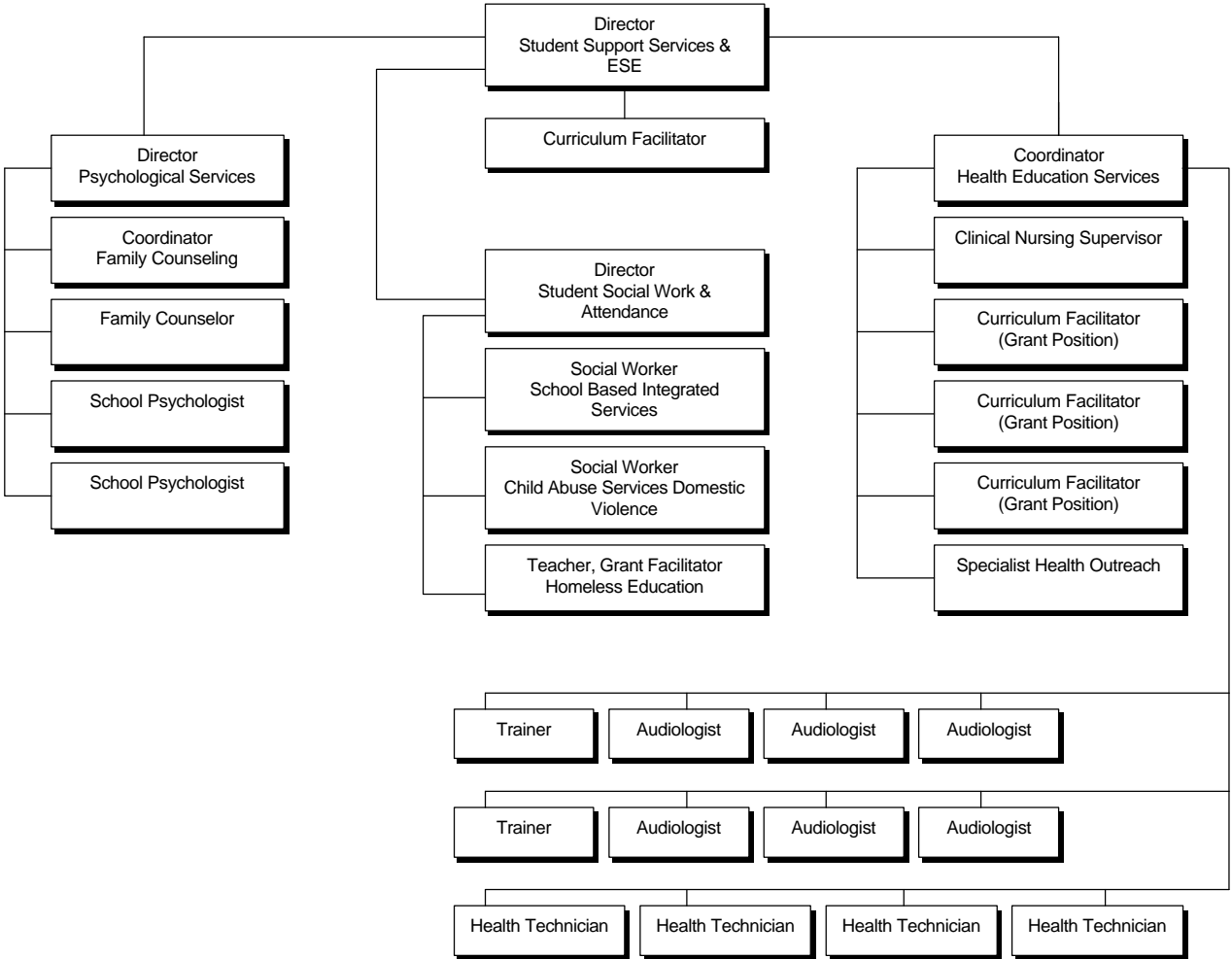
Exhibit 5-56 displays the organizational structure of the Department of Psychological Services/School Social Work and Attendance/Health Education Services. The Department uses the Standards of Student Services as the guidance document governing its goals, services, and initiatives. The Standards of Student Services (SOSS) set an expectation for a personalized support system for students and their families which organizes and utilizes internal and external services in a process that focuses on student academic, social, and health-related growth.

The services of school psychologists, guidance counselors, social workers, and other support personnel focus the delivery of services to students based on the needs of each individual school. The integrated delivery of these services is based on the district's Standards of Student Services.

The 1998-99 major goals and initiatives of the Student Support Services and ESE Education Department are:

- Field test new zone-based student services delivery systems which align with the Standards of Student Service policy by coordinating the staff development, planning, and technical assistance for six innovation zones which volunteered to adopt or develop new systems and field-test accountability indicators by June 30, 1999.
- Continue (for the second year) to implement the Medicaid Administrative Outreach Program and, in addition, establish pilot programs for school-based fee-for-service Medicaid programs in order to determine, by June 1999, which fee-for-service programs are cost-effective and beneficial for students and should therefore be implemented systemwide in 1999-2000.
- Develop a support system to meet the unique needs of foster care and homeless students by establishing written procedures related to stabilizing their school environments by creating individualized academic plans and assigning surrogate parents for students identified as ESE.
- Evaluate the impact of the funding concept (developed in 1997-98) which provides additional school psychologists, social workers, and or other support personnel for zones with the largest growth in student enrollment and for zones which have more than 65 percent of their students on free/reduced lunch. Complete analysis by May 1999 to coincide with development of budget guidelines for 1999-2000.
- Expand the "full service school" concept by establishing a "full service school" site at Deerfield Beach High School, including the development of specifications for architectural plans and creation of contracts with community partners to staff the center with medical, dental, and mental health personnel. Specifications to be completed by December 1998 and partnerships clearly defined by March 1999.

**EXHIBIT 5-56
 PSYCHOLOGICAL SERVICES/SCHOOL SOCIAL WORK AND ATTENDANCE/
 HEALTH EDUCATION SERVICES
 ORGANIZATIONAL CHARTS
 1998-99**



Source: Broward County School District, Department of Student Support Services and ESE, 1998.

- As part of the Coordinating Council of Broward, provide leadership for the school district's completion of provider profiles to support the Broward Information Network by creating a technology-based system for completing profiles which minimizes the impact on staff's time yet provides the information needed for county-wide multiagency planning and budget development. Complete the development of the system and submit at least 10 provider profiles by June 1999.
- Coordinate the information and activities of an Ad Hoc Committee on Family Counseling for the purpose of clearly defining the existing services which are being provided in many forms and locations throughout the district and making recommendations to improve and/or enhance services for students and families. Recommendations (at least some of which have no cost impact) are to be completed by February 28, 1999.

The Broward County School District has collaborated with other county-based health education and social service agencies and designed a countywide information sharing system called "The Broward Information Network" (BIN). By interconnecting the telecommunications networks of the various partners, a database of client information is being assembled. This database will maintain the security and need-to-know authorization necessary to enable an interchange of records among the various health agencies.

Recognizing the importance of early intervention and the critical role of schools addressing health-related issues, the North Broward Hospital District and the Broward County School Board joined in a partnership to improve student health services. This partnership has given students, their families, and local community members access to necessary health care.

Prior to this collaborative project, studies conducted by the 1995 Community Resources Coordinating Council, indicated that approximately 10 percent of Broward County's student population had not seen a doctor in two years and 35 percent had never seen a dentist. Also according to the 1995 Center for Disease Control (CDC) Youth Risk Behavior Survey, adolescents in Broward County had the highest rate of gonorrhea than any other age group (6.6 per 100), as well as the second highest rate of infectious syphilis.

The School Health Program was established in 1994 for the purpose of creating full-service primary health care centers in Broward County's most impoverished schools. Located in medically underserved, low income areas, these Centers offer a wide range of primary care services. The services provided by these centers emphasize health education, adolescent health services, and pregnancy prevention. Below is a list of the current health centers:

- Lauderhill Middle Community School Health Center
- Seagull School Health Center
- Pompano Multi-Purpose School health Center
- Stranahan High School Health Center

- Ely High School Health Center
- William B. Dandy Middle School Health Center
- Charles R. Drew Family Resource Health Center
- Crystal Lake Middle School Health Center
- Deerfield Beach High School Health Center

In the last two years, the North Broward Hospital District has logged over 95,000 patient visits. Approximately 85 percent of the patients were uninsured. Additionally, the North Broward Hospital District provided the supervision and training of the Broward County School Board athletic trainers at all high schools in the district. For the 1997-98 fiscal year, operating expenses for all school health programs were approximately \$1.7 million.

The District has developed programs that address the incidence of repeat teen pregnancies and sexually transmitted diseases. In collaboration with the Broward County School Board and with supplemental funding from the Broward County Children's Services Board, the district has provided health care services and case management to pregnant and parenting teens at the three Broward Teen Parent Education sites (Seagull, Hallandale Adult and Pompano Schools) and to teen parents enrolled at Stranahan High School, Ely High School and Dillard High School. Services provided at Hallandale are in collaboration with Memorial Healthcare System. This program has served over 976 adolescents. Of those students participating, 97 percent were without a repeat pregnancy and 96 percent without repeat STD infection. On follow-up 180 days after leaving this program, the participants reported no repeat STDs and a 96 percent without a repeat pregnancy.

COMMENDATION

The Broward County School District and the staff of the school health program are commended for the important strides they have made in delivering and providing important health services to students.

FINDING

Services rendered by the social workers include serving on diagnostic and crisis intervention teams, family counseling, parent education, conducting family assessments, providing consultation for teachers, and case management. Specific programs established and implemented by the School Social Work Office include child abuse services, homeless education program, school-based integrated services program, teen parent services (home school), and a graduate social work internship program.

The districts school social work services which include assessing the needs of students and families and providing the professional services to overcome any obstacles to student educational success are insufficient. Broward County has a total of 72 social workers (all possessing master's degrees) divided among the south, central, and north areas. MGT consultants conducted a focus group of 25 principals and asked them to rate various student support services provided by the district. Fifty-five percent of the responses from principal focus group sessions conducted by MGT indicated the need to increase the quantity of social worker services. The ratio of social workers to students in Broward County School District is 3,116:1. The ratio of students to social workers is

somewhat higher compared to some other comparison districts. For example, Miami-Dade County School District has a ratio of 3,039:1 and Orange County School District has a ratio of 3,080:1.

The district requires that social workers must possess a master's degree in their field. This practice is driven by Medicaid requirements when certain procedures are carried out and the district seeks reimbursement. However, many tasks assigned to social workers are not related to this requirement.

RECOMMENDATION

Recommendation 5-24:

Hire an additional four social worker assistants annually through the year 2003-04.

An acceptable practice used by other districts is to employ social worker assistants under a social worker's direction, therefore, reducing the cost of delivering services and increasing the level of services by employing additional personnel. In an effort to increase the quantity of social worker services, the district could employ social worker assistants with the ultimate goal of one assistant to each social worker. This process is justified because it should reduce the cost of rendering certain types of social work services without sacrificing quality.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Services, and Human Resource Development should provide leadership for the preparation of a plan designed to implement this recommendation. May 1999
2. The Director of Student Services and ESE, in collaboration with the Director of Personnel, should hire an additional four social worker assistants and revise current social worker job descriptions and prepare job descriptions for social worker assistants in accord with the approved plan. June 1999
3. The Superintendent should recommend to the School Board approval of the social worker assistance positions and appropriate job description. July 1999
4. The Director of Student Services and ESE should implement the plan. September 1999

FISCAL IMPACT

The average social worker assistant's salary plus 33 percent benefits is \$21,881 per year times four positions equals a cost to the district of about \$87,525 per year. Based on attrition and program growth, it is recommended that an additional four social worker assistants be hired each year until the ultimate goal of a ratio of one assistant to one social work is attained.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Hire Four Social Worker Assistants Annually	(\$87,525)	(\$175,050)	(\$262,575)	(\$351,100)	(\$437,625)

FINDING

The school district possesses a comprehensive student database system called the Total Education Resource Management System (TERMS). However, interviews with personnel, a review of the student support services program goals, objectives, and accomplishments as well as a review of the information provided by ETS, indicate that social workers are currently not entering information related to student interventions into a well-established database system. The TERMS software does permit the additional data to be entered into the system. By integrating the intervention information with the district's database system, the social workers can foster better communications with other personnel who are working with those particular students as well as it should permit more effective and efficient utilization of time for school social workers.

RECOMMENDATION

Recommendation 5-25:

Establish and implement a process to enable social workers to enter appropriate student information into the Total Education Resource Management System (TERMS).

The integration of the social work database and the student database will enable social workers, teachers, administrators, and staff to quickly furnish and receive appropriate and meaningful information related to students, student interventions, and status of assistance being offered.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Director of Social Work and Attendance and the Director of Education Technology Services should prepare a plan including recommendations designed to ensure appropriate access to technology, therefore, permitting social workers effective and efficient fulfillment of their responsibilities. | July 1999 |
| 2. The Director of Education Technology Services should implement the approved plan. | August 1999 |

FISCAL IMPACT

This recommendation can be accomplished through existing resources.

FINDING

The district's school psychological services mission statement is to "provide services that support the school community in meeting the educational, emotional, and social needs of all students." Currently, the Broward County School District is being served by 78 psychologists. A majority of the staff have specialist degrees and another 18 percent hold doctorates. All psychologists hold certificates from the Department of Education and several hold the credential of Nationally Certified School Psychologist (NCSP). The department is striving to adapt its services to the needs of a rapidly growing and diverse student population.

The Broward County school psychologists work as members of support teams in delivering services to students. They have various physical location assignment areas such as an area office, innovation zone, or a district department team. Each school can minimally access the services of one psychologist to address the needs of its students.

Interviews and a review of documents provided by the Department of Psychological Services indicate that the Broward County School psychologists, in collaboration with the reading curriculum specialists, have developed training for psychologists which links assessment to strategies for effective reading instruction.

COMMENDATION

The Broward County School District's Psychological Services Department is commended for collaboratively developing training which links assessment to strategies for effective reading instruction.

FINDING

In a review of documents supplied by the Department of Student Support Services and in interviews conducted with district personnel, no specific procedures were identified to ensure the clear delineation of responsibilities between psychological services and the Equal Opportunity Office as related to issues associated with Section 504 matters. This subject should receive high priority since confusion in this area of responsibility could result in significant non-compliant issues.

RECOMMENDATION

Recommendation 5-26:

Establish clear lines of responsibilities with regard to Section 504 responsibilities and provide the necessary staff training.

Implementation of this recommendation should assist the district in maintaining adequate and efficient compliance with the Equal Opportunity Office as it relates to Section 504. Implementing specific procedures should limit potential litigation related to non-compliance.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Education Programs, Student Support and Human Resource Development in collaboration with the Director of Student Support Services and ESE and the Director of Psychological Services/504 should develop a plan to ensure the clear delineation of responsibilities in all matters related to Section 504 matters and relationships with the Equal Opportunity Office. May 1999

2. The Deputy Superintendent for Educational Programs, Student Support and Human Resource Development, the Director of Student Support Services and ESE, and the Director of Psychological Services/504 should present the plan to the Superintendent and Executive Staff for review and final approval. June 1999

3. The Deputy Superintendent for Educational Programs, Student Support and Human Resource Development, the Director of Student Support Services and ESE should implement the approved plan. July 1999

FISCAL IMPACT

This recommendation can be implemented without the need for additional resources and could contribute to reducing the district's liability for errors that may occur in the handling of Section 504 issues.

5.8 Staff Development

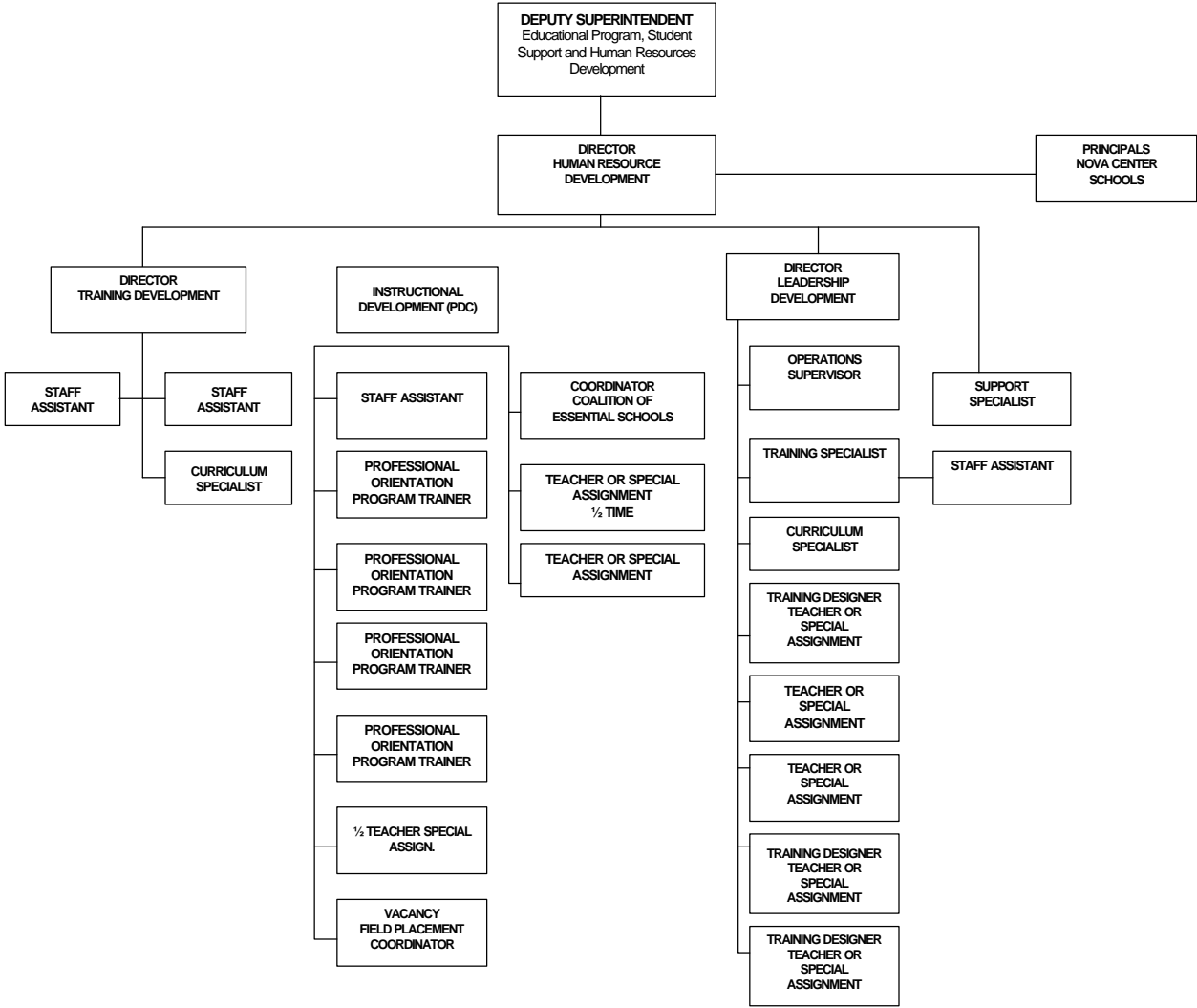
An effective staff development program must initiate and assume responsibility for developing materials and training which respond to the district's strategic plan. This section is subdivided into the following subsections: 5.8.1 addresses the overall staff development in the district, 5.8.2 discusses the Professional Orientation Program, and subsection 5.8.3 refers to the Nova Centers.

5.8.1 Overall Staff Development Program

CURRENT SITUATION

The Department of Staff Development is currently combined with the Educational Programs and Student Support Services. As seen in the Exhibit 5-57, the department is organized into three units: Training and Development, Instructional Development and Zone Support, and Leadership Development. Often the terms Staff Development and Human Resource Development are interchanged, but the reader should be cognizant that in the Broward County School District they are one in the same.

EXHIBIT 5-57
ORGANIZATIONAL CHART FOR THE DEPARTMENT OF HUMAN RESOURCE DEVELOPMENT
1998-99



Source: Broward County School District, Department of Human Resource Development, 1998.

This year, Human Resource Development added a staff development position (teacher on special assignment) to each of the 23 Innovation Zones in an effort to coordinate training opportunities.

According to the Florida Department of Education's *1997 Human Resource Management Development HRMD) Program Approval Report* conducted by a State on-site team, Broward County has a "rich history of HRMD initiatives. The district has piloted objective selection systems and internships for school principals in the early 1980s and has since, served as a model for other districts in the state. Two previous visits in 1986 and 1990 by on-site teams resulted in full approval of the HRMD Plan."

In 1996, the Broward County School District adopted the Professional Pathways Policy which emphasized the need for schools to develop their staff development plans that are directly linked to increased student achievement. Thus, the district has embarked on a staff development plan that is referred to as results-driven staff development. The following language has been added to the district's Accountability Policy:

All staff should have access to results-driven professional development and training which is aligned with the major system priorities and appropriate plans. The major system priorities must be supported by a coordinated system of staff development which is standards-based, job embedded, collaborative adult learning, and which builds a culture that ensures continuous improvement.

The goals of results-driven staff development include:

- staff development as the responsibility of all individuals in the district. Both the learner and the staff development provider must be committed to continuous improvement;
- action research among various forms of learning are recognized as effective methodologies;
- all initiatives and training must meet the district's standards and include follow-up activities; and
- the success of the training is measured by the impact on student achievement.

Exhibit 5-58 explains the department's newly developed paradigm shift.

According to those interviewed and a review of documents provided by the Department of Human Resource Development, the department is in a state of transition for the 1998-99 school year. The staff is establishing criteria for skill development and quality training that is aimed at being in alignment with the newly created Critical Content Guides and Essential Teacher Knowledge. The district currently has an ad hoc committee charged with the continuous development and refinement of a strategic plan for staff development for the Broward County School District.

**EXHIBIT 5-58
DEPARTMENT OF HUMAN
RESOURCE DEVELOPMENT'S PARADIGM SHIFT**

FROM	TO
Individual development	Individual development and organizational development
Fragmented, piecemeal improvement efforts	Staff development driven by a clear, coherent strategic plan for the school district, each school, and the departments that serve schools
District-focused	School-focused approaches to staff development
Focus on adult needs	Focus on student needs and learning outcomes
Training that one attends away from the job as the primary delivery system for staff development	Multiple forms of job-embedded learning
Orientation toward the transmission of knowledge and skills to teachers by "experts"	Study by teachers of the teaching and learning processes
Focus on generic instructional skills	Combination of generic and content-specific skills
Staff developers who function primarily as trainers	Those who provide consultation, planning and facilitation services, as well as training
Staff development provided by one or two departments	Staff development as a critical function and major responsibility performed by all administrators and teacher leaders
Teachers as the primary recipients of staff development	Continuous improvement in performance for everyone who affects student learning
Staff development as a "frill" that can be cut during difficult financial times	Staff development as an essential and indispensable process without which schools cannot hope to prepare young people for citizenship and productive employment

Source: Policy Handbook of the School Board of Broward County, 1998.

This year, the district has implemented an updated Administrator Performance Planning and Appraisal System (APPAS) for school-based and district-level administrators. A review of the documents, responses from focus groups, and one-on-one interviews indicate that the appraisal process an improvement over previous processes because it is more focused on increased student achievement and the district's strategic plan.

Various staff development programs have been designed and are being implemented by the district's Staff Development/HRD Department to support the staff development's paradigm shift as outlined in Exhibit 5-58. They include:

- Broward County Educational Consortium**—The Consortium is designed to collaborate with higher educational institutions to discuss ways the institutions can meet some of the staff development needs of the school district.

- **Clearinghouse Information Center**—This Center is a digital resource for school board employees to access information on the support and staff development initiatives being offered in the district.
- **Focus on Professional Pathways**—This monthly publication informs the district personnel of the various workshops and training being offered in the district.
- **Myron Ashmore Professional Resource Center**—This Center serves as an educational technology clearinghouse and resource room. Employees may access a list of resources housed in the Center via Intranet.
- **Professional Development Coordinating Council (PDCC)** —The HRD department coordinates meetings with the PDCC who are representatives from each of the district’s departments for the purpose of designing, delivering, and evaluating staff development offerings.
- **Zone Coach**—Each Zone has selected one coach (teachers of special assignment) to assist the zone facilitator with issues dealing with staff development. This is a new position for the 1998-99 school year and is designed to assist in the coordinating and delivering of staff development activities.
- **New Educator Support System (NESS)**—It is the intent of this program to assist new teachers in succeeding during their first teaching experience in the district. Assistance is provided by a variety of mentors (innovation zone staff, area office staff, and university personnel).

According to the district, the objectives of the program are to:

- maintain a system of observation and support;
- improve classroom performance;
- encourage reflective practice; and
- promote collegiality.

FINDING

Currently, the Department of Human Resource Development is placed within the Division of Educational Programs, Student Support, and Human Resource Development and the Director reports directly to the Deputy Superintendent for Educational Programs, Student Support and Human Resources Development. This organizational structure results in diffusing the focus of the Deputy Superintendent from the primary responsibility for program and policy development.

RECOMMENDATION

Recommendation 5-27:

Reassign the Department of Human Resource and Development to report directly to the Associate Superintendent for Education within the newly created Division of Educational Programs and Services. (See Exhibit 5-10 for the proposed reorganization of this department.)

Under the proposed reorganization, this department would be more appropriately placed under the direct supervision of the Associate Superintendent for Education Programs. This realignment should result in permitting the Deputy Superintendent to concentrate on her primary responsibilities related to policy and program development.

The realignment of this department should provide a continuum of staff development services delivered in a more efficient and effective manner.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Superintendent should include this organization change in the proposal to be recommended for School Board action. | May 1999 |
| 2. The School Board should approve the Superintendent's recommendation. | July 1999 |
| 3. The Superintendent and Executive staff should implement the approved reorganization. | August 1999 |

FISCAL IMPACT

This recommendation can be implemented using existing resources.

FINDING

Interview data at the district and school level and survey data of teachers, principals, and district administrators indicate that the quality of staff development is generally high. As previously stated in Chapter 3.0, the principal, teacher and administrator surveys conducted by MGT indicate that employees are generally satisfied with the quality of staff development in the Broward County School District. For example, 56 percent of the district's administrators rate staff development as either adequate or outstanding; nineteen percent of administrators indicate that staff development needs major improvement. Twenty percent of the principals rated staff development as outstanding and 59 percent of the teachers rated staff development as adequate or outstanding.

The Staff Development Department displays a notable commitment to the development of school leadership by providing the following programs to aspiring leaders:

- LEAD Program
- Leadership Development Activities for Experience Leaders

- Interim Assistant Principal Program
- Interim Principal Program
- Intern Principal Program

COMMENDATION

The Broward County School District is commended for its strong commitment of having a clearly defined and fluent support for professional development.

FINDING

MGT consultants reviewed documents and interviewed personnel within and outside of the Human Resources Development Department. Based on our analysis, we found that various inequities in workload assignments and position compensation exist between the directors and the training specialist who is responsible for management and skills development. Research in management has shown that morale problems and efficiency and effectiveness can emerge within an organization that does not continuously adjust for these types of inequities.

RECOMMENDATION

Recommendation 5-28:

Examine the responsibilities assigned to each director within the Human Resources Development Department and equalize assignments and compensation.

The district was unable to provide information to justify the continuation of the identified inequities. The inequities were not related to skill, training, education, or tenure of the individuals filling these positions.

Implementing this recommendation should assist in clarifying job responsibilities among the three existing units in the Department of Human Resource Development and increase the efficiency and effectiveness of the services rendered.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Support and Human Resources Development and the Director of Human Resources Development review and evaluate the job responsibilities of each position within the Human Resources Department with the objective of equalizing responsibilities and workloads, and preparing appropriate compensation recommendations. May 1999
2. The recommendation adjustments should be presented to the Superintendent and Executive Staff for review and approval. June 1999

3. The Superintendent should secure Board approval if the recommendations require Board action. July 1999
4. The Superintendent should implement the plan as approved. August 1999

FISCAL IMPACT

The analysis of job descriptions and position classifications within the HRD Department can be conducted with existing resources.

FINDING

Currently the management/skills development function is assigned to a training specialist who reports directly to the Director of Professional Development Training who, in turn reports to the Director for Human Resources Development. Furthermore, two additional directors report, along with the training specialist position, to the Director of Professional development/Training. Based on our functional analysis, the management/skills development training function has an inextricable relationship with the leadership development function and, therefore, should be more closely aligned.

RECOMMENDATION

Recommendation 5-29:

Reassign the Management/Skills Development training function and associated personnel to the Director of Leadership Development and provide the Director the flexibility to assign responsibilities in accord with critical training needs.

The reassignment of the management/skills development training function to the Director of Leadership Development should enable the director to strengthen the training offered by more closely aligning these two areas for increased training effectiveness and to reduce any duplication.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Support and Human Resources Development and the Director of Human Resources Development should assign the Management/Skills Development training function to the Director of Leadership Development and provide the Director with the necessary flexibility to manage this function. July 1999
2. The Deputy Superintendent for Educational Programs, Student Support and Human Resources development and the Director of Human Resource Development should evaluate this assignment for improved efficiency and effectiveness. July 2000

FISCAL IMPACT

This recommendation can be implemented using existing resources and it should result in a more efficient departmental operation.

FINDING

MGT consultants examined documents related to training that is provided for new district office employees. During this examination, it was noted that employees who are either new hires to district-level positions or newly reassigned to the district-level are not provided an orientation program designed to acquaint them with district-level organization, procedures, and other pertinent matters that could expedite their familiarity with the system, and, consequently, enhance immediate effectiveness. It is a common practice in other districts to provide an employee orientation to new employees.

RECOMMENDATION

Recommendation 5-30:

Design and implement a comprehensive orientation program for new hires to the district-level and newly reassigned district-level employees.

The district is a large organization with many divisions and departments within the divisions. Many large corporations provide an orientation program for new hires to ensure employees work more effectively and efficiently and have a general understanding of standard policies and procedures. MGT reviewed the district's training calendar and although a calendar exists which designates training opportunities available in the district, it is incomplete and does not show all training opportunities.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|--------------------------|
| 1. The Director of Human Resources Development should prepare a comprehensive program for orientation of new district-level employees. | October 1999 |
| 2. The Deputy Superintendent for Educational Programs, Student Support, and Human Resources Development should review and approve the program. | November 1999 |
| 3. The District of Human Resources Development should implement the new program. | January 2000 and ongoing |

FISCAL IMPACT

This recommendation can be implemented by existing staff in the Human Resource Department.

FINDING

While the district has begun developing a long-term, systematic process for aligning all staff development training and initiatives with the Critical Content Guides and Essential Teacher Knowledge as well as with the Major System Priorities, it is lagging behind district needs.

Opinions varied on the quality of staff development from the respondents in the MGT survey conducted. Twenty (20) percent of the principals rated staff development as outstanding and 19 percent of administrators indicated that staff development was in need of major improvement. Thirty-nine (39) percent of the administrators rated staff development as either needing some improvement or major improvement. Many administrators and teachers interviewed by MGT indicated that the training calendars provided to them by staff development are not all inclusive of the training being offered in the district and that some schools are hiring outside consultants for various training without staff development being aware if the training is in alignment with the Critical Content Guides. A review of training offerings, other various documents provided by staff development, and interviews with many district personnel indicate that a defined clearing house of training and how it is directly linked to the Critical Content guides has not been established.

RECOMMENDATION

Recommendation 5-31:

Focus training resources on those initiatives related to the Critical Content Guides that are concentrating on improving student achievement.

This recommendation should include a periodic executive review of training initiatives to ensure that the needs emphasized through strategic planning are appropriately addressed and that unwarranted duplication of training does not occur. This long-range planning process would facilitate the access to districtwide staff development by schools and individual employees. The Department of Human Resources Development should be responsible for coordinating the planning process and monitoring the plans.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Support and Human Resources Development should review and evaluate the current training initiatives and develop a system to ensure resources in the Human Resources Development Department are focused on prioritized areas within the Critical Content Guides, Essential Teacher Knowledge, and Major System Priorities. Fall 2000
2. The Deputy Superintendent for Educational Programs, Student Support and Human Resources Development should review and evaluate the training being offered to ensure the focus and effectiveness of training activities. Annually commencing June 2000

FISCAL IMPACT

This recommendation can be accomplished with existing staff development resources.

FINDING

The Director of Human Resource Development does not currently serve on the Superintendents' Cabinet. Other directors, including the Directors of Risk Management, Educational Technology, Diversity, Cultural Outreach, Title I, Migrant, Management/Facilities, School Boundaries, Charter Schools, Personnel, and Community Relations, are on the Cabinet and are responsible for addressing the major system priorities. It is evident that staff development should be an integral part of the Cabinet.

Having the Director of Staff Development serve on the Superintendent's Cabinet could enhance the ability of achieving the goal set forth in the accountability policy by increasing communications.

RECOMMENDATION

Recommendation 5-32:

Appoint the Director for Human Resource Development to the Superintendent's Cabinet.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should notify and appoint the Director of Human Resource Development to the Superintendent's Cabinet. May 1999

FISCAL IMPACT

This recommendation can be implemented using existing resources and should provide for greater senior staff focus on staff development programs and training.

5.8.2 The Professional Orientation Program

CURRENT SITUATION

The Professional Orientation Program (POP) was a program designed to train new teachers and was removed from statutory requirements by the Florida Legislature in 1997. The POP was eliminated as a prerequisite for professional teacher certification. The Legislature replaced the POP with legislation that establishes two district-level methods of documenting professional education competence. The first method is optional and the second is required.

- The first method states that each school district may develop and maintain an alternative certification program for the district's

instructional staff. The state board must set program standards and guidelines.

- The second program is required and it states that each district must develop and maintain a system for the district's instructional staff to document professional education competencies. All district instructional staff hired after July 1997 must demonstrate mastery within the first year of employment, unless they have completed an approved teacher education program in the state, completed a teacher education program and at least two years of successful full-time teaching experience in another state, or are participating in the district's alternative certification program. The Florida Department of Education must approve programs and the system developed to demonstrate professional education competence.

The Broward County School District responded to this change in legislation by creating the New Educator Support System (NESS). Objectives of the first few months of the 1998-99 school year were to:

- provide immediate and appropriate support for new educators;
- assign an instructional coach to new educators as soon as possible;
- complete all new educators FPMS screening observations within the first three weeks of school; and
- initiate new educators learning communities.

The purpose of the instructional coaches are to assist new educators in developing their individual learning plans. The coach uses the FPMS screening and the new educators' self-assessment as data to help the new teachers design their individual learning plans. Also the coaches help the new teachers as they document their state competencies. According to the district personnel interviewed, the purpose (or focus) of the NESS Program is to assist new teachers in building effective classroom procedures and to assist them in the implementation of those procedures with the students.

FINDING

The additional statutory change resulted in reducing the initial probationary period for teaching personnel to 90 days. The need for this additional training is not necessary if effective pre-employment screening practices are utilized and the district fulfills necessary the state's requirements for the program.

Other large school districts in Florida have either terminated the POP in an effort to redirect resources to instructional programs or they have chosen to keep the program intact by meeting the State's requirements with substantially reduced funding. For example, Hillsborough County School District has a similar program called Preparing New Educators (PNE), and this program is being implemented with a budget of \$49,000.

MGT surveyed other comparison districts and found that Duval has replaced the POP requirements with a program called Teacher Induction Program (TIP) and the budget for

the TIP Program is \$350,000. The Palm Beach County School District is implementing its teacher preparation program for less than \$100,000. Broward County School District's NESS Program has a 1997-98 budget of \$1,833,389.

RECOMMENDATION

Recommendation 5-33:

Eliminate the New Educator Support System (NESS) Program and implement an alternate program that will satisfy the state's required program.

Newly hired teachers have successfully completed teaching internship programs under the guidance of veteran, successful teachers. Consequently, serious questions are raised regarding the necessity for expending large quantities of district funds for training which simply repeats prior experiences.

The district should either research a similar program such as the programs being implemented in Palm Beach, Duval, or Hillsborough School Districts for substantially less money, or develop a school-based mentoring program that is designed by a group of school-based personnel and implemented through the individual school's administration with nominal remuneration provided to mentors.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Deputy Superintendent for Educational Programs, Student Support, and Human Resources Development, in collaboration with the Deputy Superintendent of School Operations should establish a program design committee composed of school-based administrative and instructional personnel to develop a school-based mentoring program (or alternate program) tailored to the needs of inexperienced, newly employed teachers or other alternate program. May 1999
2. The committee should prepare and present the proposed mentoring program (or alternate program) to the Superintendent and Executive Staff for review and approval. December 1999
3. The Superintendent should secure school board approval. March 2000
4. The Deputy Superintendent for Educational Programs, Student Support, and Human Resource Development should begin implementing the program. July 2000

FISCAL IMPACT

The net effect of this recommendation is to provide the district the opportunity to reallocate resources to satisfy the requirements of the present law and shift resources to the needs in the Innovative Zone Support Training. The current NESS program is costing the district \$1,833,389 per year and the implementation of a new, less expensive

program is estimated at \$400,000 per year. The estimated net savings per year is \$1,433,000.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Replace the NESS Program	\$0	\$1,433,000	\$1,433,000	\$1,433,000	\$1,433,000

5.8.3 The Nova Centers

The Nova Center for Applied and Professional Development was established in 1996 to be the district's center for piloting new staff development practices and disseminating those practices to other schools. The mission of the Nova Center is to:

- establish a personalized learning community;
- develop and demonstrate high quality results-driven professional development models; and
- identify and disseminate best practices.

According to those interviewed, the intent of the Nova schools is to reduce the ratio of support staff and staff to the number of students attending the schools while providing academic programs, action research, and professional development opportunities which may be transferable systemwide.

Twenty-three Nova team leaders (teachers on special assignment) provide additional services to students above those services rendered to the other district's schools. In addition to receiving an average salary of \$58,711 (which includes benefits), the Nova team leaders receive an \$800.00 stipend for district-level assignments. Also, recently the Board approved \$283,744 to support additional media services for the Nova schools.

The Nova schools consist of two elementary schools, one middle, school and one high school. The progress of the Nova schools towards their ultimate objective of becoming innovative, researched-based institutions has been evaluated and reviewed by the district on numerous occasions.

FINDING

MGT consultants, after reviewing district data, interviewing key personnel, and examining both the Board-approved recommendations in 1996 and the Program Evaluation, Research Brief, and Selected Reports September 1997 - August 1998 Volume 4 find that the Nova schools primarily remain traditional, have not established a common shared vision, and have not made adequate progress in implementing a distinct set of Board-approved recommendations. In the *Nova Design Status Report* approved by the Board on February 6, 1996, its states on the front cover of the report that "Taking the opportunity to revisit the Nova Design Study with specific focus on the applicability and appropriateness of each of the 58 recommendations is critical to the fulfillment of this mission."

Eight of the 58 recommendations eventually were not approved by the Board and the report states that only seven of the recommendations have been fully implemented. Interviews indicated that the goal this year is limited to focusing on only 13 out of the remaining 43 recommendations.

Over the last few years, the district has invested considerable resources in this initiative and (according to those interviewed and a review of the Board minutes) it has been an item of discussion at many Board meetings. In 1995, the Board approved the implementation of the Nova Ad Hoc Committee's recommendations with a budget of \$160,858 from the General Fund. The designing expenses for the Centers for 1996-97 totaled \$682,985 which included the support of 23 Nova Team leaders (teachers on special assignment) positions. In a traditional high school (the same size as the Nova High School), there is one Guidance Counseling Director and six guidance counselors serving students. At the Nova High School, there is one Counseling Director and seven guidance counselors. No teachers on special assignment are serving as guidance counselors at the Nova high school level.

On the other hand, a similar sized traditional middle school has one Guidance Director and 2 guidance counselors while the Nova Middle School has one Guidance Director and five teachers on special assignment who are serving a guidance counselors. Two of the teachers on special assignment positions would not be eliminated as a result of this recommendation as they are needed to fulfill the guidance services for the school.

Similarly, at a traditional elementary school there is one guidance counselor per school. At the Nova Elementary school there is one teacher on special assignment who is fulfilling all of the guidance duties; this teacher on task assignment position is not affected by this recommendation.

RECOMMENDATION

Recommendation 5-34:

Return all Nova schools to the classification of schools with identified student boundaries.

This recommendation includes the elimination of the Nova Centers and the reallocation of the additional redesign costs. The district has committed to a large sum of funds to the redesign of the Nova Centers. Yet, over a period of years, systemic organizational changes have not been implemented. These funds would be better invested in districtwide school improvement initiatives.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent and Executive Staff should prepare for School Board approval of a plan to convert the Nova schools to a classification of schools with identified student assignment boundaries and eliminate special funding. Summer 1999

- | | |
|---|-----------------------|
| 2. The Board should act to approve the Superintendent's recommendation and set the public hearing date to approve the necessary attendance zones. | Fall 1999 |
| 3. The School Board should establish new attendance zones. | January 2000 |
| 4. The Board should reclassify the Nova schools as regular schools. | 2000-2001 school year |

FISCAL IMPACT

This recommendation includes the elimination of 20 of the 23 Nova teachers on special assignment. As stated previously, three guidance counselor positions will be needed (two at the elementary and one at the middle school), therefore the total cost savings from 20 teacher positions is being proposed. The 20 Nova teachers on special assignment cost the district an average of \$59,511 per 20 teachers and the additional funding allotted to Media Team Leaders for the amount of \$283,744. This amounts to a savings to the district of approximately \$1,473,964 per year.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Reclassify Nova Schools	\$0	\$1,473,964	\$1,473,964	\$1,473,964	\$1,473,964

6.0 PERSONNEL MANAGEMENT

The Broward County School District's Department of Personnel is responsible for acquiring, deploying, and retaining over 20,000 employees.¹ This chapter reviews the practices and activities of the department in maintaining this work force for the second largest school system in the state of Florida and the fifth largest in the nation. The services delivered to school district employees; the management of human resources; and the policies, procedures, and practices guiding the Department of Personnel are examined and analyzed. The ways in which these services can be delivered more effectively and efficiently are explored.

This chapter is divided into the following seven sections:

- 6.1 Organization and Staffing
- 6.2 Policies and Procedures
- 6.3 Job Descriptions
- 6.4 Employment of Instructional and Non-instructional Personnel
- 6.5 Recruitment of Teachers
- 6.6 Salary Schedules
- 6.7 Personnel Records

6.1 Organization and Staffing

CURRENT SITUATION

The Personnel Department is one of five departments under the Division of District Administration. An associate superintendent oversees the division with a director overseeing each department within the division.

Major functions of the Personnel Department include:

- maintaining a commitment to affirmative action in the recruitment, hiring, training, promotion, and personnel management practices of the district;
- interpreting and recommending personnel policies and procedures;
- recruiting and hiring qualified personnel;
- directing the preparation and revision of job descriptions and the classification of positions; and
- administering districtwide employee relation programs, including mediation and the processing of complaints and grievances.

¹Number of employees reported by the Broward County School District as of October 29, 1998.

The current organizational structure of the Personnel Department, is shown in Exhibit 6-1. As shown, the Personnel Department is divided into four departments, each headed by a director. The following paragraphs describe the organizational structure of the Personnel Department, its staffing, and responsibilities assigned to each of the departments under it.

While MGT was on-site, a director with the support of a secretary headed the Personnel Department. Subsequent to the on-site visit, the Director of Personnel's position became vacant. The four units in the Personnel Department follow:

Employee Relations

One director, a secretary, a clerk, and two professional staff members (Employee Relation Specialists) support Employee Relations. Services provided include:

- negotiating and administering the Collective Bargaining Agreements;
- handling and monitoring employee grievances;
- assisting administrators regarding labor relations and contract interpretation;
- participating in arbitration and labor litigation; and
- counseling with instructional and non-instructional employees on employee matters.

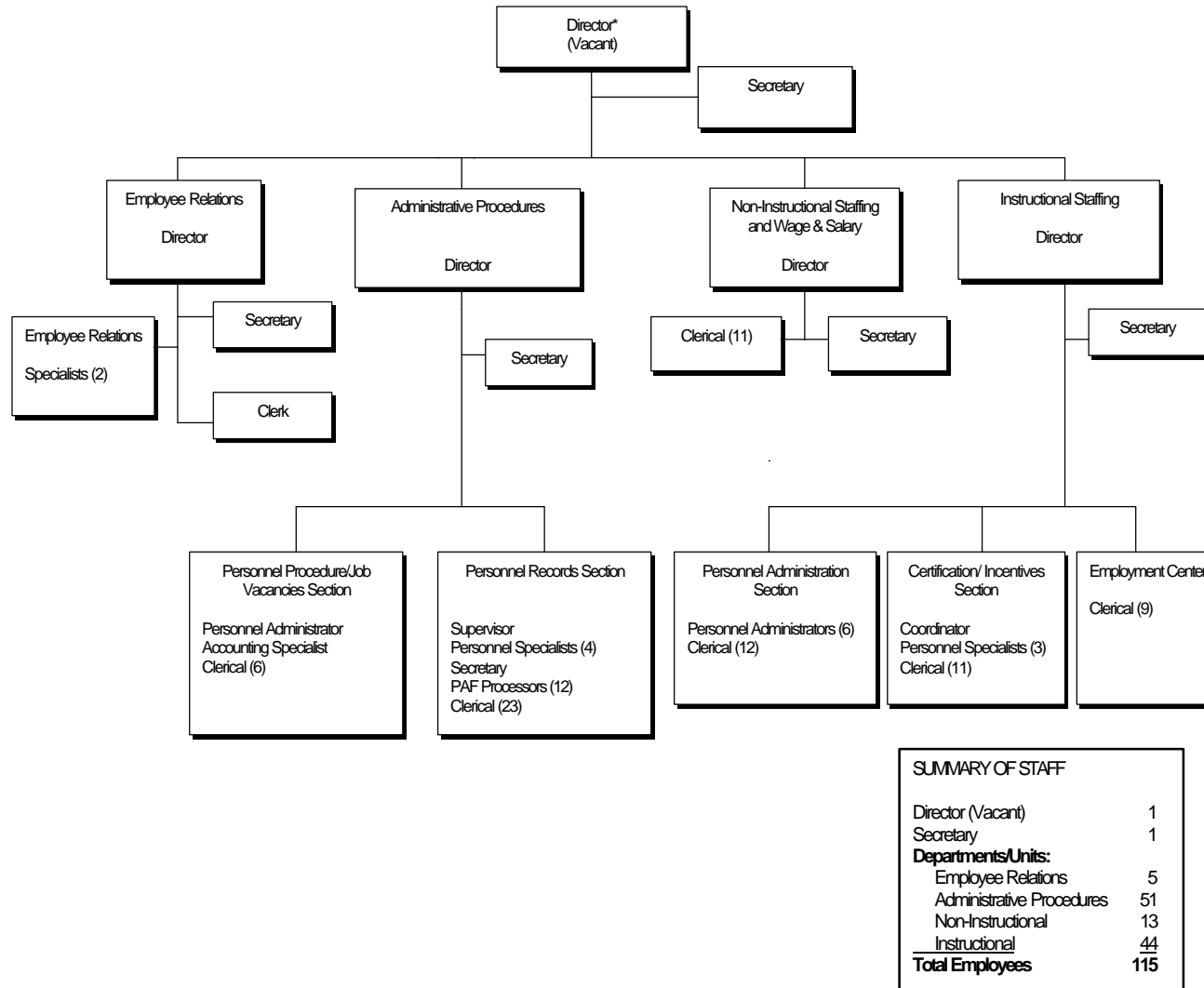
Employees in Employee Relations total five.

Administrative Procedures

A director, supported by a secretary, oversees Administrative Procedures. Responsibilities include:

- hiring and employment of district, area, and school-based administrators;
- preparing revisions and initial job descriptions;
- advertising and posting job vacancies;
- developing Employee Work Calendars;
- completing state reports;
- administering and coordinating the Teacher Directed Improvement Funds;

**EXHIBIT 6-1
PERSONNEL DEPARTMENT STAFFING IN THE
BROWARD COUNTY SCHOOL DISTRICT**



Source: As reported by Broward County School District Personnel Directors and on-site observations, November 1998

*At the time of the November 1998 on-site visit.

-
- processing personnel action forms (PAF) for leaves, resignations, retirements, and terminations;
 - producing yearly organization chart positions once approved by the Superintendent and his executive staff; and
 - maintaining personnel records.

The Administrative Procedures Unit consists of two sections – Administrative Procedures/Job Vacancies and Personnel Records. A staff of eight support Administrative Procedures/Job Vacancies – a personnel administrator, an accounting specialist, six clerical (one accounting specialist, one receptionist, three clerk specialists, two word processors and one clerk typist).

The Personnel Records Unit is overseen by a supervisor and consists of a total 41 staff members (a supervisor, four personnel specialists, a secretary, 12 processors, six clerk specialists, 11 general clerks, three clerk typists, two data entry clerks, and one file clerk). All PAF forms are processed through this section. Any changes affecting payroll are made here and sent on to payroll. The section microfilms employee records and maintains all personnel files and folders for district employees.

Employees in Administrative Procedures total 51 (41 in Personnel Records, eight in Administrative/Job Vacancies, a Director of Administrative Procedures and the Director's Secretary).

Non-Instruction Staffing (Wage and Salary)

The Director of Non-instructional Staffing oversees 12 staff members. Non-Instructional Staffing provides support to all district schools and departments in hiring of non-instructional staff, prepares salary impact information for negotiations with union and employee groups, and tests employee applicants. Substitutes for food services and custodial workers are located through this unit with the assistance of the U.S. Department of Labor which provides one of its employees to locate substitutes for employees absent from duty.

Employees in Non-instructional Staffing total 13.

Instructional Staffing

Instructional staffing is composed of three sections: personnel administration, certification and incentives, and the employment center. Each of the three sections is involved in the hiring and employment of instructional personnel. A director, supported by a secretary, heads Instruction Staffing.

- **Personnel Administration** processes applications, monitors position control, prepares a vacancy list, prepares pre-clearance paperwork once a teacher is recommended for hire, and readies the new hire for the employment process. Six personnel administrators, a bookkeeper, nine clerk specialists, one general clerk, and one clerk typist make up the section.

- **Employment Center** receives all applications for employment and processes new hires for employment. The section is composed of three clerk specialists and six clerks for a total staff of nine.
- **Certification/Incentive** monitors teacher and administrator certification. The section also processes incentives (stipends for advanced degrees) for professional staff. The staff consists of a coordinator, three personnel specialists, and 11 clerical positions.

Employees in the Instructional Staffing unit total 44.

FINDING

Arriving at the total number of employees in each of the departments was difficult as different sources reported different numbers and, in some cases, different position titles. These sources included the 1998-99 budget book, printouts of staff, and interviews with directors. For instance, the number of personnel staff reported in a printout of staff provided by the district showed 127 employees in the department instead of the 115 shown in Exhibit 6-1. For this report, however, we relied on the numbers and position titles provided by directors in the department and on-site observations.

In Exhibit 6-2, the number of staff in the Broward County School District's Personnel Department is compared to the staffing of personnel departments in four school districts - two Florida school districts (Miami-Dade County School District and Palm Beach County School District), one Virginia district (Fairfax County School System), and one Maryland district (Prince George's County School System). All of these districts have over 15,000 employees, with Broward and Miami-Dade school districts showing over 20,000. Personnel staff employed in employee benefits and in risk management are not included in the exhibit since these two areas are not part of the Personnel Department in the Broward County School District.

Comparing the number of employees in each district to the number of staff in their personnel departments who provide services to these employees, we found that all of the school districts operate with fewer staff in their personnel departments than Broward County School District. The ratios of employees to personnel staff are the lowest in Broward County and Fairfax County. For instance, the Fairfax County School System has the fewest employees per personnel staff member (161:1) and the Broward County School District at 202:1. Prince George's County Public Schools has a ratio of 209:1, but in a recent review of the Prince George's Personnel Department, MGT recommended that the staff still be cut by 13 percent.

The Broward County School District, with its 115 staff members in the Personnel Department, has almost double the number of personnel staff than in Palm Beach County School District's Personnel Department with its staff of only 64. Broward County has 51 additional staff members in their Personnel Department.

**EXHIBIT 6-2
HUMAN RESOURCE/PERSONNEL STAFF MEMBERS IN THE
BROWARD COUNTY SCHOOL DISTRICT AND OTHER SCHOOL DISTRICTS***

POSITION	BROWARD COUNTY	FAIRFAX COUNTY	PALM BEACH COUNTY	PRINCE GEORGE'S COUNTY (MD)
	1998-99	1997-98	1998-99	1997-98
Number of Departments/Units	4	7	4	2
Administrative/Professional Staff				
Assistant/Associate Superintendents	0	1	0	0
Chief Divisional Administrators	0	0	0	1
Chief Personnel Officers	0	0	0	0
**Directors	5	5.3	3	1
Assistant Directors	0	0	2	0
Officers	0	0	0	4
Coordinators	1	8	1	0
Managers	0	2	2	0
Supervisors	1	3	2	9
Personnel Administrators/Specialists	17	23	8	0
Analysts	0	0	4	10
Other Professional Staff	0	15	2	0
Total Administrative/Professional Staff				
Staff	24	57.3	24	25
Support Staff:				
Secretaries	6	6.5	4	22
Technicians	0	14	33	0
Clerical Support	83	26.5	1	22
Computer and Data Entry	2	0	0	2
Computer Operator	0	1	2	0
Total Support Staff	91	48	40	46
Total Positions	115	105.3	64	71
Total Staff	23,236	16,989	17,096	14,840
Ratio of Employees to Staff Members	202	161	267	209
Total Students	230,552	148,900	143,001	128,000
Total Students	230,000	148,900	143,001	128,000

Source: 1997-98 data supplied by Fairfax and Prince George's County School Districts and 1998-99 data supplied by Broward, Miami-Dade, and Palm Beach County School Districts.

*Note: School districts listed above include employee relations and processing of personnel changes for payroll. Employee benefits and risk management are not included in the above statistics. Miami-Dade School District data were not included because the composition of their personnel department differs considerably from the other districts shown. For instance, Miami-Dade's Personnel Department does not process personnel changes nor is Employee Relations a part of the department. The other peer districts - the Orange County School District and Duval County School District were included in the research, but did not respond to our request.

**The five directors listed here include the Director of Personnel (Vacant), Director of Employee Relations, Director Administrative Procedures, Director of Non-Instructional Staffing Wage and Salary, and Director of Instructional Staffing.

RECOMMENDATION

Recommendation 6-1:

Reduce clerical staff in Administrative Procedures by three positions, and in Instructional Staffing by three positions.

The number of clerical staff positions in both Administrative Procedures and Instructional Staffing should be reduced by at least three positions in each department. For the amount of responsibilities undertaken by staff in both of these departments, the work can be accomplished with fewer staff. The five personnel administrators in Instructional Staffing each have a secretary or clerical specialist assisting them. For the responsibilities assigned to these staff members, for each to have an assistant is unwarranted. Since instructional staffing is seasonal, temporary staff could be hired during heavy processing periods. Further, in Administrative Procedures, specifically Personnel Records, a reduction of staff is possible with the proposed implementation of a new HRMS system being developed that is discussed later in this chapter.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Personnel and unit directors for Administrative Procedures and Instructional Staffing should review all positions and responsibilities and recommend to the Superintendent that three clerical positions in the Administrative Procedures unit and three clerical positions in the Instructional Staffing unit be eliminated. June 1999
2. The positions should be eliminated through attrition or reassignment. August 1999

FISCAL IMPACT

The elimination of six clerical positions would result in a cost saving to the district of about \$133,200. The savings is based on an average salary of a General Clerk II of \$16,695 plus 33 percent in benefits (\$5,509) times six clerical positions.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Eliminate Six Clerical Positions	\$133,200	\$133,200	\$133,200	\$133,200	\$133,200

FINDING

The Broward County School District refers to the four units under the Personnel Department as departments. Perhaps a matter of semantics, but naming departments under departments by the same title is confusing especially in a district this size. The purpose of creating and maintaining a hierarchy in the organization of a school district is to establish the span of control and relationship of each area in the organization. This purpose is missed when units within units are named the same.

RECOMMENDATION

Recommendation 6-2:

Rename the four areas under the Personnel Department as "units."

The four areas under the Personnel Department should be referred to as units such as the Employee Relations Unit, Administrative Procedures Unit, Non-instructional Staffing Unit, and Instructional Staffing Unit. Areas falling under units could then be referred to as sections such as the Certification Section (an alternate recommendation would be to use the term "section" and "subsection"). This same recommendation should be applied to other departments within departments in other divisional areas.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Personnel should recommend to the Superintendent that areas now under departments should be referred to as "units" rather than departments. June 1999
2. Once the Superintendent approves this recommendation, reports, organizational charts, and other written reference to such areas should be referred to as units within departments and divisions. July 1999

FISCAL IMPACT

This recommendation can be implemented without cost to the district.

FINDING

Since the Personnel Department is one of the largest departments in the district, the title of Director of Personnel does not provide the rank that would indicate a position responsible for as many departments and employees as the Broward County School District's Director of Personnel oversees. In Miami-Dade County School District and Fairfax County Public Schools, an Assistant Superintendent heads the Personnel Human Resources departments/divisions. In Palm Beach County School District, a Chief Personnel Officer oversees the Personnel Department.

RECOMMENDATION

Recommendation 6-3:

Reclassify the position of Director of Personnel as Executive Director or Assistant Superintendent of Personnel.

The position of Director of the Department of Personnel should be reclassified as Executive Director or Assistant Superintendent of Personnel. This reclassification of the director distinguishes this position from other directors under the same department. The

(KCW) Administrative Center where the other personnel offices are located, thus resulting in time lapses and inefficiencies in accessing records.

The personnel offices or units in the KCW Administrative Center are not located on the same floor. For instance, the Director of Personnel is located on the 10th floor of the building and the Employment Center is located on the first floor. The second floor houses the offices of Employee Relations and Personnel Administrative Procedures. While the third floor of KCW houses Instructional and Non-instructional Staffing. Since the functions of Administrative Procedures and Instructional and Non-Instructional Staffing are closely linked, having these offices located on separate floors is not an effective or efficient practice. Interaction between the two offices becomes difficult, as staff must travel from one floor to another when documents need to be reviewed or checked. This is the only district that the consultant has reviewed where personnel offices and the director's office are scattered around a main facility. Various other district offices are located on these two floors as well.

The Employment Center while located yet on another floor of KCW (first floor), it is easily accessible to the public and new hires that are processed here for employment. The Employment Center can be reached from outside the KCW building where upon entrance a reception counter is provided for the public to obtain applications and information. Tables are provided for applicants to complete applications or to purview current vacancy listings.

The area used to process new hires is well-planned. The fingerprinting offices are located next to processing. Also located in the suite of offices is a benefits desk where staff are available to discuss benefits with new hires. Certification offices are also located in the area. The Employment Center accommodations and arrangement is one of the best that MGT has reviewed.

COMMENDATION

The Broward County School District is commended for the effective Employment Center accommodations provided for the hiring and processing of new employees.

RECOMMENDATION

Recommendation 6-4:

Relocate (to the extent possible) personnel offices in the KCW Administrative Center to one floor with the exception of the Employment Center.

Since offices in the Personnel Department are interrelated, to the extent possible, the offices should be located on one floor for effective interaction among staff. Relocating these offices to one floor should not create difficulty as there appears to be ample room on any one floor to accommodate all offices. The relocation of the personnel offices should reduce time lapses and inefficiencies in accessing records, and also reduce time of staff traveling from floor to floor to retrieve documents.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Director of Personnel should recommend to the Superintendent that, with the exception of the Employment Center, all personnel offices in KCW be moved to one floor. | June 1999 |
| 2. The Superintendent should approve the recommendation and assign the Facilities Department the responsibility of planning the relocation of offices in the KCW Building. | June 1999 |
| 3. The personnel offices should be moved to one floor. | Summer 1999 |

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

6.2 Policies and Procedures

CURRENT SITUATION

The Broward County School District's Policy Handbook, Policy Series 4000, addresses policies and regulations governing personnel functions. A Personnel Department Procedure Handbook provides the procedures for carrying out these policies. These handbooks guide the Personnel Department in its delivery of services to employees.

FINDING

A procedural manual developed by the Personnel Department provides employees with the procedures and forms necessary to carry out personnel actions. Personnel actions, listed in a table of contents and arranged alphabetically, include procedures for:

- advanced degree stipends
- certification
- employment of teachers
- employee discipline
- employee withholding allowance (W-4)
- good attendance awards
- incentive awards
- instruction staffing clearance
- leaves
- non-instructional staffing clearance
- payroll deduction
- personnel action forms
- sick leave banks
- teacher transfers
- transfers

As each personnel action is introduced and addressed, the purpose of the action and step-by-step procedures for implementing the action are provided. At the end of the

procedural pages, the document preparation date, the revision date, contact person, appendices, and authority are listed. Most forms or supporting documentation are then provided for that personnel action. The conciseness and layout of three pages are very user-friendly (See Exhibit 6-3).

While the handbook includes the many personnel actions involved in delivering personnel services, the handbook is not as effectively or efficiently organized as it could be. For instance, while alphabetizing personnel actions is helpful to locate one particular personnel action, if an employee is searching for all procedures and forms related to a particular personnel process or subject area, the employee must consult the table of contents and choose all personnel actions associated with that process. Much more helpful and easier for the employee would be to have the handbook indexed according to processes or subject areas so that all procedures pertaining to that area could be grouped together, (i.e. certification, employment processes, leave forms, and payroll). The various categories could then be indexed for ease in locating procedures. The alphabetized list of personnel actions, of course, would still be useful for location of specific personnel actions.

Currently, each administrator in the Personnel Department has a copy of the personnel procedures handbook. Not every staff member in each of the offices (departments) in the Personnel Department has their own personal copy. Therefore, support staff members cannot refer to the manual unless he/she uses an administrator's copy.

The manual could further be made more effective by including a mission statement, organizational structure of the Personnel Department, reporting relationships, responsibilities of each personnel unit, and any other information that would enhance the operation of the department. Currently, pages are numbered manually, not allowing much for expansion or reduction unless the entire book is reprinted each time a new procedure is added.

RECOMMENDATION

Recommendation 6-5:

Reorganize the Personnel Department Procedures Handbook and distribute a copy to each personnel employee.

Reorganizing the current handbook as suggested should make it easier for personnel employees to locate all procedures associated with a particular personnel process. The manual should be made available to every current employee for review and consultation. New employees should find it particularly helpful as they familiarize themselves with their new responsibilities. Grouping personnel actions together, adding a mission statement, providing other pertinent departmental information, and indexing the handbook will make it easier and more effective for district personnel to use.

Every department employee should receive an updated copy of the procedures handbook. When an employee terminates from the department, the manual should be returned to the department as part of the checkout process.

**EXHIBIT 6-3
SAMPLE OF PERSONNEL ACTION PROCEDURE
BROWARD COUNTY SCHOOL DISTRICT**

PERSONNEL DEPARTMENT HANDBOOK

ADDRESS CHANGES

I. Purpose

To assist employees in changing their home address in the Personnel/ Payroll System Data Base.

II. Procedures

- A. The employee completes and signs the Personal Data Form and submits it to the budget keeper or person responsible for electronic Personnel Action Forms (PAFs) at the employee work location.
- B. The budget keeper or PAF processor inputs the change directly on-line into the Personnel/ Payroll System Data Base.
- C. The school/location submits the original signed copy of the change, annotated "electronically processed", to the Personnel Records Department for verification and filing into the employee's District Personnel File.
- D. The PAF electronic processor at the school/location must ensure a copy of the signed Personnel Data Form remains at the location as authorization for changing the information in the data base.
- E. If the processing school/location does not have on-line electronic PAF capabilities, the employee can submit in writing the changes, including their name and social security number, with their signature on the document to the Personnel Records Department for processing.

Document Preparation Date: July 1, 1996

Revision Date:

Contact Person:

Appendixes: Personal Data Form

Authority:

Source: Broward County School District, Personnel Procedure Handbook. 1998.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Personnel should appoint a committee, consisting of the directors and two employees from each the four units, to edit, reorganize, re-index and update the Personnel Department Procedures Handbook. June 1999
2. Once the committee has finished its work and the Director of Personnel has given approval, a master copy should be made of the handbook on disk, copies printed, and distributed to each member of the Personnel Department. The Director of Personnel should ensure that employees who do not have access to the shared drive on the district's Intranet can obtain a hard copy of the manual. September 1999

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

When a new hire is processed for employment, an employee handbook is not provided to the employee with specific information about district procedures and policies or general information about the district. However, the new hire does receive various district publications pertaining to benefits and certification. Other information is provided at the school or department level.

MGT received several school employee handbooks. These school handbooks contain instructions, directions, policies and procedures for that particular school. Most information; however, is specific to an individual school and these handbooks, for the most part, do not contain districtwide general information about the school district, offices, and policies. However, employees can access district policies and procedures over the district's Intranet system.

RECOMMENDATION

Recommendation 6-6:

Develop an Employee Handbook to be distributed to new hires.

A handbook, including some of the district's major policies, the district's goals, information about educational centers, a general school calendar, important district phone numbers, union information, Broward County facts, and a school calendar should be particularly helpful to new hires especially those arriving from out of the area. The new employees should be referred to the district's training program (see Chapter 5, Section 8) and Intranet for further information.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Personnel should assign the Personnel Administrative Procedures Unit the task of developing an Employee Handbook for new hires that the employee would receive during the initial employment process. Summer 1999
2. Once the Employee Handbook has been developed and edited by unit directors, the Director should present the handbook to the Superintendent for review. January 2000
3. Once approved by the Superintendent, the handbook should be published and distributed to new hires upon employment. April 2000
4. The handbook should be updated on an annual basis. Commencing in Summer 2000

FISCAL IMPACT

This recommendation can be implemented with existing district resources.

FINDING

Section 231.02, Florida Statutes, and Board Policy #4002-B state that all new hires to a school district must complete a Security Background Information Form and have their fingerprints taken. As part of the district's application process, the applicant must submit a Security Background Check form with their application for employment. The form poses questions about criminal offenses that an applicant might have been convicted of or offenses currently pending against the applicant. This form is placed in the applicant's folder.

When the applicant is hired and is processed for employment at the Employment Center, the new hire must again complete a Security Background Information form and have fingerprints taken. Prior to 1996, not all employees with the district had been fingerprinted. However, the 1996 Legislature revised the law requiring all employees, no matter how long they had been employed with the district, to complete a security background form and be fingerprinted. Thus, all district employees have now been fingerprinted and a security check conducted. Approximately 4,000 fingerprints have been taken of new hires since July 1998 of which 750 did not pass clearance.

Once the new hire has completed the security form and fingerprinting has been conducted, staff in the Fingerprinting Section of the Personnel Department can access the Broward Sheriff's DOKETRAC computer system. Information is maintained on the system of court docket records of local area infractions and arrests. If a record exists at the local area, the security form is returned to the new hire to answer questions and provide additional information. The applicant is given the opportunity to provide documentation that can prove the disposal of the infraction. When new hires are fingerprinted, the prints are submitted to FDLE and the FBI who run criminal checks.

The importance of these security checks to any district can not be underestimated. The Security Background Check requests that the employee answer questions truthfully and

that any omission or falsification of any criminal history information will result in immediate termination. Specifically stated on the form is the following:

*To omit a response [on the Security Background Check form] or to be untruthful in your response, **regardless of any previous information received from your attorney or the Court** will result in your being terminated.*

District procedure is to terminate an employee if the employee omits or if identifies any response on the Security Background check. The district procedure should be adhered to, consistently applied, with equivalent results; this is not always being done.

There have been at least two employees that have failed to disclose convictions in their background and no termination action was taken against them. In one case, an employee who falsified information was demoted rather than terminated and was able to maintain a current high administrative salary. Another employee resigned after not revealing an arrest on the Security Background check that is required of all employees before finger printing.

RECOMMENDATION

Recommendation 6-7:

Adhere to the district procedure of terminating an employee who omits or falsifies any criminal history.

The district procedure should be applied equally to all employees and, depending upon the case and the offense, an employee should receive suspension or at least a reprimand. The seriousness of an offense, once revealed, should be taken into consideration as to whether an employee should be terminated or reprimanded. The important factor is that the employee must not falsify his or her record, and the consequences of such actions must be applied consistently.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Personnel should request that the Superintendent send a memorandum to every employee re-emphasizing the importance of truthfully revealing past offenses and the consequences if records are falsified; this same memorandum should be part of the application process. May 1999
2. The memorandum should be prepared and disseminated. June 1999

FISCAL IMPACT

This recommendation has no fiscal impact.

6.3 Job Descriptions

CURRENT SITUATION

Broward County School District job positions are developed to meet the conditions and needs of departments and schools, budgetary demands, and management requirements. Each position is accompanied by a job description developed to reflect the qualifications, pay grade, duties, and responsibilities of that position. A job classification number is assigned to each position as well as a pay grade.

The Department of Personnel oversees the development or revisions to job descriptions. Specifically, the Non-instructional Staffing (Wage and Salary) Unit prepares new position descriptions for approval by the Superintendent and the Board. Administrative Procedures maintains all positions for record.

FINDING

Job description contains the following information:

- position title
- contract year
- pay grade
- qualifications
- direct accountability
- supervision
- goal
- accountability procedures
- performance responsibilities

Each job description also includes the Board approval and adoption date, whether the position was retitled and realigned, and the date of the last revisions and when they were adopted. Most job descriptions are complete and descriptive. Included in the description are detailed and specific responsibilities.

Copies of job descriptions for each current position in the district were requested and analyzed for this review. MGT found 20 missing job descriptions according to the index and code sheets provided initially by the district. The district subsequently provided MGT with 15 of the 20 missing job descriptions and explained that the other five job descriptions are either not-Board-approved positions and no one is filling the position, or there simply was no job description for one position which is listed on the code sheet (Purchasing Agent III, School Food Service).

Exhibit 6-4 provides a list of the five positions that MGT found had no job descriptions; however, these were listed on the district index sheets.

**EXHIBIT 6-4
MISSING JOB DESCRIPTIONS IN THE
BROWARD COUNTY SCHOOL DISTRICT**

CODE	JOB DESCRIPTION
CC-050	Risk Management Benefits Administrator I & II
DD-094	Purchasing Agent III, School Food Service
HH-010	Student Advocate
HH-011	Program Coordinator
NN-147	Foreman Paint Stripper (not board approved)

Source: MGT's review of Broward County School District job descriptions, 1998.

While the job descriptions showed they had been updated within the last five to ten years, descriptions should be updated more frequently -- on a three-year cycle to ensure undertaken by staff. The consultant saw no evidence of this more frequent updating.

Job descriptions should be available for review by district staff, prospective employees, or in this case auditors and this, should be maintained in hard copy - organized and entered efficiently.

RECOMMENDATION

Recommendation 6-8:

Ensure that written job descriptions are available for every position in the Broward County School District and ready for review by prospective hires, district staff, and auditors.

All positions in the district should have a job description on file. If the position has not been Board approved, the district should not include those positions in their current index sheets. The job a descriptions and index sheets should be updated every three years and available in a hard copy format and electronically for persons to review.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-----------------|
| <p>1. The Director of Personnel should request that the Administrative Procedures Unit review all job descriptions to make sure that one is available for each position and that edits be made accordingly, and the job descriptions updated in a thee-year cycle.</p> | <p>May 1999</p> |
| <p>2. The Administrative Procedures Unit should review all job descriptions to ensure that one is available for every position.</p> | <p>May 1999</p> |

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

6.4 Employment of Instructional and Non-Instructional Personnel

CURRENT SITUATION

Of the full-time employees in the Broward County School District, around 65 percent are site-based instructional personnel (teachers, guidance counselors, librarians, paraprofessionals/teacher aides, and other instructional staff). Teachers (including counselors and librarians) comprise over 56 percent of the total employees in the district while district and school-based administrators account for about three percent of the total. One hundred nine-five (195) of the administrators serve as principals and 370 as assistant principals. Clerical/secretarial and service workers make up most of the non-instructional staff of about 6,800. Exhibit 6-5 details the number of employees in the school district according to administrative, instructional, and support staff categories.³

The Department of Personnel is responsible for ensuring that all positions in the school district are filled. The department advertises and posts vacancies, accepts and processes applications, screens applications, plans recruitment efforts, acts upon recommendations to hire, and processes new employees. Hiring efforts are divided between the Instructional Staffing (teachers) and Non-Instructional Staffing (food service workers, custodians, clerical, maintenance workers, and bus drivers) departments.

The process of hiring and employing instructional staff is outlined in Exhibit 6-6. The exhibit shows the entire process from the official notice that a vacancy has occurred to the actual employment of a new hire. The process is divided into three basic areas – the hiring process, the pre-employment process, and the employment process.

Exhibit 6-7 shows the process for hiring non-instructional staff, which is very similar to instructional, with a few caveats. The hiring of administrative staff (district and school-based) is different in that the advertising for a vacancy, interviewing an applicant, processing the new hire, and employment of an individual is handled through Administrative Procedures.

FINDING

The hiring, employment, and processing of new hires involves several steps and forms as noted in Exhibits 6-6 and 6-7. Both of these exhibits give the reader an idea of the amount of paperwork that is processed and disseminated when personnel are hired.

The Personnel Action Form (PAF) that is initiated during the hiring phases and when any other change is made to an employee's record is of particular concern to the consultant. Processing PAFs, whether to hire a person, to change an employee's name or address, or to assign, promote, transfer, retire, or terminate an employee, is labor intensive -- involving excessive paperwork, staff, steps, and time.

Exhibit 6-8 details this PAF processing. Over 120,000 PAFs are processed through the Personnel Records section each year. And while Personnel Records is effectively organized to handle these PAFs that come through their section, the mere volume that is processed still is labor intensive and involves many staff. MGT found this to be true as they followed the process itself as is shown in Exhibits 6-6 and 6-7.

³ The latest data which were available by personnel category (administrative, instructional, and support staff) were from December 1997. As of October 1998, there were 23,236 employees in the district.

**EXHIBIT 6-5
EMPLOYEES BY CATEGORY IN THE
BROWARD COUNTY SCHOOL DISTRICT**

CLASSIFICATION	TOTAL	
	#	%
ADMINISTRATORS		
District-based Administrators		
Instructional ¹	23	0.1%
Non-instructional ²	49	0.2%
School-based Administrators		
Principals	195	0.9%
Assistant Principals	370	1.7%
Deans	1	0.0%
Total Administrators	638	3.0%
INSTRUCTIONAL (school-based):		
Teachers		
Elementary	4,994	23.5%
Secondary	3,699	17.4%
Exceptional Child Teacher	1,312	6.2%
Other Teachers	1,183	5.6%
Guidance Counselors	435	2.1%
Librarians	201	0.9%
Total Teachers	11,824	55.8%
Instructional Support Staff³	310	1.5%
Paraprofessionals (aides)		
Classroom	1,039	4.9%
Exceptional Child	357	1.7%
Other	276	1.3%
Total Instructional Staff	13,806	65.1%
Non-Instructional		
Clerical/Secretarial	2,306	10.9%
Technicians	115	0.5%
Service Workers	3,115	14.7%
Skilled Crafts	680	3.2%
Laborers, unskilled	235	1.1%
Non-administrative	311	1.5%
Total Nonadministrative Staff	6,762	31.9%
TOTAL EMPLOYEES	21,206	100.0%

Source: Broward County School District, Personnel Department, December 1997.

¹ Superintendent, Deputy/Assistant/Associate Superintendents, Directors, Supervisors, Coordinators

² Deputy/Assistant/ Superintendents, Directors, Supervisors, Coordinators

³ Visiting Teachers/Social Workers, Psychological, OPS non-administrative

**EXHIBIT 6-6
HIRING PROCESS FOR INSTRUCTIONAL STAFF IN THE
BROWARD COUNTY SCHOOL DISTRICT**

PROCESS	FORMS PROCESSED
Hiring Process:	
<ul style="list-style-type: none"> ▪ Principal notifies area office superintendent that a teacher vacancy exists. 	
<ul style="list-style-type: none"> ▪ Area office officially notifies Instructional Staffing in writing that a vacancy exists. 	Vacancy Notice prepared
<ul style="list-style-type: none"> ▪ Vacancy is checked for position control in Instructional Staffing. 	
<ul style="list-style-type: none"> ▪ Vacancy is forwarded on to Administrative Procedures unit for posting in a weekly district publication of <u>Teacher Vacancies</u> posted throughout the district. ▪ Posting includes the position, location, qualification, effective date of vacancy, application deadline for each vacancy, and a contact name for applicants to send resumes. 	Posted in district Teacher Vacancies publication
<ul style="list-style-type: none"> ▪ Interested applicant files an application with the Employment Center who in turn distributes it to the Instructional Staffing unit to be entered into the district's electronic personnel application database called Computerized Applicant Flow System (CAFS). A file folder is prepared for the applicant and is filed with other applications. ▪ Until the application is complete (references, security background check form, and qualifications submitted, a principal may not review the application or interview the applicant. The applicant may; however, send a resume to the school. 	Application entered into an electronic personnel application database.
<ul style="list-style-type: none"> ▪ Once applications are entered into the electronic database and are complete, a principal has access to the applications electronically. 	
<ul style="list-style-type: none"> ▪ Principal and/or the site-based committee interview applicants. ▪ Once a selection is made, a <u>Pre-Clearance for Teacher</u> form is faxed to Instructional Staffing for initiation of the employment process. 	Pre-Clearance for a Teacher form
Pre-Employment Process	
<ul style="list-style-type: none"> ▪ Pre-Clearance for teacher form of the new hire is assigned to a Personnel Administrator in Instructional Staffing who initiates the <u>Pre-Employment Clearance</u> form. ▪ Pre-Employment Clearance form is a checklist of items that must be cleared before the new hire is processed for employment such as a completed up-to-date application and references, security form, official transcripts, and a verification of eligibility for a valid teachers certificate. 	Pre-Employment Clearance form
<ul style="list-style-type: none"> ▪ Personnel Administrator sends the new hire's file to the Certification Section to verify the eligibility of the new hire for teacher certification. 	
<ul style="list-style-type: none"> ▪ Certification returns new hire's file back to the Personnel Administrator who initiates a <u>Clearance Appointment for Teacher</u> (CAT) which is faxed to the school with the vacancy. 	Clearance Appointment for Teachers (CAT)
<ul style="list-style-type: none"> ▪ School sets up a date for the new hire to be processed at the district's Employment Center. ▪ New hire is instructed to pick up the CAT before being processed as the form lists what the new hire must bring to the Employment Center (fees for fingerprinting, a completed Personnel Action Form (PAF), social security card, picture ID). ▪ PAF is completed and signed by the new hire when the CAT form is picked up. 	PAF is initiated and signed
Employment Process:	
<ul style="list-style-type: none"> ▪ Employee brings to the Employment Center required documents and begins the employment process by paying fees and completing other forms such as the loyalty oath, W-4 form, personal data form, I-9 form, and health, dental, vision, life insurance enrollment forms. 	Other required forms
<ul style="list-style-type: none"> ▪ Security Background Information form is completed and the employee's fingerprints are taken. ▪ Local check is done through the Broward County Sheriff's Department Doketrac computer system. If no record surfaces, the employee is cleared to work and fingerprints are sent to FDLE and then the FBI. 	Security Background Information form Fingerprints taken
<ul style="list-style-type: none"> ▪ Employee speaks with staff member about benefits. 	
<ul style="list-style-type: none"> ▪ Employee speaks with a certification staff member. 	
<ul style="list-style-type: none"> ▪ Employee goes over completed file and paperwork with a Personnel Administrator. 	
<ul style="list-style-type: none"> ▪ New hire is fully processed and his file and the PAF are returned to Instructional Staffing. ▪ Instructional Staffing sends file and PAF to Personnel Records to be filed and processed. 	

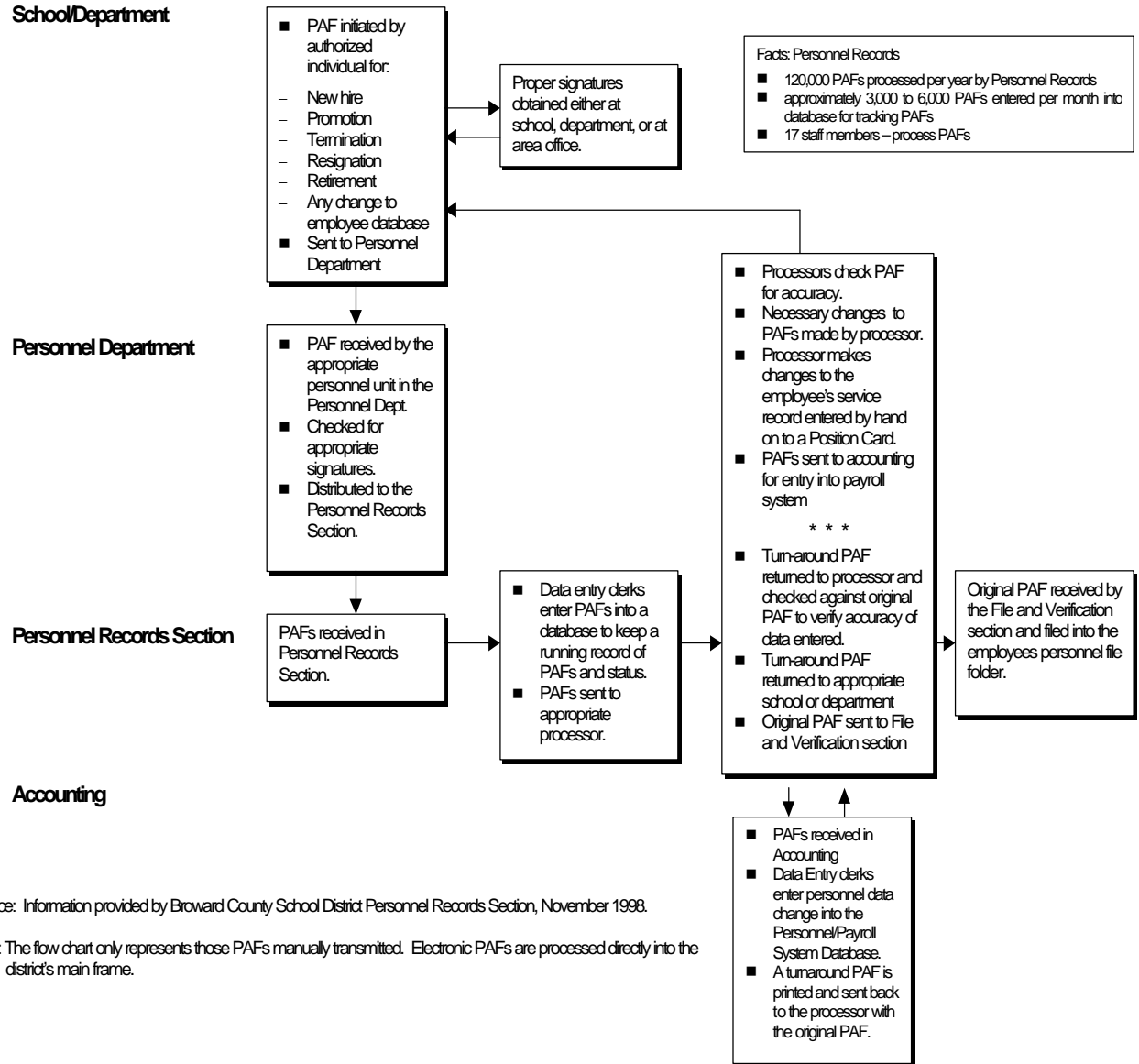
Source: MGT's interviews with staff, November 1998.

**EXHIBIT 6-7
HIRING PROCESS FOR NON-INSTRUCTIONAL STAFF IN THE
BROWARD COUNTY SCHOOL DISTRICT**

PROCESS	FORMS PROCESSED
Hiring Process:	
<ul style="list-style-type: none"> ■ School or department officially notifies Non-instructional Staffing that a vacancy exists for a non-instructional position. 	Vacancy Notice prepared
<ul style="list-style-type: none"> ■ Non-instructional staff prepares a vacancy listing that is published in a weekly district publication of <u>Existing Vacancies</u> posted throughout the district. ■ Posting includes the position, location, qualification, effective date of vacancy, application deadline for each vacancy, and a contact name for applicants to send resumes. 	Posted in district Existing Vacancies publication
<ul style="list-style-type: none"> ■ Interested applicants file application and/or resume with the school or department where the vacancy exists. ■ If the person is applying for a clerical position, they are first sent to the testing center to complete clerical tests that qualify them for particular positions. A copy of the test scores go to the applicant with a list of the clerical areas for which they qualify. 	Application filed with school or department with vacancy.
<ul style="list-style-type: none"> ■ Principal or the head of the department where the vacancy exists interviews the applicant. 	
<ul style="list-style-type: none"> ■ Principal or the head of the department makes a recommendation to hire and sends the appropriate paperwork to Non-instructional Staffing. ■ Personnel Action Form (PAF) is initiated and sent to Non-instructional Staffing. 	Written recommendation to hire PAF is initiated and signed
Pre-Employment Process	
<ul style="list-style-type: none"> ■ Staff in Non-instructional Staffing places the new hire on the correct wage step, prepares a file folder for the new hire's documents, and sends the file to the Employment Center for processing along with the PAF. ■ Appointment is made with the new hire to be processed. 	New hire placed on correct wage step. Employee file sent to Employment Center
Employment Process:	
<ul style="list-style-type: none"> ■ Employee brings the required documents and fees to the Employment Center (fees for finger printing, completed PAF , social security card, picture ID). ■ Employee is processed filling out required forms such as loyalty oath, W-4 form, personal data form, I-9 form, and health, dental, vision, life insurance enrollment forms. 	
<ul style="list-style-type: none"> ■ Security Background Information form is completed and the employee's fingerprints taken. ■ Local check is done through the Broward Sheriff's Department Doketrac computer system. If no record surfaces, the employee is cleared to work and fingerprints are sent to FDLE and then the FBI. 	Security Background Information form Fingerprints taken
<ul style="list-style-type: none"> ■ Employee speaks with staff member about benefits. 	
<ul style="list-style-type: none"> ■ New hire is fully processed and his file and the PAF are returned to Non-instructional Staffing for final check over. ■ Non-instructional Staffing sends file and PAF to Personnel Records to be filed and processed. 	

Source: MGT's interviews with staff, November 1998.

**EXHIBIT 6-8
WORK FLOW OF PERSONNEL ACTION FORMS (PAFs) IN THE
BROWARD COUNTY SCHOOL DISTRICT**



Source: Information provided by Broward County School District Personnel Records Section, November 1998.

Note: The flow chart only represents those PAFs manually transmitted. Electronic PAFs are processed directly into the district's main frame.

Even during the mail survey conducted by MGT, over 50 percent of district administrators and teachers felt that “*major bottlenecks exist in many administrative processes which cause unnecessary time delays.*”⁴ And, in fact, the responses of Broward administrators and teachers when compared to surveyed administrators and teachers in other districts show a greater dissatisfaction with these processes. For instance, 58 percent of the Broward administrators indicate that bottlenecks exist while, only 41 percent of administrators in other districts report that administrative processes were causing delays. While Broward teachers felt less concern, over 50 percent still felt that bottlenecks were occurring as compared with other districts where fewer than 50 percent of the teachers felt the same.

Many of the steps in processing PAFs could be eliminated with technology capabilities. Already technology has been implemented to reduce some of the abundant paper flow. This Electronic On-Line PAF that was piloted successfully in 1992-93 allows processing of PAFs via computer rather than on paper.

An Electronic PAF Processing Procedure Manual has been designed to help staff at the school and department level enter the data electronically or directly into the mainframe of the personnel payroll system (ISITAPS) if the department or school has this capability. Personnel specialists in Personnel Records provide training at the school/department level for using the system.

Unfortunately, not all PAFs can be process through this system, especially those for new hires. Those PAFs that can be processed in this manner include:

- labor distribution changes
- pre-clearance requests
- selected additional positions
- grants
- delete selected additional position jobs
- update personal data information

On August 28, 1998, the Broward County School District released a Request for Proposals (RFP) to software vendors to implement a new Human Resources Management System (HRMS) that, once implemented, could reduce the paper flow and time consuming efforts of staff. Some technical objectives set forth in the RFP would provide:

- electronic routing of forms and documents;
- electronic capturing of information at the source;
- electronic storage of documents such as fingerprints, photos, forms, signatures;
- an integrated data element dictionary to facilitate adding, changing, and tracking data elements;
- electronic access to historical records;

⁴ See MGT results of mail survey of administrators and teachers in Chapter 3.

- system transactions triggered by events, dates, or conditions; and
- the formulation of e-mail notifications triggered by events, dates, or conditions.

At the time of the on-site review, the firm had not yet been selected to implement this proposed system. Nonetheless, the results of such a system are obvious and surely would curtail the amount of work processes now being conducted by in the Personnel Department. The cost savings from implementing such a system will be substantial from purchasing paper, printing charges, labor hours, and staff.

RECOMMENDATION

Recommendation 6-9:

Set as one of the district's top priorities (once the vendor is selected) a plan to implement a new Human Resources Management System (HRMS) with the electronic capability to process Personnel Action Forms.

High on the list of priorities (once the HRMS system is implemented) should be to electronically transmit PAFs from the source of origin whether it is a school or department.

The Broward County School District is commended for appropriating funds to implement the computer system that will allow the Personnel Department staff to process paper work more efficiently and effectively.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Personnel should work with MIS and the Superintendent to ensure that the processing of PAFs electronically receive top priority when the HRMS system is implemented. August 2001
(Dependent on the
implementation of the
HRMS system)

FISCAL IMPACT

This recommendation has no fiscal impact.

FINDING

To substitute teach in the district, an application must be completed. For a degreed substitute, an official transcript is required. If an applicant is a non-degreed substitute, official transcripts showing at least 60 semester hours of college credit are required. The applicant must also submit a minimum of three references, a copy of a valid state of Florida or Broward County Certificate, picture identification, and social security card. If a valid certificate is not available, the applicant needs to complete a *Request for a Substitute Teaching Certificate*. A background security check is completed on each applicant, and fingerprints are taken and submitted to FDLE and the FBI.

In order to be cleared as a substitute teacher, the applicant must attend a substitute clearance workshop that is offered twice a month. In order to be cleared as a substitute

teacher immediately at a particular school, the applicant must meet each of the above requirements, and have a letter from the school administrator stating that the school will be employing the substitute teacher prior to the next substitute teacher clearance workshop. However, in order to substitute teach at any school in the district, the applicant must attend the substitute workshop.

Interim substitute teachers are those employed to teach for at least 20 consecutive days or more and hold a bachelor's degree. An interim substitute may not be used in a vacant or unfilled position unless the district has stopped hiring contracted teachers.

The rate of pay for substitutes is shown in Exhibit 6-9 .

**EXHIBIT 6-9
HOURLY AND DAILY RATE OF PAY
FOR SUBSTITUTE TEACHERS IN THE
BROWARD COUNTY SCHOOL DISTRICT**

TYPE OF SUBSTITUTE	DEGREE	HOURLY RATE OF PAY	DAILY RATE OF PAY
Substitute who has not completed the 30 hour Substitute Teacher Training Program.	Bachelor's or higher degree	\$ 9.06	\$ 67.95
	A.A. Degree	\$ 6.95	\$ 52.12
Substitute who has completed the 30 hour Substitute Teacher Training Program.	Bachelor's or higher degree	\$ 9.93	\$ 74.47
	A.A. Degree	\$ 7.33	\$ 55.00
Interim Substitute Teacher		\$19.06	\$142.95

Source: Broward County School District, Personnel Procedural Handbook, 1998.

In 1990, the Broward County School District purchased an electronic substitute system to automate the process of teachers reporting absences, and the selection, notification, and assignment of substitutes. The system was returned and money refunded to the vendor when it was found that the system did not function properly. Another system was purchased in 1992 with the same capabilities and is available 24 hours a day to receive phone calls from teachers, school administrators, and substitute teachers. Approximately 3,700 persons are registered with the district as substitute teachers and, on average, more than 1200 substitutes a day are needed.

Exhibit 6-10 shows the number and percent of teachers absent from duty for the past two years and for the first three months of the 1998-99 school year (August, September and October).⁵ The percent of absent teachers increased a total of nearly nine percent from 1996-97 to 1997-98. Approximately eight percent of the teachers were absent each day during the 1996-97 and 1997-98 school years. Thus far in the 1998-99 school year, almost six percent of teachers, on average, have been absent per day for the first three months of the 1998-99 school year. If the trend continues as it has in the previous three years, the 1998-99 school year will experience more absences than in the past.

⁵ The total absences reported in the exhibit do not include substitutes hired for vacant or unfilled positions.

**EXHIBIT 6-10
TEACHER ABSENCES IN
1996-97, 1997-98, AND 1998-99 IN THE
BROWARD COUNTY SCHOOL DISTRICT**

YEAR	TOTAL ABSENCES	DAYS PER SCHOOL YEAR	AVERAGE NUMBER ABSENT PER DAY	NUMBER OF TEACHERS	PERCENT ABSENT
1996-97	178,403	196	910	11,910	7.6%
1997-98	195,151	196	996	12,239	8.1%
1998-99 ¹	32,201	44	732	12,420	5.9%

Source: Broward County School District, Statistical Report, 1998.

¹ Includes absences for August, September, and October only - 44 days.

In Exhibit 6-11, the number of teacher absences is provided by month for the past three years and for the first three months of the 1998-99 school year. As can be seen, the months of August and September consistently have the least amount of teachers absences. August had over 1,000 absences for each year shown except for this school year (1998-99) when the number of absences significantly decreased (189). In each year, the number of absences per month begins to increase significantly in September. In the current school year, the number of absences reported in September declined by 4,185 from 1997-98. The month of May for each of the past three years show the largest number of absences. In May of last year (1997-98), for example, over 28,000 absences were reported for the month; that is approximately 1,415 absences per day or almost 12 percent of the teachers were absent per day.

**EXHIBIT 6-11
SUMMARY OF ABSENCES PER MONTH
1995-96, 1996-97 AND 1997-98 IN THE
BROWARD COUNTY SCHOOL DISTRICT**

MONTH	1995-96	1996-97	1997-98	1998-99
AUG	1,048	1,305	1,324	189
SEP	9,974	11,925	15,017	10,832
OCT	15,595	19,485	19,543	21,180
NOV	14,904	17,417	19,377	
DEC	12,054	14,692	16,358	
JAN	15,330	16,066	17,049	
FEB	18,387	21,929	22,586	
MAR	21,275	19,650	26,407	
APR	13,039	20,454	21,767	
MAY	23,244	27,676	28,225	
JUN	6,575	7,804	7,508	
TOTAL	151,425	178,403	195,161	32,201

Source: Broward County School District, Statistical Report, 1998.

In other school districts such as the Lee and Clay County School Districts in Florida, and El Paso and San Angelo Independent School Districts in Texas (in which MGT has conducted performance reviews), the teacher absences per year have ranged from 1.6 percent to 13 percent. The average teacher in districts absentee rate for all teachers in districts that we have reviewed is six percent.

The largest number of Broward County teacher absences reported over the past three years is for illness, in-service, and personal reasons (see Exhibit 6-12). The majority of absenteeism was due to illness; the number of absent teachers increased by over 6,000 from 1995-96 to 1997-98. Absences due to In-service days ranged from 41,114 in 1995-96 to 53,416 in 1997-98. Approximately 20,000 teachers were absent each year for personal reasons.

**EXHIBIT 6-12
MAJOR REASONS FOR ABSENCES
1995-96, 1996-97, AND 1997-98 SCHOOL YEAR
BROWARD COUNTY SCHOOL DISTRICT**

REASONS*	1995-96	1996-97	1997-98
ILLNESS	57,024	56,316	63,112
INSERVICE	41,114	48,850	53,416
PERSONAL	19,092	20,820	22,458

Source: Broward County School District, Statistical Report, 1998.
*Other reasons such as military, release time, family illness, workers' compensation, jury duty, and leave are not

RECOMMENDATION

Recommendation 6-10:

Appoint a committee to investigate ways in which the absenteeism rate of teachers can be reduced to a level of under six percent.

The Broward County School District should set a six percent goal as a goal to reach in the next two years. The committee, once appointed, should consider such alternatives as a reward system similar to the one exercised by the Transportation Department to decrease the number of teachers absent for personal reasons. A perfect/good attendance monetary award could be given to those who take "...particular care in the maintenance of their health and job attendance..." The dollars given towards the award system would inevitably be compensated by not having to hire as many substitute teachers.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Personnel should appoint a committee of representatives from the Personnel Department, and teaching staff to consider ways to decrease the number of teachers absent each day. June 1999
2. The committee should meet and develop methods for decreasing teacher absenteeism. Summer 1999

FISCAL IMPACT

This recommendation cannot show a fiscal impact until the committee's recommendations to reduce teacher administration are implemented and takes effect.

6.5 Recruitment of Teachers

In the 1998-99 school year, at the time of the on-site review, there were 12,420 teachers employed in the Broward County School District. Of this number, approximately 12 percent (1,047) are new teachers. Recruiting personnel to fill available teaching positions, ensuring that those hired become certified, and retaining teachers in the district are the focus of this section of the report.

Exhibit 6-13 shows the number of teachers in the district by ethnicity for the past three years. The exhibit also includes the number of new teachers hired per year by ethnicity over the three-year period. As can be seen, the increase in the number of teachers teaching in the district over the past three years has not been significant. From 1996-97 to 1997-98, the number of teachers increased by only 2.7 percent. And, for this school year (1998-99), the number has only increased by 1.5 percent.

**EXHIBIT 6-13
NUMBER OF TEACHERS AND NEW TEACHERS FOR
1996-97, 1997-98, AND 1998-99 SCHOOL YEARS IN THE
BROWARD COUNTY SCHOOL DISTRICT**

TEACHERS	1996-97		1997-98		1998-99	
	NUMBER	PERCENT	NUMBER	PERCENT	NUMBER	PERCENT
African American						
Teachers	2,382	20.0%	2,490	20.3%	2,591	20.9%
New Teachers	309	2.6%	306	2.5%	256	2.1%
Hispanic American						
Teachers	544	4.6%	617	5.0%	689	5.5%
New Teachers	109	0.9%	111	0.9%	122	1.0%
Asian American						
Teachers	55	0.5%	59	0.5%	67	0.5%
New Teachers	13	0.1%	8	0.1%	16	0.1%
Native American						
Teachers	51	0.4%	51	0.4%	55	0.4%
New Teachers	13	0.1%	4	0.0%	6	0.0%
Non-minority						
Teachers	8,878	74.5%	9,019	73.7%	9,018	72.6%
New Teachers	853	7.2%	747	6.1%	647	5.2%
Total Teachers	11,910	100.0%	12,236	100.0%	12,420	100.0%
Total New Teachers	1,297	10.9%	1,176	9.6%	1,047	8.4%

Source: Broward County School District, Statistical Report, 1998.

* Percent of teachers to total teachers and percent of new teachers to total teachers.

The number of new teachers hired to teach in the district for the past three years has decreased by 9.3 percent in 1996-97 and by 11 percent in 1998-99. However, the number of new minority teachers hired has increased each year for each of the minority classifications with the exception of African American teachers. The number of Hispanic American, Asian American, and Native American teachers have continued to increase over the three-year period. In contrast, the number of new African American teachers has decreased over the three-year period.

The Broward County School District must hire from 1,000 to 1,500 teachers per year. The planning and oversight of recruitment strategies to attract teachers to the school district is the responsibility of the Instructional Staffing Unit. The Director of Instructional Staffing, the Director of Personnel, and various other staff within the unit plan the visits to colleges, universities, and job fairs to recruit teachers. These employees participate in the visits to colleges, universities, and job fairs.

FINDING

The Department of Personnel was unable to provide written procedures and planning efforts that the department follows to recruit teachers; the Personnel Procedures Handbook does not contain information on recruitment. Various staff in the department plan recruitment trips and these efforts take place without any formal procedures or guidelines. Without procedures or a plan, the district cannot adequately decide what colleges/fairs should be visited, who will or should attend, and what priorities should be in place for expending money for recruitment trips. The district allots \$50,000 for recruitment trips. Out-of-area trips usually consume \$30,000 of the budget with the other \$20,000 expended for advertising, brochures, conferences, and recruitment materials. A plan would set priorities for the expenditures of these funds and set objectives based on each year's needs. Without a plan and procedures, money can be wasted on unnecessary trips.

Two recruitment reports (which the district refers to as recruitment plans) were provided to MGT with a list of recruitment trips taken for the past two years (1996-97 and 1997-98 school years). These reports contained information on the number of interviews conducted, total teachers hired by ethnicity, whether a contract had been offered, and a brief summary of each trip. The recruitment reports did not contain any goals, measurable objectives, fiscal impact, or plans for annual evaluations. While the 1997-98 report did not provide an evaluation of each recruitment experience, the 1996-97 report included a statement for each event listed in Exhibit 6-14 as to whether to continue or not continue the effort.

Exhibit 6-14 provides an overview of recruitment trips taken during the 1996-97 and 1997-98 school years. As can be seen, over 40 job fairs, conferences, and colleges/universities were visited in the past two years.

One purpose of recruitment trips is to locate teachers in critical shortage areas such as math, special education, and science. Exhibit 6-15 presents an overview of the teachers hired in critical shortage areas for the past three years. For 1998-99, four areas particularly stand out – math, music, science, and special education. For the current school year, 36 teachers were hired in music, 63 in science, 80 in math, and 102 in special education. In 1997-98 and 1996-97, most teachers were hired in these same areas.

**EXHIBIT 6-14
RECRUITMENT TRIPS IN THE
BROWARD COUNTY SCHOOL DISTRICT
1996-97 AND 1997-98 SCHOOL YEARS**

POSTSECONDARY INSTITUTION OR NAME OF FAIR/CONFERENCE	UNSigned CONTRACT		TOTAL		NON-		AFRICAN		HISPANIC		NATIVE		ASIAN			
	OFFERED		HIRED		MINORITY		AMERICAN		AMERICAN		AMERICAN		AMERICAN			
	INTERVIEWS ¹	1997-98	96-97	97-98	96-97	97-98	96-97	97-98	96-97	97-98	96-97	97-98	96-97	97-98	96-97	97-98
Florida																
Barry University ²																
Teacher Education Alliance			16		16		13		3		0		0		0	
Florida Memorial	21	11	4		9	6	1	0	6	5	2	1	0	0	0	0
Florida Atlantic University	103	0			0	44	0	40	0	2	0	2	0	0	0	0
Florida International University ²		0			0		0		0		0		0		0	
FSU-Broward ²		0			0		0		0		0		0		0	
Lynn University ²		0			0		0		0		0		0		0	
Nova SE, Speech Language Interns		0			0		0		0		0		0		0	
Nova SE	44		13		23		16		6		1		0		0	
St Thomas University		0			0		0		0		0		0		0	
University of Miami ²		0			0		0		0		0		0		0	
Florida Assoc. the Student Council for ESE Children	15	1			0	2	0	2	0	0	0	0	0	0	0	0
Bethune Cookman, UF		16			15		7		6		2		0		0	
FAMU	31	5	6		6	4	0	0	6	4	0	0	0	0	0	0
Valdosta State Univ., FAMU, FSU	121	32	12		16	20	6	13	8	6	2	1	0	0	0	0
UCF & USF		10			5		3		1		1		0		0	
Bethune Cookman, UCF, USF, UF	69		10		29		20		9		0		0		0	
FFMT Teach Recruitment	77		0		0		0		0		0		0		0	
Great Florida Teach-in	56		7		2		2		0		0		0		0	
University of West Florida	0		0		0		0		0		0		0		0	
Alabama																
Alabama South, Tuskegee University	36	10	7		6	6	0	0	6	6	0	0	0	0	0	0
Colorado																
Univ. of N Colorado, Greater Denver Teacher Fair	30	10	6		1	2	1	2	0	0	0	0	0	0	0	0
Georgia																
Spellman, Clark Atlanta University	27	6	11		2	3	0	0	2	3	0	0	0	0	0	0
University of Georgia, Athens	30	5	5		2	2	2	2	0	0	0	0	0	0	0	0
Indiana																
Ball State and Indiana State			5		0		0		0		0		0		0	
Maryland																
University of Maryland Consortium			1		1		1		0		0		0		0	

**EXHIBIT 6-14 (Continued)
RECRUITMENT TRIPS IN THE
BROWARD COUNTY SCHOOL DISTRICT
1996-97 AND 1997-98 SCHOOL YEARS**

POSTSECONDARY INSTITUTION OR NAME OF FAIR/CONFERENCE	INTERVIEWS ¹	UNSIGNED CONTRACT OFFERED		TOTAL HIRED		NON- MINORITY		AFRICAN AMERICAN		HISPANIC AMERICAN		NATIVE AMERICAN		ASIAN AMERICAN		
		1997-98	96-97	97-98	96-97	97-98	96-97	97-98	96-97	97-98	96-97	97-98	96-97	97-98	96-97	97-98
	Massachusetts															
Mass Ed Recruitment Consortium	50	5	9	3	4	2	4	1	0	0	0	0	0	0	0	0
New York																
NY Minority Expo	25	19	8	12	7	7	3	3	3	2	1	0	0	0	0	0
NY Central/West	133	26	17	18	9	14	7	3	2	1	0	0	0	0	0	0
North Carolina																
UNC Greensboro, NC Central Univ., Winston Salem State, NC A&T University	26	4	5	2	3	1	2	1	1	0	0	0	0	0	0	0
Pennsylvania																
Penn State, Edinboro, Slippery Rock	83	11	15	5	2	4	1	1	1	0	0	0	0	0	0	0
Philadelphia Teacher Fair		8		2		0		2		0		0		0		0
Cheyney University & W Chester University	12		2		2		0		2		0		0		0	0
South Carolina																
SCS and Claflin College		0		2		0		2		0		0		0		0
SCS, Claflin College, and Morris College	37		12		1		0		1		0		0		0	0
Virginia																
Technology Education ²																
Other																
Instructional Staffing Office	300	125	125	75	45	40	29	28	11	6	4	0	0	1	1	
National Student Speech Language Hearing Assoc.	23	5		5	1	5	1	0	0	0	0	0	0	0	0	0
ASHA, National Speech Conference ²																
Industrial Technology Education Assoc.	24	0	2	0	1	0	1	0	0	0	0	0	0	0	0	0
Teca Eastern Regional		0		0		0		0		0		0		0		0
Teacher Education Alliance	13		13		12		8		1		2		0		1	
Music Educators ²		0		0		0		0		0		0		0		0
TOTAL	1,386	331	289	203	230	107	153	79	63	16	12	0	0	1	2	

Source: Broward County School District, Personnel Department, 1998.

¹ The number of interviews conducted for 1996-97 was not provided.

² No statistics given for 1997-98.

**EXHIBIT 6-15
NEW TEACHERS HIRED IN CRITICAL SHORTAGE AREAS
IN THE BROWARD COUNTY SCHOOL DISTRICT
1996-97, 1997-98 and 1998-99 SCHOOL YEARS**

SUBJECT	1998-99	1997-98	1996-97
Family & Consumer Science	12	4	2
Gifted	9	11	5
Industrial Arts	9	8	10
Math	80	49	47
Media Specialist	9	3	3
Music	36	20	16
Reading	26	14	
Science	63	54	37
Special Education - Autistic	23	11	
Special Education - EH	14	10	13
Special Education - MH	13	6	8
Special Education - VE	52	41	24
Speech Language Impaired	32	31	25

Source: School District of Broward County as of 11/10/98.

Due to the competitive salaries offered, the district's location in a warm climate and near water, its reputation for being a frontrunner in educational programs, the Broward County School District does not have the difficulty attracting teachers that many other districts experience. For example, in Prince George's County School System in Maryland with a student enrollment about one half of Broward County School District, the increase in the number of teachers needed annually has put great demands on the school system's recruiting efforts.

When Broward administrators and teachers were asked (during the mail survey conducted by MGT) their opinion of personnel recruitment, over 56 percent of administrators report that recruitment efforts were *adequate* or *outstanding*. On the other hand, only 32 percent of the teachers indicate that recruitment efforts were *adequate* to *outstanding*. Less than 50 percent of the administrators surveyed in other districts felt recruitment efforts were *adequate* to *outstanding* (56 percent in Broward; 45 percent in other districts). Teachers in other districts felt about the same way as teachers in Broward; about 37 percent reported that recruitment was *adequate* to *outstanding* (37 percent).

RECOMMENDATION

Recommendation 6-11:

Strengthen the current recruitment plan by including a mission statement, goals, measurable objectives, needs assessment, analysis and evaluation of past efforts, and strategies for attracting teachers to the Broward County School District.

The district's recruitment plan should be modified so that it will guide the efforts of staff in the recruitment of teachers. The plan should detail the areas where a critical teacher shortage exists and ways in which the shortages should be addressed. A staff member

should be chosen to develop and oversee the recruitment plan and process. In addition to the end of the year report of postsecondary institutions and job fairs visited, the report should include a written analysis of the trips and recommendations for future efforts. Budget management should also be a part of the plan and recommendations should be made as to how to best allocate funds.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Personnel should assign the Director of Instructional Staffing the responsibility to developing a formal recruitment plan to guide the efforts of the department in hiring teachers. May 1999

2. The Director of Instructional Staffing should meet with unit staff and develop the recruitment plan. This Director should also be responsible to oversee recruitment activities, produce an end-of-the-year report, and update the plan annually. Summer 1999

3. The Director of Instructional Staffing should present the plan to the Director of Personnel for approval and initiate oversight of the recruitment plan and process. September 1999
and Ongoing

FISCAL IMPACT

This recommendation will not have a fiscal impact.

FINDING

As analysis of turnover rates helps a district to determine the percentage of teachers leaving the district and the reasons for their departure. Nationally, public school systems have a teacher turnover rate of approximately six percent. The cost to recruit and hire a large number of teachers to replace those leaving is a major problem for many districts. The Broward County School District does not maintain and analyze statistical data related to teacher turnover rate.

The Broward County School District could not provide the number of teachers that leave the district each year. Data were available, however, from the Florida Department of Education (FDOE). FDOE was able to provide the number of teachers leaving Broward County School District and the five peer districts. This data is shown in Exhibit 6-16.

As can be seen, the Broward County School District has the lowest teacher turnover rate of the five peer school districts. Over the three school years, this rate has changed very little from 2.4 percent in 1995-96 to 2.7 percent to 1997-98. These rates are about three percentage points below the national average.

The highest teacher turnover rate for the 1997-98 school year are in Duval and Hillsborough County School Districts at 9.5 percent and 8.8 percent, respectively. In Duval, the teacher turnover rate has increased over two percent from 1995-96 to 1997-98 and in Hillsborough, the rate has increased by about 1.3 percent.

**EXHIBIT 6-16
COMPARISON OF TEACHER TURNOVER RATE
IN PEER SCHOOL DISTRICTS FOR SCHOOL YEARS
1995-96, 1996-97 AND 1997-98**

SCHOOL DISTRICT	1995-96			1996-97			1997-98		
	TEACHERS	TEACHERS LEAVING DISTRICT ¹	TURNOVER RATE	TEACHERS	TEACHERS LEAVING DISTRICT ¹	TURNOVER RATE	TEACHERS	TEACHERS LEAVING DISTRICT ¹	TURNOVER RATE
Broward	10,112	244	2.4%	10,544	251	2.4%	11,188	298	2.7%
Miami-Dade	16,969	659	3.9%	17,262	563	3.3%	17,525	577	3.3%
Duval	6,251	461	7.4%	6,401	617	9.6%	6,658	635	9.5%
Hillsborough	8,695	650	7.5%	8,741	622	7.1%	9,115	804	8.8%
Orange	6,800	N/A		7,203		N/A	7,946	681	8.5%
Palm Beach	7,507	432	5.8%	7,539	457	6.1%	7,869	553	7.0%

Source: Florida Department of Education, Educational Information Services, 1999.

¹Teachers leaving district - retirements, resignations, and dismissals.

In fact, turnover rates in these selected districts have increased by one or two percentage points in all school districts except Broward and Miami-Dade.

Although the district's teacher turnover rate is relatively low, a system should be in place for tracking why the teachers leave the district. A number of reasons can be cited for why teachers leave a school district (e.g., retirement, relocation, salary, morale, termination, illness, armed services, or to pursue advanced education). Some reasons are part of normal attrition. Of particular importance to a district should be any evidence that teachers are leaving for morale issues (e.g., size of class, lack of professional development, lack of communication between a principal and teacher, poor salaries, conditions at the school). With this knowledge, corrective measures can be taken to retain good teachers.

The Broward County School District requires that an employee, resigning or retiring from the district, complete a Resignation Form that is forwarded to the Personnel Department with a completed PAF form. The resignation is submitted to the Board for approval and the PAF form is processed through the Personnel Records Section and placed in the employee's file. While the resigning employee is asked to check reasons for resigning on the Resignation Form, the reasons are not maintained in any form of a database for analysis.

RECOMMENDATION

Recommendation 6-12:

Develop a database for tracking the reasons why teachers leave the Broward County School District.

While the Broward teacher turnover rate is low, common statistical data should be maintained, turnover analysis conducted, and annual reports developed. The resignation form contains a short list of reasons for resignation; however, the list should be expanded to include more specific reasons. This information should be maintained in a database so that annual reports can be generated. Additionally, reasons should be

classified as voluntary (relocation, person illness, business, study) and involuntary (death, retirement, termination for lack of proper certification, inefficiency, immorality, misconduct, insubordination) to provide a more accurate database for the turnover rate.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|------------------------------------|
| 1. The Director of Personnel should work with information systems to set up a database system where teacher turnover data can be maintained as well as specific information relating to the resignation. | June 1999 |
| 2. Once the system is in place, the data should be entered at the same time a PAF is processed. | Commencing in Fall 1999
Ongoing |

FISCAL IMPACT

The recommendation can be implemented with existing resources.

FINDING

Exhibit 6-17 provides the number of employees by ethnicity. The figures shown are from December 1997 which was the most recent data. As can be seen, nearly 40 percent of employees are minorities. Thirty (30) percent are instructional staff (including teachers, instructional support staff, and paraprofessionals) and 26 percent are teachers. The largest group of minority employees is African Americans at about 31 percent. Non-minority employees comprise about 62 percent of the total employees within the district.

Student enrollment is also included in the exhibit to draw a comparison of minority instructional staff to the minority students in the classroom. Fifteen (15) percent of students are Hispanic but only six percent of the instructional staff are Hispanic. African American students comprise 36 percent of the student body, but only 24 percent of the instructional staff are African American. Minority students comprise 54 percent of the student body, but only 30 percent of the instructional staff are minority.

Recruiting high quality minority staff to fill teaching positions has been a problem for the district. The Broward County School District is competing with other districts across the country for the same minority staff. In addition, private industry generally offers higher salaries to these prospective candidates.

RECOMMENDATION

Recommendation 6-13:

Train a mixed ethnic group of both teachers and administrators and assign them specific recruitment responsibilities during the course of the year at targeted colleges and universities having larger numbers of minority candidates.

**EXHIBIT 6-17
NUMBER OF ADMINISTRATIVE, INSTRUCTIONAL, AND NON-INSTRUCTIONAL EMPLOYEES AND
STUDENTS BY ETHNICITY IN THE BROWARD COUNTY SCHOOL DISTRICT**

CLASSIFICATION	AFRICAN AMERICAN		HISPANIC AMERICAN		ASIAN AMERICAN		NATIVE AMERICA		TOTAL M/WBES		NON-MINORITY		TOTAL	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
ADMINISTRATORS														
District-based Administrators														
Instructional ¹	5	21.7%	2	8.7%					7	30.4%	16	69.6%	23	0.1%
Non-instructional ²	11	22.4%	2	4.1%	1	2.0%			14	28.6%	35	71.4%	49	0.2%
School-based Administrators														
Principals	52	26.7%	8	4.1%			1	0.5%	61	31.3%	134	68.7%	195	0.9%
Assistant Principals	101	27.3%	22	5.9%					123	33.2%	247	66.8%	370	1.7%
Deans											1	100.0%	1	0.0%
Total Administrators	169	26.5%	34	5.3%	1	0.2%	1	0.2%	205	32.1%	433	67.9%	638	3.0%
INSTRUCTIONAL (School based):														
Teachers														
Elementary	1,095	21.9%	254	5.1%	21	0.4%	26	0.5%	1,396	28.0%	3,598	72.0%	4,994	23.5%
Secondary	811	21.9%	187	5.1%	22	0.6%	17	0.5%	1,037	28.0%	2,662	72.0%	3,699	17.4%
Exceptional Child Teacher	132	10.1%	43	3.3%	5	0.4%	3	0.2%	183	13.9%	1,129	86.1%	1,312	6.2%
Other Teachers	274	23.2%	55	4.6%	6	0.5%	5	0.4%	340	28.7%	843	71.3%	1,183	5.6%
Guidance Counselors	106	24.4%	27	6.2%	2	0.5%			135	31.0%	300	69.0%	435	2.1%
Librarians	27	13.4%	3	1.5%	1	0.5%			31	15.4%	170	84.6%	201	0.9%
Total Teachers	2,445	20.7%	569	4.8%	57	0.5%	51	0.4%	3,122	26.4%	8,702	73.6%	11,824	55.8%
Instructional Support Staff³	65	21.0%	32	10.3%	2	0.6%	1	0.3%	100	32.3%	210	67.7%	310	1.5%
Aides:														
Classroom	428	41.2%	100	9.6%	12	1.2%	9	0.9%	549	52.8%	490	47.2%	1,039	4.9%
Exceptional Child	171	47.9%	29	8.1%	2	0.6%	1	0.3%	203	56.9%	154	43.1%	357	1.7%
Other	146	52.9%	49	17.8%	9	3.3%	2	0.7%	206	74.6%	70	25.4%	276	1.3%
Total Instructional Staff	3,255	23.6%	779	5.6%	82	0.6%	64	0.5%	4,180	30.3%	9,626	69.7%	13,806	65.1%
NON-INSTRUCTIONAL														
Clerical/Secretarial	515	22.3%	170	7.4%	15	0.7%	23	1.0%	723	31.4%	1,583	68.6%	2,306	10.9%
Technicians	27	23.5%	11	9.6%	1	0.9%	1	0.9%	40	34.8%	75	65.2%	115	0.5%
Service Workers	2,243	72.0%	192	6.2%	13	0.4%	32	1.0%	2,480	79.6%	635	20.4%	3,115	14.7%
Skilled Crafts	111	16.3%	27	4.0%	3	0.4%	11	1.6%	152	22.4%	528	77.6%	680	3.2%
Laborers, unskilled	101	43.0%	21	8.9%	5	2.1%	2	0.9%	129	54.9%	106	45.1%	235	1.1%
Non-administrative	63	20.3%	22	7.1%	2	0.6%	3	1.0%	90	28.9%	221	71.1%	311	1.5%
Total Non-Administrative Staff	3,060	45.3%	443	6.6%	39	0.6%	72	1.1%	3,614	53.4%	3,148	46.6%	6,762	31.9%
TOTAL EMPLOYEES	6,484	30.6%	1,256	5.9%	122	0.6%	137	0.6%	7,999	37.7%	13,207	62.3%	21,206	
TOTAL INSTRUCTIONAL STAFF⁴	3,255	23.6%	779	5.6%	82	0.6%	64	0.5%	4,180	30.3%	9,626	69.7%	13,806	
TOTAL STUDENTS⁵	80,778	36.0%	33,657	15.0%	6,731	3.0%	0	0.0%	121,166	54.0%	103,217	46.0%	224,383	

Source: Broward County School District, December 1997. (except students - see footnote 5), 1998.

Note: The percent of the number of M/WBES and non-minority employees for each position classification is based on the total number of employees in that position. The percent of the total number of employees for each position classification is based on the total number of employees in the district.

¹ Superintendent, Deputy/Assistant/Associate Superintendent, Directors, Supervisors, Coordinators

² Deputy/Assistant/ Superintendent, Director, Supervisor, Coordinators

³ Visiting Teachers/Social Workers, Psychological OPS non-administrative

⁴ School-based Instructional Staff.

⁵ Statistical Brief, Membership in Florida Public Schools, Florida Department of Education, November 1997.

This recommendation should be implemented with particular attention to establishing the school district's presence on that campus during the year in order to establish working, recruiting relationships. This concept could be likened to the district's approach to lobbying its legislative delegation. The key to success is expending appropriate resources to establish a creditable presence that permits young minority group members to develop confidence that this system has an integral interest in their professional development and employment.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|----------------------------|
| 1. As part of the development of a formal recruitment plan, the Director of Personnel should ensure that a mixed ethnic group of teachers and administrators are trained and knowledgeable of the district's personnel plan and assigned specific recruitment responsibilities. | May 1999 |
| 2. The Director of Personnel and the Director of Instructional Staffing should assign trained personnel to visit targeted college and universities having larger numbers of minority candidates. | September 1999 and Ongoing |

FISCAL IMPACT

This recommendation does not have a fiscal impact.

6.6 Salary Schedules

CURRENT SITUATION

Competitive salaries and employee benefits, such as retirement and health benefits, are essential to attracting and retaining highly qualified and competent professional and support staff. The development and maintenance of competitive salary scales ensure that district employees are treated equitably and that they understand how their salary is determined (Benefits are addressed in Chapter 10).

Three major bargaining units which represent employees in the Broward County School District include:

- Broward Teachers Union (BTU) of the American Federation of Teachers (AFT) representing teachers;
- Broward County Paraprofessional Association, an affiliate of the Broward National Education Association (NEA), the Florida Teaching Profession-NEA, and the NEA, representing paraprofessionals; and
- Federation of Public Employees (FOPE) of the AFL-CIO representing secretarial/clerical/technical, food services, facility services maintenance, transportation and security specialist employees.

Whenever a negotiated agreement is made between the School Board of Broward County, Florida and the bargaining unit, the employee is provided a copy of the contract that includes all wages, hours, terms, and conditions of employment that have been negotiated between the two parties.

A new three-year agreement between the Board and the BTU, approved by the Board in October 1998, provides an average pay raise of five percent to teachers plus a five percent increase in all supplements and advanced degrees. Other negotiated contracts representing employees were scheduled to be presented to the Board in December 1998.

FINDING

The Broward County School District regularly collects labor market data to analyze the competitiveness of compensation packages. Salary surveys and comparisons are conducted regularly and used for comparisons in contract negotiations, reclassifications, and the establishment of new positions.

For example, in 1995 a private consultant firm conducted a compensation study for the district. The study reviewed administrative, supervisor, technical and professional positions, school-based administrators, and selected clerical/secretarial positions. In 1997-98, salaries of eight district positions (associate superintendent of financial management, directors of research and evaluation, facilities, vocational, exceptional student education, student services, and food service workers) were surveyed in Florida's largest school districts (Miami-Dade, Duval, Hillsborough, Orange, Palm Beach, Pinellas, and Polk).

Salary schedule information provided to the consultant in determining pay for each employee classification level for 1998-99 was unclear and incomplete. As explained by staff, some salaries had yet to be negotiated and approved by the Board. As a result, it was difficult to determine pay grade levels for particular administrative staff. No guidelines were provided.

RECOMMENDATION

Recommendation 6-14:

Develop a salary schedule that is complete, clear, and concise.

While the district was still negotiating contracts at the time of the on-site visit and revisions were still being made to the schedule, the condition of the schedule was such that even the pay scales included were difficult to understand. For example, even through a pay schedule is included for administrative, supervisory, professional, and technical staff, no indication is included as to what pay grade a particular position is assigned. Complete and clear salary schedule are a necessity for union negotiations and information for employees as well as inside and outside auditors.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|----------------|
| 1. The Director of Personnel should ensure that a clear, complete, and concise salary schedule is available to employees and staff at all times. | September 1999 |
|--|----------------|

FISCAL IMPACT

This recommendation has no fiscal impact.

FINDING

Exhibit 6-18 provides the minimum and maximum hourly pay rates of non-instructional personnel over the past three years. Minimum and maximum hourly pay rates of secretaries and bus drivers have increased over the three years. The minimum hourly pay for paraprofessionals, food service workers, maintenance workers, and custodians remained the same from 1996-97 and 1997-98. The maximum hourly pay for these groups of employees; however, increased over the three years. Minimum hourly pay of secretaries, bus drivers, and skilled maintenance workers have increased the most from 1995-96 to 1997-98 --- about seven percent.

**EXHIBIT 6-18
SALARIES OF NON-INSTRUCTIONAL PERSONNEL
1995-96, 1996-97, AND 1997-98**

POSITION CLASSIFICATION	1995-96		1996-97		1997-98	
	MIN	MAX	MIN	MAX	MIN	MAX
Paraprofessional	7.88	11.27	8.19	12.18	8.19	12.21
Secretary	8.76	16.60	9.11	17.26	9.38	17.78
Bus Driver	8.76	14.06	9.11	14.62	9.38	15.06
Food Service Worker	6.86	9.84	7.13	10.46	7.13	10.54
Maintenance Helper	10.03	13.83	10.43	14.38	10.43	14.73
Maintenance Skilled	12.13	19.33	13.01	20.10	13.01	20.59
Custodian	7.60	11.75	7.90	11.96	7.90	12.25

Source: Educational Support Personnel Wage Report, Florida Teaching Profession - NEA, 1995-96, 1996-97, and 1997-98.

The minimum and maximum hourly pay for non-instructional personnel is compared to four other Florida school districts (Broward, Miami-Dade, Hillsborough, Orange, and Palm Beach) in Exhibit 6-19 for 1997-98 school year. Also included in the exhibit is the rank of the four districts among the 67 Florida school districts in minimum and maximum pay.

The exhibit shows that, in the Broward County School District:

- Paraprofessionals' minimum hourly pay of \$7.10 is the highest of the four comparison districts, but ranks 25th when compared to other state school districts.
- The minimum hourly pay of \$9.38 for secretary/clerical staff is the second lowest of the four comparison districts, but still ranks in the top 10 districts in the state for the highest secretarial pay.
- Bus drivers' minimum hourly pay of \$9.38 is the highest of the four comparison districts and \$2.20 higher than Palm Beach and \$0.84 higher than Miami-Dade. However, 12 other Florida school districts pay bus drivers more than Broward.
- Food service workers also receive the highest hourly minimum wage (\$7.13) when compared to the four other school districts and rank 16th in the state.

**EXHIBIT 6-19
COMPARISON OF MINIMUM AND MAXIMUM SALARIES FOR NON-INSTRUCTIONAL PERSONNEL
1997-98**

CLASSIFICATION	BROWARD				DADE				HILLSBOROUGH				ORANGE				PALM BEACH			
	MIN	STATE RANK	MAX	STATE RANK	MIN	STATE RANK	MAX	STATE RANK	MIN	STATE RANK	MAX	STATE RANK	MIN	STATE RANK	MAX	STATE RANK	MIN	STATE RANK	MAX	STATE RANK
Paraprofessional	7.10	25	12.21	19		57		57	6.5	37	12.3	15	6.00		8.95	54	6.57	34	12.69	9
Secretary/Clerical	9.38	6	17.78	2	9.55	4	16.88	4	9.5	5	17.3	3	7.46	34	11.12	41	10.25	1	21.13	1
Bus Driver	9.38	13	15.06	15	8.54	26	12.49	36	8.3	25	14.9	18		60		60	7.18	48	15.79	8
Food Service Worker	7.13	16	10.54	26	5.77	47	9.72	40	6.2	33	11.2	19	6.00	41	12.30	6	6.01	40	13.65	2
Maintenance Helper	10.43	2	14.73	2	8.42	10	9.48	36	7.5	19	13.6	6	8.71	6	13.64	5	8.58	8	15.79	1
Maintenance Skilled	13.01	3	20.59	5	9.23	30	17.41	14	7.9	49	23.1	2	8.29	43	16.32	22	12.25	6	22.72	3
Custodian	7.90	8	12.25	6	6.67	30	10.66		6.5	35	11.7	13	6.00		10.29	29	7.18	18	13.65	3

Source: Educational Support Personnel Wage Report, Florida Teaching Profession - NEA, 1997-98.

- Skilled maintenance workers and helpers have the highest minimum hourly pay of the four comparison districts, and rank second and third in the state, respectively.
- Custodians also have the highest minimum hourly pay than all comparison districts at \$7.90.

Secretaries, skilled maintenance workers, maintenance helpers, and custodians in the Broward County School District rank among the top 10 districts with the highest hourly minimum and hourly maximum pay. Palm Beach is the only school district of the four that ranks number one among the districts in highest minimum hourly pay for secretaries, and among the districts with the highest maximum hourly pay for secretaries and maintenance helpers.

Yearly average salaries of Broward administrators are compared to five other Florida school districts (Miami-Dade, Duval, Hillsborough, Orange, and Palm Beach) in Exhibit 6-20. The Broward Superintendent's yearly salary of \$167,948 ranks below Miami-Dade County and Orange County at \$199,801 and \$197,900, respectively; but is above the state average of \$93,178. Broward's deputy/associate/assistant superintendents earn more than any other deputy/associate/assistant superintendent in the comparison districts. Average annual salaries of high school, middle school, and elementary school principals are higher in Broward County than in the other five comparison school districts. Broward County high school principals earned over \$80,000, on average.

**EXHIBIT 6-20
COMPARISON OF AVERAGE SALARIES FOR ADMINISTRATORS
IN PEER SCHOOL DISTRICTS
1997-98**

SCHOOL DISTRICT	SUPERINTENDENT	DEPUTY/ASSOCIATE/ ASSISTANT SUPERINTENDENT	HIGH SCHOOL PRINCIPAL	MIDDLE SCHOOL PRINCIPAL	ELEMENTARY PRINCIPAL
Broward	\$167,948	\$112,513	\$82,681	\$79,403	\$73,865
Miami-Dade	199,801	108,834	78,889	75,212	73,782
Duval	125,000	88,285	63,378	58,486	54,940
Hillsborough	129,998	94,175	73,509	66,544	63,091
Orange	197,900	88,009	70,927	59,590	59,024
Palm Beach	141,750	98,000	68,080	64,178	60,125
State Average	\$93,178	\$81,520	\$68,478	\$64,476	\$62,126

Source: Statistical Brief, Florida District Staff Salaries of Selected Positions, 1997-98, Florida Department of Education, February 1998.

Beginning salaries for teachers with a bachelor's degree are shown in Exhibit 6-21 for six Florida school districts (Broward, Miami-Dade, Duval, Hillsborough, Orange and Palm Beach). The Broward County School District ranks second among the school districts with the highest beginning salaries, Miami-Dade and Palm Beach earning the most, both at \$28,922. Miami-Dade and Palm Beach, both neighboring districts, rank first among the comparison districts, but only earn two percent more than Broward County beginning teachers. Orange County offers the lowest beginning salary of the school districts shown.

**EXHIBIT 6-21
COMPARISON OF MINIMUM TEACHER SALARIES *
WITH PEER SCHOOL DISTRICTS
1997-98**

SCHOOL DISTRICT	MINIUM SALARY	RANKING
Broward	\$28,410	3
Miami-Dade	\$28,922	1
Duval	\$24,782	12
Hillsborough	\$25,002	9
Orange	\$24,700	13
Palm Beach	\$28,922	1

Source: Teacher Compensation Data, Florida Teaching Professional
– NEA, 1997-98,

*Teachers with bachelor's degree

Turning to average teacher salaries among the six districts, Broward's average salary of \$34,848 for a teacher with a bachelor's degree is about \$274 more than Miami-Dade and \$1,356 less than Palm Beach (see Exhibit 6-22). Average salaries for teachers with a master's degree are the highest in Miami-Dade and Palm Beach at \$43,092 and \$42,427, respectively. The same two school districts show the highest average salary for teachers with a Ph.D. The Broward County School District ranks third (behind Miami-Dade and Palm Beach) among the five comparison districts having the highest average salaries for teachers with a master's degree (\$40,883) or Ph.D. (\$43,932).

**EXHIBIT 6-22
COMPARISON OF AVERAGE TEACHER SALARIES'
WITH PEER SCHOOL DISTRICTS
1997-98**

SCHOOL DISTRICT	Bachelor's Degree	Master's Degree	Ph.D.
Broward	\$34,848	\$40,883	\$43,932
Miami-Dade	\$34,574	\$43,092	\$49,729
Duval	\$30,914	\$36,756	\$39,144
Hillsborough	\$29,946	\$36,611	\$40,888
Orange	\$29,379	\$35,521	\$39,291
Palm Beach	\$36,204	\$42,427	\$45,848

Source: Profiles of Florida School Districts, January 1997.

Overall, the salaries of Broward County School District employees remain competitive with their two neighboring districts. Comments were made during the two public hearings that Broward County was losing teachers to Palm Beach because of non-competitive salaries. These comments do not appear justified since a beginning salary for teachers with a bachelor's degree is only behind Miami-Dade and Palm Beach by \$512. And as far as average teacher salaries are concerned, Broward is not far behind Miami-Dade or Palm Beach (not more than \$1,600) either with a bachelor's or master's degree except, perhaps, for teachers with a doctorate degree.

COMMENDATION

The Broward County School District is commended for establishing salaries that are competitive with other large districts in the state and especially with the two adjacent school districts in South Florida.

6.7 Personnel Records

CURRENT SITUATION

The Department of Personnel is responsible for maintaining efficient, accurate, and up-to-date employee personnel files and taking the necessary measures to protect the confidentiality of these files. The Personnel Records Section of the Administrative Procedures Unit in the Personnel Department oversees personnel files. The Personnel Records Section is housed in the Technology and Support Services facility with its own security entrance, offices, and a staff of 41. The main responsibilities of this section include:

- processing Personnel Action Forms (PAFs);
- verifying employment records;
- maintaining personnel files (establish contents, create retention schedule, secure confidentiality, and regulate access); and
- microfilming.

Nineteen (19) of the 41 staff members oversee the processing of personnel action forms (PAFs) that were addressed earlier in this chapter. Ten personnel staff members manage the filing and verification of personnel records. This staff verifies the employment of district employees for businesses and agencies providing bank loans, food stamps, and unemployment compensation; maintains all personnel files; and monitors file requests. The Microfilming Section employs nine staff members who are responsible for preparing hard copy files for microfilming, storing microfilm once processed, and disposing of hard copy files after microfilming is completed.

FINDING

MGT examined about 45 personnel files. These files were randomly selected and included a cross section of the various employee categories such as:

- administrators – district and school based
- teachers – regular, ESL, SEE
- media specialists
- paraprofessionals
- clerical
- custodians
- maintenance workers
- facilities personnel

- food service staff
- bus drivers

All proper procedures were followed in gaining permission to review files. A request was made, filing clerks pulled the records, a form was signed verifying the file was accessed, and the records were then reviewed in a secure place with a Personnel Office staff member present.

All of the personnel files examined contained the following information (dependent upon category of employee):

- application and references
- resume
- transcripts
- certification
- high school diploma
- correspondence
- employment verification
- social security card
- Florida drivers license
- W-4 form
- deductions
- direct deposit
- benefits
- loyalty oath
- union membership
- contract/reappointment
- personnel data
- evaluations
- personnel action forms

COMMENDATION

The Broward County School District is commended for the maintenance, completeness, and security of personnel files.

FINDING

The district maintains its own equipment for the microfilming of personnel record files of active employees, employees who have retired, resigned, or terminated. Microfilming is conducted within the Personnel Records Section by a staff of nine, one of which is a personnel specialist overseeing the section. Eight clerks conduct the microfilming, one of which indexes the film once microfilmed and a senior clerk member who oversees the work of the other six clerks.

The staff is housed in a suite of offices within Personnel Records with one office housing the staff, another housing the microfilming equipment, and another for the storage of microfilm. In addition to microfilming past employee records, portions of current employee records are being microfilmed if the employee record file contains an overabundance of documents.

Hard copy employee files once microfilmed are taken to a landfill three times a year and buried. This practice ensures that the confidentiality of the records has been maintained.

Hundreds of past employee records are being microfilmed. The personnel records are prepared for microfilming by eliminating unnecessary documents from the file and then preparing the remaining documents for microfilming.

The turnover of staff is frequent. Last school year alone, four of the nine employees in the section vacated their positions and were replaced in July 1998. Two of the positions still remain vacant.

RECOMMENDATION

Recommendation 6-15:

Eliminate five clerical positions in the microfilming section of Personnel Records as soon as the district acquires the capability of electronic imaging.

The new Human Resource Management System should (see Section 6.4 of this chapter) alleviate the necessity for the large staff that is currently maintained (See Section 6.4 of this chapter on the acquisition of a new HRMS). Implementing the electronic imaging of personnel records should be given high priority once the system is in place. A staff of four should be maintained for imaging of records - one staff member to oversee the work, two clerks to prepare and image the records, and one to index the documents as they are being imaged.

The process should begin in 2001-02. By this period, all efforts to microfilm past employee records should be almost complete so that when imaging begins the staff can stay current with the process.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Personnel should recommend to the Superintendent that the imaging capability for personnel records be given top priority once the Human Resources Management System is in place. January 2000
2. Once the system is in place, and the imaging and electronic storage of archived documents are available, five clerical positions should be eliminated in the microfilming section. July 2001

FISCAL IMPACT

Eliminating five clerical positions will result in a cost saving to the district of about \$112,300 annually. This estimate is based upon an average salary of a general clerk of \$16,889 plus 33 percent in benefits (\$5,573) for a total salary of \$22,462 times five clerical positions.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Eliminate Five Clerical Positions	\$0	\$0	\$112,300	\$112,300	\$112,300

FINDING

Each year Broward County School District employees are evaluated on their job performance. The procedures for conducting these evaluations are dependent upon the employee category. If the employee is under union contract, the evaluation procedures are outlined in the contract. The appraisal system used for evaluating teachers is called the Instructional Personnel Assessment System (PAS). The Department of Personnel is responsible for receiving employee evaluation instruments once completed. The completed evaluations are filed in the employee’s personnel file.

An annual schedule of assessment activities is developed and distributed by the Personnel Department. If an employee is an administrator receiving an unsatisfactory rating, the instrument is sent to the Director of Administrative Procedures in the Personnel Department. The director prepares a list that is forwarded to the Associate Superintendent of District Administration. The Superintendent is advised and requests that the Non-instructional Staffing/Wage and Salary Unit make the proper adjustment to the employee’s salary. Those evaluations receiving a satisfactory rating are sent to Personnel Records Section and filed in the employee’s personnel file.

All non-administrative employees who receive an unsatisfactory rating are sent to the appropriate personnel unit (Instructional, Non-instructional, and Administrative Procedures) where they are held for 30-60 days in case a grievance is filed. All non-administrative satisfactory ratings are sent to Personnel Records Section to be filed in the employee’s personnel file.

Prior to this year, the Personnel Department did not monitor whether or not an employee’s evaluation had been conducted. The department’s only responsibility was to ensure that the evaluation instrument, once received, was placed in the employee’s personnel file. Determining who had and who had not been evaluated was nearly impossible. A recent directive from the Superintendent’s office requires that Personnel Records Section monitor this process, and determine who has and who has not been evaluated for each year.

RECOMMENDATION

Recommendation 6-16:

Develop a policy and administrative procedures to ensure that appraisals are returned to the Personnel Department by a specified deadline.

While a directive from the Superintendent has been established, a policy and administrative procedure should be developed to ensure that completed appraisals are returned to the Personnel Department by a specified deadline and, if they are not, what procedures should be taken. Tracking appraisals that have not met deadlines is time consuming for staff. Thus, a policy and procedure should be developed that will clearly

mandate that appraisers, supervisors, and employees have responsibility for ensuring employees are appraised on time and that a copy of the appraisal is returned to the Personnel Department by the deadline.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|----------------|
| 1. The Director of Personnel should draft a policy and administrative procedure for submitting appraisal instruments to the Personnel Department. | Summer 1999 |
| 2. The Director of Personnel should present the policy and procedures to the Superintendent and Board for approval. | August 1999 |
| 3. The Board should approve the policy. | September 1999 |

FISCAL IMPACT

This recommendation has no fiscal impact.

7.0 COMMUNITY INVOLVEMENT

This chapter discusses the relationship and interactions between Broward County School District and parents, businesses, the media, and the community at large. This chapter is organized into six sections:

- 7.1 Public Accountability
- 7.2 Public Relations and Communications
- 7.3 District and School Advisory Councils
- 7.4 Volunteer Involvement
- 7.5 Broward Education Foundation
- 7.6 Business and Municipal Partnerships

BACKGROUND

Several questions on MGT's survey of Broward County administrators, principals, and teachers addressed community relations. The complete survey results are shown in tables in Chapter 3 of this report. Overall, the results between these staff groups indicated some differences of opinion regarding community relations. For example, from Exhibit 3-2:

- Almost four-fifths (79%) of principals *agree* or *strongly agree* with the statement "This community really cares about its children's education." In contrast, only slightly more than half of the administrators (57%) and the teachers (53%) also *agree* or *strongly agree* with the statement.
- When presented with the statement, "Parents play an active role in decisionmaking in my school," the only staff group that was in majority agreement was the principals (67% *agree* or *strongly agree*); less than half of the administrators (21%) and the teachers (42%) *agree* or *strongly agree* with the statement.
- When presented with the statement, "Parents in this district are satisfied with the education their children are receiving;" a majority of principals (75%) *agree* or *strongly agree* with the statement, while a minority of administrators (41%) and teachers (46%) do.
- The staff groups were slightly closer in opinion when presented with the statement, "Most parents really don't seem to know what goes on in our schools." Similar percentages of administrators (49%) and principals (41%) *agree* or *strongly agree* with the statement; slightly more teachers (56%) also *agree* or *strongly agree*.

Exhibit 3-3 asked respondents to rate various areas of the district as *excellent*, *good*, *fair*, or *poor*. Pertinent results included:

- When asked to assess parent participation in school activities and organizations, only 21 percent of administrators, 34 percent of principals, and 20 percent of teachers rated it as *good* or *excellent*. On the other hand, when asked to assess “teachers’ work in communicating with parents,” 43 percent of administrators, 72 percent of principals, and 71 percent of teachers rated that as *good* or *excellent*.
- When to assess “how well relations are maintained with various groups in the community” most principals (72%) rated it as *good* or *excellent*, as did 55 percent of administrators. Yet, only 46 percent of teachers did. Overall, 32 percent of administrators, 22 percent of principals, and 48 percent of teachers indicated that community relations needed *some* or *major improvement*.

When these figures are compared with MGT’s benchmark database of surveys completed in other school systems around the country, community relations in the Broward County School District fared far below average. For example (drawn from Exhibits 3-10, 3-11, and 3-15):

- Seventy-one (71) percent of administrators (polled separately in Broward County as administrators and principals, but combined for national comparisons) around the country *agreed* or *strongly agreed* with the statement “This community really cares about its children’s education;” only 66 percent of Broward administrators did the same. Nearly equal percentages of teachers nationally (52%) and in Broward (53%), also *agreed* or *strongly agreed* with the same statement.
- Only 38 percent of administrators nationally *agreed* or *strongly agreed* with the statement, “Most parents really don’t seem to know what goes on in our schools; in Broward, 46 percent did so. Again, teachers nationally (59%) were nearly equal to Broward teachers (56%) who also *agreed* or *strongly agreed*.
- On other questions regarding maintaining relations with the outside community, Broward administrators and teachers were within the margin of error for the results found nationally, except in overall rating. When rating the district’s overall community relations, 42 percent of administrators nationally said their community relations needed *some* or *major improvement*; only 28 percent of Broward administrators did the same. Likewise, 48 percent of teachers nationally said their community relations needed *some* or *major improvement*; as did 48 percent of Broward teachers.

As part of the research for community involvement in the Broward County School District, MGT completed a separate business and community survey. This survey was sent to 350 individuals identified by the Director of Community Relations as business and community leaders. To some extent, this group of leaders is not accurately

representative of all Broward County leaders – they are already participating in and communicating with the school district. Of the 350 surveys sent, 74 were returned by the deadline. While the reader should keep in mind that 21 percent of the response rate is not statistically valid, this survey provides useful information on business and community leader perspectives on the school district.

Exhibit 7-1 shows the percentage responses to the 11 questions asked of the leaders. As the exhibit shows:

- Over half of the business and community leaders believe that “most community and business leaders don’t really seem to know what goes on in our schools” – 62 percent *agree* or *strongly agree* with the statement.
- Over half also believe that the school district is not spending wisely – 60 percent *disagree* or *strongly disagree* with the statement, “Taxpayer dollars are being used wisely to support public education in Broward County School District.”
- Almost half, 46 percent, do not believe that business and community leaders are kept “honestly informed on developments in the schools.”
- Almost one-third, 32 percent, believe that businesses are “not well-recognized for their contributions to the district schools.”
- Only 40 percent of the leaders believe that “Businesses, community leaders, and parents have many opportunities to provide feedback to the school district on many issues.”

In comparison, business and community leaders believe that parents are less satisfied than do the employee staff groups. When presented with the statement, “Parents in this district are satisfied with the education their children are receiving,” 41 percent of administrators, 75 percent of principals, and 46 percent of teachers *agree* or *strongly agree*. In contrast, only 27 percent of the business and community leaders feel the same way. With the statement, “Taxpayer dollars are being use wisely...” 63 percent of administrators, 72 percent of principals, and 24 percent of teachers *agree* or *strongly agree*. Only 23 percent of the business and community leaders share this view.

7.1 Public Accountability

A school district is accountable to many different groups: its staff, its teachers, the state, its students, their parents, local businesses, and the community at large --- all have invested time and money into the school system and all have a stake in its success. In return, the school district is obligated to demonstrate that it has spent the time and money afforded to it wisely and is making its best effort to produce well-educated, work-ready, civic-minded graduates.

**EXHIBIT 7-1
SURVEY RESPONSES
BROWARD COUNTY BUSINESS AND COMMUNITY LEADERS**

COMMUNITY SURVEY ITEM	PERCENTAGE ¹					
	SA	A	N	D	SD	DK
1. Parents in this district are satisfied with the education their children are receiving.	1	26	18	35	18	1
2. Most parents don't really seem to know what goes on in our schools.	6	53	15	23	1	1
3. Most community and business leaders don't really seem to know what goes on in our schools.	10	52	8	26	4	0
4. This community really cares about its children's education.	17	36	8	11	0	0
5. Taxpayer dollars are being used wisely to support public education in Broward County School District.	3	20	16	38	22	0
6. The business and community leaders in the county are kept honestly informed on developments in the schools.	7	23	23	31	15	0
7. The school district welcomes the input and recommendations of the business community.	7	31	28	24	10	0
8. Business and parent volunteers are welcomed and well-treated in Broward schools.	12	46	22	15	3	1
9. Broward schools make it easy and enjoyable to be a school volunteer.	10	33	32	19	3	4
10. Businesses are not well-recognized for their contributions to the district schools.	3	29	24	35	8	1
11. Businesses, community leaders, and parents have many opportunities to provide feedback to the school district on many issues.	8	32	22	28	8	0

Source: MGT Business and Community Leader Survey, December 1998.

¹SA = Strongly Agree; A = Agree; N = Neutral; D = Disagree; SD = Strongly Disagree; DK = Don't Know. Percentages may not add to 100 due to rounding.

Compounding this challenge is the increasing competition for every public dollar, a common situation in every local government agency across the nation. The era of big government is over and so is public indifference to the use of tax dollars. Today, citizens demand the most of out every cent contributed to public coffers. This situation is particularly acute in Florida schools, where a burgeoning student population requires new school facilities almost daily. A school district can only be successful in this environment if it can consistently prove that it has a product, namely a valuable education, that is worth continued public investment.

FINDING

The Broward County School Board's mission statement is:

We, the School Board of Broward County, Florida, commit ourselves to a philosophy of respect and high expectations for all students (pre-kindergarten through adult), teachers and staff; and, with parent and community participation and partnerships, we will provide the process and support which will give our diverse, multicultural student population equal access to a quality education.

This mission statement is underpinned by 15 School Board “beliefs,” of which the last one is “We believe that both parent and community participation, and parent and community responsibility, are essential to the positive social, emotional, cultural and academic development of every child and adult.” Corresponding to their beliefs and mission statement, the Board has adopted nine major system priorities. They are:

- improving student achievement and school effectiveness;
- addressing growth;
- embracing, celebrating, and demonstrating diversity;
- improving student/staff safety and security;
- increasing student and staff accountability;
- expanding partnerships;
- attracting, retaining, and training the best teachers, principals and support staff;
- utilizing technology to improve student achievement, teaching and staff productivity; and
- empowering parents and community through participation.

These beliefs and priorities were adopted in March 1995 and have been revised several times since then. The beliefs and priorities are well-disseminated throughout the district and are included in the *Handbook for Principals*.

When MGT asked the district for a copy of its long-range strategic plan, representatives of the district indicated that the district did not have a strategic plan but was “in the process of developing such a plan.” It should be noted, however that the district has several major planning documents (e.g. technology plan).

RECOMMENDATION

Recommendation 7-1:

Convene a committee of Board members, central office and school administrators, teachers, parents, and business and community leaders to participate in the continued development of a long-range strategic plan for the school district.

The strategic plan should reiterate the priorities of the district, outline action steps for reaching the priorities, and determine by what indicators the district and the public will know that the district has achieved the priorities. Only with clearly established goals and outcome indicators can the Broward County School District report to the community it serves that it has either succeeded in its endeavors or fallen short (also Recommendation 4-15 in Chapter 4).

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|----------------|
| 1. The Board should direct the creation of a long-range strategic plan. | June 1999 |
| 2. The committee should develop a long-range strategic plan, using various mechanisms to ensure the widest possible community input. | July 2000 |
| 3. The committee should present a draft strategic plan to the Board for a vote. | September 2000 |

FISCAL IMPACT

There is no fiscal impact associated with this recommendation. It can be accomplished with existing resources.

FINDING

The School Board meets twice a month in regular session. Although the Board meetings have no set ending time, there is an established time for public input, well before the end of the meeting. Any member of the public who wishes to make a presentation to the Board may do so. Presentations can be no longer than three minutes in length, unless a person is making a presentation on behalf of a group of people, in that case, the maximum length of the presentation is three minutes for each member of the group. In addition to this opportunity, members of the public may, according to Board Policy 1100A, "raise a question or make a brief statement in behalf of any item on the official board agenda when recognized by the Board Chairperson."

During a Board meeting attended by an MGT consultant, the members of the Board were conscientious in starting the public input segment on time. In general, Board members listened politely to all of the public input presenters and asked pertinent questions about the matters they presented. Where possible, the Board sought to reach some conclusion on each matter, generally requiring the Superintendent and his

staff to research questions. When presenters went over the three-minute time limit, they were politely asked to reach closure in comments and were not just cut off abruptly.

COMMENDATION

The School Board of Broward County is commended for holding the public input segment at a set time during regular meetings.

Often, school boards only allow public comment at the end of their meetings, which can be at any time, requiring members of the public to sit through often three or four-hour meetings to offer their few minutes of input on a matter that may be totally unrelated to what has previously been discussed in the meeting.

7.2 Public Relations and Communications

Open, two-way communication with the public is essential for a school district to maintain and increase its support base in the community. A school district must find effective ways to communicate with the public and to receive input from different segments of the community. An informed public, and one that is heard, provides the added support and feedback needed to maintain district excellence.

The primary role of public relations in a school district is to work closely with the Superintendent to convey a message and image consistent with the policies and programs set by the School Board and implemented by the Superintendent's Office. A school system's public relations and community outreach efforts will significantly affect citizen's perceptions of the system. A strong public relations program will manage to garner public support even when the district faces adversity or fails to achieve high goals. Conversely, a weak public relations program will fail to bring into the public eye achievements even when the district is performing quite well. The best public relations program will engender public support and public involvement, in the form of parent and community volunteers, participation in decision-making processes affecting the schools, and productive business and community alliances.

The outcomes of effective public relations are extensive. They include:

- an enriched learning environment;
- expanded educational opportunities;
- community 'ownership' of the district's achievements; and
- improved student achievement.

CURRENT SITUATION

In August 1997, the Broward County School Board adopted a new policy regarding communication and public engagement (Policy 1164, adopted August 1997). The beliefs of this policy are that effective communication:

- *stems from a perception and appreciation of the community as a whole;*
- *acknowledges that all partners are equal in the education process;*
- *is a shared value of the community and is based on trust;*
- *is user-friendly;*
- *is everyone's responsibility;*
- *is a dynamic, continuous process which is planned; involves everyone; flows in all directions; and, is sensitive to all individuals/groups in the community;*
- *is affected by the informal, unplanned communication system as well as by planned communication strategies.*

FINDING

The new policy regarding communication and public engagement contains procedures that, essentially, retain responsibility for dissemination of information publicly, and promotion of districtwide events and issues within the Community Relations Department. Each department within the central office, school, and Innovation Zone is responsible for publicizing their own events and activities, with consulting support from the Community Relations Department.

The policy also defines a method for gathering input on new initiatives within the district, now commonly known as the "looping process." As defined in district documentation, the objective of looping is "to establish a two-phase process for communication on major district/school initiatives that involves key stakeholders." Looping brings together representatives of identified stakeholder groups to discuss draft plans on various issues and receive feedback using various formats, including focus groups, surveys, interviews, and meetings. The district has advertised on its website for volunteers to participate in the looping process.

So far, the looping process has been used to review several policy issues being considered in the district – among them, the proposed revisions to several Board policies as a result of 1998 changes in legislation concerning School Advisory Councils. From discussions with members of the staff and the community members who have participated in the looping process, MGT found the process to be an effective and innovative way to obtain community participation. Due to the timing of site visits, MGT was unable to view the looping process in action.

COMMENDATIONS

The Broward County School District is commended for adopting a positive practice regarding communication with the public.

The Broward County School District is commended for implementing new methods to seek public input and response to potential Board actions via the looping process.

FINDING

Criticisms of the district are given wide play in the media. Furthermore, opposition to the school district has become organized in the form of a community watchdog group called Independent Voices for Better Education, Inc. In interviews with members of the Community Relations Department, several indicated that the central office believes they were fighting an uphill battle for positive media and public relations.

MGT consultants visited 62 schools. When visiting schools, a few MGT consultants encountered a lack of good customer service from some school front office personnel. Some specific examples which are indicative of the reception given to MGT in at least 25 percent of the visited schools include:

- One front office employee expressed that the MGT consultant had not made an appointment ahead of time, even though the consultant only asked to review a volunteer log readily available at the front desk.
- At another school, the volunteer coordinator was not available so the consultant left her card and requested a return phone call. The volunteer coordinator of the school never called.
- At a third school, the consultant was allowed to immediately review the volunteer log. When she asked to see the administrator in charge of the volunteer program, the front office employee took her business card and spoke with an assistant principal. The front office employee returned to say that someone would be with her in a few minutes. However, 25 minutes passed and the consultant had to leave.
- At one school, the MGT consultant observed one non-English speaking parent who received no assistance from front office staff. When the parent entered the office, the front office employee asked what she needed. When the parent indicated that she did not speak English, she was waved to a chair. None of the front office staff attempted to find a staff member who could speak Spanish. After waiting 20 minutes, when a Spanish-speaking staff member the parent knew came by, the parent was able to explain what she needed and obtain assistance.

RECOMMENDATION

Recommendation 7-2:

Require customer service training for school front office personnel.

Parents, above all other community members, have a right to access school administrators and obtain courteous service. Other members of the community have a right to courteous service and compliance with reasonable requests. Finally, if the school district wants to earn a positive image in the eyes of the public, schools should be much more accommodating to members of the media. This training should be directed to the primary front office staff member at each school (approximately 200 persons). In order to save funds, principals should receive training during school year start-up activities. Principals should then be responsible for training the front office staff at their schools. Principals should also be responsible for monitoring customer service.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-------------|
| 1. The Director of Community Relations should develop a one-hour training program on the components of good customer service and positive media relations. | June 1999 |
| 2. The Superintendent should issue a memorandum directing all community relations personnel to deliver the training to the principals of Innovation Zones for which they are responsible. | Summer 1999 |
| 3. The community relations personnel should complete the delivery of the training to all principals. | Fall 1999 |
| 4. The principals should deliver the training to the front office personnel they supervise. | Fall 1999 |
| 5. The Volunteer Services Coordinator should conduct periodic assessments of school front office customer service. | Ongoing |
| 6. Principals should monitor the level of customer service their personnel deliver. | Ongoing |

FISCAL IMPACT

Customer service training for principals and front office personnel should be set as a priority in 1999-2000. The train-the-trainer workshop can be conducted by in-house personnel.

7.2.1 Organizational Structure

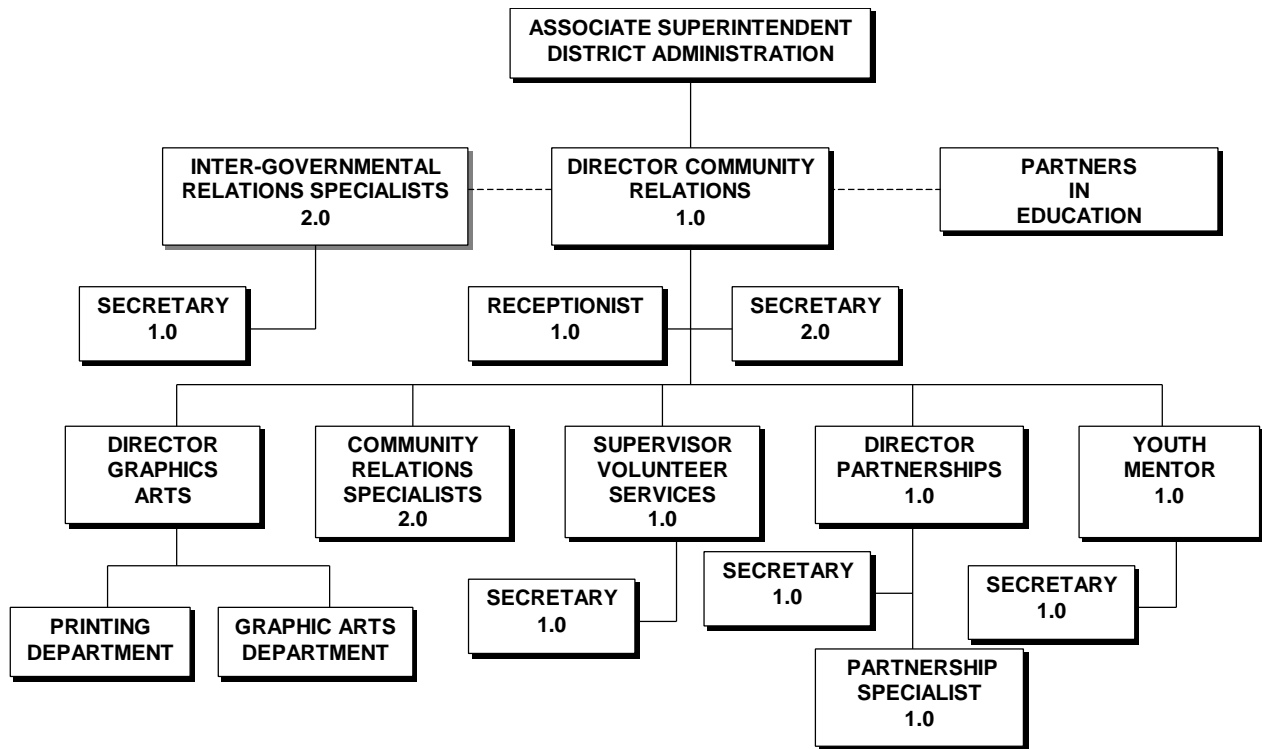
A solid public relations effort requires an organizational structure that facilitates ease of communication from the Superintendent to the public and gives a voice for the public to the Superintendent and the School Board. Members of the media and community should have an easily identifiable resource to call and should be able to rely on that resource for prompt, honest response.

CURRENT SITUATION

Five years ago, the Community Relations Department was staffed by two persons. Today, the department has expanded both in responsibility and personnel. This department now has 13 staff members, not including personnel in the graphic arts and printing departments, and now is responsible for many functions previously located elsewhere in the central office.

Exhibit 7-2 shows the current organization structure for the department. The present structure is two years old.

**EXHIBIT 7-2
ORGANIZATIONAL STRUCTURE
OF THE COMMUNITY RELATIONS DEPARTMENT**



Source: Broward County School District documentation and staff interviews, November 1998.

Major functions of the Community Relations Department include:

- responding to the more than 800 media requests each year;
- training department and school administrators in media relations;
- creating and supervising the development and printing of numerous publications;

- writing speeches for Board members and district administrators, including the Superintendent;
- serving as liaisons in media and community relations to the Innovation Zones;
- developing and maintaining the district Website;
- developing and maintaining effective partnerships;
- planning and hosting numerous recognition and informational events each year; and
- working with segments of the community to increase involvement.

FINDING

Around the nation, MGT has completed similar reviews of three other large school districts that can be considered comparable to Broward – Hillsborough County Public Schools in Florida, Fairfax County Public Schools in Virginia, and Prince George’s Public Schools in Maryland. Although organizational comparisons are difficult because districts often group similar functions differently, one can draw some conclusions from analysis of each district’s community involvement/relations organizational structure.

In the comparison districts, MGT found the following:

- At the time of the review in Hillsborough County (January 1997), there were five different units within the Office of the Superintendent performing some community involvement functions. Altogether, nine administrative personnel, supported by four support staff, were involved in the functions of communications, public information, community coordination, and the education foundation. MGT recommended the consolidation of the units into one department that reported to the Superintendent, with a final employee count of eight administrative personnel and four support personnel.
- MGT reviewed Fairfax County Public Schools in 1996 and found seven professional staff under an Assistant Superintendent for Communications supported by 2.5 clerks and secretaries. This office was responsible for community relations, media relations, public relations, and the programming for the district’s cable television channel. Business relations and volunteer programs were the responsibility of another office. MGT recommended the consolidation of all community and business interactions into a new Office of Community Relations, headed by a director, with a staff of 11 professionals and 2.5 support staff. None of these positions were grant-funded.

- At the time of the MGT review in Prince George's County (March 1998), the district had 22 personnel responsible for the functions of intergovernmental relations, business and community outreach, communications, and graphics arts design for the district. Of the 22 positions, nine were secretarial or clerical in nature. None were grant-funded. MGT recommended the elimination of three clerk positions and the creation two new professional positions, for a final personnel count of 21. This count included personnel to be responsible for the education foundation, the volunteer program, and business partnerships --- functions that were previously left unfulfilled.

Given these comparisons, the current size of the Broward Community Relations Department appears to be adequate. Not counting the graphic arts or printing departments, Broward has 13 positions in the department, including two positions that are grant-funded.

Nonetheless, the organizational structure of the Broward Community Relations Department does lend itself to some ineffectiveness. For example:

- The Director of Community Relations reports to an Associate Superintendent, rather than the Superintendent. The Director has a unique charge, one that must be closely coordinated with the goals of the Superintendent.
- "Partnerships," whether they are with municipal or business entities, and whether they are districtwide or with individual schools, are handled by three separate areas – Partners in Education, the Director of Partnerships within the Community Relations Department, and the inter-governmental relations specialists in another central office department. Given that the overlap in roles and responsibilities is great, this structure is inefficient.
- A specialist in another department is responsible for cultural outreach for half of the time. Even though this overlaps and is duplicative with activities of the Community Relations Department, there is no reporting relationship, nor a significant degree of coordination.
- There are two inter-governmental relations specialists who are not part of the Community Relations Department. They have a dotted line relationship to the Director of Community Relations.
- The Education Foundation has no current formal or informal reporting or working relationship with the Community Relations Department. While all individuals reported that they worked together well when needed, the organizational structure does not indicate the presence of a reporting or working relationship.

Based on this organizational analysis and anecdotal evidence, MGT found that community relations efforts are fragmented.

RECOMMENDATION

Recommendation 7-3:

Reorganize the Broward County School District Community Relations Department to reflect the importance of this function.

The following changes should be made:

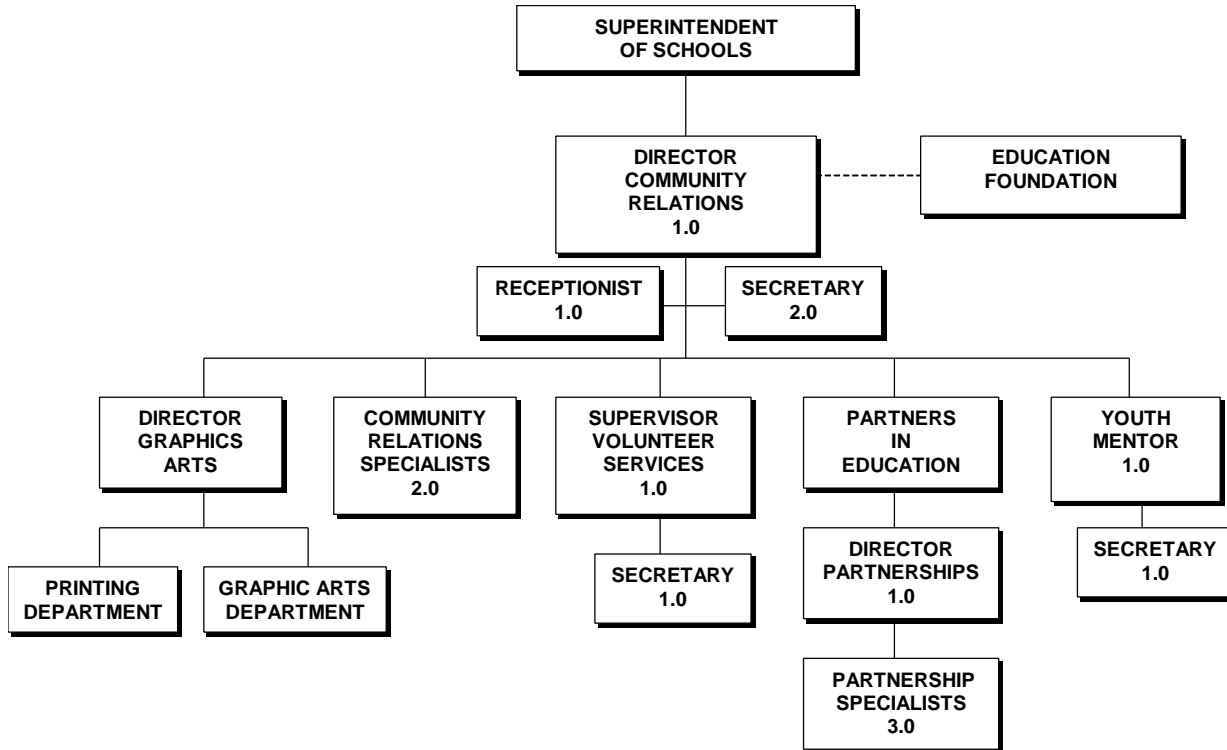
- The Director of Community Relations should report directly to the Superintendent.
- The inter-governmental relations specialists should be moved to the Community Relations Department, under the Director of Partnerships, and their title changed to partnership specialists. Their primary responsibilities would not change, but they would also be available to assist as necessary in other partnership areas. Further justification for this recommendation is provided in Section 7.6.
- The Education Foundation should maintain a dotted line relationship with the Community Relations Department.
- The Partners in Education (PIE) should have a formal reporting relationship to the Director of Community Relations. The Executive Director of PIE should have overall responsibility for all partnerships. The Director of Partnerships should report to the Executive Director. Further justification for this recommendation is provided in Section 7.5.
- Responsibility for cultural outreach should be transformed to the Community Relations Department.

Exhibit 7-3 shows the proposed structure for the Community Relations Department.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-----------|
| 1. The Superintendent should advise district staff of the organizational change, to be effective starting July 1999. | May 1999 |
| 2. The structure should be submitted to the Board for approval. | June 1999 |
| 3. The Superintendent should meet with the Board of Directors of both foundations to seek approval for the recommended changes. | July 1999 |

**EXHIBIT 7-3
RECOMMENDED STRUCTURE FOR THE
BROWARD COUNTY COMMUNITY RELATIONS DEPARTMENT**



Source: Created by MGT, December 1998.

FISCAL IMPACT

No new positions are created with this recommendation.

FINDING

Broward County schools often have staff members titled “community liaisons.” Despite their title, these staff members are actually providers of social services functions, including;

- functioning as a member of a case management team;
- identifying the needs for community resources for families; and
- documenting student interventions.

Community liaisons work with school social workers to provide services to identified students.

RECOMMENDATION

Recommendation 7-4:

Change the title of Community Liaison to Services Liaison.

In a school district as large and complex as Broward, every attempt must be made to clearly identify the roles and responsibilities of district employees to parents and members of the community. Placing social service functions under a title of 'community' is undoubtedly confusing.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should advise current staff of the title change. June 1999

FISCAL IMPACT

There is no fiscal impact associated with this recommendation.

7.2.2 Publications

A primary source of information about the school system and its achievements should be the district's own publications. Well-crafted, regular publications regarding school district efforts increase the potential for meaningful two-way dialogue with the community.

FINDING

The primary periodical publication distributed to the community is the *Broward Educator*, which is published five times per year and distributed as part of the local paper. In addition, the Community Relations Department publishes a number of other informational and update guides, including:

- the *Annual Report*, which is a multi-page, full-color publication that highlights the achievements of the district in regard to the Board's major priorities;
- *Board Action*, a color, double-sided one page review of the results of Board meetings that is distributed to schools, departments and approximately 1,000 identified community and business leaders;
- The Student Enrichment Directory, a joint collaboration with the County Council of PTAs, and the Multicultural Infusion, Cultural enrichment and Language Advisory Council to publicize classroom and academic cultural enrichment activities being done throughout the district and to promote their replication elsewhere in the district;

- *Basics for School Improvement & Accountability*, a booklet that reviews Broward School Board beliefs and priorities and the measures the district uses to assess progress on the priorities;
- *Facts*, a brochure with overview information on the district;
- a business card-size foldover with the school calendar and the district Website address;
- a business card-size foldover for distribution to school administrators with information the Community Relations Department, including the Director's home phone number;
- an 8.5 x 11-size booklet on the district's magnet programs;
- an extensive booklet on the Youth Mentoring programs; and
- numerous other brochures on various topics.

All of the publications are color, attractively laid-out, and generous in the use of graphics and pictures.

COMMENDATION

The Community Relations Department is commended for developing a comprehensive array of attractive district publications.

FINDING

In coordination with several other departments and the Broward County Council of PTAs, the Community Relations Department publishes the Community Involvement Tool Kit, an attractively packaged binder with reference materials on:

- ***Program Review***, including the process the screening committee uses before an outside organization is allowed to distribute materials through the schools and the list of the current materials approved for distribution;
- ***Speakers Bureau***, including contact, fee, affiliation, and topic information for all individuals who have agreed to serve as speakers to the school district;
- ***Arts and Enrichment***, including a directory of arts enrichment programs the schools can use;
- ***Volunteers and Mentors***, including master copies of volunteer program handouts and forms, ideas for using volunteers, procedures and requirements, and a summer volunteer guide to encourage students to volunteer in their community;

- ***Partnership Information***, including background on Partners in Education and systemic partnerships and a guide to assessing partnership effectiveness; and
- ***Training***, including the district's master training calendar for all activities related to community involvement.

The Community Involvement Tool Kit is distributed to schools and central office departments.

COMMENDATION

The Broward County School District is commended for bringing together pertinent community involvement strategies and information into one publication for its employees.

FINDING

Parents of prospective new students who call to request information on the Broward County School District receive:

- a one-page overview of the district with a letter from the Superintendent on the back;
- a one-page overview of the school calendar;
- a three-page handout on the documents required for school registration;
- a three-page handout of 1998 Stanford Achievement Test results for all of the schools in the district;
- a six-page handout with overview and magnet program information;
- a two-page handout of various district statistics, such as how many meals are served each day;
- a listing of all the schools, their principals, and phone and fax numbers; and
- a map of Broward County with locators for all of the schools.

While this information provides much detail on Broward County schools, it is provided in a fairly unattractive package. With the exception of the one-page overview and letter from the Superintendent, none of the documents are printed in color. The appearance of this information is not inviting, nor is it pulled into a cohesive package. In particular, the test information is presented without explanation and, as a result, could easily be misinterpreted.

Moreover, the letter from the Superintendent is not really welcoming in nature and instead discusses the challenges and problems facing the district, which are not necessarily the best areas with which to greet new parents. Finally, none of the documents provided included a phone number of whom to contact for more information, nor an advertisement for the district's extensive Website.

RECOMMENDATION

Recommendation 7-5:

Create a newcomer package that is reflective of the quality of the Broward County School District.

First impressions are often the most lasting. Given this, the district should spend the time to develop a creative newcomer package. District staff estimate that they mail approximately 900 newcomer packages each year.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-------------|
| 1. The Director of Community Relations should develop a draft information package for review by the Superintendent and Board. | May 1999 |
| 2. The Superintendent and School Board should review the newcomer package and make any necessary modifications. | July 1999 |
| 3. The Director of Community Relations should have sufficient copies made to satisfy estimated upcoming requests. | August 1999 |

FISCAL IMPACT

There is no fiscal impact associated with this recommendation. The district has already recognized the need for a more polished newcomer package and plans to contract with an outside firm to develop the materials for the new package. The contractor will be paid by proceeds from local business advertisements in the package.

FINDING

During school visits, we observed that most Broward County schools produce and distribute their own monthly newsletter, which is sent home with students. These newsletters are typically one or more pages, with articles written by students. Articles include items of interest to both students and parents, including calendar events, school menus, parent involvement opportunities (including several announcements for MGT's two public forums), the web address for the Broward Website, and reports of recent school activities.

One outstanding newsletter, published by Attucks Middle School was seven pages long and published bi-monthly. It includes information on nearly every school happening, including SAC/SAF, a letter from the principal, reports on new teachers, all of the activities sponsored in the schools by the various business partnerships, athletic schedules, health screenings, upcoming events, social service resource phone numbers, and the short-term school calendar. This newsletter is presented in an attractive format, with graphics and easily referenced highlights.

COMMENDATION

Broward County schools are commended for developing and distributing individual school newsletters.

School newsletters provide an important vehicle to maintain contact with parents and to encourage participation in school events.

FINDING

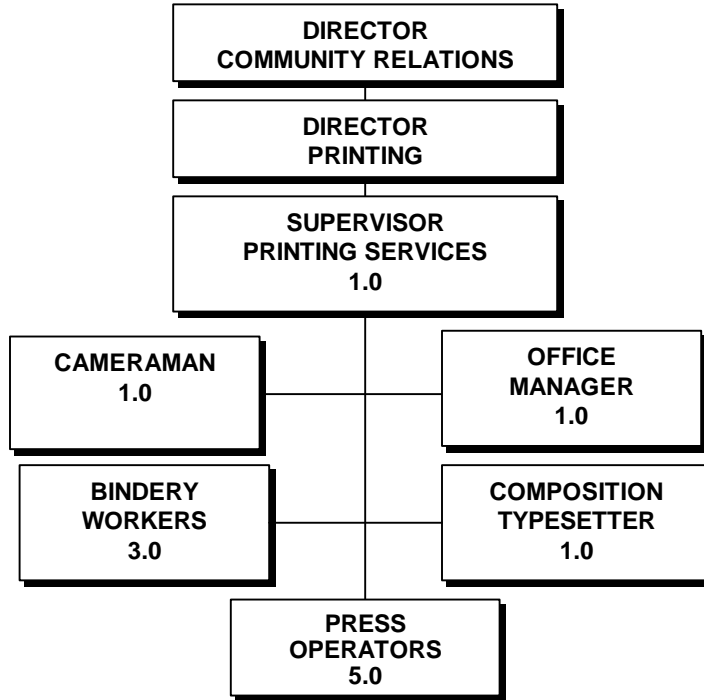
In the Broward County School District, the printing service and graphic arts departments are part of the Community Relations Department. Exhibit 7-4 shows the organizational structure of the Printing Department and Exhibit 7-5 shows the Graphic Arts Department.

The Printing Department is run as an independent charge back enterprise – the department starts each year with a budget of zero and charge district clients for their services. District departments and schools can choose to use the Printing Department or go to an outside vendor. In each of the last two years, the Printing Department has done over \$1 million in business. In 1997-98, the Department completed approximately 3,800 print jobs, ranging anywhere from 20 to 500,000 copies. The Printing Department earned a profit of \$90,000 and used a portion of this to buy a new press. According to the Printing Services Supervisor, 60 percent of the printing volume is done for the central warehouse – most of its forms used in daily district business. Another 20 percent is for the central office administration and the final 20 percent is for schools.

The Graphic Arts Department not only does the graphic arts production for the district, but also manages the large Website and is developing the potential for producing district videos (started in June 1998). The Graphic Department does not work on a zero-based budget like the Printing Department – it only charges clients for materials, not artist time. Department employees and schools must use the Graphic Arts Department and cannot use outside vendors. According to one of the graphic artists, the department's biggest client is the Community Relations Department, followed by the Superintendent's office.

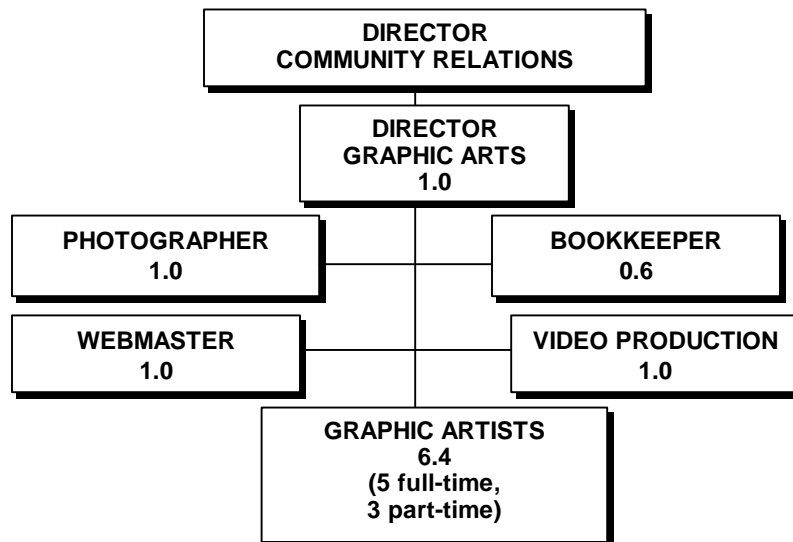
The department does not do much work for schools, presumably because, with the advent of computers, schools are doing more of it themselves. The department is well-stocked with the latest computer and video production equipment.

**EXHIBIT 7-4
ORGANIZATIONAL STRUCTURE OF THE
PRINTING SERVICES DEPARTMENT**



Source: Broward County School District, November 1998.

**EXHIBIT 7-5
ORGANIZATIONAL STRUCTURE OF THE
GRAPHIC ARTS DEPARTMENT**



Source: Broward County School District, November 1998.

RECOMMENDATION

Recommendation 7-6:

Move the Graphics Arts Department to a zero-based, entirely charge back budget and allow departments and schools to use outside vendors for graphic arts services.

This change will help ensure that the Graphic Arts Department is functioning efficiently and effectively. Although they currently charge for materials, they are not charging clients for the largest portion of their expenses – personnel time.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should inform the Graphic Arts Department of the pending change to a zero-based operation. August 1999
2. The Director of Graphic Arts should prepare the department for the change and develop necessary procedures and policies. May 2000
3. The Director of Graphic Arts should implement a zero-based budget. July 2000

FISCAL IMPACT

In terms of salaries, benefits and graphic arts costs, the district will not save much money from this recommendation – money for these items will simply come from another budget category. The intent of this recommendation is to allow the Graphic Arts Department to be able to fully cost out its direct and indirect costs. Once the department has implemented a zero-based budget, it will then, like the Printing Department, be able and required to, provide for future capital outlay through internally generated profits. The district has not conducted any studies of whether the Graphic Arts Department is operating more cost efficiently than local graphic arts providers, although they believe that they are at least as cost-efficient. Adopting a zero-based budget will ensure that they are, since central office departments and schools will have the opportunity to buy from other sources if they choose.

Given that the Printing Department is able to price its services competitively and still generate a profit (\$90,000 in 1997-98), the Graphic Arts Department should be able to do the same. In fact, the district should require that all future capital outlays for graphic arts come from internally generated profits. The volume the Graphic Arts Department handles is smaller than the print shop, and its services are more labor-intensive. Therefore, the department will probably only be able to generate a fraction of the profit margin of the print shop. In calculating the fiscal impact, MGT has allowed one and one-half years for the department to fully implement zero-based budgeting and to adjust prices over time in order to ensure competitiveness. MGT arrived at the figure of \$20,000 based on an estimate of a reasonable profit percentage.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Change Funding of Graphic Arts Department	\$0	\$10,000	\$20,000	\$20,000	\$20,000

FINDING

In addition to paper-based publications, the Broward County School District launched a Website in 1996. The Website provides many kinds of information, including:

- a list of schools, their addresses, and phone numbers;
- the latest standardized test scores;
- agendas for upcoming Board meetings;
- short messages from each Board member; and
- lunch menus.

The Website received a “Cool School Award” from *Education World* for its innovative design and easy navigation. The site is updated often --- the section on the School Board was updated the same day new Board members took office.

In the 110-day time span between July 31, 1998 and November 19, 1998, the Broward Web site was accessed nearly 2.5 million times, with an average of 21,972 requests per day. Requests come from as far away as Romania and India; however, the largest users (over half of all requests) are from within the United States.

The content on the Website is the responsibility of one of the Community Relations Specialists in the Community Relations Department, while the actual updating is the responsibility of a staff member in the Graphic Arts Department.

In addition to the extensive main Website, the district is developing a Website solely to meet the information needs of the legislative delegation that represents the Broward County School District. The goal of this project is to provide legislators with continually updated information in a format that is accessible 24 hours a day, seven days a week. The district representative from the Community Relations Department held a brainstorming session with legislative aides to discuss the kinds of information they might need. At the time of the on-site visit, the district had plans to operationalize its legislative Website in Spring 1999.

COMMENDATION

The Broward County School District is commended for moving forward technologically and developing a comprehensive and innovative Website.

Over time, the Website will become a valuable outlet for Broward County media and public relations. The Community Relations Department is particularly commended for maintaining such an excellent site.

FINDING

The Website lists one address for the public to send e-mail to the Board members and no address for the Superintendent. Board members do not have individual addresses. MGT sent multiple messages to this address with a request that they be directed to individual Board members. MGT asked the Board members to estimate the number of e-mail messages they receive from the Website. Of the nine e-mails sent (seven Board members, plus the student representative and the Superintendent), only one was responded to in about three weeks.

MGT found that e-mails directed to Board members do not go directly to their offices. Instead, the webmaster reviews them and answers the ones that he can. If he cannot answer them, they are given to the Director of Community Relations. Only if she cannot answer them do e-mails, intended for Board members, actually go to Board members. The webmaster estimated that the Website receives between five and 10 messages per day, with only one or two of those addressed to specific Board members.

In a telephone interview with the Board Chairperson and her secretary, both indicated that they received copies of all e-mails sent to them on at least a weekly basis. Having individual e-mail addresses for Board members that were perhaps directed to their secretaries first would improve the ability of Board members to review and respond to constituent e-mail.

RECOMMENDATION

Recommendation 7-7:

Create e-mail addresses for all Board members and allow the public to send e-mail directly to each Board member.

Offering this level of communication will effectively demonstrate the desire of the Board to hear from the public on all matters. Several other school districts have successfully made e-mail linkages directly with Board members. Board members should have the option to have their e-mail invisibly routed directly to their secretaries.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Website administrator should create e-mail addresses for each Board member and post them on the Website. May 1999
2. Each Board member's secretary, or each Board member, should check the e-mail account at least every other day. May 1999

FISCAL IMPACT

No costs are associated with this recommendation; it can be accomplished with existing resources.

FINDING

When someone calls the central office and is placed on hold, instead of hearing background music, they hear information about the school district, including the Website, information on School Board meetings, new publications, and other information. The message is changed periodically.

COMMENDATION

The Broward County School District is commended for making innovative use of caller waiting time to the central office.

7.2.3 Media Relations

FINDING

There are numerous newspapers and television stations in Broward County, including:

- *The Sun-Sentinel*
- *The Miami Herald*
- *Broward Times*
- *Coconut Creek Tribune*
- *Coral Springs Forum*
- *Fort Lauderdale Downtown*
- WTVJ Channel 4
- WSVN Channel 7
- WPEC Channel 12
- WCIX Channel 6
- WPLG Channel 10

There are also numerous radio stations, including several non-English-speaking ones.

Generally, anyone in the current Community Relations Office is empowered to speak for the district when talking to the media. They often refer reporters directly to department contacts within the central office. The Director of Community Relations also encourages reporters to go directly to the school contacts they need for stories.

The *Handbook for Principals* includes both public relation strategies and hints, including the following:

Instruct your secretary to put through any calls to and from the press promptly.

Reporters questions about your school should be answered promptly.

Observe the best principles of human relations when dealing with the press.

Despite these directives, most reporters interviewed over the telephone by MGT indicated that some school principals were completely non-responsive to information requests, even for positive stories. MGT attempted to contact 13 media contacts provided by the district and was successful in interviewing nine over the telephone. Of these nine, eight were in agreement that some school principals were non-responsive. One reporter, who had worked in four other areas of the country, covering public education, indicated that he receives return calls from schools only about half the time and gave overall press communications a C+. Furthermore, he stated that principals seem to believe they will get in trouble if they talk to the press. Another reporter indicated that schools were quick to release positive information only. For example, schools quickly provided her a list of valedictorians, but refused to release a list of those not receiving diplomas among the 12th graders.

One reporter indicated that one school principal refused to speak with him, did not take phone calls from him, refused an interview with him, and allowed the school secretary to treat him quite rudely. This incident was reportedly even more alarming because, at first, the principal did not know the reporter was, in fact, a reporter. The reporter believed that the principal would treat parents just as rudely.

Four of the nine reporters who were interviewed mentioned that they had expressed concerns over their reception in schools to the Community Relations Department. In one case, a representative from the public relations department promised to look into the matter, but the reporter never heard anymore about the concern. Another reporter indicated that the Community Relations Department appears to have little leverage in getting administrators to cooperate with the press.

Although the information provided by the reporters is not a comprehensive, in-depth analysis of how schools handle press relations, it is convincing evidence that at least some principals are not following the aforementioned three rules provided in the *Handbook for Principals*. Even one instance of the media being mishandled, treated rudely, or ignored would violate the rules. The fact that eight, from different media outlets, all indicated that they had been, treated rudely or ignored is sufficient cause for concern that schools are not following district rules for dealing with the media.

RECOMMENDATION

Recommendation 7-8:

Develop a district policy that the media will be asked to follow in dealing with schools and re-enforce the policy for schools to follow in dealing with the media. Establish a route of appeal through the Community Relations Department for media personnel when a school or the media does not respond accordingly.

Most reporters indicated that they get most of their information from the schools themselves, so this information avenue is critical. However, the district should establish what constitutes reasonable expectations for both the media and school personnel.

These procedures should include such as items as to how quickly a principal will return a phone call, what is a reasonable amount of time to fill a data request, etc.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Director of Community Relations should draft the recommended policy regarding media relations for Board approval. | July 1999 |
| 2. The Director of Community Relations should disseminate the joint policies to district staff and the media. | August 1999 |
| 3. The Director of Community Relations should deal promptly and completely with any complaints from the media regarding schools that do not comply this requirement. | Ongoing |

FISCAL IMPACT

There is no fiscal impact associated with this recommendation.

7.3 District and School Advisory Councils

CURRENT SITUATION

State legislation, adopted in 1991, required all schools to establish school advisory councils (SACs) as part of the statewide school improvement process (Florida School Improvement and Accountability). The SAC must represent the school's community and include parents, teachers, administrators, students, business people, and other community members.

Florida School Improvement and Accountability legislation requires that the school board annually review SACs to ensure that they are properly constituted. The legislation also requires that SAC members representing each stakeholder group be elected by their respective peer groups at the school (with the exception of business representatives who can be appointed by other members of the team).

The SAC process required by the state of Florida is as follows:

- school conducts needs assessment based upon state goals, performance standards, and local and state data;
- SAC sets priorities for goals and standards to be included in the school improvement plan;
- SAC assists in preparing the proposed school improvement plan, including improvement activities, evaluations, definitions of adequate progress, and request(s) for waivers;

- school improvement plan is released to the community for input before being finalized;
- school improvement plan is submitted by the principal to the school board, for approval;
- school board either approves or negotiates changes and approves plan; approval may include waivers from school board policy;
- school improvement plan is implemented;
- SAC reviews progress of plan implementation; and
- as long as the adequate progress criteria are met, the school improvement planning process continues as in previous years.

Beginning in 1997, the state of Florida required that a majority of members of each SAC be persons not employed by the school. This is a minor change over previous legislation which required that a majority not be employed by the school district. The Broward County School District has reflected this change in its revised Policy 1403, where it states that "A majority of SAC members shall not be employed at the school site where they perform their duties."

The 1997 Legislature also directed districts to give each SAC a portion of lottery funds to be used to implement the school improvement plan and meet the needs of the school. Although some restrictions apply, SACs have a great deal of flexibility in how the money is used. Principals may not override SAC recommendations.

In 1998, HB 3901 legislation required the change of name from School Improvement Team (SIT) to School Advisory Councils (SAC). The previous SACs are now called the School Advisory Forums (SAF).

7.3.1 District and Area Advisory Councils

FINDING

According to School Policy 1.2, members of the District Advisory Council (DAC) are elected for terms of one year and may be appointed for additional terms not to exceed a total service of four consecutive years. The composition of the DAC is:

- the Chairperson of each of the Area Advisory Councils;
- one teacher from each area, elected by the Area Steering Council from teacher nominations submitted by individual schools;
- one student from each area elected by the Area Steering Council from student nominations submitted by individual schools;

- one parent from each area elected by the Area Steering Council from parent nominations submitted by individual schools;
- two parent representatives elected from each Area Advisory Council's at-large membership;
- one citizen-at-large from each area appointed by the Area Steering Council – these citizens may not have any children enrolled in the public school system nor be employed by the public school system;
- one lay citizen appointed by each School Board member – these citizens may not be employees of the public school system;
- one city government representative appointed by the League of Cities;
- one legislative representative from each area;
- one facilities representative from each area;
- four school-based principals;
- one administrator appointed by the chairperson of the assistant principal's organization;
- one representative appointed by the president of the Support Services Personnel Association;
- one representative appointed from the County Council PTA;
- one representative from the teacher's bargaining agent;
- one representative from the Vocational, Adult and Community Education, Exceptional Student Education Advisory, and District ESOL Advisory committees;
- one business representative from each area; and
- one representative from World Class Schools.

The responsibility of the DAC is advisory in nature only. Its objectives are to:

- assist the School Board and the Superintendent in the identification and assessment of the needs of the school system;
- foster and promote interlocking two-way communications among the School Advisory Forums, Area Advisory Councils, and the DAC;
- participate in the development of the Superintendent's annual report; and

- promote and encourage parent and community involvement in schools.

Area Advisory Councils are established in each administrative area of the district. These councils include at least two representatives, one from each School Advisory Council and one from each School Advisory Forum, and the principal from each school in the area. Other members, such as local business leaders, may be added as the council wishes. As with the DAC, the responsibilities of the Area Advisory Councils are advisory in nature and include:

- assisting in the identification of the educational needs and priorities of the schools in the area;
- coordinating community resources and securing community support;
- offering assistance to SACs and SAFs within the area; and
- serving as a liaison between the SACs and SAFs and the DAC.

COMMENDATION

The Broward County School District is commended for establishing districtwide advisory councils.

FINDING

In attending one of the DAC meetings, MGT found that the group is not ethnically reflective of the student body. Non-white students comprise 54 percent of the student body; however, less than one-third, and possibly as few as one-fifth, of the members of the DAC are non-white. The district does not keep an official tally of the ethnicity or race of DAC members, so an exact count was not possible to obtain. The Director of Community Relations, nevertheless, indicated that non-white members have never comprised more than one-fourth of the DAC membership.

Neither state legislation nor district policy requires that DAC membership reflect the ethnicity of the district. However, the fact that the DAC is not as ethnically diverse as the community implies that there are some barriers to DAC membership for non-white ethnicities. These barriers may impede the ability of the DAC to fulfill its objectives to:

- "...bring before the School Board and the Superintendent of Schools area interests that affect the entire county school system; communicate to the Area Advisory Councils the countywide concerns of the School Board and the Superintendent, and make recommendations to School Board and Superintendent on improvements based on this intercommunication." (Board Policy 1.2)
- "...promote and encourage parent and community involvement in the schools." (Board Policy 1.2)

RECOMMENDATION

Recommendation 7-9:

Promote greater diversity among community members serving on the DAC.

The district should give every community segment a voice in the school district. One method to ensure that every segment has a voice is to ensure that every segment is represented proportionally in appropriate councils and committees.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Community Relations should be responsible for actively seeking non-white representatives to become members of the DAC. May 1999

FISCAL IMPACT

There is no fiscal impact associated with this recommendation. It can be accomplished with existing resources.

7.3.2 School Advisory Councils

Exhibit 7-6 shows the self-reported composition of each school's School Advisory Council (SAC) – how many members there are and what percentage are non-school site employees. As stated previously, legislation passed in 1998 requires that the SAC have a majority of members not employed at the school site for which they serve on a SAC. The exhibit shows that the Broward schools largely comply with this requirement. However, upon examination of the individual forms submitted by the schools, MGT found numerous discrepancies. For example:

- At Pompano Beach Institute, the school indicated that 13 of 21 members were not at the school site. However, one of the members it reports as being at the school site is listed as a parent. This parent should be counted as a non-school district employee, but is not. If the parent is in fact also an employee, they should not be listed as a parent as their first affiliation. This same type of error was also found in the reports for Markham Elementary, Village Elementary, Coconut Creek High, Pasadena Lakes, Elementary, Hallandale High, Stephen Foster Elementary, Lauderhill Paul Turner, Collins Elementary, Driftwood Elementary, Olsen Middle, and Parkway Middle.
- At Attucks Middle School, nearly the same reporting error occurred. The school listed one member as a representative of the community, but then counted him as at the school site. If the community member is employed by the school district, "community" should not be listed as his first affiliation. If the community member

**EXHIBIT 7-6
SCHOOL ADVISORY COUNCIL COMPOSITION IN THE
BROWARD COUNTY SCHOOL DISTRICT
1998-99**

SCHOOL NAME	LEVEL	MEMBERS	PERCENT NOT EMPLOYED BY SCHOOL
A. C. Perry	Elem.	21	52%
Apollo	Middle	27	56%
Atlantic Vo-Tech	Ctr.	21	57%
Atlantic West	Elem.	25	56%
Attucks	Elem.	31	52%
Bair	Middle	25	56%
Banyan	Elem.	20	55%
Bayview	Elem.	16	63%
Bennett	Elem.	21	52%
Bethune	Elem.	19	58%
Boulevard Heights	Elem.	24	63%
Boyd Anderson	Elem.	37	59%
Broadview	Elem.	13	46%
Broward Estates	Elem.	14	57%
Castle Hill	Elem.	19	68%
Castle Hill Annex	Elem.	22	55%
Central Park	Elem.	19	53%
Chapel Trail	Elem.	19	58%
Charles Drew	Elem.	12	58%
Coconut Creek	Elem.	17	53%
Coconut Creek	High	23	57%
Colbert	Elem.	25	64%
Collins	Elem.	23	57%
Cooper City	Elem.	20	60%
Cooper City	High	27	52%
Coral Park	Elem.	13	62%
Coral Springs	Elem.	51	69%
Coral Springs	Middle	32	56%
Coral Springs	High	34	59%
Country Hills	Elem.	21	67%
Country Isles	Elem.	17	35%
Cresthaven	Elem.	14	57%
Croissant Park	Elem.	19	58%
Cross Creek	Alt.	21	52%
Crystal Lake	Middle	19	63%
Cypress	Elem.	17	59%
Cypress Run	Alt.	11	45%

**EXHIBIT 7-6 (Continued)
SCHOOL ADVISORY COUNCIL COMPOSITION IN THE
BROWARD COUNTY SCHOOL DISTRICT
1998-99**

SCHOOL NAME	LEVEL	MEMBERS	PERCENT NOT EMPLOYED BY SCHOOL
Dania	Elem.	14	57%
Davie	Elem.	28	57%
Deerfield Beach	Elem.	18	61%
Deerfield Beach	Middle	19	53%
Deerfield Beach	High	34	59%
Deerfield Park	Elem.	22	64%
Dillard	Elem.	16	56%
Dillard	High	34	53%
Driftwood	Center	19	26%
Driftwood	Middle	19	58%
Eagle Point	Elem.	28	57%
Eagle Ridge	Elem.	15	60%
Ely	High	35	80%
Embassy Creek	Elem.	18	56%
Everglades	Elem.	13	54%
Fairway	Elem.	20	75%
Flamingo	Elem.	18	72%
Flanagan	High	29	55%
Floranada	Elem.	14	57%
Forest Glen	Middle	34	53%
Forest Hills	Elem.	12	58%
Fox Trail	Elem.	24	58%
Ft. Lauderdale	High	22	59%
Gator Run	Elem.	13	62%
Griffin	Elem.	14	57%
H.D. Perry	Middle	21	52%
Hallandale	Elem.	20	60%
Hallandale	High	35	57%
Hallandale Adult	Center	32	53%
Harbordale	Elem.	18	61%
Hawkes Bluff	Elem.	24	54%
Hollywood Central	Elem.	19	53%
Hollywood Hills	Elem.	26	54%
Hollywood Hills	High	21	52%
Hollywood Park	Elem.	30	67%
Horizon	Elem.	23	52%
Hunt	Elem.	18	56%
Indian Ridge	Middle	20	55%
Indian Trace	Elem.	21	57%
J. P. Taravella	High	22	64%

**EXHIBIT 7-6 (Continued)
SCHOOL ADVISORY COUNCIL COMPOSITION IN THE
BROWARD COUNTY SCHOOL DISTRICT
1998-99**

SCHOOL NAME	LEVEL	MEMBERS	PERCENT NOT EMPLOYED BY SCHOOL
Lake Forest	Elem.	29	55%
Lakeside	Elem.	11	55%
Larkdale	Elem.	13	54%
Lauderdale Lakes	Elem.	27	67%
Lauderdale Manors	Elem.	23	57%
Lauderhill	Middle	22	59%
Lauderhill Paul Turner	Elem.	35	57%
Lloyd Estates	Elem.	12	58%
Maplewood	Elem.	23	57%
Margate	Elem.	19	53%
Margate	Middle	28	50%
Markham	Elem.	30	60%
Martin Luther King, Jr	Elem.	15	53%
McArthur	High	24	58%
McFatter Technical	Center	25	56%
McNab	Elem.	19	58%
McNicol	Elem.	19	63%
Meadowbrook	Elem.	24	54%
Miramar	Elem.	34	62%
Miramar	High	31	61%
Mirror Lake	Elem.	42	52%
Morrow	Elem.	13	54%
New River	Middle	34	59%
Nob Hill	Elem.	13	62%
Norcrest	Elem.	15	53%
North Andrews Gardens	Elem.	19	53%
North Lauderdale	Elem.	20	55%
North Side	Elem.	26	77%
Northeast	High	26	58%
Nova Center	Center	63	44%
Oakland Park	Elem.	21	52%
Oakridge	Elem.	17	59%
Olsen	Middle	27	52%
Orange Brook	Elem.	14	57%
Oriole	Elem.	29	59%
P. M. P. E. C.	Center	34	56%
Palm Cove	Elem.	13	62%
Palmview	Elem.	29	52%
Panther Run	Elem.	35	77%
Park Ridge	Elem.	15	60%

**EXHIBIT 7-6 (Continued)
SCHOOL ADVISORY COUNCIL COMPOSITION IN THE
BROWARD COUNTY SCHOOL DISTRICT
1998-99**

SCHOOL NAME	LEVEL	MEMBERS	PERCENT NOT EMPLOYED BY SCHOOL
Park Springs	Elem.	14	57%
Parkway	Middle	36	69%
Pasadena Lakes	Elem.	30	63%
Pembroke Lakes	Elem.	19	63%
Pembroke Pines	Elem.	34	56%
Peters	Elem.	13	54%
Pine Ridge	Alt.	17	53%
Pines	Middle	21	62%
Pines Lakes	Elem.	20	55%
Pinewood	Elem.	32	59%
Pioneer	Middle	16	63%
Piper	High	36	53%
Plantation	Elem.	17	53%
Plantation	Middle	21	57%
Plantation	High	63	67%
Plantation Park	Elem.	13	54%
Pompano Beach	Elem.	20	55%
Pompano Beach	Middle	13	54%
Pompano Beach	Inst.	21	62%
Quiet Waters	Elem.	13	54%
Ramblewood	Elem.	21	67%
Ramblewood	Middle	24	54%
Rickards	Middle	17	53%
Riverglades	Elem.	24	67%
Riverside	Elem.	18	56%
Rock Island	Elem.	19	53%
Royal Palm	Elem.	21	52%
Sanders Park	High	18	44%
Sandpiper	Elem.	13	54%
Sawgrass	Elem.	15	53%
Sawgrass Springs	Middle	22	27%
Sea Castle	Elem.	13	62%
Seagull School	Alt.	11	73%
Seminole	Middle	19	58%
Sheridan Hills	Elem.	23	61%
Sheridan Park	Elem.	16	56%
Sheridan Vo-Tech	Center	23	57%
Silver Lakes	Middle	30	50%
Silver Lakes	Elem.	15	67%
Silver Palms	Elem.	17	59%

**EXHIBIT 7-6 (Continued)
SCHOOL ADVISORY COUNCIL COMPOSITION IN THE
BROWARD COUNTY SCHOOL DISTRICT
1998-99**

SCHOOL NAME	LEVEL	MEMBERS	PERCENT NOT EMPLOYED BY SCHOOL
Silver Ridge	Elem.	24	67%
Silver Trail	Middle	25	52%
South Area Alternative	Alt.	21	52%
South Broward	High	23	57%
South Plantation	High	24	58%
Stephen Foster	Elem.	17	59%
Stirling	Elem.	26	62%
Stoneman Douglas	Inst.	35	60%
Stranahan	High	31	77%
Sunland Park	Elem.	24	71%
Sunrise	Middle	12	58%
Sunset School	Alt.	22	45%
Sunshine	Elem.	30	77%
Tamarac	Elem.	27	48%
Tedder	Elem.	38	66%
Tequesta Trace	Middle	34	68%
The Quest	Middle	28	50%
Thurgood Marshall	Elem.	26	58%
Tradewinds	Elem.	9	56%
Tropical	Elem.	12	58%
Village	Elem.	21	62%
Virginia S. Young	Elem.	17	59%
Walker	Middle	29	52%
Walter C. Young	Middle	20	65%
Watkins	Elem.	29	52%
Welleby	Elem.	17	53%
West Hollywood	Elem.	13	54%
Westchester	Elem.	25	40%
Western	High	35	60%
Westpine	Middle	25	60%
Westwood Heights	Elem.	20	60%
Whiddon-Rogers	Center	20	60%
William Dandy	Elem.	26	62%
Wilton Manors	Elem.	13	54%
Wingate Oaks	Center	19	63%
Winston Park	Elem.	13	62%
Average	NA	22	58%

Source: Broward County School District documentation, December 1998.

is in fact a school employee, then Attucks Middle School has no true community representatives on its SAC. This same type of error was also found in the reports for South Broward High, Plantation Elementary, Cross Creek, Silver Lakes Middle, and Palmview Elementary.

- At Hallandale High School, one secondary student is listed as being at the school site. Since this is being interpreted to mean that they are employed at the school site, this is an error or a misinterpretation of the reporting guidelines. This same type of error was also found in the reports for Ft. Lauderdale High and Flanagan High.
- Many schools do not list a representative from the non-instructional area, although Florida legislation encourages this participation. This includes Margate Elementary, Country Hills Elementary, Crystal Lake, Western High, Stranahan High, Sunland Park Elementary, Westpine Middle, J.P. Taravella, Tradewinds Elementary, Deerfield Park, Eagle Ridge, Charles Drew, Floranada Elementary, Forest Hills Elementary, Hunt Elementary, Lloyd Estates Elementary, McNab Elementary, Broward Estates Elementary, Castle Hill Elementary, Dillard Elementary, Horizon Elementary, Boulevard Heights Elementary, Everglades Elementary, Fairway Elementary, Gator Run Elementary, Cooper City High, Hollywood Hills Elementary, A.C. Perry Elementary, North Side Elementary, Sawgrass Elementary, Sandpiper Elementary, Miramar High, Oakridge Elementary, Panther Run Elementary, Pines Lakes Elementary, Sheridan Hills Elementary, Stirling Elementary, and Sunshine Elementary.
- Two schools – Nob Hill Elementary and Orange Brook Elementary – failed to provide any information on the representation of their SAC memberships.
- Several schools, including Sunset, Sanders Park Elementary, Lake Forest Elementary and Meadowbrook Elementary, listed either instructional or non-instructional members as not being at the school site. If they are not employed at the school site, they should be listed as having either a “parent” or “community” affiliation for SAC membership.
- Dillard High School does not list any student members, although legislation requires student membership for high schools.
- There are no clear instructions on how to count members listed on the form as “ESOL” and “ESE.” Some schools are counting them as at the school site and some are not. It is unclear whether any of these members are being counted properly.

State legislation is unclear on the inclusion of students on SACs. High schools are required to include them on their SACs, while middle schools “may.” Legislation does

not address the inclusion of elementary students. A December 14, 1998 memo from the Director of the Division of Public Schools and Community Education and the Executive Director of the Florida Commission on Education Reform and Accountability to district superintendents advises that:

For school advisory council composition purposes, school boards might want to consider establishing policy that does not [emphasis added] count student members in either group [as employees of the school or members of the community], while allowing them full membership and voting status.

The Broward Board has not addressed this issue in its consideration of policy changes. Thus, most Broward schools with student members are counting them as part of the required 51 percent non-school employees. For example:

- Bennett Elementary lists a student as a member, and appears to be the only Broward elementary school to do so.
- At Ramblewood Middle School, three students are listed as members of the community. Eliminating these from the count, Ramblewood fails to have a majority of non-school employees on its SAC.
- At Pompano Beach Middle School, the SAC has counted students as part of the official membership. Eliminating these from the count, Pompano Beach fails to have a majority of non-school employees on its SAC.
- Several schools have numerous student members. In particular, Plantation High School has 21 student members and 63 SAC members overall. This size committee is unwieldy. Western High School has 10 student members out of 35 total members. Legislation does not regulate the size of the SACs, but does require “appropriate balance” between teachers, education support employees, students, parents, and other business and community citizens.

The State of Florida requires that SACs be “representative of the racial, ethnic, and economic community served by the school.” However, Florida law does not specify how closely SAC membership should reflect the composition of the school community. House Bill 3901 only states that:

Each advisory council shall be composed of the principal and appropriately balanced number of teachers, education support employees, students, parents, and other business and community citizens who are representative of the ethnic, racial, and economic community served by the school...

Therefore, MGT analyzed SAC membership to identify those SACs with a non-white SAC percentage that is within 10 percentage points of the non-white student body percentage.

Exhibit 7-7 shows the non-white percentage of each SAC and the non-white percentage of each school's student body. As the exhibit shows, many Broward schools do not have SACs with a non-white SAC percentage that is within 10 percentage points of the non-white student body percentage.

RECOMMENDATION

Recommendation 7-10:

Improve both the SAC reporting at the school level and the review process at the central office.

The form used by the Broward County School District is confusing in regards to the correlation between "at the school site" and whether a member is a non-school district employee. The form is unclear on how to count several categories of members. Middle schools are routinely erroneously counting students among their membership. No documentation was provided by the district that the central office had taken any steps to correct these errors or to instruct the schools in proper completion of the requirements.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|---------------|
| 1. The Superintendent should direct central office staff to revise the SAC reporting form to make it more easily understandable. | May 1999 |
| 2. The Superintendent should direct central office staff to more carefully review SAC membership reports. | May 1999 |
| 3. Central office staff should provide feedback to SAC chairpersons if their 1999-2000 membership reports are not in compliance with district and legislative requirements. | December 1999 |

FISCAL IMPACT

There is no fiscal impact associated with this recommendation. It can be accomplished with existing resources.

7.4 Volunteer Involvement

Volunteers are often the most valuable resource a school district has. An effective school volunteer program will solicit needed assistance from the community, enhance the student learning environment, and provide positive feedback to the volunteers. Volunteers should be drawn from the ranks of every facet of the community, not only parents.

**EXHIBIT 7-7
SAC AND STUDENT BODY NON-WHITE PERCENTAGES IN THE
BROWARD COUNTY SCHOOL DISTRICT
1998-99**

SCHOOL NAME	LEVEL	SAC MEMBERS PERCENT NON-WHITE	STUDENT BODY PERCENT NON-WHITE	DIFFERENCE	WITHIN 10 PERCENT
A. C. Perry	Elem.	67%	89%	22	NO
Apollo	Middle	56%	56%	1	YES
Atlantic Vo-Tech	Ctr.	57%	52%	(5)	YES
Atlantic West	Elem.	40%	46%	6	YES
Attucks	Elem.	61%	62%	1	YES
Bair	Middle	60%	51%	(9)	YES
Banyan	Elem.	30%	39%	9	YES
Bayview	Elem.	19%	17%	(2)	YES
Bennett	Elem.	39%	64%	25	NO
Bethune	Elem.	53%	70%	18	NO
Boulevard Heights	Elem.	42%	39%	(3)	YES
Boyd Anderson	Elem.	62%	93%	31	NO
Broadview	Elem.	69%	73%	3	YES
Broward Estates	Elem.	86%	97%	11	NO
Castle Hill	Elem.	69%	99%	30	NO
Castle Hill Annex	Elem.	68%	97%	29	NO
Central Park	Elem.	21%	21%	-	YES
Chapel Trail	Elem.	42%	41%	(1)	YES
Charles Drew	Elem.	75%	97%	22	NO
Coconut Creek	Elem.	24%	41%	17	NO
Coconut Creek	High	57%	57%	0	YES
Colbert	Elem.	80%	90%	10	NO
Collins	Elem.	61%	99%	38	NO
Cooper City	Elem.	25%	17%	(8)	YES
Cooper City	High	19%	21%	2	YES
Coral Park	Elem.	8%	19%	11	NO
Coral Springs	Elem.	33%	41%	8	YES
Coral Springs	Middle	25%	24%	(1)	YES
Coral Springs	High	24%	38%	14	NO
Country Hills	Elem.	10%	30%	20	NO
Country Isles	Elem.	30%	24%	(6)	YES
Cresthaven	Elem.	36%	55%	19	NO
Croissant Park	Elem.	53%	60%	7	YES
Cross Creek	Elem.	24%	28%	4	YES
Crystal Lake	Middle	53%	73%	21	NO
Cypress	Elem.	77%	80%	4	YES
Cypress Run	Alt.	55%	78%	23	NO
Dania	Elem.	36%	58%	23	NO
Davie	Elem.	25%	28%	3	YES
Deerfield Beach	Elem.	28%	39%	11	NO

**EXHIBIT 7-7 (Continued)
SAC AND STUDENT BODY NON-WHITE PERCENTAGES IN THE
BROWARD COUNTY SCHOOL DISTRICT
1998-99**

SCHOOL NAME	LEVEL	SAC MEMBERS PERCENT NON-WHITE	STUDENT BODY PERCENT NON-WHITE	DIFFERENCE	WITHIN 10 PERCENT
Deerfield Beach	Middle	47%	65%	17	NO
Deerfield Beach	High	56%	65%	9	YES
Deerfield Park	Elem.	77%	90%	12	NO
Dillard	Elem.	94%	98%	4	YES
Dillard	High	91%	94%	2	YES
Driftwood	Center	58%	53%	(5)	YES
Driftwood	Middle	53%	46%	(6)	YES
Eagle Point	Elem.	36%	34%	(2)	YES
Eagle Ridge	Elem.	33%	28%	(5)	YES
Ely	High	77%	86%	9	YES
Embassy Creek	Elem.	11%	22%	11	NO
Everglades	Elem.	31%	34%	4	YES
Fairway	Elem.	70%	94%	24	NO
Flamingo	Elem.	22%	18%	(4)	YES
Flanagan	High	55%	55%	(1)	YES
Floranada	Elem.	29%	27%	(2)	YES
Forest Glen	Middle	24%	40%	16	NO
Forest Hills	Elem.	25%	34%	9	YES
Fox Trail	Elem.	25%	16%	(9)	YES
Ft. Lauderdale	High	32%	67%	36	NO
Gator Run	Elem.	31%	34%	3	YES
Griffin	Elem.	14%	19%	5	YES
H.D. Perry	Middle	72%	86%	14	NO
Hallandale	Elem.	80%	78%	(2)	YES
Hallandale	High	83%	83%	0	YES
Hallandale Adult	Center	63%	76%	14	NO
Harbordale	Elem.	22%	48%	26	NO
Hawkes Bluff	Elem.	33%	24%	(10)	YES
Hollywood Central	Elem.	47%	42%	(6)	YES
Hollywood Hills	Elem.	15%	29%	14	NO
Hollywood Hills	High	33%	40%	7	YES
Hollywood Park	Elem.	63%	61%	(2)	YES
Horizon	Elem.	26%	53%	27	NO
Hunt	Elem.	33%	53%	20	NO
Indian Ridge	Middle	15%	17%	2	YES
Indian Trace	Elem.	29%	35%	6	YES
J. P. Taravella	High	14%	23%	10	YES
Lake Forest	Elem.	73%	81%	9	YES
Lakeside	Elem.	55%	58%	3	YES
Larkdale	Elem.	77%	99%	22	NO

**EXHIBIT 7-7 (Continued)
SAC AND STUDENT BODY NON-WHITE PERCENTAGES IN THE
BROWARD COUNTY SCHOOL DISTRICT
1998-99**

SCHOOL NAME	LEVEL	SAC MEMBERS PERCENT NON-WHITE	STUDENT BODY PERCENT NON-WHITE	DIFFERENCE	WITHIN 10 PERCENT
Lauderdale Lakes	Elem.	70%	95%	24	NO
Lauderdale Manors	Elem.	74%	99%	25	NO
Lauderhill	Middle	64%	100%	36	NO
Lauderhill Paul Turner	Elem.	94%	99%	4	YES
Lloyd Estates	Elem.	40%	56%	16	NO
Maplewood	Elem.	22%	24%	2	YES
Margate	Elem.	21%	28%	7	YES
Margate	Middle	82%	31%	(51)	NO
Markham	Elem.	87%	99%	13	NO
Martin Luther King, Jr	Elem.	87%	100%	13	NO
McArthur	High	63%	60%	(3)	YES
McFatter Technical	Center	40%	60%	20	NO
McNab	Elem.	21%	29%	8	YES
McNicol	Elem.	69%	84%	15	NO
Meadowbrook	Elem.	38%	69%	32	NO
Miramar	Elem.	65%	79%	14	NO
Miramar	High	58%	88%	30	NO
Mirror Lake	Elem.	33%	56%	23	NO
Morrow	Elem.	39%	53%	14	NO
New River	Middle	59%	67%	8	YES
Nob Hill	Elem.	89%	32%	(57)	NO
Norcrest	Elem.	40%	38%	(2)	YES
North Andrews Gardens	Elem.	47%	47%	(1)	YES
North Lauderdale	Elem.	55%	79%	24	NO
North Side	Elem.	77%	97%	20	NO
Northeast	High	46%	50%	4	YES
Nova Center	Center	37%	47%	11	NO
Oakland Park	Elem.	48%	56%	9	YES
Oakridge	Elem.	59%	57%	(2)	YES
Olsen	Middle	41%	79%	38	NO
Orange Brook	Elem.	50%	63%	13	NO
Oriole	Elem.	86%	98%	12	NO
P. M. P. E. C.	Center	30%	68%	39	NO
Palm Cove	Elem.	54%	62%	8	YES
Palmview	Elem.	76%	93%	17	NO
Panther Run	Elem.	46%	48%	2	YES
Park Ridge	Elem.	87%	97%	10	NO
Park Springs	Elem.	43%	27%	(16)	NO
Parkway	Middle	63%	80%	17	NO
Pasadena Lakes	Elem.	37%	45%	8	YES

**EXHIBIT 7-7 (Continued)
SAC AND STUDENT BODY NON-WHITE PERCENTAGES IN THE
BROWARD COUNTY SCHOOL DISTRICT
1998-99**

SCHOOL NAME	LEVEL	SAC MEMBERS PERCENT NON-WHITE	STUDENT BODY PERCENT NON-WHITE	DIFFERENCE	WITHIN 10 PERCENT
Pembroke Lakes	Elem.	26%	34%	8	YES
Pembroke Pines	Elem.	27%	48%	21	NO
Peters	Elem.	31%	56%	25	NO
Pine Ridge	Alt.	71%	72%	1	YES
Pines	Middle	52%	62%	10	YES
Pines Lakes	Elem.	40%	47%	7	YES
Pinewood	Elem.	44%	56%	12	NO
Pioneer	Middle	13%	17%	4	YES
Piper	High	48%	53%	5	YES
Plantation	Elem.	47%	97%	50	NO
Plantation	Middle	38%	65%	27	NO
Plantation	High	43%	60%	17	NO
Plantation Park	Elem.	31%	43%	12	NO
Pompano Beach	Elem.	50%	56%	6	YES
Pompano Beach	Middle	62%	70%	9	YES
Pompano Beach	Inst.	57%	72%	15	NO
Quiet Waters	Elem.	31%	41%	10	NO
Ramblewood	Elem.	24%	25%	1	YES
Ramblewood	Middle	20%	25%	5	YES
Rickards	Middle	41%	54%	13	NO
Riverglades	Elem.	13%	9%	(3)	YES
Riverside	Elem.	22%	18%	(4)	YES
Rock Island	Elem.	90%	99%	9	YES
Royal Palm	Elem.	81%	99%	18	NO
Sanders Park	High	93%	93%	(0)	YES
Sandpiper	Elem.	23%	30%	7	YES
Sawgrass	Elem.	33%	33%	0	YES
Sawgrass Springs	Middle	32%	27%	(5)	YES
Sea Castle	Elem.	54%	80%	26	NO
Seagull School	Alt.	46%	84%	38	NO
Seminole	Middle	16%	49%	33	NO
Sheridan Hills	Elem.	48%	50%	2	YES
Sheridan Park	Elem.	31%	49%	17	NO
Sheridan Vo-Tech	Center	52%	46%	(6)	YES
Silver Lakes	Middle	37%	63%	26	NO
Silver Lakes	Elem.	67%	65%	(2)	YES
Silver Palms	Elem.	53%	64%	11	NO
Silver Ridge	Elem.	13%	13%	-	YES
Silver Trail	Middle	36%	42%	6	YES
South Area Alternative	Alt.	48%	51%	3	YES

**EXHIBIT 7-7 (Continued)
SAC AND STUDENT BODY NON-WHITE PERCENTAGES IN THE
BROWARD COUNTY SCHOOL DISTRICT
1998-99**

SCHOOL NAME	LEVEL	SAC MEMBERS PERCENT NON-WHITE	STUDENT BODY PERCENT NON-WHITE	DIFFERENCE	WITHIN 10 PERCENT
South Broward	High	85%	35%	(50)	YES
South Plantation	High	25%	59%	34	NO
Stephen Foster	Elem.	41%	48%	7	YES
Stirling	Elem.	27%	33%	6	YES
Stoneman Douglas	Inst.	17%	23%	6	YES
Stranahan	High	68%	78%	10	NO
Sunland Park	Elem.	88%	NA	NA	
Sunrise	Middle	24%	65%	41	NO
Sunset School	Alt.	41%	57%	16	NO
Sunshine	Elem.	90%	67%	(23)	NO
Tamarac	Elem.	22%	44%	21	NO
Tedder	Elem.	68%	84%	16	NO
Tequesta Trace	Middle	35%	36%	0	YES
The Quest	Middle	47%	58%	12	NO
Thurgood Marshall	Elem.	54%	97%	43	NO
Tradewinds	Elem.	11%	35%	24	NO
Tropical	Elem.	25%	32%	7	YES
Village	Elem.	67%	90%	24	NO
Virginia S. Young	Elem.	41%	42%	1	YES
Walker	Middle	76%	98%	23	NO
Walter C. Young	Middle	91%	55%	(36)	NO
Watkins	Elem.	55%	88%	33	NO
Welleby	Elem.	24%	37%	14	NO
West Hollywood	Elem.	46%	61%	15	NO
Westchester	Elem.	24%	25%	1	YES
Western	High	34%	30%	(4)	YES
Westpine	Middle	27%	45%	18	NO
Westwood Heights	Elem.	95%	98%	3	YES
Whiddon-Rogers	Center	70%	66%	(4)	YES
William Dandy	Elem.	85%	9%	(76)	NO
Wilton Manors	Elem.	46%	58%	12	NO
Wingate Oaks	Center	58%	82%	24	NO
Winston Park	Elem.	31%	32%	1	YES
Average	NA	48%	56%	9	YES

Source: Broward County School District documentation, December 1998.

A school volunteer is defined in Section 228.041, Florida Statutes, as “any nonpaid person who may be appointed by a school board or its designee [and may] include but not be limited to parents, senior citizens, student, and others who assist the teacher or other members of the school staff.” The volunteer legislation also addresses intergenerational school volunteer programs and notes its legislative intent to:

...recognize and unite senior citizens and school children in order to enrich the lives of both [by creating] a mechanism for the development, expansion, and support of effective and innovative intergenerational school volunteer programs in the state (Section 230.71, F.S.).

Of the eight goals established by the Florida Department of Education for public school systems in the state, #8 is “Communities, school boards, and schools provide opportunities for involving parents and guardians as active partners in achieving school improvement and education accountability.”

In order to provide feedback to volunteers and track volunteer involvement as an indicator of school success, schools track the number of hours volunteered by each individual and the capacity they gave --- whether it be lunchroom monitoring, math tutoring, or materials copying. Schools sponsor volunteer recognition programs based on the number of hours volunteered. The school district tracks overall volunteer involvement as an indicator of community support, establishes annual goals based on inter-district comparisons and identified needs, and clearly communicates unmet volunteer needs to the community.

The school volunteer effort as a whole in Florida is nationally acclaimed. Florida is the only state in the nation with enabling legislation, an annual appropriation, and a state coordinating office ---the Florida Department of Education Citizen Involvement Program. In 1990, the Department of Education School Volunteer Program earned the Presidential Award, a national leadership award. The program estimates that, statewide, more than one-half million volunteers give over 10 million hours of time each year.

The Broward County School Board adopted a new Parent/Family Involvement policy in September 1998 (Policy 1165). The policy defines parent and school responsibilities in promoting parent/family involvement. It also establishes five “standards for family involvement.” They are:

- **Communicating** – *Communication between home and school is common, consistent, two-way and meaningful.*
- **Parenting** – *Parenting skills are promoted and supported.*
- **Volunteering** – *Parents are welcome in schools and their support and assistance are actively sought and appreciated.*
- **School Decision-Making and Advocacy** – *Parents are full partners in decisions that affect children and families.*

- **Collaborating with the Community** – Community resources are used and/or redirected to strengthen schools, families and student learning.

7.4.1 School Volunteers

CURRENT SITUATION

A potential volunteer can either offer their services at any Broward County school or may call the Supervisor of Volunteer Services directly at the central office. Once a volunteer decides to provide service, he/she must complete annually a volunteer application, which asks for the following information:

- home address
- home and work phone numbers
- employer
- whom to notify in event of an emergency
- career/volunteer experience
- languages, skills, and hobbies
- previous school volunteer experience
- education
- age range
- grade level preferences in which to volunteer
- job preferences in which to volunteer
- social security number

The application also asks the potential volunteer 10 questions about their criminal background, if any. The questions are:

- Have you ever been convicted of an offense other than a minor traffic violation?
- Have you ever been found guilty of a criminal offense?
- Have you entered a *nolo contendere* or no contest plea in a criminal proceeding?
- Have you ever had a criminal record sealed or expunged?
- Have you ever participated in any type of pre-trial intervention/diversion program or had adjudication withheld in a criminal offense?
- Are there criminal charges currently pending against you?
- Have you ever been imprisoned or jailed in a criminal proceeding?
- Have you ever been placed on probation in a criminal proceeding?

- Have you ever paid a fine in a criminal proceeding?
- Have you ever failed to appear in court or forfeited bond in a criminal proceeding?

All volunteer applications are forwarded to the central office for processing, which can take up to two months. If the applicant answers 'yes' to any of the security questions, he may not volunteer until their application has been processed and approved by the district. If the applicant has not answered 'yes' to any of the security questions, he/she may start volunteering at once, while the district is still processing the application. The school and the district both maintain a copy of the application. It is part of Board Policy 4002-B that the fingerprinting of the volunteers may be required, at the discretion of the district.

If a volunteer has checked "yes" on any of the security questions, he/she is asked to provide related court documentation. A screening committee --- the same committee that handles security decisions for employees --- makes decisions on a case-by-case basis for prospective volunteers.

FINDING

In visits to schools, MGT found that each school had a clearly identified notebook for volunteers that was readily available at the front counter. Each notebook was similar among schools, with a common format. Each volunteer had his/her own page in the notebook where they could sign in and out and note the type of activity in which they participated. Some books had copies of volunteer guidelines which volunteers could take.

MGT found that the schools were maintaining their copies of the volunteer applications in the volunteer notebook, meaning that any volunteer could review personal information about other volunteers at any time. In four schools, MGT also found that several applications had not been forwarded to the central office for review. When asked why this had not been done, school representatives indicated that they did not know that they had to forward them, since the volunteer had not answered 'yes' to any of the security questions. This is contrary to district procedures established by the Supervisor of Volunteer Services, which requires copies of all volunteer applications to be submitted to the central office. The Supervisor of Volunteer Services indicated that central office personnel do randomly screen samples of these applications for compliance with procedures and possible security concerns.

Also in reviewing the school volunteer logs, MGT found that, while the volunteer application asks for interests and skills that might be useful in the volunteer setting, this information is not contained on the volunteer log sheets. Thus, a teacher cannot browse through the log of available volunteers to find ones with a particular skill or interest.

COMMENDATION

The Broward County School District is commended for having a consistent volunteer notebook format throughout the schools.

RECOMMENDATION

Recommendation 7-11:

Review proper volunteer procedures with schools and implement new volunteer log sheets.

Personal volunteer information should not be public knowledge. Moreover, schools are missing an opportunity to promote the use of volunteers by not publicizing the skills and interests of volunteers to the teachers who will use their services.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-----------|
| 1. The Supervisor of Volunteer Services should issue a clarification memorandum, emphasizing that volunteer applications should not be kept in an area accessible by the general public. | June 1999 |
| 2. The Supervisor of Volunteer Services should design and produce a new volunteer log sheet that will provide an easy reference to the skills and interests of the volunteer for distribution to the schools. | July 1999 |

FISCAL IMPACT

There is no fiscal impact associated with this recommendation. It can be accomplished with existing resources.

FINDING

Exhibit 7-8 shows the number of volunteers and the number of hours volunteered during the 1997-98 school year for all Florida school districts, as reported to the Florida Department of Education by the school districts. Based on Fall 1997 membership, the number of volunteers and volunteer hours per student has been computed. Exhibit 7-9 shows the same information for 1996-97. As the exhibits show:

- Broward County had 0.12 volunteers for every student, or approximately eight students per volunteer in 1997-98. This is lower than the statewide average of 0.16 volunteers per student. It is also lower than the comparison districts of Duval, Hillsborough, and Orange, but higher than the comparison districts of Miami-Dade and Palm Beach.
- Broward County volunteers served an average of 5.19 hours per year in 1997-98. This is also lower than the statewide average of 6.67 hours and also lower than all of the comparison districts.
- Broward's 1997-98 figures reflect an improvement over 1996-97. The district went from 0.11 volunteers per student to 0.12 and from 5.0 volunteer hours per student to 5.19 hours.

**EXHIBIT 7-8
1997-98 VOLUNTEERISM IN
FLORIDA SCHOOL DISTRICTS**

SCHOOL DISTRICT	TOTAL VOLUNTEERS	VOLUNTEERS/STUDENT	TOTAL HOURS	HOURS/STUDENT	TOTAL MEMBERSHIP
Alachua	11,512	0.38	504,199.00	16.77	30,063
Baker	0	0.00	11,212.00	2.37	4,733
Bay	12,947	0.50	358,987.00	13.79	26,023
Bradford	666	0.16	17,985.00	4.34	4,148
Brevard	10,606	0.16	564,197.05	8.31	67,872
Broward	25,910	0.12	1,164,501.00	5.19	224,383
Calhoun	380	0.17	9,002.00	3.94	2,282
Charlotte	0	0.00	0.00	-	16,294
Citrus	3,645	0.25	138,700.00	9.50	14,598
Clay	5,869	0.22	210,112.50	7.85	26,753
Collier	3,831	0.13	0.00	-	29,261
Columbia	3,303	0.35	100,584.00	10.70	9,400
Miami-Dade	28,604	0.08	3,260,856.00	9.43	345,970
Desoto	472	0.10	36,974.75	8.11	4,561
Dixie	0	0.00	0.00	-	2,367
Duval	25,561	0.20	681,934.00	5.37	126,969
Escambia	12,034	0.26	516,799.00	11.29	45,780
Flagler	1,616	0.27	47,196.50	8.00	5,897
Franklin	78	0.05	4,500.00	2.99	1,507
Gadsden	2,594	0.31	34,581.00	4.08	8,486
Gilchrist	0	0.00	0.00	-	2,625
Glades	86	0.07	1,020.00	0.89	1,148
Gulf	184	0.08	4,320.00	1.83	2,358
Hamilton	0	0.00	0.00	-	2,334
Hardee	1,090	0.22	11,024.00	2.24	4,912
Hendry	0	0.00	0.00	-	7,363
Hernando	2,340	0.15	0.00	-	16,105
Highlands	1,961	0.18	90,886.00	8.21	11,072
Hillsborough	24,825	0.16	1,769,000.00	11.58	152,727
Holmes	0	0.00	0.00	-	3,862
Indian River	0	0.00	0.00	-	14,317
Jackson	1,373	0.17	35,761.00	4.46	8,025
Jefferson	0	0.00	0.00	-	2,033
Lafayette	0	0.00	0.00	-	1,073
Lake	1,882	0.07	110,672.00	4.08	27,123
Lee	0	0.00	0.00	-	53,787

**EXHIBIT 7-8 (Continued)
1997-98 VOLUNTEERISM IN
FLORIDA SCHOOL DISTRICTS**

SCHOOL DISTRICT	TOTAL VOLUNTEERS	VOLUNTEERS/STUDENT	TOTAL HOURS	HOURS/STUDENT	TOTAL MEMBERSHIP
Leon	0	0.00	0.00	-	31,455
Levy	1,234	0.20	34,186.00	5.60	6,100
Liberty	97	0.07	742.00	0.57	1,298
Madison	0	0.00	0.00	-	3,556
Manatee	3,040	0.09	92,018.00	2.73	33,705
Marion	8,749	0.24	299,166.00	8.04	37,210
Martin	2,900	0.19	165,000.00	10.75	15,350
Monroe	0	0.00	0.00	-	9,534
Nassau	1,689	0.16	45,280.00	4.41	10,275
Okaloosa	11,962	0.39	158,075.50	5.21	30,314
Okeechobee	556	0.08	0.00	-	6,616
Orange	40,000	0.30	1,100,000.00	8.23	133,653
Osceola	13,183	0.46	289,000.00	10.06	28,740
Palm Beach	15,511	0.11	898,481.00	6.30	142,621
Pasco	12,224	0.27	266,568.00	5.96	44,763
Pinellas	22,386	0.20	0.00	-	109,303
Polk	15,176	0.20	701,692.00	9.17	76,493
Putnam	710	0.05	0.00	-	13,045
Santa Rosa	6,288	0.29	151,757.00	7.04	21,563
Sarasota	8,780	0.26	301,748.00	9.10	33,159
Seminole	0	0.00	0.00	-	56,921
St. Johns	5,007	0.28	172,797.00	9.81	17,623
St. Lucie	3,200	0.11	292,842.00	10.35	28,284
Sumter	541	0.09	18,000.00	3.07	5,856
Suwannee	713	0.12	42,594.00	7.22	5,901
Taylor	0	0.00	0.00	-	3,834
Union	219	0.09	9,398.00	4.06	2,314
Volusia	10,667	0.18	528,024.00	8.90	59,310
Wakulla	0	0.00	0.00	-	4,651
Walton	0	0.00	10,175.00	1.78	5,724
Washington	145	0.04	9,138.00	2.73	3,344
TOTAL	368,346	0.16	15,271,685.30	6.67	2,290,726

Source: Florida Department of Education, Office of Business and Education Alliances, 1998.

**EXHIBIT 7-9
1996-97 VOLUNTEERISM IN
FLORIDA SCHOOL DISTRICTS**

COUNTY	TOTAL VOLUNTEERS	VOLUNTEERS / STUDENT	TOTAL HOURS	HOURS/ STUDENT	TOTAL MEMBERSHIP
Alachua	11,810	0.40	420,473	14.2	29,648
Baker	670	0.14	13,966	3.0	4,630
Bay	10,991	0.43	304,332	11.9	25,665
Bradford	671	0.16	18,127	4.3	4,192
Brevard	9,462	0.14	544,758	8.2	66,679
Broward	24,936	0.11	1,086,887	5.0	218,576
Calhoun	213	0.09	6,085	2.7	2,288
Charlotte	NA	NA	NA	NA	16,083
Citrus	4,197	0.30	94,010	6.6	14,194
Clay	6,308	0.24	210,298	8.1	25,915
Collier	2,733	0.10	NA	NA	28,177
Columbia	2,250	0.24	120,496	13.0	9,263
Miami-Dade	28,043	0.08	3,196,902	9.4	341,120
DeSoto	NA	NA	NA	NA	4,616
Dixie	NA	NA	NA	NA	2,323
Duval	26,989	0.21	608,415	4.8	126,100
Escambia	13,752	0.30	488,397	10.7	45,692
Flagler	1,571	0.28	50,123	8.9	5,662
Franklin	78	0.05	4,000	2.5	1,575
Gadsden	NA	NA	NA	NA	8,546
Gilchrist	NA	NA	NA	NA	2,651
Glades	84	0.07	1,074	0.9	1,149
Gulf	384	0.16	10,840	4.6	2,346
Hamilton	NA	NA	NA	NA	2,336
Hardee	774	0.16	10,004	2.0	4,974
Hendry	528	0.07	11,756	1.6	7,257
Hernando	1,783	0.11	48,781	3.1	15,842
Highlands	844	0.08	128,285	11.6	11,020
Hillsborough	25,443	0.17	1,412,000	9.6	147,788
Holmes	NA	NA	NA	NA	3,820
Indian River	3,018	0.22	127,125	9.1	13,972
Jackson	2,168	0.27	50,094	6.2	8,098
Jefferson	NA	NA	NA	NA	2,127
Lafayette	NA	NA	NA	NA	1,109
Lake	1,164	0.04	75,226	2.9	26,133
Lee	4,468	0.09	263,259	5.0	52,302

**EXHIBIT 7-9
1996-97 VOLUNTEERISM IN
FLORIDA SCHOOL DISTRICTS**

COUNTY	TOTAL VOLUNTEERS	VOLUNTEERS / STUDENT	TOTAL HOURS	HOURS/ STUDENT	TOTAL MEMBERSHIP
Leon	6,538	0.21	381,729	12.1	31,558
Levy	508	0.09	18,950	3.2	5,831
Liberty	127	0.10	1,462	1.2	1,247
Madison	392	0.11	16,063	4.6	3,479
Manatee	1,971	0.06	75,380	2.3	32,797
Marion	8,207	0.23	240,994	6.6	36,244
Martin	1,764	0.12	170,000	11.5	14,823
Monroe	1,152	0.12	NA	NA	9,369
Nassau	2,158	0.21	44,921	4.4	10,189
Okaloosa	8,962	0.30	149,670	5.0	30,048
Okeechobee	619	0.09	19,769	3.0	6,597
Orange	34,642	0.27	1,000,000	7.8	128,941
Osceola	17,280	0.63	418,400	15.3	27,376
Palm Beach	14,513	0.11	872,518	6.8	127,600
Pasco	10,714	0.25	262,388	6.0	43,461
Pinellas	21,625	0.20	1,328,890	12.4	107,051
Polk	14,824	0.20	607,413	8.1	74,800
Putnam	645	0.05	34,500	2.6	13,294
Santa Rosa	5,759	0.28	153,771	7.4	20,668
Sarasota	6,668	0.21	279,769	8.8	31,951
Seminole	10,131	0.18	410,000	7.3	55,972
St. Johns	5,266	0.32	129,526	7.9	16,365
St. Lucie	2,298	0.08	261,671	9.5	27,669
Sumter	584	0.10	203,000	34.3	5,921
Suwannee	1,055	0.18	90,402	15.5	5,851
Taylor	NA	NA	NA	NA	3,840
Union	210	0.09	7,577	3.3	2,317
Volusia	14,700	0.25	514,929	8.9	58,004
Wakulla	1,133	0.25	21,677	4.9	4,444
Walton	NA	NA	10,525	1.9	5,459
Washington	NA	NA	8,905	2.7	3,249
TOTAL	379,777	0.17	17,040,512	7.6	2,230,283

Source: Florida Department of Education, Office of Business and Education Alliances, 1998.

Volunteer activities in the Broward County School District include:

- assisting in the front office;
- working in the Meet the Masters program;
- working in the Just Say No program;
- chaperoning field trips;
- assisting in the media center;
- selling popcorn as part of fundraising efforts;
- landscaping school grounds;
- after-school tutoring for students with low grades;
- participating in school alumni associations;
- assisting in vision, hearing, and head lice health screenings;
- setting up school computer systems;
- assisting teachers with technology implementation;
- assisting in the reading lab; and
- assisting teachers in classroom.

Exhibit 7-10 shows the level of volunteerism districtwide for the past three years in the district. As the exhibit demonstrates:

- The total number of volunteers has risen by 7.8 percent over a three-year period and is currently at about one volunteer for every 10 students in the district.
- The number of female volunteers has risen steadily; however, the number of male volunteers has declined from a peak in 1996-97.
- Total volunteer hours have risen by 26.7 percent over a three-year period and is currently at about 45 hours per volunteer per year.

**EXHIBIT 7-10
SCHOOL VOLUNTEERISM TRENDS IN THE
BROWARD COUNTY SCHOOL DISTRICT**

CATEGORY	1995-96	1996-97	1997-98
Total Volunteers	23,887	24,936	25,910
Female Volunteers	19,025	19,894	20,975
Male Volunteers	4,862	5,042	4,935
Total Volunteer Hours	853,658	1,086,887	1,164,501

Source: Broward County School District, Volunteer Services Office, November 1998.

The Supervisor of Volunteer Services annually asks the schools to complete a Community Involvement Survey. The survey is conducted at the end of each school year and asks the schools to provide information on the number of volunteers at the school, the number of hours volunteered, the kinds of volunteer/partnership activities which took place during the year, and the level of partnership support.

Based on this survey, Exhibits 7-11 and 7-12 examine the level of volunteerism on a school-by-school basis. Exhibit 7-11 shows the number of volunteers in each age bracket for each school (data were not available for all schools), the total number of volunteers, and the ratio of volunteers to students. Exhibit 7-12 shows the number of “regular” volunteers (volunteers who “serve on a regularly scheduled basis”) at the schools and the total number of volunteer hours per student. As the exhibits show:

- Schools varied widely in the number of volunteers per student, from none to 0.65, with an average of 0.12 volunteers per student.
- Schools also varied widely in the number of volunteer hours. The highest number of hours per volunteer was 117.7, with a district average of 31.7 hours per volunteer. The highest number of volunteer hours per student was 13.0, with an average of 3.7 hours per student.

Volunteerism in the Broward County School District schools is fostered by the Supervisor of Volunteer Services within Community Relations Department. She is assisted by a secretary and, as needed, by others in the Community Relations Department. Each school has an appointed volunteer coordinator.

In reviewing volunteer logbooks at schools, MGT consultants found that school personnel may calculate volunteer hours very differently. Some schools count attending PTA coffees as volunteer time and some count regular PTA meetings while others do not. This confusion over what is a volunteer activity has obscured the ability to truly compare volunteer efforts among schools.

COMMENDATION

The Supervisor of Volunteer Services is commended for completing a thorough community involvement survey of the schools each year.

RECOMMENDATION

Recommendation 7-12:

Intensify volunteer recruiting efforts at all levels.

The Broward County School District is below the state average in school volunteerism and should make greater efforts to recruit volunteers, particularly male volunteers. If the Broward County School District can raise district volunteerism to a level equal to the state average, it will reap the benefit of an additional 568,000 hours annually. In order to intensify recruiting efforts, the district will need to identify the current barriers to increased volunteerism and will then need to develop strategies to overcome those barriers. As outlined in the implementation plan, the Supervisor of Volunteer Services should take the lead in this process.

**EXHIBIT 7-11
SCHOOL VOLUNTEERS**

SCHOOL	AGE OF VOLUNTEERS			TOTAL VOLUNTEERS	VOLUNTEERS/STUDENT
	UNDER 21	21 - 49	50 & OVER		
A. C. Perry Elementary	11	68	11	90	0.10
Apollo Middle	0	11	1	12	0.01
Atlantic West Elementary	5	110	48	163	0.18
Bair Middle	33	50	5	88	0.05
Banyan Elementary	52	109	8	169	0.16
Bayview Elementary	0	91	10	101	0.20
Bennett Elementary	15	30	6	51	0.09
Bethune Elementary	1	47	2	50	0.05
Boulevard Heights Elementary	1	94	1	96	0.10
Boyd Anderson High	0	1	0	1	0.00
Broadview Elementary	6	18	11	35	0.03
Broward Estates Elementary	8	167	22	197	0.23
Castle Hill Elementary	7	35	30	72	0.09
Castle Hill Annex Elementary	0	12	15	27	0.06
Central Park Elementary	10	313	22	345	0.30
Chapel Trail Elementary	16	269	16	301	0.19
Colbert Elementary	2	30	17	49	0.06
Collins Elementary	4	21	8	33	0.09
Cooper City Elementary	10	321	30	361	0.33
Country Hills Elementary	29	348	10	387	0.32
Country Isles Elementary	1	248	5	254	0.19
Cresthaven Elementary	4	76	16	96	0.13
Croissant Park Elementary	13	44	1	58	0.06
Crystal Lake Community Middle	27	10	3	40	0.02
Cypress Elementary	11	56	22	89	0.13
Dania Elementary	12	24	5	41	0.07
Davie Elementary	22	70	6	98	0.09
Deerfield Park Elementary	8	40	20	68	0.10
Eagle Point Elementary	0	195	2	197	0.11
Eagle Ridge Elementary	0	117	0	117	0.13
Ely High	116	97	9	222	0.09
Embassy Creek Elementary	6	479	27	512	0.47
Fairway Elementary	35	72	6	113	0.11
Flamingo Elementary	25	80	12	117	0.10
Flanagan High	3	60	6	69	0.02
Floranada Elementary	9	144	28	181	0.26
Forest Glen Middle	42	65	30	137	0.09
Forest Hills Elementary	7	147	6	160	0.15
Fort Lauderdale High	25	137	14	176	0.09
Griffin Elementary	10	178	0	188	0.23
H. D. Perry Middle	71	46	1	118	0.07
Harbordale Elementary	12	93	9	114	0.26
Hawkes Bluff Elementary	17	325	17	359	0.31
Hollywood Central Elementary	10	48	6	64	0.06
Hollywood Park Elementary	1	14	8	23	0.03
Horizon Elementary	0	70	10	80	0.09
Hunt Elementary	1	99	10	110	0.12
Indian Ridge Middle	0	116	21	137	0.08
Indian Trace Elementary	5	308	25	338	0.29

**EXHIBIT 7-11 (Continued)
SCHOOL VOLUNTEERS**

SCHOOL	AGE OF VOLUNTEERS			TOTAL VOLUNTEERS	VOLUNTEERS/STUDENT
	UNDER 21	21 – 49	50 & OVER		
J. P. Taravella High	0	6	19	25	0.01
Lake Forest Elementary	23	115	7	145	0.18
Larkdale Elementary	6	2	40	48	0.05
Lauderdale Lakes Middle	86	39	5	130	0.10
Lauderdale Manors Elementary	17	112	13	142	0.16
Lauderdale Middle	1	3	21	25	0.02
Lauderhill Paul Turner Elementary	11	46	8	65	0.07
Lloyd Estates Elementary	5	35	3	43	0.05
Maplewood Elementary	0	186	24	210	0.22
Markham Elementary	12	22	28	62	0.12
Martin Luther King Elementary	3	33	8	44	0.04
McArthur High	185	201	16	402	0.20
McNab Elementary	3	66	11	80	0.11
McNicol Middle	16	34	0	50	0.03
Meadowbrook Elementary	70	38	4	112	0.10
Mirror Lake Elementary	65	343	24	432	0.56
Morrow Elementary	8	156	8	172	0.21
New River Middle	48	61	9	118	0.06
Nob Hill Elementary	7	78	12	97	0.10
Norcrest Elementary	0	75	3	78	0.12
North Side Elementary	19	27	0	46	0.07
North Andrews Gardens Elementary	9	75	2	86	0.09
North Fork Elementary	5	27	2	34	0.05
North Lauderdale Elementary	39	20	9	68	0.06
Northeast High	136	15	3	154	0.09
Oakland Park Elementary	5	127	21	153	0.23
Oakridge Elementary	41	55	11	107	0.14
Olsen Middle	7	7	1	15	0.01
Orange Brook Elementary	2	79	14	95	0.13
Oriole Elementary	50	34	7	91	0.12
Palm Cove Elementary	0	145	5	150	0.13
Palmview Elementary	14	29	9	52	0.10
Panther Run Elementary	0	165	4	169	0.31
Park Ridge Elementary	22	65	2	89	0.11
Park Springs Elementary	4	297	6	307	0.34
Parkway Middle	2	106	8	116	0.07
Pasadena Lakes Elementary	0	62	15	77	0.09
Pembroke Lakes Elementary	4	119	26	149	0.15
Pembroke Pines Elementary	2	27	5	34	0.04
Peters Elementary	17	127	15	159	0.16
Pines Lakes Elementary	5	142	52	199	0.21
Pinewood Elementary	9	215	45	269	0.24
Pioneer Middle	3	69	4	76	0.05
Piper High	0	43	25	68	0.02
Plantation Park Elementary	4	107	0	111	0.17
Quiet Waters Elementary	3	147	19	169	0.17
Rickards Middle	4	10	2	16	0.01
Riverglades Elementary	1	310	4	315	0.30
Riverland Elementary	11	43	9	63	0.09

**EXHIBIT 7-11 (Continued)
SCHOOL VOLUNTEERS**

SCHOOL	AGE OF VOLUNTEERS			TOTAL VOLUNTEERS	VOLUNTEERS/ STUDENT
	UNDER 21	21 - 49	50 & OVER		
Riverside Elementary	3	214	23	240	0.23
Rock Island Elementary	14	61	9	84	0.14
Royal Palm Elementary	2	65	16	83	0.06
Sanders Park Elementary	11	31	7	49	0.07
Sandpiper Elementary	0	128	4	132	0.13
Sawgrass Elementary	2	109	4	115	0.13
Sawgrass Springs Middle	60	118	9	187	0.11
Sea Castle Elementary	2	102	22	126	0.10
Seminole Middle	2	53	2	57	0.04
Sheridan Hills Elementary	2	99	14	115	0.15
Sheridan Park Elementary	0	36	8	44	0.06
Silver Lakes Middle	371	50	11	432	0.27
Silver Palms Elementary	0	186	10	196	0.13
Silver Ridge Elementary	15	223	8	246	0.19
Silver Trail Middle	8	87	9	104	0.06
South Broward High	63	48	9	120	0.07
South Plantation High	189	114	26	329	0.14
Stephen Foster Elementary	10	43	6	59	0.09
Stirling Elementary	8	46	4	58	0.07
Stoneman Douglas High	0	92	6	98	0.03
Stranahan Middle	298	29	1	328	0.17
Sunland Park Elementary	16	40	9	65	0.10
Sunrise Middle	2	78	3	83	0.05
Sunshine Elementary	3	80	4	87	0.07
Tamarac Elementary	1	72	44	117	0.09
Tedder Elementary	20	22	18	60	0.07
Thurgood Marshall Elementary	47	90	18	155	0.18
Tradewinds Elementary	0	108	10	118	0.12
Tropical Elementary	93	397	18	508	0.65
Village Elementary	2	64	10	76	0.07
Virginia Shuman Young Elementary	1	235	14	250	0.28
Walker Elementary	3	69	10	82	0.08
Walter C. Young Middle	23	91	12	126	0.07
Watkins Elementary	6	48	6	60	0.07
Welleby Elementary	5	267	30	302	0.29
West Hollywood Elementary	24	90	3	117	0.15
Westchester Elementary	0	240	7	247	0.21
Western High	585	43	14	642	0.19
Westpine Middle	3	35	0	38	0.02
Westwood Heights Elementary	6	60	8	74	0.09
William Dandy Middle	0	42	6	48	0.03
Wilton Manors Elementary	11	67	17	95	0.12
Winston Park Elementary	16	95	15	126	0.12
TOTAL*	3,614	14,215	1,670	19,499	0.12

Source: Broward County School District, Annual Community Involvement Survey, 1998.

* Note: This total does not match the total shown in Exhibit 7-10 because not all schools completed a 1997-98 survey, and some schools that did complete a survey were not clearly identified in the results provided to MGT.

**EXHIBIT 7-12
REGULAR SCHOOL VOLUNTEERS AND TOTAL HOURS**

SCHOOL	NUMBER OF REGULAR VOLUNTEERS	TOTAL VOLUNTEER HOURS	HOURS/ VOLUNTEER	VOLUNTEER HOURS/ STUDENT
A. C. Perry Elementary	NA	1,948	21.6	2.1
Apollo Middle	6	109	9.1	0.1
Atlantic West Elementary	10	4,568	28.0	5.0
Bair Middle	47	3,702	42.1	2.1
Banyan Elementary	47	3,883	23.0	3.6
Bayview Elementary	54	4,739	46.9	9.3
Bennett Elementary	20	450	8.8	0.8
Bethune Elementary	2	2,000	40.0	1.8
Boulevard Heights Elementary	50	3,441	35.8	3.7
Boyd Anderson High	1		-	
Broadview Elementary	37	2,430	69.4	2.4
Broward Estates Elementary	130	3,756	19.1	4.4
Castle Hill Elementary	2	2,050	28.5	2.7
Castle Hill Annex Elementary	200	1,612	59.7	3.4
Central Park Elementary	315	8,597	24.9	7.5
Chapel Trail Elementary	95	17,916	59.5	11.2
Colbert Elementary	25	1,870	38.2	2.2
Collins Elementary	17	1,058	32.1	2.9
Cooper City Elementary	44	8,092	22.4	7.4
Country Hills Elementary	98	13,695	35.4	11.2
Country Isles Elementary	58	4,000	15.7	3.0
Cresthaven Elementary	8	3,567	37.2	4.9
Croissant Park Elementary	40	2,250	38.8	2.2
Crystal Lake Community Middle	20	1,765	44.1	1.1
Cypress Elementary	11	1,770	19.9	2.5
Dania Elementary	8	1,216	29.7	2.0
Davie Elementary	17	4,600	46.9	4.1
Deerfield Park Elementary	9	3,200	47.1	4.5
Eagle Point Elementary	44	12,089	61.4	6.6
Eagle Ridge Elementary	NA	2,428	20.8	2.7
Ely High	62	9,929	44.7	3.9
Embassy Creek Elementary	48	9,757	19.1	9.0
Fairway Elementary	7	2,000	17.7	1.9
Flamingo Elementary	NA	4,000	34.2	3.4
Flanagan High	157	1,795	26.0	0.5
Floranada Elementary	150		-	0.0
Forest Glen Middle	NA	5,000	36.5	3.3
Forest Hills Elementary	67		-	0.0
Fort Lauderdale High	25	1,200	6.8	0.6
Griffin Elementary	82	13,272	70.6	16.0
H. D. Perry Middle	50	7,121	60.3	4.1
Harbordale Elementary	3	5,000	43.9	11.3
Hawkes Bluff Elementary	3	15,050	41.9	13.0
Hollywood Central Elementary	7	2,633	41.1	2.5
Hollywood Park Elementary	1	2,457	106.8	3.7
Horizon Elementary	75	3,516	44.0	3.8
Hunt Elementary	10	2,894	26.3	3.3
Indian Ridge Middle	10	4,332	31.6	2.5
Indian Trace Elementary	100	10,575	31.3	9.1

**EXHIBIT 7-12 (Continued)
REGULAR SCHOOL VOLUNTEERS AND TOTAL HOURS**

SCHOOL	NUMBER OF REGULAR VOLUNTEERS	TOTAL VOLUNTEER HOURS	HOURS/VOLUNTEER	VOLUNTEER HOURS/STUDENT
J. P. Taravella High	61	2,942	117.7	1.1
Lake Forest Elementary	130	3,165	21.8	3.9
Larkdale Elementary	89	328	6.8	0.3
Lauderdale Lakes Middle	NA	6,536	50.3	5.2
Lauderdale Manors Elementary	NA	5,438	38.3	6.0
Lauderdale Middle	50		-	0.0
Lauderhill Paul Turner Elementary	35		-	0.0
Lloyd Estates Elementary	34	1,525	35.5	1.9
Maplewood Elementary	NA	9,428	44.9	10.0
Markham Elementary	38	3,052	49.2	5.8
Martin Luther King Elementary	8	1,286	29.2	1.2
McArthur High	4	20,867	51.9	10.5
McNab Elementary	39	3,508	43.8	4.8
McNicol Middle		1,071	21.4	0.7
Meadowbrook Elementary	175	2,500	22.3	2.3
Mirror Lake Elementary		4,586	10.6	5.9
Morrow Elementary	10	2,401	14.0	2.9
New River Middle	112	708	6.0	0.4
Nob Hill Elementary	21	3,500	36.1	3.8
Norcrest Elementary	224	3,129	40.1	4.7
North Side Elementary	126		-	0.0
North Andrews Gardens Elementary	14	2,804	32.6	2.8
North Fork Elementary	50	826	24.3	1.2
North Lauderdale Elementary	100	4,453	65.5	3.8
Northeast High	67	8,548	55.5	5.0
Oakland Park Elementary	57	2,272	14.8	3.4
Oakridge Elementary	568	4,237	39.6	5.7
Olsen Middle	165	485	32.3	0.3
Orange Brook Elementary	24	2,450	25.8	3.3
Oriole Elementary	64	1,395	15.3	1.8
Palm Cove Elementary	16	6,107	40.7	5.4
Palmview Elementary	27	1,253	24.1	2.3
Panther Run Elementary		5,289	31.3	9.8
Park Ridge Elementary	74	600	6.7	0.7
Park Springs Elementary	17	8,468	27.6	9.3
Parkway Middle	5	4,000	34.5	2.3
Pasadena Lakes Elementary	45	5,945	77.2	6.8
Pembroke Lakes Elementary	60	12,467	83.7	12.4
Pembroke Pines Elementary		2,163	63.6	2.4
Peters Elementary	55	4,547	28.6	4.5
Pines Lakes Elementary	43	5,246	26.4	5.4
Pinewood Elementary	125	150	0.6	0.1
Pioneer Middle	43	1,559	20.5	1.0
Piper High	9	6,888	101.3	2.4
Plantation Park Elementary	120	5,000	45.0	7.8
Quiet Waters Elementary	170	2,065	12.2	2.1
Rickards Middle	37		-	0.0
Riverglades Elementary		8,363	26.5	7.9
Riverland Elementary	5	4,050	64.3	5.6
Riverside Elementary	11	10,852	45.2	10.5
Rock Island Elementary	25	929	11.1	1.5

**EXHIBIT 7-12 (Continued)
REGULAR SCHOOL VOLUNTEERS AND TOTAL HOURS**

SCHOOL	NUMBER OF REGULAR VOLUNTEERS	TOTAL VOLUNTEER HOURS	HOURS/ VOLUNTEER	VOLUNTEER HOURS/ STUDENT
Royal Palm Elementary	11	5,723	69.0	3.8
Sanders Park Elementary	39	2,497	50.9	3.4
Sandpiper Elementary	9	4,157	31.5	4.1
Sawgrass Elementary	87	2,000	17.4	2.2
Sawgrass Springs Middle	23	4,200	22.5	2.6
Sea Castle Elementary	200	5,000	39.7	4.2
Seminole Middle	8	2,770	48.6	2.1
Sheridan Hills Elementary	264	4,351	37.8	5.5
Sheridan Park Elementary	78	2,884	65.5	4.1
Silver Lakes Middle	65	2,214	5.1	1.4
Silver Palms Elementary	4	8,779	44.8	5.7
Silver Ridge Elementary	181	10,776	43.8	8.1
Silver Trail Middle	100	3,942	37.9	2.1
South Broward High	30	347	2.9	0.2
South Plantation High		22,519	68.4	9.4
Stephen Foster Elementary	140	3,000	50.8	4.4
Stirling Elementary	60	3,022	52.1	3.6
Stoneman Douglas High	15	1,600	16.3	0.5
Stranahan Middle	35	18,942	57.8	9.5
Sunland Park Elementary	2	1,700	26.2	2.6
Sunrise Middle	5	790	9.5	0.5
Sunshine Elementary	130	2,787	32.0	2.4
Tamarac Elementary	190		-	0.0
Tedder Elementary		3,480	58.0	4.1
Thurgood Marshall Elementary	8	36	0.2	0.0
Tradewinds Elementary		6,184	52.4	6.3
Tropical Elementary		2,015	4.0	2.6
Village Elementary	70	3,512	46.2	3.2
Virginia Shuman Young Elementary	20	3,350	13.4	3.7
Walker Elementary	100	2,007	24.5	2.0
Walter C. Young Middle	45	3,912	31.0	2.2
Watkins Elementary			-	0.0
Welleby Elementary	120	4,000	13.2	3.9
West Hollywood Elementary	39	1,600	13.7	2.1
Westchester Elementary		8,500	34.4	7.1
Western High		31,840	49.6	9.5
Westpine Middle	25		-	0.0
Westwood Heights Elementary	35	1,314	17.8	1.6
William Dandy Middle	39	807	16.8	0.5
Wilton Manors Elementary		3,576	37.6	4.7
Winston Park Elementary	16	4,500	35.7	4.2
TOTAL		617,339	31.7	3.7

Source: Broward County School District, Annual Community Involvement Survey, 1998.

IMPLEMENTATION STRATEGIES AND TIMELINE

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| 1. The Supervisor of Volunteer Services should review five years of previous community involvement surveys of the district's schools and build an historical analysis of volunteerism in the Broward County School District. | November 1999 |
| 2. The Supervisor of Volunteer Services should meet with all of the school volunteer coordinators to brainstorm new methods for recruiting volunteers. | December 1999 |
| 3. The Supervisor of Volunteer Services should disseminate the brainstorm ideas through the district's looping process and design an action plan to raise the level of volunteerism in the district. | February 2000 |
| 4. The Supervisor of Volunteer Services should implement the resulting action plan. | April 2000 |
| 5. The Supervisor of Volunteer Services should assess the impact of the action plan. | April 2001 |

FISCAL IMPACT

There is no fiscal impact associated with this recommendation.

RECOMMENDATION

Recommendation 7-13:

Define clearly what schools can count as volunteer hours.

Consistency should be established in the way in which schools record and report volunteer hours. The only guidance that the Florida Department of Education provides in this matter is that volunteer hours are those which "support instruction." The Volunteer Services Coordinator at Florida Department of Education indicated to MGT that Attending PTA meetings should not be considered as supporting instruction. Operational definitions must be developed in Broward County and all schools should comply with these definitions in reporting volunteer hours. It is inconsistent for one school to count time as a volunteer activity that others do not. Moreover, inaccurate accounting of volunteer hours distorts the true picture of volunteerism in the district.

IMPLEMENTATION STRATEGIES AND TIMELINE

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| 1. The Supervisor of Volunteer Services should issue a memorandum to all school volunteer coordinators clearly defining what can be considered a volunteer activity and what cannot. | June 1999 |
|--|-----------|

FISCAL IMPACT

There is no fiscal impact associated with this recommendation.

FINDING

According to the Florida Department of Business and Education Alliances, intergenerational programs in school districts throughout the state include:

- seniors rocking and reading to primary students;
- students writing letters and journals to home bound seniors;
- high school and middle school classes learning the political process with the aid of seniors to promote legislation for youth and the elderly;
- seniors serving as mentors and tutors; and
- retired military personnel working with high school and middle school students as mentors and developing peer tutoring programs.

(Source: Office of Business and Education Alliances Website, November 1998)

In 1997-98, seniors (those age 50 and over) comprised only 8.4 percent of the Broward volunteer population, while seniors, according to the 1990 census, comprised 34.0 percent of the Broward County population. In interviews with several school administrators, they noted that they are not getting as many retirees as they think they could or should get, given their local demographics. Clearly, the school district has an untapped resource in the large percentage of senior citizens in the region.

Volunteer Services does have a relationship with RSVP, the Retired Senior Volunteer Program. In 1996-97, the district had 461 RSVP volunteers.

RECOMMENDATION

Recommendation 7-14:

Intensify recruitment and training of senior volunteers.

The Volunteer Services Supervisor should develop a special outreach program to draw in the senior citizen population in Broward County. At over one-third of the local population, seniors represent a substantial pool of potential volunteers.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Volunteer Services Supervisor should explore the possibility of joining statewide and national intergenerational programs that perform outreach to older citizens in Broward County in order to increase the volunteer pool in the schools. June 1999

2. The Volunteer Services Supervisor should assist each school volunteer coordinator in identifying senior groups and organizations such as RSVP, AARP, Foster Grandparents, nursing homes, church groups, local senior centers, and other senior organizations in each school's immediate community area. Volunteers should be recruited from these groups. August 1999

3. The Volunteer Services Supervisor should explore the possibility of securing a grant from the Florida Department of Education or Department of Elder Affairs for intensifying the recruitment of older volunteers. November 1999

FISCAL IMPACT

There is no fiscal impact associated with this recommendation.

FINDING

The district has a procedure of distributing color-coded name badges for volunteers to wear with "permanently affixed names." Each school must enforce the wearing of name badges. MGT found in two schools that the appropriate name badge was being used, but left completely unsecured, thus defeating their purpose. In three other schools, stick-on name tags were left on the front counter and volunteers could write in their name on one each time they came in. This practice creates security problems and prevents the recognition of volunteers because they have their own name badge.

RECOMMENDATION

Recommendation 7-15:

Enforce the current district procedure of using tamper-proof, readily identifiable name badges for volunteers.

The use of such name badges enhances the security of each school. Moreover, it elevates the status of volunteers and, since the central office already provides them to schools, is a simple step for schools to take.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Volunteer Services Supervisor should issue a memorandum with the Superintendent's signature emphasizing the requirement to use tamper-proof identifiable name badges. May 1999

2. The Volunteer Services Supervisor should conduct periodic inspections of selected schools to ensure compliance. September 1999

FISCAL IMPACT

There is no cost associated with this recommendation.

FINDING

The Volunteer Services Supervisor has a section on the Broward Website to solicit volunteers. Under the title “Help Make Dreams Come True for Broward County Students,” the section lists the following nine types of volunteers the Broward County School District is seeking:

- career shadowing/internship volunteers – showing students jobs and careers available in the county;
- HOSTS (Help One Student to Succeed) volunteers – helping a student one-on-one to learn to read;
- youth mentoring program volunteers – being a role model and friend to a selected student;
- classroom volunteers – assisting teachers in classroom activities;
- ‘I’m Thumbody’ volunteers – leading second grade students in self-esteem building exercises;
- Meet the Masters volunteers – teaching about the works of famous artists in elementary classrooms;
- community resource volunteers – speaking to classes about the community in which they live and historic events in the community;
- listener volunteers – listening to students to help them find solutions to their problems and increase their self-esteem; and
- special activity volunteers – assisting with such activities as Special Olympics, curriculum fairs, and student productions.

If a community member wishes to volunteer, they are directed to call a number at the central office that connects directly to the Volunteer Services Supervisor.

COMMENDATION

The Broward County School District is commended for using its Website to recruit volunteers.

7.4.2 Youth Mentoring

The Broward County School District has an active Youth Mentoring Program. In 1997-98, the program had over 600 mentors volunteering at 60 schools within the district. Several mentors have been working in the program since its inception eight years ago.

Exhibit 7-13 shows the breakdown in school-level for mentors in 1998-99. These figures show the number of mentors that completed the cycle of recruitment, fingerprinting, and placement in program schools. Currently, the program is on track to exceed last year’s final total of over 600.

**EXHIBIT 7-13
YOUTH MENTORS IN THE
BROWARD COUNTY SCHOOL DISTRICT
1998-99 TO DATE**

SCHOOL LEVEL	NUMBER OF MENTORS
Elementary	79
Middle	103
High	87
Centers	3
Tutors	21
Miscellaneous	14
TOTAL	309

Source: Broward County School District, Youth Mentoring Program, December 1998.

Students in the program are selected on the basis of attendance, grades, poor behavior, and general attitude. The program relies on schools to select from among their students for the admission into the program.

Volunteers are found through presentations to various business organizations and through word of mouth. Beyond the volunteer application that all volunteers are required to complete, the district fingerprints all mentors. Selected mentors are required to sign a commitment pledge for one year and attend an initial two-hour training session. Youth mentors also have the opportunity to attend a series of presentations from experts on various topics throughout the year. Mentors are rescreened each year, and mentors commit to working with a student for at least one hour per week. All mentoring is done on the school campus during school hours.

Youth mentors are recognized at an annual dinner celebration near the end of the school year and 'Mentor of the Year' awards are given. Mentors are also annually recognized at a Florida Marlins baseball game.

The success of the program is measured through surveys of the students and the mentors throughout the year. One survey found that 81 percent of the students in the program are now thinking more about their future. An outside evaluator also does a year-end study annually, which includes focus groups with the students. One of the biggest success stories of the program is a student who has raised his GPA from 0.8 to 3.2 in two years and credits the program with his dramatic improvement.

All funding for the Youth Mentoring Program comes from the Safe and Drug Free Schools federal grant, which is renewable annually. The Youth Mentoring Program is run by two facilitators, who actually timeshare a 37.5 hour per week position. The facilitators are assisted by a full-time secretary whose salary is partially funded by the federal grant and partially funded by a private foundation.

The district is in the process of changing the grant-funded positions to district-funded positions because much of what the program does and will do is beyond the scope of

the current grant, which requires a linkage of every activity to drug and violence reduction. The facilitators anticipate that the change will take place in January 1999.

COMMENDATION

The Broward County School District is commended for implementing a successful Youth Mentor program and for funding the program through a federal grant.

RECOMMENDATION

Recommendation 7-16:

Find other grant funds to support the Youth Mentoring facilitator position.

There are numerous grant opportunities available to support the current and future expansion objectives of the Youth Mentoring Program. There also would likely be significant business interest in potentially supporting the program through contributions. Funding the position with district funds is unnecessary.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|---------------|
| 1. The Youth Mentoring facilitators should seek and identify additional sources of federal funding. | August 1999 |
| 2. The Youth Mentoring facilitators, in consultation with the Director of Community Relations, should determine which source of federal funds will best meet the objectives of the department. | October 1999 |
| 3. The Youth Mentoring facilitators should apply for federal funding for their 1.0 FTE position. | November 1999 |
| 4. If federal funds are not secured, the Youth Mentoring facilitators should work with the Director of Partnerships to identify potential corporate supporters of the program. | June 2000 |
| 5. The Youth Mentoring facilitator position should be funded from a source other than the district. | August 2000 |

FISCAL IMPACT

It will likely take a year to secure additional outside funding for this position. This recommendation could save the district funds if new sources of funding, whether federal or private, are found.

7.5 Broward Education Foundation

Traditionally, business involvement in schools was limited to such activities as adopting a school, donating equipment, and providing representatives for Career Day. Nationally, the level of corporate giving to public schools has been, and continues to be, a small fraction of the giving to postsecondary institutions. Corporate giving to public schools in 1990 was less than \$250 million --- equal to many single donations to a university or college. Most universities and colleges have a “development office,” charged with raising and securing funds from alumni, businesses, private donors, and philanthropies.

Florida statutes allow public school boards to create educational foundations as private, non-profit “direct support organizations” to raise funds. A direct support organization is defined in statute as an entity which “is organized and operated exclusively to receive, hold, invest, and administer property and make expenditures to or for the benefit of public pre-kindergarten through 12th grade education ... programs.”

The function of these education foundations is to increase the level of corporate giving and to leverage supplemental funding for the schools. In 1996, the Florida Department of Education allotted \$500,000 statewide in matching funds to 59 educational foundations, for an average of \$8,621 per district with a foundation (not all counties have one). The foundations leverage this small amount of money as developmental “seed money” to reach out and convince the private sector to give meaningful monetary donations to schools.

CURRENT SITUATION

The Broward Education Foundation is a non-profit, 501(c)3 organization created in 1983. The mission of the Foundation is:

...to augment educational resources which will assist Broward Public School students and teachers to reach their maximum potential and to establish and build an endowment to ensure continuous financial strength for educational enhancement.

To achieve this goal, the Foundation runs numerous programs:

- **Annenberg** – The Foundation received a grant in 1997 from the Annenberg Foundation to explore expansion and collaboration of existing programs.
- **Black Male College Explorers** – The Foundation raises funds and awards scholarships to several students each year to a summer program at Florida A & M University.
- **Broward Advisors for Continuing Education (BRACE) Scholarship Fund** (started in 1988) – The Foundation awards last dollar scholarships to qualifying students who have exhausted all avenues of financial aid and still fall short of their monetary need to

pursue a postsecondary education. Scholarships totaling over \$377,200 were given to 220 graduates in 1998.

- **Citibank Success Fund** (started in 1989) – Under this program, the Foundation uses funds from Citibank to fund mini-grants for innovative dropout prevention programs to teachers, counselors, and administrators. In 1996-97, the Foundation awarded 39 such mini-grants totaling \$30,000.
- **Florida Future Educators of America (FFEA)** – The Foundation awards scholarships to graduates who wish to become future educators. In 1996-97, the Foundation awarded 24 such scholarships totaling \$26,750.
- **IMPACT II** – IMPACT II is a national non-for-profit organization founded in 1979 to recognize and reward innovative teachers. It provides teachers with grant money to package and export their own successfully implemented teaching innovations.
- **Jayne Coraggio Scholarship Fund** – The Foundation awards one \$1,000 scholarship each year under this program.
- **Lynn Wills Memorial Scholarship Fund** (started in 1998) – The Foundation awards one scholarship each year under this program.
- **Marlene Methelis Scholarship Fund** – The Foundation administers a scholarship fund for students interested in pursuing post-secondary education in art.
- **Mini-grants** – The Foundation funds teacher mini-grants for innovative classroom ideas. Grant amounts average \$500 per award.
- **Project Opportunity Scholarship Fund** – The Foundation awards scholarships to public school paraprofessionals and support services personnel who want to become future educators.
- **Reusable Resource Center/Ocean Bank Teacher Idea Store** – The Foundation has just begun a program to enable teachers to receive free instructional and enrichment materials that would otherwise be thrown away by area businesses.
- **Sherman “Red” and Evelyn Crise Scholarship Fund** – The Foundation administers a scholarship fund for student with demonstrated skills in business and/or entrepreneurial areas.
- **Take Stock in Children** (started in Broward in 1996) – This is a statewide initiative that awards scholarships and a volunteer mentor to at-risk students. Children are selected for the program between the 3rd and 9th grades. Students must have financial need, maintain

satisfactory grades, demonstrate good behavior, have outstanding school attendance, and remain drug- and crime-free.

Several of the larger programs of the Broward Education Foundation are presented below.

Student Scholarships

The Foundation awards scholarships through numerous programs. Awards in 1997-98 included:

- BRACE – scholarships totaling \$377,200 awarded to 220 graduates (an increase of more than \$100,000 over 1996-97);
- Take Stock in Children – 88 middle school students at 12 schools were selected to participate in the program (the program is too new in Broward to have any graduates yet);
- Florida Future Educators of America – scholarships totaling \$23,250 awarded to 23 graduates (an increase of more than \$4,000 over 1996-97);
- Project Opportunity Scholarship Fund – scholarships totaling more than \$10,000 awarded to 46 graduates (an increase of more than \$2,000 over 1996-97); and
- Lynn Wills Memorial Scholarship Fund – the first scholarship awarded was under this program this year.

Teacher Mini-Grants

The purpose of the mini-grant fund is to reward teachers and school-based administrators by funding their creative and innovative projects. These projects should:

...enrich the standard curriculum and explore new alternatives to traditional methods of learning. Grant applications should address priority needs at a school site for which funding is not available through state, federal, or district revenues. Priority is given to projects designed to motivate students and which create eagerness for students to learn.

Grants average \$500 per project. In 1997-98, the Foundation received more than 170 mini-grant applications – 41 mini-grants were funded, with a total of \$22,420 in award money. Mini-grant recipients included such projects as:

- **Project Relax** at Sandpiper Elementary School – Fourth grade students are introduced to music, yoga, and relaxation breathing decrease anxieties and increase performance;

- **Mini-Grants for Mini-People** at Sawgrass Elementary School – Students develop and demonstrate their writing skills by to earn mini-grants ranging from \$10 to \$25 for creative and innovative projects they would like to do at the school;
- **Good News Travels Fast** at New River Middle School – Students produce, develop, and present a multimedia presentation to students matriculating from feeder elementary schools;
- **Bengal Shopping Mall** at Pompano Beach Middle School – Student develop a business plan for an imaginary store in a mall; and
- **Child Care Connection** at McArthur High School – Students with an interest in working with children are placed at daycare centers to work under the supervision of center staff.

Through the Citibank Success Fund, 39 mini-grants were awarded, totaling \$30,000 in 1997-98. Some of the programs awarded mini-grants include:

- **Tire Garden** at North Fork Elementary – Students build a garden with recycled tires and organic fertilizer generated through the cafeteria. They germinate seeds in the science lab and the harvested vegetables are donated to the local community center;
- **When I Grow Up** at Palmview Elementary School – Preschool students with disabilities and low socio-economic status learn about careers and their communities. They participate in monthly field trips and produce a picture book of their experiences;
- **Garden of Peace** at New River Middle School – At risk students learn alternative ways of dealing with stress and conflict through gardening and the creation of a peaceful environment;
- **How to Become a Productive Employee** at New River Middle School – At risk eighth grade students follow a curriculum designed to teach skills needed to succeed in society. Students choose an occupation through job descriptions and the education and experience needed for the job. They also calculate monthly income and create a budget; and
- **Real World Science** at Marjory Stoneman Douglas High School – Dropout prevention students participate in coursework not centered around a textbook but around problem solving and real world applications of science concepts.

Reusable Resource Center/Ocean Bank Teacher Idea Store

The Broward Education Foundation collects materials from industries that might otherwise be delivered directly to landfills, such as:

- overruns
- punchouts
- rejects
- leftovers

Teachers are able to visit the Idea Store and choose from among such items as:

- mylar
- contact paper
- styrofoam
- fabric and yarn
- plastic parts
- colored tubes
- general office supplies
- out of model pager parts
- out of use stationery
- out of use bank deposit forms and ledgers

The store is open from 2:00 to 5:00 pm, twice a month, and teachers can take any materials they wish for free, up to two full shopping bags. The store is housed in a strip mall near the Fort Lauderdale High School campus. Broward has partnered heavily with Miami-Dade County in launching this program. As this program develops, it is anticipated that the Foundation will need a full-time employee to solicit materials and two full-time employees to manage the store.

In addition to these programs, the Foundation has fiduciary responsibilities for the following programs, including investments, disbursements, and monitoring:

- Academy/Center for Excellence
- Athletic Programs
- Awards for Excellence
- Broward County Academy of Finance
- Broward County Academy of Travel and Tourism
- Broward Days Tallahassee
- Eunice Brown Memorial Fund
- Alyce Culpepper Journalism Scholarship Foundation
- Dropout Prevention Program
- Education Technology Services
- Everglades Elementary Fund
- Charles Ellerin Scholarship
- Gator Run Elementary Foundation
- Homebound Scholarship Program
- Home Depot Run
- Gerri Intrasco Scholarship
- JC Penney Golden Rule Award
- Lauderdale Lakes Middle School Foundation
- Barbara Lazear Scholarship
- McFatter Vocational School Foundation
- Net Day

- Nova Blanche Forman Foundation
- Nutcracker Ballet Program
- Old Dillard Foundation Fund
- Alice Perlmutter Scholarship
- Riverland Elementary Fund
- Steven Roy Schacknow Memorial Fund
- Schools of Excellence Conference
- Special Projects Department
- Superintendent's Partnership Recognition Dinner
- Mary Ann Taylor Scholarship Fund
- Teacher of the Year
- Technology Recycling Grant Project
- Volunteer Services
- Western High School Foundation
- Rose Williams Scholarship Fund
- World of Baseball
- Youth Mentoring Programs

FINDING

To meet the financial needs of these programs, the Foundation receives funding from a number of sources:

- contributions, both in-kind and financial;
- revenues from 'education' license plates sales in Broward County;
- employee payroll deduction; and
- interest on the endowment.

The endowment fund was established as a goal by the Foundation Board in 1996. The Foundation hopes to grow the fund over the next 10 years. As of June 30, 1997, the Foundation had \$48,662 in endowment funds.

Of its sources of income, the Foundation received the most revenue from contributions --- over \$1.3 million. In 1997-98, the Foundation had 11 Platinum contributors --- organizations that gave \$20,000 or more in a single year. The Foundation also had seven Gold Star contributors --- organizations that gave \$10,000 or more.

In comparison to the Hillsborough County School District Education Foundation, the Broward Education Foundation is somewhat smaller. Hillsborough received over \$3 million in donations in 1995-96, while Broward has yet to approach this amount three years later.

The Foundation is run by a Board of Directors with an Executive Committee of nine, a regular Board of 26, and 14 ex-officio members. Members of the Board represent the major industries in Broward County, as well as its higher education institutions, media outlets, and members of the central office administration. Each is elected for three-year terms by the Board. Meetings are held quarterly and the Executive Committee meets monthly.

The Foundation is administrated by a Director (assisted by an office manager), a program coordinator, a student advocate, a clerk/typist (all full-time) and a part-time bookkeeper. The director and the office manager positions are funded by the district; all others are funded by the Foundation.

RECOMMENDATION

Recommendation 7-17:

Require all Foundation positions to be Foundation funded within five years.

The Foundation is large enough that it can support the salaries of the two positions currently funded by the district – the Director of the Foundation and the office manager.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-----------|
| 1. The Superintendent should inform the Education Foundation that the district will no longer fund the two positions starting in the 2001-02 school year. | June 1999 |
| 2. The Foundation should begin funding all of the positions in its organization. | July 2001 |

FISCAL IMPACT

MGT estimates that the current cost to the district of the two positions is \$146,300 per year including benefits. The fiscal impact on the Foundation will be minimal if the continuing endowment capital campaign is successful.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Fund Education Foundation Positions through the Foundation	\$0	\$0	\$146,300	\$146,300	\$146,300

RECOMMENDATION

Recommendation 7-18:

Require the Foundation to maintain a dotted line reporting relationship to the Director of Community Relations.

While the Foundation should maintain a level of independence from the district, the Foundation and the Community Relations Department both interact heavily with many of the same members of the community. Therefore, it is in the best interest of the district to foster close communication between the two.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Superintendent and the Board of Directors of the Education Foundation should agree on the dotted line reporting relationship. | August 1999 |
| 2. The Director of the Education Foundation should be included in all actions as a member of the Department of Community Relations. | August 1999 |

FISCAL IMPACT

There is no cost associated with this recommendation.

RECOMMENDATION

Recommendation 7-19:

Intensify endowment efforts.

The Education Foundation will be able to operate on a much larger scale once it is endowed to a significant degree. Securing and growing the endowment fund should be the top priority of the Director of the Foundation for the next five years.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-----------|
| 1. The Director of the Foundation should make a presentation to the School Board on the need for an endowment and should seek their assistance in developing an endowment base. | July 1999 |
| 2. The Director of the Foundation should identify and meet with as many potential endowment contributors as possible. | July 2000 |
| 3. The Director of the Foundation should solicit contributions from major philanthropies. | July 2001 |

FISCAL IMPACT

There is no cost associated with this recommendation.

7.6 Business and Municipal Partnerships

7.6.1 Business Partnership

Florida legislation addresses ties between public schools and the private sector in the "Florida Private Sector and Education Partnership Act" (Section 229.602, F.S.). This Act recognizes the benefits to teachers, schools, and student from the support,

recognition, and expertise provided by the business community as well as the benefits to the business community by enhancing its image and improving its pool of potential employees. The legislation states that "local communities with strong support from the business community have better educational systems, contributing to a better quality of life, greater community stability, and a healthier economic climate."

Ideally, a business partnership is more than a check given annually to a school. Business leaders and employees have valuable, real-life experiences to share. They also can make time to spend with students, something that is often more valuable than money. A good business partnership is an on-going relationship between a business and a school or group of schools that changes over time to meet the new challenges the students face. It is also a two-way relationship – the business gains recognition for its efforts, provides a fulfilling volunteer option to its employees, and has the opportunity to provide input into the kinds of skills it would like to see its future potential employees learning in school.

CURRENT SITUATION

In the Broward County School District, two kinds of business partnerships are defined:

- Systemic Partnerships – these are between typically large corporations and the entire school district and are generally handled centrally (although the Partners in Education Program handles some); and
- School Partnerships – these are between typically medium and small corporations and individual schools or a small group of schools in the district and are handled by Partners in Education.

Each is described separately below. Civic partnerships are considered in the final subsection.

Systemic Partnerships

Of the current 1,398 partnerships in Broward, approximately 150 are considered systemic partnerships. Systemic partnerships are countywide – the business partners with the district as a whole and either provides funds or assistance through the central office or provides funds or assistance to most of the schools in the district. All systemic partnerships must be approved by the Board. Current partnerships include:

- Academy Publishing, Inc.
- Apple Computer Corporation
- Boca Publishing, Inc.
- Brain Injury Association of Florida, Inc.
- Broward Community College (BCC)
- Broward County Fair
- Broward County Library Foundation
- Broward County Office of Environmental Services
- Broward Soil and Water Conservation District

- Communities in Schools of Broward County, Inc.
- Co-NECT
- Fashion Mall at Plantation (The)
- Florida Academy of Professional Mediators
- Florida Atlantic University (FAU)
- Florida International University
- Florida Panthers (The)
- Florida Power and Light
- IntelliQuest International, Inc.
- International Game and Fish Association
- Jewish Women International
- Keiser College
- Lens Crafters Foundation
- McKinley Financial Services, Inc.
- Mental Health Association of Broward County (The)
- Miami Dolphins Football Team
- Miami HEAT (The)
- Mount Bethel Human Services Corporation, Inc.
- New American Schools Development Corporation
- North Broward Hospital District
- Nova Southeastern University
- Old Dillard Foundation
- Paxson Communications Corporation
- Siemens Corporation
- South Florida Business Journal
- Sunshine Health Center, Inc.
- Target Stores
- Transition Project (The)
- University of Florida Cooperative Extension Service
- Urban League of Broward County
- Whitbread Race Americas, Inc.

The partnerships include activities such as:

- Florida Power and Light, begun in 1994 – provides district facilities department staff with guidelines for school construction; the district has received more than \$500,000 in energy efficiency incentive payments, earned through the purchase of energy equipment that qualified for rebates;
- Nova Southeastern University – provides school-based professional development for pre-service and in-service programs;
- IntelliQuest International – provides classroom teachers and students with opportunities to participate in classroom-oriented educational contests; and
- Mount Bethel Human Services Corporation, begun in 1993 – provides outreach and academic remediation services to selected

Broward schools – works with students and their families to address the issues of juvenile crime, dropout prevention, and family dysfunction.

In reviewing the database of systemic partnerships, MGT found numerous partnerships listed with local municipal entities, as well as partnerships with non-profit associations and partnerships that clearly do not benefit the entire school system, but only one or two schools.

Systemic partnerships are managed by Director of Partnerships, assisted by a Partnerships specialist and a secretary.

School Partnerships

School partnerships in the Broward County School District are handled through Partners in Education, a non-profit organization. The mission of Partners in Education is to:

...create and develop partnerships between businesses and community organization with Broward County School District to influence the success of teaching and learning for our students, and to facilitate business and school communications.

Partners in Education (PIE) was founded in 1983 as a project of the Junior League and the Chamber of Commerce as a way of partnering businesses with schools. It was initially funded equally by the Junior League, the Chamber, and the school district. Since then, it has evolved into a 501(c)3 organization with a Board of Directors composed of:

- two representatives from the Junior League;
- one representative of the Superintendent;
- three principals, one from each school level; and
- 14 other business and community leaders, although this number may fluctuate.

Currently, members include representatives from companies such as: First Union National Bank, Arthur Andersen, Citibank, Motorola, Home Depot, Holland & Knight, Humana, and Barnett Bank. Members serve for three year terms, except for Junior League representatives who serve for two year terms. All can serve for multiple terms. Election to the PIE Board requires nomination by a current member of the Board and then a simple majority vote of approval from the Board.

Businesses can participate in a number of programs under the PIE umbrella, including:

- mentoring or tutoring a student one-on-one for one hour each week;

- assisting in School to Career transition, a program where businesses help bridge the gap between theoretical learning and practical application by helping student explore and establish career goals, demonstrating examples of workplace application of study subjects, providing field trips, shadowing experiences, or internships, and keeping teachers up-to-date on industry needs;
- providing instructional support and enrichment by providing teachers with in-service training, helping teachers to develop structure classroom activities, providing guest speakers, or helping a classroom set up a mock business;
- joining the School Improvement Team (SIT); and
- providing funds for particular school needs.

Exhibit 7-14 shows number of the current PIE business partners for each Broward County school. As the exhibit shows, the number of business partners varies a great deal among the schools – some elementary schools have as many as 20 business partners, some as few as one or none at all. Elementary schools have an average of 6.7 partners, middle schools have 6.3, and high schools have 9.0.

According to a 1998 Community Involvement Survey conducted by the district, 1,292 school partnership businesses gave 197,436 hours of volunteer time. The in-kind value of their donations was estimated at \$2,372,225 and their total cash donations totaled \$3,530,103.

Some of the best success stories from business partnerships include:

- North Fork's Marine Science Magnet Elementary and Holland & Knight – Begun in 1995, Holland & Knight volunteers visit students on a monthly basis and provide a reading program. The volunteers began with a pre-kindergarten group and attend to continue with them throughout their elementary years.
- Westwood Heights Elementary and Renaissance Cruises – This partnership began in 1993 and in 1996-97 50 employees volunteered one hour a day, two days a week mentoring and tutoring students. School testing data indicated an increase of six percent in the number of students who scored above the 50th percentile in reading over the previous year.
- Thurgood Marshall Elementary and Southwest Airlines – This year Southwest Airlines introduced the Adopt-A-Pilot program to 5th grade students. The program teaches about the United States and aviation through the eyes of a pilot; the curriculum covers geography, aviation, math, and science.

**EXHIBIT 7-14
BUSINESS PARTNERS IN EDUCATION IN THE
BROWARD COUNTY SCHOOL DISTRICT
1997-98**

ELEMENTARY SCHOOL	NUMBER OF PARTNERSHIPS
Lake Forest	3
Atlantic West	5
Banyan	2
Bayview	0
Bennett	4
Bethune	17
Boulevard Heights	8
Broadview	5
Broward Estates	17
Castle Hill	1
Castle Hill Annex	1
Central Park	12
Chapel Trail	13
Coconut Creek	7
Colbert	6
Collins	5
Cooper City	8
Coral Park	14
Coral Springs	3
Country Hills	9
Country Isles	8
Cresthaven	8
Croissant Park	4
Cypress	6
Dania	7
Davie	7
Deerfield Beach	6
Deerfield Park	5
Dillard	7
Drew, Charles	4
Driftwood	8
Eagle Point	10

**EXHIBIT 7-14 (Continued)
BUSINESS PARTNERS IN EDUCATION IN THE
BROWARD COUNTY SCHOOL DISTRICT
1997-98**

ELEMENTARY SCHOOL	NUMBER OF PARTNERSHIPS
Eagle Ridge	5
Embassy Creek	7
Everglades	0
Fairway	7
Flamingo	13
Floranada	3
Forest Hills	16
Foster, Stephen	8
Fox Trail	0
Gator Run	0
Griffin	9
Hallandale	7
Harbordale	6
Hawkes Bluff	7
Hollywood Central	13
Hollywood Hills	9
Hollywood Park	9
Horizon	5
Hunt, James S.	7
Indian Trace	6
King, Martin Luther	14
Lakeside	0
Larkdale	1
Lauderdale Manors	3
Lauderhill Paul Turner	2
Lloyd Estates	6
Maplewood	9
Margate	3
Markham, Robert C.	4
Marshall, Thurgood	9
McNab	3
Meadowbrook	7

**EXHIBIT 7-14 (Continued)
BUSINESS PARTNERS IN EDUCATION IN THE
BROWARD COUNTY SCHOOL DISTRICT
1997-98**

ELEMENTARY SCHOOL	NUMBER OF PARTNERSHIPS
Miramar	13
Mirror Lake	7
Morrow	4
Nob Hill	8
Norcrest	4
North Andrews Gardens	8
North Fork	11
North Lauderdale	11
North Side	7
Oakland Park	7
Oakridge	6
Orange Brook	6
Oriole	7
Palm Cove	5
Palmview	10
Panther Run	9
Park Ridge	8
Park Springs	5
Pasadena Lakes	10
Pembroke Lakes	7
Pembroke Pines	5
Perry, Annabel C.	5
Peters	8
Pines Lakes	8
Pinewood	4
Plantation	5
Plantation Park	4
Pompano Beach	2
Quiet Waters	13
Ramblewood	9
Riverglades	9
Riverland	4

**EXHIBIT 7-14 (Continued)
BUSINESS PARTNERS IN EDUCATION IN THE
BROWARD COUNTY SCHOOL DISTRICT
1997-98**

ELEMENTARY SCHOOL	NUMBER OF PARTNERSHIPS
Riverside	7
Rock Island	6
Royal Palm	5
Sanders Park	2
Sandpiper	7
Sawgrass	9
Sea Castle	7
Sheridan Hills	5
Sheridan Park	4
Silver Palms	20
Silver Ridge	16
Stirling	5
Sunland Park	13
Sunshine	5
Tamarac	5
Tedder	3
Tradewinds	4
Tropical	3
Village	4
Walker	1
Watkins	5
Welleby	10
West Hollywood	5
Westchester	5
Westwood Heights	4
Wilton Manors	6
Winston Park	4
Young, Virginia Shuman	5
AVERAGE	6.6

**EXHIBIT 7-14 (Continued)
BUSINESS PARTNERS IN EDUCATION IN THE
BROWARD COUNTY SCHOOL DISTRICT
1997-98**

MIDDLE SCHOOL	NUMBER OF PARTNERSHIPS
Apollo	3
Attucks	8
Bair	8
Coral Springs	9
Crystal Lake Community	8
Dandy, William C.	5
Deerfield Beach	6
Driftwood	6
Forest Glen	10
Indian Ridge	8
Lauderdale Lakes	11
Lauderhill	1
Margate	17
McNicol	4
New River	3
Nova	1
Olsen	2
Parkway	7
Perry, Henry D.	12
Pines	13
Pioneer	8
Plantation	5
Pompano Beach	8
Ramblewood	2
Rickards	5
Sawgrass Springs	
Seminole	3
Silver Lakes	2
Silver Trail	7
Sunrise	4

**EXHIBIT 7-14 (Continued)
BUSINESS PARTNERS IN EDUCATION IN THE
BROWARD COUNTY SCHOOL DISTRICT
1997-98**

MIDDLE SCHOOL	NUMBER OF PARTNERSHIPS
Tequesta Trace	2
Westpine	5
Young, Walter C.	8
AVERAGE	6.3
HIGH SCHOOL	
Anderson, Boyd	8
Coconut Creek	7
Cooper City	9
Coral Springs	3
Deerfield Beach	1
Dillard	12
Ely	11
Flanagan, Charles W.	20
Ft. Lauderdale	4
Hallandale	19
Hollywood Hills	5
McArthur	4
Miramar	4
Northeast	3
Nova	14
Piper	4
Plantation	5
South Broward	4
South Plantation	4
Stoneman Douglas	16
Stranahan	26
Taravella, J.P.	3
Western School	20
AVERAGE	9.0

**EXHIBIT 7-14 (Continued)
BUSINESS PARTNERS IN EDUCATION IN THE
BROWARD COUNTY SCHOOL DISTRICT
1997-98**

CENTER	NUMBER OF PARTNERSHIPS
Atlantic Vocational Center	22
Beacon	6
Bright Horizons	16
Cross Creek School (Vocational)	7
Cypress Run Alternative/	6
District Guidance	1
Drew, Charles Family	4
Hallandale Adult & Community Center	11
McFatter, William T. Voc-Tech Center	11
Physical Education	1
Pine Ridge Alternative Center	5
Pompano Beach Inst.	0
School To Career	0
Seagull School	9
Sheridan Vocational Technical Center	10
South Area Alternative School	2
Summer Institute	1
Sunset School	3
The Quest Center	14
Whiddon, Gene A. Adult Center	11
Whispering Pines Off Campus	0
Whispering Pines School Middle/High	7
Wingate Oaks Center	12
AVERAGE	6.9

Source: Created by MGT from Business Partners in Education data, 1998.

- Chapel Trail Elementary and City of Pembroke Pines – As a result of the “Principal for a Day” program, the City Manager of Pembroke Pines asked the students to design a playground the City was planning to build next to the school. Students completed designs and budgets for the project and had the opportunity to work with architects, engineers, city planners, and builders over a five-month period.
- Palm Cove Elementary and McDonald’s – In this partnership, 4th grade students spend eight weeks learning how to design and run a McDonald’s franchise and includes 25 hours of classroom instruction with McDonald’s employees as facilitators. The conclusion of the program takes students to McDonald’s where they get a chance to actually run the franchise for a day.
- Fort Lauderdale High School and the Broward Sheriff’s Office – This school-to-career program acquaints students in their senior year with career opportunities in criminal justice/public safety telecommunications. Participating students receive training in computer aided dispatch on the 911 system and an overview of police, fire, and rescue operations. Broward County has committed to hiring all students who successfully complete the program.

FINDING

When asked about the difference between systemic and school partnerships, the Executive Director noted that the Broward PIE businesses tend to be the small local businesses in the community, while the systemic partnerships are attracting the major large businesses, although PIE also has a few large business partnerships. She noted that there seems to be a gap, with the medium-sized businesses falling through the cracks. She indicated that the businesses with 10 to 50 employees do not seem to have a resource to assist them in partnering with schools.

The Director of Partnerships was also asked about the separation between systemic and school partnership oversight. She indicated that the two partnerships were previously considered together under Partners in Education until five or so years ago.

Broward Partners in Education is staffed by a full-time Executive Director and a full-time administrative assistant/office manager. The Executive Director has a dotted line reporting relationship to the Director of Community Relations. Broward PIE is not an endowed organization; it relies on funds from a number of sources to fund yearly operations, including:

- donated office space in the First Union Bank;
- donated annual audit services;
- approximately \$70,000 in funding from the school district;

- an annual donation of \$1,000 from each of the business leader Board members;
- several fundraisers and recognition programs that generate revenue; and
- grant monies from the Broward Community Foundation, the Bank Atlantic Foundation, and Sun Sentinel charities.

Although the Executive Director of PIE noted that she does not have to spend a lot of time raising funds each year, she also indicated that it would be easier to operate from an endowment budget.

RECOMMENDATION

Recommendation 7-20:

Place the responsibility for all partnership activity under the Partners in Education non-profit organization and reallocate current district staff to work on other areas in the Community Relations Department.

Only with a concerted, coordinated effort can the potential benefits of partnerships be achieved. The current division of duties between systemic and school partnerships is illogical and brings no tangible benefits. Current district staff who are responsible for partnerships can be effectively reassigned to other areas of the department. With this change, the district should require a formal, dotted-line reporting relationship from the Executive Director of PIE to the Director of Community Relations.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Superintendent should advise district staff of the organizational change to be effective starting July 2000. | June 2000 |
| 2. The Superintendent should meet with the Board of Directors of PIE to seek their approval of the proposed responsibility change. | July 2000 |
| 3. The Executive Director of PIE should begin coordinating all partnership activities. | August 2000 |
| 4. All partnership activities should be coordinated. | June 2001 |

FISCAL IMPACT

There is no fiscal impact to the district.

FINDING

Broward Partners in Education provides yearly voluntary training to principals and assistant principals on building effective partnerships. The training is typically offered

at the beginning of the school year and includes one and one-half hours of training from the Executive Director and then one and one-half hours of presentations from a school with recognized good business partnerships and/or presentations from administrators in the central office. The Executive Director noted that the district is currently discussing including business partnership training as part of the already-required assistant principal training.

RECOMMENDATION

Recommendation 7-21:

Require training on building effective business partnerships as part of the assistant principal curriculum.

Building effective business partnerships is too critical a skill to be left to a voluntary training program. Requiring new assistant principals to receive this training will give them a skill set early in their administrative career that will potentially have a lasting impact on the schools they lead.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Superintendent should require that building effective business partnerships be incorporated into the assistant principal training curriculum. | May 1999 |
| 2. The Executive Director of the Broward Partners in Education, in coordination with the community involvement coordinators of the central office should revise and refine a three-hour program for inclusion in the assistant principal training. | July 1999 |
| 3. The Executive Director should begin presenting on building effective business partnerships as part of the assistant principal training. | August 1999 |

FISCAL IMPACT

There is no cost associated with this recommendation. It can be accomplished with existing resources.

7.6.2 Municipal Partnerships

FINDING

The Municipal Partnership Project in the Broward County School District was launched in 1995-96 to establish direct lines of communication between elected officials and staff of the county's 29 municipalities and the school district. Broward County was the first school district in the state to institutionalize partnerships and establish clear contractual expectations for both parties; rather than crafting partnerships whereby the schools and

the school district are primarily the recipient of services, municipal partnerships are clearly mutually beneficial arrangements.

The self-reported outcomes of this project have been:

- establishing a communications link – district staff have attended monthly city managers' meetings and assisted in addressing various civic concerns, such as traffic congestion at the start and end of the school day and the need for additional crossing guard training;
- sharing resources – over 60 percent of municipalities has some sort of partnership agreement with the school to provide alternative to suspension or after school care programs together. The district has expanded support for city recreation programs through the in-kind or low cost leases of pools and buses; and
- supporting issues of mutual interest – the district supported the City of Fort Lauderdale's passage of its parks bond while cities have supported various measures related to purchasing and leasing portable classrooms.

Partnership agreements are approved individually by the School Board after approval by the municipality concerned. Exhibit 7-15 shows the status of current municipal partnerships with the district. As the exhibit illustrates, the school district has current municipal partnerships with 24 of the 29 cities in Broward County.

Examples of municipal partnerships include:

- an agreement with the City of Lauderdale Lakes to provide a facility for the Boyd Anderson Zone to establish and alternative to external suspension program;
- an agreement with the City of Margate to provide students in the Pompano area with an opportunity to observe and participate in local government and allow students to participate in mock elections, apply for city staff positions, role play in various community groups, and address city-related problems;
- an agreement with the City of Fort Lauderdale to build a track and football complex on school property, built by the city so that the city could use it during non-school hours and paid for by local bond; and
- an agreement with the City of Fort Lauderdale on behalf of the Fort Lauderdale Police Department and Crime Stoppers for a Gun Stoppers Program to promote safety awareness, offer students an opportunity to report the possession of illegal firearms, and to provide a reward funds for persons who are aware of someone in possession of illegal firearms.

**EXHIBIT 7-15
CURRENT BROWARD SCHOOL
MUNICIPAL PARTNERSHIPS**

SCHOOL BOARD APPROVAL DATE	MUNICIPAL PARTNER	EXPIRATION DATE
6/4/96	City of Oakland Park	1999
11/19/96	City of Wilton Manors	3/4/99
3/4/97	City of Fort Lauderdale	3/4/99
3/4/97	City of Sunrise	3/4/99
5/20/97	City of Coconut Creek	6/30/99
5/20/97	City of Tamarac	5/30/99
6/17/97	City of Pembroke Pines	Ongoing
7/15/97	City of Dania	Yearly Renewal
9/2/97	City of Deerfield Beach	Ongoing
9/2/97	City of Hallandale	Ongoing
9/16/97	City of Lauderhill	Ongoing
10/6/98	City of Miramar	Ongoing
10/7/97	City of Cooper City	Ongoing
10/7/97	City of Margate	NA
10/7/97	City of North Lauderdale	Ongoing
10/7/97	City of Weston	Ongoing
10/7/97	City of Hollywood	Ongoing
NA	City of Davie	Ongoing
1/20/98	City of Parkland	Ongoing
4/21/98	City of Lauderdale Lakes	Ongoing
NA	City of Coral Springs	Pending
1/20/98	City of Plantation	Ongoing
7/21/98	City of Pembroke Park	Ongoing
8/18/98	City of Lighthouse Point	Ongoing

Source: Broward County School District, Business Partnership Program, November 1998.

Newer partnerships generally include this language:

As a result of this partnership, cities are updated on local and districtwide programs, projects and opportunities as well as districtwide initiatives available to students. In addition, the school district and staff have been able to address requests for assistance by municipalities in a ore cooperative and expeditious manner. The [municipality] has addressed several programs through this agreement, including a city recognition program for students and school staff members, use of city facilities as a living classroom, school facilities for city programs and events and incorporation of the School Board's technical centers for city staff training needs.

The Municipal Partners Program is run by two inter-governmental relations specialists, assisted by a secretary. The specialists report to the Director for District Administration, under the Associate Superintendent for District Administration. Organizationally, they have no reporting relationship with the Community Relations Department, although their work places them in the public eye and involves coordination between members of the community and the school district.

In addition to their major responsibility for municipal partnerships, the inter-governmental relations specialists work with the state legislative delegation on issues of importance to the district. They also work with the district's lobbyist on issues.

RECOMMENDATIONS

Recommendation 7-22:

Reorganize the reporting relationship for the inter-governmental specialists from the Director of District Administration to the Director of Partnerships within the Community Relations Department.

Only with a concerted, coordinated effort can all the potential benefits of partnerships -- both business and municipal -- be reaped. The current separation of the inter-governmental specialists from the Community Relations Department is illogical and brings no tangible benefits.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should inform the Director of District Administration and the Director of Community Relations of the organizational change, to be effective July 1999. May 1999

FISCAL IMPACT

There is no cost associated with this recommendation. The intent of this recommendation is to increase the efficiency and the effectiveness of all partnership efforts of the district.

Recommendation 7-23:

Eliminate the secretarial position under the inter-governmental relations specialists.

This position will be unnecessary once all partnerships efforts are consolidated and coordinated. Currently, the specialists are located in a section of the central office building separate from the Community Relations Department, and the specialists are frequently working out in the community -- thus, they have a secretary to field their phone calls and support their clerical needs. Once the specialists are part of Community Relations and moved into an office area within the department, the support staff already in Community Relations will be able to absorb the workload of the inter-governmental relations secretary. While not a popular recommendation, district staff indicate that this consolidation would probably not hinder the effectiveness of the Community Relations Department.

IMPLEMENTATION STRATEGIES AND TIME LINE

1. The Superintendent should eliminate the funding for this position in the 2000-2001 budget. May 2000

FISCAL IMPACT

With the preceding organizational change, the current district-funded secretarial position under the inter-governmental specialists will be unnecessary. The current cost for this position is estimated at \$25,000 per year plus 33 percent benefits. Delaying the elimination of this position for a year will allow the current support staff to learn the duties of the eliminated position.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Eliminate One Secretarial Position	\$0	(\$33,250)	(\$33,250)	(\$33,250)	(\$33,250)

8.0 FACILITIES USE AND MANAGEMENT

This chapter presents the results of the review of the district's facilities use and management for the 201 school facilities and central office facilities in the Broward County School District. The major sections in this chapter are:

- 8.1 Organizational Structure
- 8.2 Facility Planning
- 8.3 Facility Use
- 8.4 Design and Construction
- 8.5 Maintenance
- 8.6 Custodial Services
- 8.7 Energy Management

A comprehensive facilities use and management program will coordinate all the planning, use, and maintenance of all the facilities in a school district. The administrators of the program will effectively integrate facilities planning with the other aspects of institutional planning to ensure that the facilities are reinforcing the educational goals of the school district.

An effective program will ensure that facilities are fully utilized by the educational program and the community, whenever possible. Full utilization requires an accurate facilities inventory and clear management policies. Underutilized school facilities represent a waste of a valuable public resource.

An effective maintenance program will maintain the facilities at a level that reinforces the educational program and does not detract from the learning environment. The life of the facilities will be extended as far as possible thereby protecting the community's financial investment. A preventive maintenance program is a vital part of a facilities management program.

8.1 Organizational Structure

CURRENT SITUATION

The major facility functions are separated under three different areas.

- The planning, design, construction, and site acquisition functions are under the responsibility of the Associate Superintendent of Facilities and Construction Management.
- The maintenance function is under the responsibility of the Associate Superintendent of Financial Management and Support Services.
- The capital systems reporting and control functions are under the Office of the Comptroller.

Exhibit 8-1 presents an organizational chart for these facilities functions. The only area that has a direct link with the facilities functions that is not included in these three areas is that of student assignments, which provides the enrollment projections and recommended boundary adjustments. This office is located under the Deputy Superintendent for School Operations.

It is important to note that the position of Associate Superintendent for Facilities and Construction Management is currently (November 1998) unfilled. Also, the maintenance and capital planning and reporting functions were shifted from the Facilities and Construction Management Department in 1997. This shift was the result of an organizational study that concluded that the separation would result in a more desirable division of responsibilities.

FINDING

The present organization for facilities functions is somewhat unusual. The typical organization is to have all support functions, maintenance, facility design and construction, transportation, food services, and purchasing, under one associate or deputy superintendent. The district's organization of these functions is due to a previous organizational study that sought to improve effectiveness. The MGT review team finds no strong reason to recommend a change in this structure.

The review team did find, however, that the communication between the maintenance function and the design function needs to be improved. Facility managers in design and construction are responsible for projects under \$500,000 in their assigned schools. Many of these projects can be done more efficiently by district maintenance crews rather than through a design-bid process. This, in fact, takes place but often with little communication between the departments, which results in a misunderstanding of the project objectives. Conversely, the Maintenance Department often completes projects that require the assistance of design professionals. The facility managers could provide a regular link with the assurance that both departments are proceeding in a like manner.

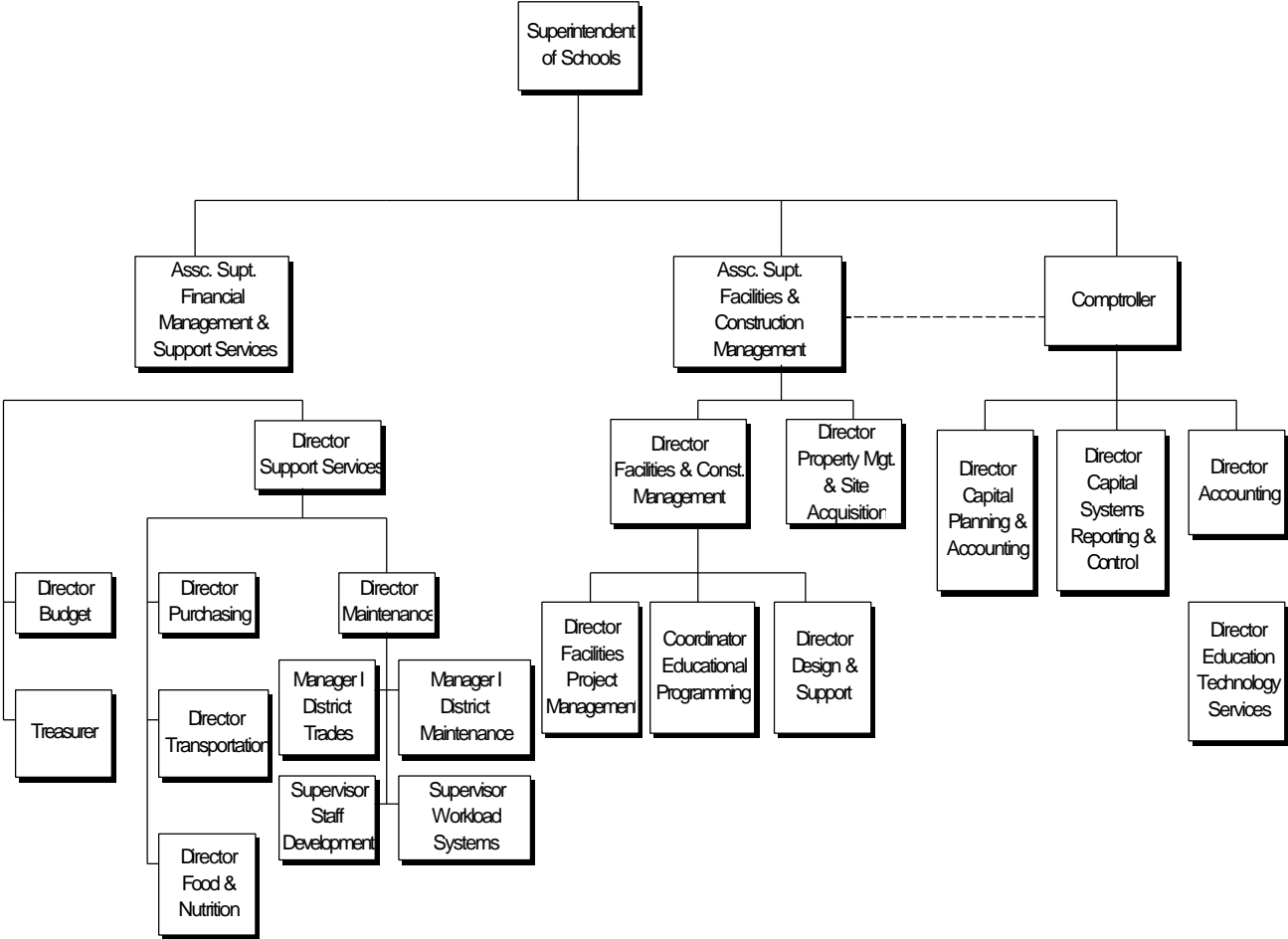
Recommendation 8-1:

Develop organizational links to improve communication between the design and construction function and the maintenance function.

Facility managers are responsible for planning projects to improve the schools in their area. These managers need the support of the maintenance staff in these areas to plan effectively, but cannot ensure access to the necessary maintenance staff. Maintenance supervisors are responsible for completing improvement projects that require plans and specifications from the facility managers, but have no avenue to ensure these plans and specifications are prepared to meet their work schedule.

The directors for maintenance and facilities and construction management should develop a communication linkages between their respective departments to ensure necessary communication.

**EXHIBIT 8-1
CURRENT ORGANIZATIONAL CHART FOR FACILITY FUNCTIONS
IN THE BROWARD COUNTY SCHOOL DISTRICT
1998 – 99**



Source: Created by MGT from various organizational charts provided by the Broward County School District, 1998.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-----------|
| 1. The directors should meet to discuss the present organizational structure and prepare a plan to improve communications. | May 1999 |
| 2. The directors should meet with the involved staff to discuss possible solutions and receive input. | June 1999 |
| 3. The directors should implement the plan and appropriate procedures. | July 1999 |

FISCAL IMPACT

This recommendation can be accomplished within the existing resources of the district.

8.2 Facility Planning

Effectively managing a school district's facilities requires a district to have a sound facilities planning process which includes each of the following items:

1. An appropriate organizational structure to coordinate and control the planning process.
2. An accurate needs assessment process to identify both current and future requirements which includes each of the following components:
 - valid demographic statistics including reliable estimates of future enrollments and geographic trends;
 - an up-to-date inventory of existing space by type of space;
 - established facility use rate and space guidelines;
 - established facility capacities;
 - educational program needs as related to current facilities;
 - comparisons of future space needs with current inventories by type of space to identify areas of space shortages and overages;
 - school boundary analysis; and
 - transportation analysis.

3. An accurate definition of the scope of improvements necessary to meet the identified need which will include each of the following components:
 - facility needs programming;
 - accurate cost estimating;
 - scheduling to match needs with planned improvements; and
 - specific improvement plans for each school.
4. Effective strategies planned to insure the scope of needs will be addressed.
5. A plan for public approval of the facilities improvement needs.

BACKGROUND

School facility planning in Broward County School District has been under close scrutiny during the past few years. Since 1994, the Facilities Design Department has received a comprehensive review of facilities management conducted by Coopers and Lybrand (with a subsequent follow-up review), a professional services review regarding agreements with architects and other professional groups conducted by Sharpten Brunson, and a Grand Jury Report pertaining to construction of public schools in the Broward County School District. In addition, an audit of construction change orders is currently being conducted.

Both the facilities management review and Grand Jury Report found major problems in facilities use and management in the Broward County School District. The key findings and recommendations pertaining to facilities planning from the facilities management review and the Grand Jury reports are summarized below (the professional services review dealt with specifics from individual contracts; the change order review has not been completed). It should be noted that many of the recommendations have been implemented and will be discussed in the findings sections of this chapter. This information is intended for the purpose of reviewing the current situation in the facilities planning arena and the processes that have transpired.

Facilities Management Review

The major findings included the fact that project managers were not involved in the financial aspects of projects, there was poor communication between facilities planning and construction and facilities funding, and weak project management and tracking.

Major recommendations of this review included the following:

- improve communication between the facilities and capital budgeting departments;
- reorganize Project Manager/Construction Manager System;

- coordinate the *Project Managers' Manual* into a comprehensive policies and procedures manual;
- take a more active role in the financial aspects of projects by project managers;
- implement value engineering;
- consider alternative contracting methods (e.g., construction management, design-build); and
- implement a project tracking/scheduling mechanism.

Grand Jury Report

The major findings of the Grand Jury Report included the fact that buildings were occupied before construction was complete, major problems with construction at specific sites (e.g., air quality control, fire code violations, etc.), and no specific building inspection processes. The Grand Jury Report contained the following recommendations:

- Several prototype designs should be implemented with evaluations prior to re-use.
- Facility planning should emphasize functional design rather than "architectural statements."
- Clear inspection processes in various areas of construction should be established.
- Staffing levels of inspectors and construction managers should keep pace with the construction growth.
- Numerous recommendations specific to one (or a group) of individual projects (e.g., indoor air quality, fire code violations, walkway ceiling failure, etc.) were included.
- Before occupancy, construction should be substantially complete.

The impact of the numerous reports, findings and recommendations (along with the extensive media attention they have generated) has eroded confidence in the facility planning process throughout the Broward County School District. While, in fact, many of the recommendations have been implemented, the challenge will be to bring up the confidence level both with District staff and the general public. There will need to be proof that the Broward County School District can implement the five-year plan, to in fact build new schools and renovate old schools within budget and in a timely manner.

CURRENT SITUATION

The facility planning function in the Broward County School District is conducted primarily among the following four departments:

- Office of the Comptroller
 - Capital Planning and Programming which is located within the Office of the Comptroller. This office is responsible for conducting needs assessments, assisting in the development of the five-year capital plan, and formulating the capital budget. This office also coordinates development of the generic educational specifications, the State Plant Survey, and the Florida Inventory of Schoolhouses (FISH) Report.
 - Capital Systems Reporting and Control is also under the Office of the Comptroller and is responsible for developing, monitoring and maintaining the Capital Outlay Budget which includes revenue funds, appropriations and expenditures; development of the financial portion of the Five-Year Capital Work Program; and support of Network server systems hardware/software, database applications, and Intranet/Internet for the Office of the Comptroller.
- The Department of Facilities and Construction Management is responsible for the implementation of the five-year capital plan including facility design and support, project management, construction and follow-up. This office also coordinates the development of project specific educational specifications through the individual project managers.
- The Department of Property Management and Site Acquisition has the responsibility for all acquisition and disposition of real property, coordination and agreements with local municipalities, and environmental issues associated with school sites. This office also coordinates the allocation and relocation of portable classrooms throughout the district.
- The Department of School Boundaries, Student Assignment, Summer School, Charter Schools and Year-Round Schools has the primary responsibility for forecasting student enrollment projections that are utilized in the development of the five-year capital plan. This office is also involved in the school planning process in terms of the effect of year-round programs, charter schools, and summer schools on the overall facility needs of the district.

The process of facility planning in the Broward County School District is based on the development of the five-year facility plan. The current version, titled "Adopted Facilities Work Program, 1989-99 to 2002-03," provides for total capital expenditures over the five-year period of \$1.5 billion. The total, within this amount, for existing capital projects, new facilities, remodels, and renovations is approximately \$645,000,000. The remaining amount is for debt service, mold/mildew abatement, technology, maintenance transfer, ADA, equipment, vehicles, land purchase, and contingency.

The projected revenue sources for implementation of the five-year plan include 44 percent from millage and interest, 26 percent through the issuance of certificates of participation

(COPs), and 26 percent from state funded programs (classrooms first, public education capital outlay). The remaining four percent is funded through a variety of minor sources including impact fees and land sales.

The focus for expenditures included in the five-year plan are:

- existing projects, capacity additions, remodeling, and renovations;
- correction of indoor air quality problems at 155 of the District's schools;
- technology upgrades at numerous schools;
- health and safety considerations including fencing projects, emergency shut-offs at gas service lines, installation of bus barricades and installation of emergency generators at locations utilized as emergency shelters;
- maintenance needs at selected schools including equipment replacement, equipment, flooring, etc.;
- facility improvements to implement the requirements of the Americans with Disabilities Act (ADA); and
- a reduction in the number of portable classrooms.

Exhibit 8-2 provides the expenditure detail for the proposed five-year capital improvement plan.

**EXHIBIT 8-2
EXPENDITURE DETAIL FOR THE FIVE-YEAR CAPITAL IMPROVEMENT PLAN
1998-99 AND FIVE YEAR TOTAL**

APPROPRIATION	1998-99	FIVE-YEAR TOTAL*
Debt Service	\$37,438,000	\$220,862,000
Existing Projects	\$46,442,000	\$70,120,000
Capacity Additions	\$51,841,000	\$499,111,000
Remodel / Renovate	\$9,380,000	\$75,942,000
Mold / Mildew (environmental)	\$7,739,000	\$31,119,000
Technology	\$31,546,000	\$198,550,000
HSS	\$9,500,000	\$41,900,000
Maintenance	\$17,100,000	\$87,800,000
Maintenance Transfer	\$15,600,000	\$78,000,000
ADA	\$3,500,000	\$19,000,000
Equipment	\$4,000,000	\$27,500,000
Vehicles	\$3,200,000	\$40,900,000
Land Purchase & Other	\$7,000,000	\$12,600,000
Contingency & Legal	\$3,500,000	\$25,500,000
Capitalized Cost	\$6,731,000	\$39,449,000
COLA (for existing projects only)	\$0	\$32,248,000
Total	\$254,517,000	\$1,500,601,000

Source: Facilities and Construction Management, 1998.

*1998-99 through 2002-03

While the financial data referred to above are compiled in the Office of Capital Systems Reporting and Control, the department primarily charged with the responsibility for the implementation of the five-year plan is in the Office of the Associate Superintendent for Facilities and Construction Management. The current organizational chart for this department is shown in Exhibit 8-3. It is important to note that, as of January 1999, five positions (assistant superintendent, coordinator for educational programming, and three facility managers) are unfilled.

This organizational chart is a part of the restructuring effort that came about as a result of the facility concerns cited in the reports discussed above. To address these concerns, the Superintendent and Board determined that a check and balance system was needed between construction, maintenance, and budgeting so these departments were separated under different administrators. Key components of the restructuring effort (involving organizational chart changes) include:

- separation of the capital budgeting, inspection, and maintenance departments from design and construction;
- redefinition of the roles of facility managers and project managers; and
- addition of the coordinator for educational programming position.

The restructuring of the roles of facility and project managers provides the basic structure for the facilities improvement process. Facility managers are assigned a group of schools and manage all projects under \$500,000 for those schools. They have the responsibility to work with site administrators at schools in their zone to see that facility needs are met. Facility managers help compile the needs assessment for their schools and coordinate in-house projects. There are currently six facility managers with the intention of adding an additional six positions.

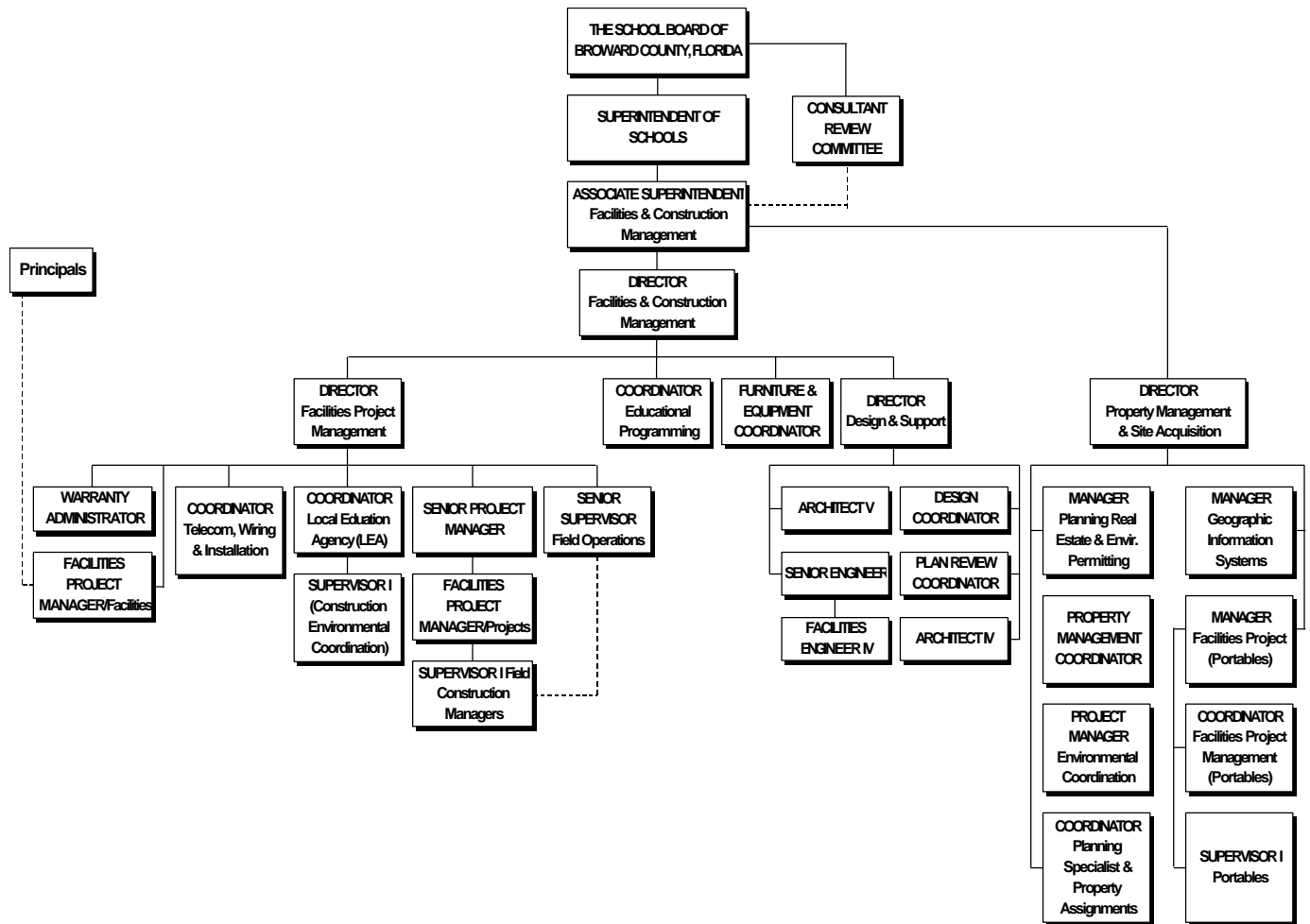
Project managers are assigned major projects on an as-needed basis. When a major project is approved, the project manager will work with the construction firm and the architects to ensure the project is completed. Project managers are assigned duties on a project basis with the responsibility of managing projects that exceed \$500,000. The number of project managers (currently seven budgeted*) is based on a formula that assigns each project manager no more than eight active projects. Two field construction managers are assigned to each project manager and is responsible for the on-site supervision of the active projects.

The overall supervision of the facilities planning and construction process is the responsibility of the Director of Facilities and Construction Management and includes the following duties:

- a detailed needs assessment for each facility;
- project specific educational specifications;
- assistance with the development of the five-year capital plan;
- architect selection;

*Interviews were being conducted to hire the seventh project manager at the time of the MGT on-site review.

**EXHIBIT 8-3
CURRENT ORGANIZATION CHART
FACILITIES AND CONSTRUCTION MANAGEMENT DEPARTMENT**



Source: Broward County School District, Facilities and Construct Management Department, 1998.

- management of project design;
- determination of the delivery system (e.g., design-build, re-use of prototype, construction management, etc.);
- supervision of construction; and
- warranty inspections.

The processes utilized for school facility planning for determining capacity space needs and for conducting major renovations involve the following steps:

Capacity Space Needs

1. Enrollment projections are utilized to determine the need and geographical locations of needed capacity space.
2. Sites are evaluated and secured in the appropriate locations.
3. The decision regarding the amount of new space, whether it will be completed through additions and/or new facilities is made with involvement of the facilities, budgeting, and administrative staff.
4. A project manager* is assigned.
5. The facility manager*, with assistance from an independent cost estimator and construction scheduling firm develops a budget and preliminary schedule.
6. The proposed project is taken to the Board for inclusion on the five-year plan.
7. Educational specifications are prepared.
8. The decision is made as to the appropriate delivery system.
9. A request for qualifications for architects, design builders and or construction manager (depending on the delivery system determined) is advertised and qualified forms are short listed, interviewed, and negotiated thereto.
10. Schematic design, design development, and construction documents are completed.
11. After completion of construction documents and review by appropriate parties, construction is started. Depending on the project's delivery system, the project may be advertised for bids.

*See p. 8-9 for a description of responsibilities for facility managers and project managers.

12. At substantial completion of the project, the project manager*, field construction manager, design professional or design criteria professional and conduct an inspection and a punch list is prepared. Prior to occupancy, the Superintendent of Schools declares substantial completion based on a walk-through of the facility and receipt of a final sign-off by the Uniform Building Code (UBC) Inspectors and the Project Manager.
13. Six-month and one-year warranty inspections are conducted.

Major Renovations/Remodels

1. The facility manager, with the involvement of community, school staff, and educational planners prepares a needs assessment for each facility under their responsibility.
2. A scope of the project is developed by the facility manager.
3. The scope is used as the basis for determining the educational specifications for the project.
4. The facility manager*, with assistance from an independent cost estimator and construction scheduling firm, develops a budget and preliminary schedule.
5. The proposed project is taken to the Board for inclusion on the five-year plan.
6. A request for qualifications for architects, design builders and or construction manager (depending on the delivery system determined), is advertised and qualified forms are short listed, interviewed, and negotiated thereto.
7. Schematic design, design development, and construction documents are completed.
8. After completion of construction documents and review by appropriate parties, construction is started. Depending on the project's delivery system, the project may be advertised for bids.
9. At substantial completion of the project, the project manager*, field construction manager, design professional, design criteria professional, and the superintendent of schools conduct an inspection and a punch list is prepared. Prior to occupancy, the Superintendent of Schools declares substantial completion based on a walk-through of the facility and receipt of a final sign-off by the Uniform Building Code (UBC) Inspectors and the Project Manager.
10. A six-month and one-year warranty inspection is conducted.

*See p. 8-9 for a description of responsibilities for facility managers and project managers.

Since 1987, the Broward County School District has constructed 55 new schools and completed major renovations at 124 schools.

FINDING

The problems identified in the two reports have been addressed by the Broward County School District and corrected. As a result of the management review of capital construction and the subsequent Grand Jury report, the Broward County School District has implemented numerous changes based on the recommendations from these reports. While the majority of the changes relate to the actual construction process (discussed in Section 8.4 below), those that pertain specifically to facility planning include the following:

- reorganization of the facilities department so that facility managers are assigned to a group of schools to oversee the overall needs of those schools;
- added the position of coordinator for educational programming;
- separation of the capital budgeting from the facilities and construction department;
- the formation of a facilities task force, comprised of members from the community, school representatives, and staff members. This committee is charged with the task of establishing facility priorities providing input for the facilities planning and construction processes;
- the development of cost effective prototypical designs (specifics of the cost factors will be discussed in Section 8.4 below);
- the prioritization and establishment of a funding source to address the indoor air quality issues addressed in the Grand Jury Report; and
- the development of a project listing by school (as a supplement to the five-year plan), so citizens and staff can easily review the plans for a particular site.

COMMENDATION

The Broward County School District is commended for addressing the issues and concerns identified in the Management Review of the Capital Program and the Grand Jury Report.

While not all recommendations have been implemented, a significant effort to address the issues identified has occurred. In the 1997 follow-up to management review, Coopers and Lybrand concluded that a majority of the recommendations had been completed and that “genuine effort has been made to implement the recommendations that were presented in October 1994 to increase the accountability of the Facilities and

Construction Management Department and the oversight of the capital program for the District as a whole."

FINDING

The enrollment projection methodology (upon which capacity needs are based) consists of the following steps:

- The primary projection tool is a geographically based cohort survival model that projects future students by grade. The model derives the growth factor for student survival to the next grade based upon previous survival numbers to the same grade of students in geographic zones identified as a traffic analysis zone (TAZ). In most cases, the TAZ represents a neighborhood, of which there are 800 in the county.
- A linear regression model is used to project kindergarten and first grade enrollments. Simply put, the projections are based on what the numbers have been historically and the trend is continued into the future.
- The projections by TAZ are aggregated to individual schools based upon the TAZ's that are in a school's attendance boundaries.
- The projections are compared with the state data and individual principal's projections.
- Projections are revised if unusual circumstances are identified (e.g., new housing developments, severe economic changes, natural phenomena, etc.).
- Projections are revised if program changes occur (e.g., location and number of bi-lingual clusters, start of magnet programs, etc.).

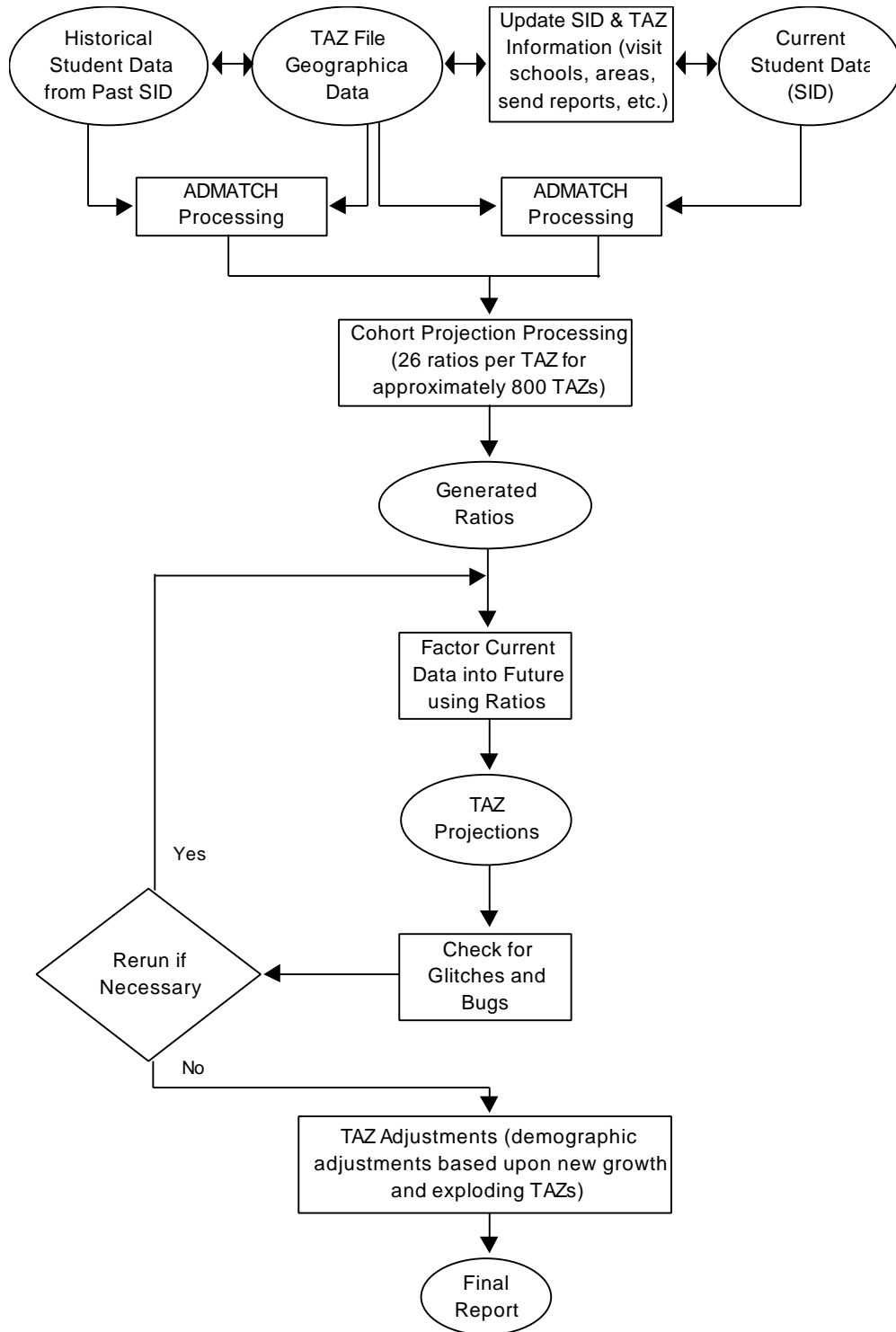
Exhibit 8-4 below shows the flow chart utilized to implement a final student enrollment projections report.

COMMENDATION

The Broward County School District is commended for developing a sophisticated system for student enrollment projections that has consistently produced accurate results.

The system in place for determining enrollment projections (and therefore to determine school capacity needs) gives an accurate projection by grade level and by geographical region of the Broward County School District. In fact, the projections over the past five-year period have been within three percent of actual enrollments. MGT has found in previous studies that in large districts it is difficult to maintain enrollment projections that are within five percent accuracy on an annual basis.

**EXHIBIT 8-4
STUDENT POPULATION PROJECTION FLOW CHART**



Source: Broward County School District, School Boundaries, Assignment, Summer School, Charter

Schools, and Year Round Schools, 1996.

FINDING

The long-term need for school sites is determined based on student enrollment projections. When the need for additional capacity in a particular region is determined, the Office of Property Management and Site Acquisition takes the following steps:

- determines if the district has an appropriate site in the current inventory;
- creates an aerial mosaic of the area to determine where vacant sites are located;
- compiles an inventory of vacant sites that meets the size and configuration requirements is compiled. The size and configuration requirements are:
 - Elementary Schools: Minimum of 12 acres, 720' x 720',
 - Middle Schools: Minimum of 20 acres, 1250' (front) x 730' (depth),
 - High Schools: Minimum of 45 acres, 1300' (front) x 1500' (depth);
- evaluates sites based on the adjacent property usage, access, interference (noise, odor, or other program interference), right-of-way, drainage, capacity of roads in the area, traffic control, availability of utilities, high voltage power lines in the vicinity, environmental considerations, soil samples, location of parks (the minimum site size could be reduced), and availability of affordable housing in the area;
- reviews possible sites with the district site selection committee;
- recommends sites which are then platted and taken to county officials for review; and
- forwards recommended sites to the Board for approval.

COMMENDATION

The Broward County School District is commended for developing a comprehensive site selection process.

The site selection process includes the following criteria identified in the state's best practices:

- completed well in advance of need, based on district-developed criteria;
- consideration of the most economical and practical locations;

- process for ensuring that prices paid are fair; and
- site plans incorporate future facility needs.

In addition, the information taken to the Board for their deliberation is presented in a manner that is visually appealing and includes appropriate information and graphics.

FINDING

While the process for determining the need for capacity additions is well documented and understood, the process for determining the need for renovations and remodels is much less comprehensive. Capacity additions are based on the number of students enrolled and the current square footage (or capacity). Renovations and remodels, however, are based on the need for upgrades to the existing facility which is often seen as subjective.

The components of a prioritization process are in place (i.e., needs assessment, up-to-date educational plant survey, community involvement, etc.) and, in fact, projects have been prioritized and placed on the five-year plan. Over the past 10 years, nearly two-thirds of facility improvement dollars have been spent in the eastern part of the county (using University Ave. as the divider), yet the perception is the opposite. This perception, as evidenced during the diagnostic review and on-site interviews, indicates a lack of communication regarding the processes that are, in fact, in place. Because of this lack of communication and dissemination of data, the general perception of community citizens is that the needs of existing schools have not been prioritized and that the funds have gone mostly to the construction of new schools in the western part of the district.

Recommendation 8-2:

Define, implement, and publicize a formal prioritization process for determining the highest needs for facility renovations.

The needs assessment for all facilities is currently up-to-date, so a system of putting objective scores to the priority needs would be relatively easy to implement. This would quantify the assessments and provide a defensible basis for prioritization. The need should then be to effectively communicate. Currently, a project listing by school exists that provides each school with the information regarding the number of projects and scheduling of improvements. This list should be included as a part of the effort to disseminate information.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Facilities Construction and Management should develop an objective scoring system for the prioritization of renovations identified in the needs assessment. July 1999
2. The five-year plan should be updated to reflect the identified priorities. August 1999

- | | |
|---|--|
| 3. The renovation priorities and timelines should be included within the project listing by school and distributed to all school principals to share with their school communities. | Beginning in the 1999-2000 school year |
|---|--|

FISCAL IMPACT

This recommendation can be accomplished with existing district resources.

FINDING

The division of responsibilities among the project and facility managers is a sound process for dealing with all facility needs --- both large and small. The relationship between school-site administrators and the assigned facility managers is good and, is seen as a positive step towards providing regular facility improvements. The problem, however, rests with the number of facility managers. The goal of the reorganization plan was to have a total of 12 facility managers, yet only six are currently (November 1998) in place. With over 200 school facilities in the county, the number assigned to each facility manager is currently more than 30. Building the type of relationship that is needed for an effective facility manager program is difficult when there cannot be regular communication between facilities staff and the facility manager.

Recommendation 8-3:

Fill the remaining facility manager positions as quickly as possible.

The facility manager positions are needed to keep up-to-date with the number of facility needs throughout the Broward County School District. This position is envisioned as a positive addition with site administrators, but the positive impact will not be as effective if the workload of the facility managers does not allow them to respond in a timely manner. As stated above, there are over 30 schools currently assigned to each facility manager. This has resulted in facility managers frequently not being on site for more than a month.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|------------------------------------|
| 1. The Director of Facilities Construction and Management should form hiring committees (to include facilities staff and site administrators) and advertise the positions. | May 1999 |
| 2. The hiring committees should interview qualified candidates. | June 1999 |
| 3. All facility managers should be on staff and assigned schools. | Prior to the 1999-2000 school year |

FISCAL IMPACT

The facility manager position are currently approved and included in the district's budget.

FINDING

The position of project manager is a reasonable method for managing large scale projects throughout the county and the workload of a maximum of eight projects is reasonable as long as the scope of projects is equally divided, and to the degree possible, geographically divided, among the project managers. The problems that have occurred are normally due to the lack of understanding between the roles of project and facility managers.

Specific problem areas include:

- Even though job descriptions exist and the division of projects is defined as above and below \$500,000, there are often times when work is duplicated among the project and facility managers. This is in large part due to the fact that there are no clear guidelines regarding who schedules project meetings, places ads for consultants, and other specific responsibilities.
- Project managers, since they are assigned on a project basis, are sometimes assigned projects that are some distance apart. To the degree possible, project managers should be assigned projects that are in the same zone in order to save travel time.
- In some cases, project managers that have worked with a prototypical design have not been given the assignment for the same project when it is re-built. Realizing there may be a conflict with the goal for geographical proximity as discussed above, to the degree possible, efforts should be made to assign projects managers continued prototypical designs as they are re-used. The knowledge gained through previous project management experience with a particular design will likely allow the individual to be more efficient and therefore more productive even when there is more travel involved.

Although the previous two issues are part of the district's criteria for assigning projects, we found these criteria are not regularly implemented.

Recommendation 8-4:

Clarify the roles of the project and facility managers, define the procedures, and compile a detailed procedures manual for use by individuals in both positions.

No procedures manual exists in the Facilities Department. There are numerous procedures, accompanying forms, and policies for implementation that could be better understood by all parties if they were clearly defined in a detailed procedures manual. This manual should be distributed to site administrators as well as facility department staff.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-----------------------|
| 1. The Director of Facilities Construction and Management, with assistance from project and facility managers should develop a detailed procedures manual. | Summer 1999 |
| 2. The procedures manual should be distributed and implemented. | 1999-2000 school year |

FISCAL IMPACT

This recommendation can be accomplished with existing district resources.

FINDING

The process for the development of educational specifications currently involves the Director of Capital Planning and Programming who develops the districtwide standards, and the project or facility managers, who develop the project specific educational specifications. There are no guidelines for the development of project-specific educational specifications so the results vary widely. The lack of guidelines causes individual schools to vary a great deal in types of spaces provided and has the effect of creating wide discrepancies among schools in a district where there is already a perceived unfairness in different regions of the county.

A review of sample specifications found that, because the districtwide standards are in place, the district mission, philosophy statements, and space listings are usually included and are up to date. The proposed program (i.e. instructional philosophy, design implications of the proposed programs) is often not included. Also not included is information on the specific facilities needs required to carry out the program. In addition, the input from educators, architects, and community members varies widely depending on the individual needs established by the Design Review Committee. The educational specifications are approved by the area superintendent prior to finalizing the project scope.

Recommendation 8-5:

Develop and implement procedures for the creation of specific educational specifications for each major project.

The process of defining the districtwide standards through the capital planning and programming department is sound and should be continued. These standards should be used to develop project specific specifications on a regular and consistent basis. The process should be defined by the coordinator for educational programming and should involve the project manager, site administrators and staff, community members, students (for middle and high school projects) and the project architects.

The specifications for each project should include:

- the educational programs, trends, etc. for the project that will have implications to the design;

- the determination of the specific facility needs required to carry out the program; and
- the preparation of written educational specifications that include:
 - the project rationale described in terms of educational level, whether it is an addition, modernization, or a totally new building, the total number of students to be served, and the necessity for the project;
 - a description of the community to be served providing a brief historical background as well as current factual information. The geographic area to be served and a description of the site should also be described;
 - the planned educational program including a description of the instructional program to be housed in the facility, the instructional methods to be employed, and the design implications of the program;
 - general building considerations that include the anticipated accessibility issues, circulation, traffic patterns, building security, communication systems, community usage, etc.;
 - a complete description of each instructional area; and
 - a summary of spatial requirements.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|--|
| 1. The Director of Capital Planning and Programming should develop guidelines for the utilization of district standards in all project educational specifications. | May 1999 |
| 2. The Coordinator for Educational Programming should develop guidelines for the development of project specific educational specifications. | Summer 1999 |
| 3. Project managers should form educational specification committees to prepare specifications for each project they are assigned. The committees should include broad representation of school staff, community, students, and professional design staff. | Beginning in the 1999-2000 school year |

FISCAL IMPACT

This recommendation can be accomplished with existing district resources.

8.3 Facilities Use

The effective and efficient use of facilities is a primary responsibility of all public institutions, and especially so for public school districts that face constrained budgets and higher user expectations. Proper facility use requires insightful planning (as discussed in Section 8.2 above) as well as:

- a detailed facilities inventory;
- an assessment of facility needs for repair and renovation;
- effective utilization of existing resources;
- effective utilization of temporary buildings; and
- clear and effective policies and procedures governing the use of facilities, boundary changes, and consolidations.

CURRENT SITUATION

The Broward County School District has calculated the current utilization of all facilities based on:

- the Educational Plant Survey
- the Florida Inventory of School Houses (FISH)
- enrollment projections prepared by the district
- capacity as determined by the FISH report
- capacity as determined by district-adopted program requirements

Based on this information, Exhibit 8-5 below provides the summary information regarding the existing enrollment and capacity of schools throughout the district. The data shown provide the overall square footage for each group of schools, the capacity of permanent buildings (portable classrooms will be discussed later in this section), the current enrollment, and the resulting excess or deficit capacity. The capacity figures utilized for determining the excess or deficit capacity are those determined through the Florida Inventory of School House (FISH) process.

EXHIBIT 8-5 SUMMARY OF FACILITY CAPACITY AND UTILIZATION

SCHOOL TYPE BY AREA	1997-98 ENROLLMENT	PROJECTED 2002-03 ENROLLMENT	CAPACITY	EXCESS (DEFICIT) CAPACITY
North Area Elementary	35,983	34,508	31,593	(2,915)
Central Area Elementary	33,490	31,858	29,594	(3,896)
South Area Elementary	42,488	41,871	40,745	(1,427)
Total Elementary	111,961	108,237	101,932	(8,238)
North Area Middle	15,574	17,950	16,208	(1,742)
Central Area Middle	15,634	19,806	14,161	(5,645)
South Area Middle	20,402	23,077	18,589	(4,488)
Total Middle	51,610	60,833	48,958	(11,875)

Facilities Use and Management

North Area High	17,890	20,443	16,208	(4,235)
Central Area High	16,822	18,657	15,279	(3,378)
South Area High	20,447	25,094	18,064	(7,030)
Total High	55,159	64,194	49,551	(14,643)
Centers & Alternative Programs	4,903	6,148	9,635	3,487
Unassigned Pre- K	-	550	-	(550)
Total District	223,633	239,962	210,076	(31,819)

Source: Broward County School District, School Boundaries, Assignment, Summer School, Charter

Schools, and Year Round Schools, 1996.

It is important to note that the above figures are for permanent space only and therefore do not reflect the capacity need that is being met through the use of portable classrooms. Exhibit 8-6 below provides these data. As can be seen, currently, portables are just meeting the deficit capacity needs. It is also important to note, however, that in the five-year plan, the district has set a goal of reducing the total number of portable classrooms to less than 500 by the 2002-03 school year.

**EXHIBIT 8-6
SUMMARY OF FACILITY CAPACITY AND UTILIZATION**

SCHOOL TYPE	NUMBER OF PORTABLE CLASSROOMS	PORTABLE SQUARE FT. (% OF TOTAL SQUARE FT.)	CAPACITY DEFICIT (PERMANENT BUILDINGS)	PORTABLE CAPACITY*
Elementary	972	874,800 (8.2%)	8,238	19,440
Middle	554	498,600 (9.5%)	11,875	11,080
High	423	380,700 (5.9%)	14,643	8,460
Centers & Alternative Programs	125	112,500 (7.0%)	Currently have excess	2,500
District Total	2,074	1,866,600 (7.8%)	31,819	41,480**

Source: Broward County School District, Facilities and Construction Management Department, 1998.

*Based on average program capacity in portable classrooms of 20 students.

**Out of the 2,074 portable classrooms utilized by the District, 441 are not used for instructional purposes (e.g., kitchens, restrooms, cafeterias) which lowers the capacity by 8,820 to a total of 32,660 which is within 3 percent of the capacity deficit in permanent buildings.

In response to the overcrowded conditions in many schools, the district adopted Policy 5000 which provides the following definitions and procedures regarding overcrowded schools:

- Requires that boundary changes be reviewed every three to five years with the goal of reducing severely overcrowded conditions as much as possible. The policy provides guidelines for the establishment of boundaries and attendance areas that includes input from all appropriate individuals.
- Provides standards for school construction and school sites. Within this section, the policy calls for portable classrooms to be used as temporary and not permanent facilities.
- Provides the following standards to define overcrowded schools:

SCHOOL TYPE	CAPACITY	CRITICALLY OVERCROWDED DEFINITION
Elementary	Less than 900 Greater than 900	175% of FISH or exceeds 1200 150% of FISH
Middle	Less than 1500 Greater than 1500	140% of FISH or exceeds 1700 125% of FISH
High	Less than 2000 Greater than 2000	150% of FISH or exceeds 2500 125% of FISH

- Provides the criteria for and the requirement that schools that exceed the critically overcrowded standards develop alternative student enrollment options. The development of the options must

come from the staff, students, parents, and community at the overcrowded school. Possible options include:

- additional portable classrooms
 - enrollment capping
 - flexible scheduling
 - boundary changes
 - reconfigured grades and/or programs
- Provides alternative enrollment strategies for under enrolled schools.

The schools that are defined in the 1998-99 school year as critically overcrowded are shown in Exhibit 8-7.

FINDING

A comparison of Exhibits 8-7 and 8-8 demonstrate that the capacity additions included in the five-year plan reflect the areas of highest need. For example, Exhibit 8-7 shows that Royal Palm Elementary, located in the central area, is the most severely overcrowded elementary school. Exhibit 8-8 shows that the highest level of capacity additions for elementary schools is planned for the central area schools.

COMMENDATION

The Broward County School District is commended for providing a five-year plan that addresses the areas of highest capacity need.

While there are capacity needs at all school levels in the Broward County School District, the overall capacity need by the 2002-03 school year will be at secondary schools in the central and south areas, and at the elementary level in the central area. The proposed capacity additions (expressed in terms of total expenditures) clearly reflect these needs, as can be seen in Exhibit 8-8 when the total expenditures by area are compared.

FINDING

The Broward County School District has effectively implemented an objective process for facilities planning. Policy 5000 provides an objective process within facility planning for areas that are often highly subjective and sometimes emotional. The policy clearly defines the district responsibilities regarding the provision of adequate facilities and what factors constitute an overcrowded facility. When a facility is determined to be overcrowded, the policy identifies the alternatives that may be considered and the process to be followed for selection of the appropriate alternative(s). The process requires participation from key individuals, a "buy in" from the communities that will be affected, and the guidelines for implementation. In addition, the policy identifies the criteria to be used in the evaluation of alternatives.

COMMENDATION

The Broward County School District is commended for addressing issues of overcrowded schools and the possible alternatives (other than new construction) in an objective manner that involves the local community.

**EXHIBIT 8-7
CRITICALLY OVERCROWDED SCHOOLS
1998-99**

	SCHOOL	20 TH DAY MEMBER- SHIP 1998-99	F.I.S.H. CAPACITY*	CRITICAL OVERCROWDED CRITERIA**	PERCENT OF F.I.S.H. CAPACITY
	ELEMENTARY				
1	Royal Palm Elementary	1,501	691	Exceeds 1,200 students	217%
2	Country Hills Elementary	1,326	845	Exceeds 1,200 students	157%
3	Tamarac Elementary	1,391	920	150% of FISH	151%
4	Margate Elementary	1,252	838	Exceeds 1,200 students	149%
5	Indian Trace Elementary	1,204	845	Exceeds 1,200 students	142%
	MIDDLE				
6	Pines Middle	1,665	1,016	140% of FISH	164%
7	Tequesta Trace Middle	2,102	1,376	Area rapidly growing stud.pop.	153%
8	WC Young Middle	1,897	1,385	Exceeds 1,700 students	137%
9	Ramblewood Middle	1,783	1,324	Exceeds 1,700 students	135%
10	Westpine Middle	1,833	1,376	Exceeds 1,700 students	133%
11	Bair Middle	1,816	1,388	Exceeds 1,700 students	131%
12	Perry Middle	1,710	1,427	Exceeds 1,700 students	120%
	HIGH				
13	Western High	3,675	1,944	Area rapidly growing stud.pop.	189%
14	Flanagan High	4,158	2,693	Area rapidly growing stud.pop.	154%
15	Piper High	3,068	2,046	125% of FISH	150%
16	Deerfield Beach High	2,729	1,967	150% of FISH	139%
17	Taravella High	2,831	2,197	125% of FISH	129%

Source: Broward County School District, School Boundaries, Assignment, Summer School, Charter

Schools, and Year Round Schools, 1996.

*F.I.S.H. - Florida Inventory of School Houses -- State Department of Education permanent capacity (without portables) - Sept. 1998.

**Based upon criteria in School Board Policy 5000.

**EXHIBIT 8-8
TOTAL EXPENDITURES INCLUDED IN THE FIVE-YEAR PLAN**

High School - North		High School - South		High School - Central	
Name	5-Year Total Expenditure	Name	5-Year Total Expenditure	Name	5-Year Total Expenditure
Deerfield Beach	\$10,300,000	Hallandale	\$3,604,003	Boyd Anderson	\$6,800,000
Coconut Creek	20,964,233	McArthur	11,213,416	Dillard	30,100,000
North Area Alt.	300,000	Miramar	7,600,000	Fort Lauderdale	16,700,000
Pompano Beach	14,900,000	South Broward	25,200,000	Piper	8,700,000
Taravella	6,800,000	Weston	43,400,000	Plantation	6,400,000
				South Plantation	9,000,000
				Pine Ridge Alt.	890,961
				Whiddon-Rogers	5,100,000
Total:	53,264,233		91,017,419		\$83,690,961
Middle School - North		Middle School - South		Middle School - Central	
Name	5-Year Total Expenditure	Name	5-Year Total Expenditure	Name	5-Year Total Expenditure
Margate	\$3,000,000	Apollo	\$1,422,742	Central Area/West	\$25,400,000
Coconut Creek	25,400,000	Miramar	25,400,000	Plantation	1,800,000
Silver Lakes	2,600,000	Weston	25,400,000		
Total:	\$31,000,000		\$52,222,742		\$27,200,000
Elementary School - North		Elementary School - South		Elementary School - Central	
Name	5-Year Total Expenditure	Name	5-Year Total Expenditure	Name	5-Year Total Expenditure
Broadview	\$2,100,000	Bethune	\$6,000,000	Bayview	\$8,000,000
Coconut Creek	1,713,385	Colbert	4,699,298	Castle Hill	4,600,000
Cypress Run	4,813,322	Miramar	12,900,000	Central Park	1,949,415
Coral Springs	12,900,000	Pembroke Falls	12,178,600	Lauderhill	12,900,000
Floranda	12,900,000	Hallandale	12,900,000	Meadowbrook	5,000,000
Margate	2,000,000	Hollywood Hills	4,000,000	North Fork	2,000,000
McNab	6,700,000	Lake Forest	7,000,000	Oriole	2,400,000
Norcrest	5,400,000	Orange Brook	874,091	Peters	2,227,900
Oakland Park	1,300,000	Perry	2,600,000	Plantation	12,900,000
Park Ridge	1,113,700	Sunshine	2,300,000	Royal Palm	6,000,000
Tamarac	1,300,000	Weston B-6	12,900,000	Central Area/East	18,800,000
Winston Park	2,552,330	Weston C-6	12,957,609	Sunrise	18,800,000
				Village	3,600,000
				Walker	3,400,000
				Wilton Manors	3,000,000
Total:	\$54,792,737		\$91,309,598		\$105,577,315
Grand Total:	\$139,056,970		\$234,549,759		\$216,468,276

Source: Broward County School District, Facilities and Construction Management Department,

1998.

The processes provided for in Policy 5000 allow for meaningful discussions alternatives and an objective means of reviewing boundary changes. This policy also provides reasonable standards for addressing facility needs.

FINDING

While the district has identified the need for reducing the number of portable classrooms (based on the age and condition of many of the existing portables), the overall square footage and capacity included in portable buildings is within reasonable limits. Nationally, the average square footage of portables is 10 percent of the total gross square footage at the elementary level and five percent at the secondary level. As can be seen in Exhibit 8-6 (shown previously), the percentage in the Broward County School District ranges from seven percent at alternative schools to 9.5 percent at middle schools.

Nonetheless, the condition and age of portables in the Broward County School District (as well as the Board-adopted policy) justify the call for the reduction in the number of portables. In addition, the wide range of portable usage in different schools (the number varies from zero at many schools to 66 at Flanigan High) indicates that, in some facilities, the number of portable classrooms puts a severe strain on the permanent facilities. This wide range of portable usage is due in part to the absence of a clear Board policy regarding the use of portables, when they should be assigned to a school, and when they should be removed. The district does include general guidelines in its annual portable classroom survey (e.g., portables are not to be used for storage, requests for units for special programs will be carefully scrutinized, etc.), but these guidelines are not specific.

Recommendation 8-6:

Establish a policy on the use of temporary (portable) facilities that will provide the criteria for need and establish limits on the total amount of temporary space at a particular facility.

Portable classrooms are a reality in growing districts like the Broward County School District. Therefore, the reasons for placing portables (e.g., overcrowded conditions as defined in Policy 5000, construction activity, special programs, etc.) need to be clearly identified and understood by internal and external stakeholders. In addition, it is important to clearly identify what the reasons are for removing portables. Often, portables that are no longer needed for the original purpose are converted to less critical uses rather than removed. This results in a need for maintaining space that may not be necessary.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|--------------------|
| 1. The Director of Property Management should meet with school personnel, facilities staff, and district administrative staff and prepare policy on use of portable classrooms. | May – October 1996 |
| 2. The proposed policy should be submitted to the Board for approval. | November 1996 |
| 3. The policy should be implemented. | January 2000 |

FISCAL IMPACT

This recommendation can be accomplished with existing district resources.

FINDING

In a number of cases, the implementation of Board Policy 5000 at critically overcrowded schools has resulted in a proposal for the use of an alternative calendar as a means of creating additional capacity. While this discussion has centered on the need to alleviate overcrowded conditions, a number of schools have chosen to continue with the alternative schedule even after the overcrowded conditions were alleviated. In fact, there are currently four schools that are on a single-track, year-round program, and one school on a multi-track program.

School districts such as San Diego Unified in California, Cherry Creek in Colorado, and Buena Vista in Virginia have shown that multi-track, year-round calendars can reduce facility needs by as much as 25 percent. A school built for 750 students can handle an attendance of 1,000 since at any one time a quarter of the students will be on vacation. The reduction in need for additional facilities reduces maintenance and operation costs per student and pressure for new buildings.

The multi-track year-round (MYR) calendar also can benefit the educational program. The MYR calendar reduces the time between school terms and therefore increases the student's academic retention from one term to the next. A major drawback to the MYR calendar is the perceived effect it has on family schedules due to concern over the lack of support services such as day care and summer programs. However, in large metropolitan areas like Broward County, the resources such as day care and extensive summer programs are available to alleviate this concern. Further, as noted in Chapter 5, stakeholders (including parent and teachers) support the year-round program at schools where it has been implemented.

The San Diego County Office of Education, which has successfully converted the majority of its schools to the MYR calendar, has published a planning guide that addresses negative concerns such as the following.

- Teachers may state that they are being deprived of an important vacation benefit.
- Scheduling classes and rooms, especially at the high school level, can be challenging.
- Teachers will not always have their own classroom.
- Student participation in sports and other seasonal activities may have to be accomplished during vacation periods.
- Intercession or vacation programs will require additional planning.

The MGT review team acknowledges that some school districts have not successfully implemented a year-round calendar. The year-round approach is a major change that affects all participants, administrators, teachers, staff, parents, and students. For any major change in a school district to be successful, careful planning must clearly state the priorities, goals, and processes for changes. The planning must include all participants

and must be well communicated to the community at large. When these items are addressed, and attendance at a year-round facility is voluntary, the results can be very successful.

Recommendation 8-7:

Implement a multi-track, year-round calendar* at 10 percent of the district's elementary schools.

With 127 elementary schools, this would require that 13 schools adopt such a calendar. If these are in strategic locations, the option can be offered on a voluntary basis and will significantly reduce the need for additional classrooms at the elementary level.

IMPLEMENTATION STRATEGIES AND TIMELINE

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|--|------------------|
| 1. The School Board should appoint a school calendar committee comprised of administrators, teachers, parents, and community members. | September 1999 |
| 2. The school calendar committee should study alternative school calendars including a multi-track, year-round schedule and make recommendations to the Board based on the efficient use of school facilities. | 1999 – 2000 year |
| 3. The Associate Superintendent for School Operations should develop a process for educating teachers and parents about the benefits and planning procedures of a MYR calendar. | Spring 2000 |
| 4. The Board should approve a school calendar that optimizes the use of school facilities and authorizes the administration to identify schools that should implement the new calendar. | 2000-01 year |

FISCAL IMPACT

This committee function can be accomplished with existing district resources. By implementing a year-round calendar, even with the added costs associated with transportation, food service, and other support services, the Broward County School District can realize a substantial cost avoidance in the construction of new capacity. Twenty-five (25) percent of the capacity needs identified in the five-year plan for elementary capacity construction (\$20,162,586) could be reduced because of the use of schools during the summer months. The cost savings is prorated based on a percentage of the proposed construction costs for each year.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Implement Multi-Track Year-Round Calendar	\$0	\$5,830,000	\$5,987,800	\$4,460,700	\$3,884,000

*Also see Chapter 5.3 for additional information on the year-round school program

8.4 Design and Construction

The mission of the typical design and construction department is to provide new and modernized facilities that meet the needs of students at the lowest possible cost. The specific goals of a design and construction department include the following:

- establish a policy and framework for long range facility planning;
- utilize valid enrollment projections on which to base estimates of future needs for sites and facilities;
- select and acquire proper school sites and to time their acquisition to precede actual need while trying to avoid wasting space;
- determine the student capacity and educational adequacy of existing facilities and to evaluate alternatives to new construction;
- develop educational specifications that describe the educational program and from which the architect can design a functional facility that matches the needs of the curriculum with the potential to enhance and reinforce the education the District desires for its students;
- secure architectural services to assist in planning and constructing facilities;
- develop a capital planning budget that balances facility needs, expenditures necessary to meet those needs, and how expenditures will be financed;
- translate satisfactorily the architectural plans into a quality school building and to do so within the budget and time scheduled; and
- establish and carry out an orientation program so that users of the facility can better understand the design rationale and become familiar with the way the building is supposed to work.

CURRENT SITUATION

As described in the previous sections of this chapter, the typical facility planning functions are subdivided over three departments within the Broward County School District. The responsibility for design and construction for new and/or remodeled schools lies with the Facilities and Construction Management Department. The staff includes a department director, directors for facilities project management and design and support, a new position as the coordinator for educational programming, and a furniture and equipment coordinator. The Director of Facilities Project Management oversees a senior project manager and six project managers, two senior facility managers, and 12 facility managers, a senior supervisor field construction manager and 26 field construction managers, two coordinators and a warranty administrator. The Acting Director for Design and Support oversees two architects, four engineers, and two coordinators. The primary responsibilities of this department are to carry out the five-year facilities plan which is coordinated through the facility and project managers as discussed in Section 8.2 above.

The construction process in the Broward County School District utilizes all of the following delivery systems:

- Design/Bid/Build. This system is the traditional program that the school district uses. It consists of the district securing architectural services for the design of the school, putting the project out for bid, and selecting the lowest qualified bidder.
- Re-Use of Prototypes. This system consists of site adapting and re-using the same facility plan either in its entirety or with minimal changes. The result is significant savings in the design costs.
- Design/Build. This process occurs when the school district contracts with one firm to both design and build a facility within set parameters.
- Turn Key Acquisition Programs. This system is a rarely used process where a private firm completes a facility and then either leases or sells the building to the district.

At the completion of the initial planning process (discussed in Section 8.2 above) and the development of a budget and schedule by the facility manager, the delivery system for the project is determined and the project taken to the Board for inclusion on the five-year plan. The decision is made based on an identified list of advantages and disadvantages of each model as they apply to the specific project being considered.

After approval is received from the Board, the request for qualifications for architects design builders (depending on the delivery system chosen) is advertised and qualified firms are short-listed, interviewed, and selected. After completion of construction documents by the selected firm(s), construction is started with oversight by an assigned project manager and field construction manager. Depending on the project's delivery system, the project may or may not be advertised for bids.

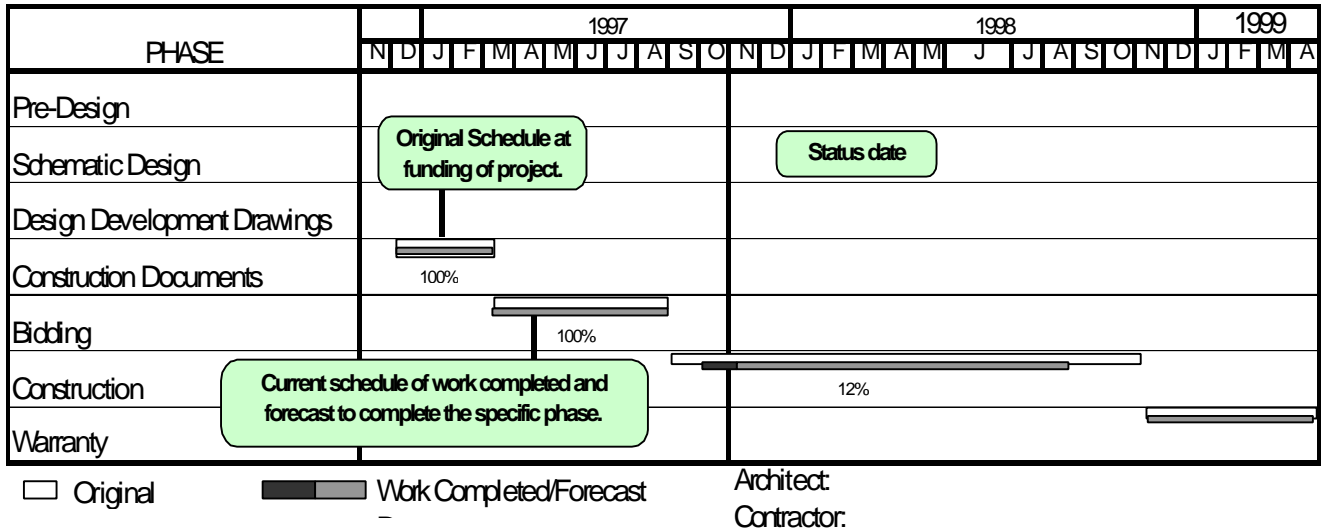
The primary tool for the reporting of the design and construction process and progress toward the goals established in the five-year plan is the quarterly construction status report that is submitted to the Board. This report provides an overview of the status of each project including the schedule progress, financial information, and comments. Exhibit 8-9 below shows an example report.

FINDING

To assist the district with the development of the five-year plan and with the overall design and construction process, the Construction Overview Committee (consisting of community citizens familiar with the construction process) has been formed. The specific responsibilities of the committee include:

- review of project status and financial data;
- ascertain that the construction project management control structure is appropriately designed and functioning effectively;
- oversee the performance of the construction management function;

**EXHIBIT 8-9
SAMPLE CONSTRUCTION STATUS REPORT**



Design Phase Estimate

Fixed Limit of Construction	Project Phase	Construction Estimate	Variance
9,842,000	Construction	10,215,699	373,699

Board Approved Construction Cost

Construction Phase

Latest estimate of Construction Costs

Contract Award Amount	No. of Change Orders	Change Orders/Change Directive	Current Contract Amount
10,215,699	1	-24,301	10,191,398

Board Approved Contract Amount

Comments

Source: Broward County School District, Facilities and Construction Management Department, 1998.

- ensure that the recommendations from previous reports receive appropriate attention;
- review quarterly project status and regulatory reports; and
- provide effective communication links.

COMMENDATION

The Broward County School District is to be commended for the formation and implementation of a Construction Review Committee.

The Construction Review Committee, which reports directly to the Board with a dotted line relationship to the Comptroller and Associate Superintendent of Facilities and Construction Management, has provided meaningful recommendations regarding the most effective delivery systems, the most effective construction materials, and the community needs.

FINDING

Exhibit 8-10 below provides an analysis of actual construction cost data (including change orders) for a sample of recently completed projects. New school facilities in Broward County reflect the use of improved materials from those that were criticized in the Grand Jury Report and a design that meets the educational program. The costs for these projects, as provided above, are somewhat high but within reasonable ranges for the region. For comparison purposes, the estimated cost for school construction in South Florida are shown below. These estimates are taken from the 1998 edition of *Square Foot Costs* published by the R.S. Means Company, Construction Publishers and Consultants, and are based on the actual costs nationwide with local area adjustments:

- Elementary Schools \$74.94 / square foot
- Middle Schools \$78.17 / square foot
- High Schools \$82.66 / square foot

These cost estimates are for new construction. Renovations are normally from 10 – 20 percent higher. In addition, the generally accepted range for change orders is up to five percent for new construction and up to 10 percent for renovations.

The district has also realized a savings through the use of prototypical designs that meet the education program and safety requirements and through the use of a variety of delivery modes.

COMMENDATION

The Broward County School District is commended for implementing cost savings alternatives in school construction.

The use of prototypical school designs, the design – build process, and a turn key acquisition process, along with attention to the use of cost effective materials has resulted in an overall savings in school construction costs.

**EXHIBIT 8-10
CONSTRUCTION COST ANALYSIS IN THE
BROWARD COUNTY SCHOOL DISTRICT**

PROJECT	TYPE	CONTRACT AMOUNT	COST PER SQUARE FOOT	CHANGE ORDERS (%)
Middle School "HH"	New Project – Design Build	\$16,245,040	\$81.10	Completion Date is July 2000
Attucks Middle School	Traditional	\$3,323,510	\$88.34	\$10,510 (.03%)
Middle School "KK"	New Project – Design Build	\$18,602,181	\$92.87	Completion Date is April 2000
Deerfield Beach Middle School	Traditional	\$8,407,272	N/A	\$110,058 (1.3%)
Everglades Elementary	New School – Design Build	\$9,697,615	\$77.79	Completion Date is August 1999
Fox Trail Elementary	New School – Turnkey Acquisition	\$10,703,147	\$96.91	(\$24,301) (-.02%)
Lakeside Elementary	Traditional Design/Build	\$9,949,642	\$94.48	\$152,642 (1.5%)
McNichol Middle School	Design/Build	\$18,679,121	\$153.75	\$922,121 (4.9%)
Panther Run Elementary	New School – Turnkey Acquisition	\$10,363,693	\$93.85	\$10,964 (.01%)
Parkway Middle School	Traditional	\$2,960,946	\$78.94	(10.1%)
Plantation High School	Traditional	\$8,872,460	N/A	\$292,206 (3.3%)
Sunshine Elementary	Traditional	\$1,510,261	\$135.33	\$26,561 (1.8%)
Walter Young Middle	Traditional	\$1,882,404	\$78.42	\$39,785 (2.1%)

Source: Broward County School District, Facilities and Construction Management Department, 1998.

FINDING

While the Broward County School District has developed cost savings programs in the facilities and construction (as discussed above), the overall cost remains higher than national averages. The following items which have proven to substantially lower overall costs have not been implemented:

- The development of a value engineering process is directed towards a review of the design and materials proposed with the intent of providing the most cost effective products. The review should be conducted by an independent consulting team comprised of design architects, mechanical and electrical engineers, landscape architects, educational specialists, cost estimators, and any other professionals appropriate for the particular project. The value engineering process should be conducted early in design development when enough design information is available to determine costs accurately, but before it is too late to make meaningful changes. The Broward County School District currently utilizes what it refers to as a value engineering process, but it consists primarily of cost reductions to get projects within budget.

- The streamlining of the district design manual to emphasize consistency or standardization. The district's design manual, where practical, should allow either one or two models of products for each item (i.e. lockers, toilet accessories, plumbing fixtures, mechanical units, bleachers, food service equipment). This standardization will save costs over time because excessive parts stocking will not be required, and training on the repair of multiple types of equipment will not be necessary. The district is in the process of developing a design manual, which needs to be completed.

- Pre-determined specifications need to be provided to the degree possible. The specifications for whiteboards and chalkboards, for example, should be standardized to a single specification section and given to all of the architect/engineering firms. If there are five projects and five architectural firms working on projects simultaneously, this would eliminate recreating the same specification five times with five different interpretations and five different possibilities for error.**Note:** Subsequent to the on-site review, in February 1999, the district published a document entitled *Facilities Materials Standards* which includes specifications for materials.)

RECOMMENDATION

Recommendation 8-8:

Further reduce costs and improve effectiveness in the design and construction arena through the use of the cost savings alternatives outlined above (value engineering and design standards manual).

Implementation of value engineering and providing a standardized design manual should create greater efficiencies in school facilities construction.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|----------------|
| 1. The Facilities and Construction Management Department should develop a standardized design manual. | Summer 1999 |
| 2. The Facilities and Construction Management Department should develop a value engineering process. | Summer 1999 |
| 3. The Director for Facilities and Construction Management should implement a design manual and value engineering strategies. | September 1999 |

FISCAL IMPACT

The fiscal impact of this recommendation will be realized when future projects are bid. According to the Washington State Office of Financial Management, studies have shown an average savings of 12 times the cost of the value engineering services.

MGT has conducted facilities studies in over 50 school districts. Based on that experience we have found that the cost for value engineering is between \$12,000 and \$18,000. Using a cost of \$15,000 for value engineering, on a \$25,000,000 project, the savings would total \$180,000 or approximately three-fourths of one percent. For the purposes of estimating the fiscal impact in Broward County, the chart below utilizes a more conservative one-half of one percent estimate.

The use of a standardized design manual will not necessarily result in construction cost savings, but rather reduce long-term operational costs for facilities.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Implement Construction Cost Saving Measures	\$1,801,500	\$1,850,300	\$1,378,400	\$1,200,200	\$1,560,000*

*Not yet included in the five-year plan -- the cost savings for this year is based on an average of previous years.

8.5 Maintenance

CURRENT SITUATION

The Maintenance Department of the Broward County School District has a staff of 687 and a budget of \$50,820,364. This department is responsible for maintaining all elementary; middle, and high schools; vocational, adult and alternative centers; and district facilities for a total of 24,797,265 gross square feet.

Exhibit 8-11 presents an organizational chart for the Maintenance Department.

The two other functions in the Maintenance Department are workload systems and staff development. Workload systems is responsible for managing the work order tracking software, COMPASS, and the departmental budget and fiscal software, GEAC.

Routine work order requests are typically generated by a school administrator and submitted to the workload management staff. The workload management staff evaluates the work order request and qualifies the order, assigns trades, and prioritizes the order before sending it on to COMPASS.

Work order priorities are:

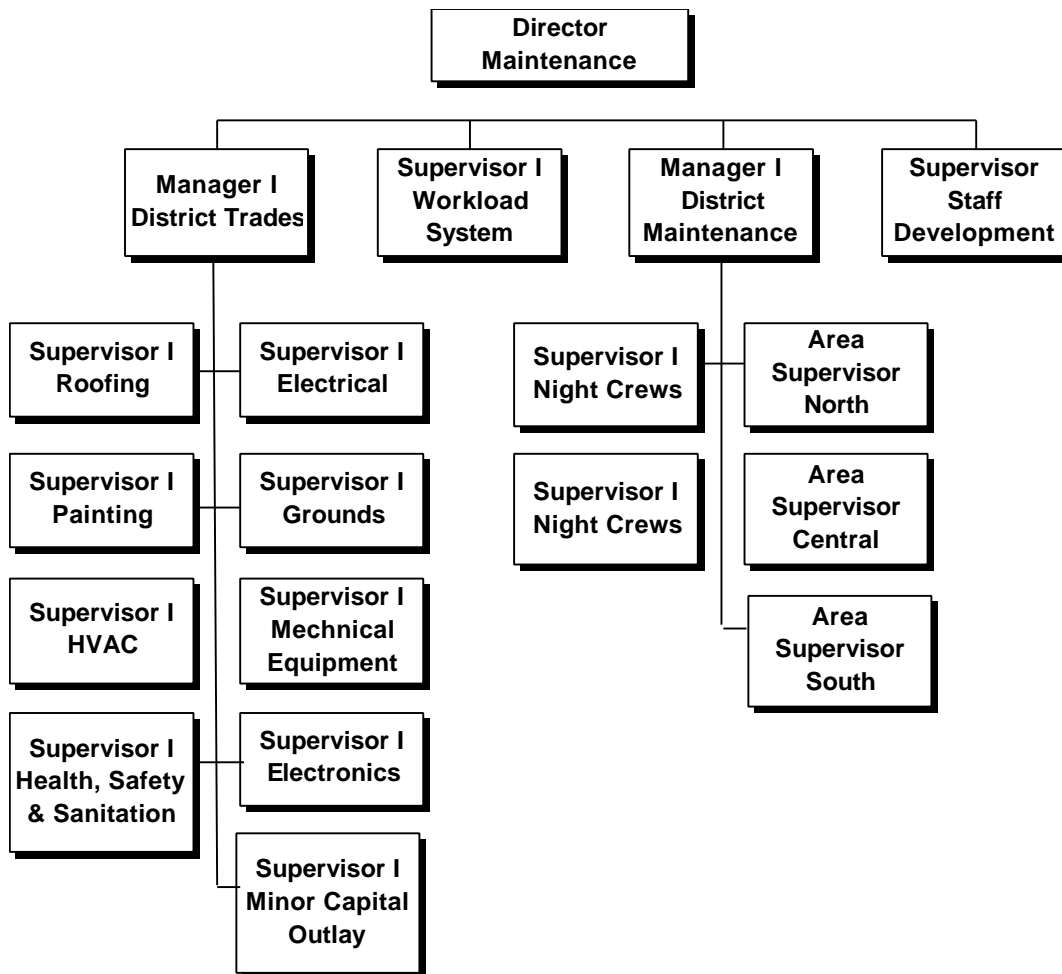
- 01 – Emergency – An immediate response is requested.
- 02 – Urgent – A response is requested within 24 hours.
- 03 – Routine – Can be planned and scheduled to meet future completion date.
- 04 – Shutdown required – To be scheduled at a mutually agreeable time with the principal.

- 05 – Unfunded request – Sent to District Maintenance Accounting.
- PM– Preventive Maintenance – Generated for the express purpose of implementing a planned/scheduled preventive maintenance program.

The work order is entered into the COMPASS system and given a planned and approved status. The workorder is forwarded to the appropriate foreperson who plans materials or changes to the request and returns it to COMPASS for scheduling. The order is then returned to the foreperson who assigns it to the appropriate tradesperson, and processes any materials requested. Once completed, the work order is returned to COMPASS where time card information is input, and the work order is closed out.

The COMPASS system is sophisticated and capable of being an effective management tool. The district recently created the Supervisor of Workload Systems position to oversee the work order tracking process and to improve the utilization of the software.

**EXHIBIT 8-11
MAINTENANCE DEPARTMENT ORGANIZATIONAL CHART
1998-99**



Source: Broward County School District, Maintenance Department, 1998.

The maintenance trades workers are organized into three basic groups that include:

- **Area Crews** – The District has been divided into three zones and each zone has a full compliment of trades assigned to it. The area crews concentrate on the day-to-day maintenance repair items. They report to the area supervisors.
- **Districtwide Crews** – These crews work out of the central maintenance facility and are largely responsible for maintenance projects funded with capital funds. They report to a supervisor of their trade.
- **Night Crews** – These workers report to work after the school day is finished and some of the crews work four – 10 hour days. These crews support both the area crews and the districtwide crews by accomplishing projects that would be to disruptive during the school day.

The Maintenance Department has three geographic areas: north, central, and south. Each area has a maintenance facility that is responsible for the day-to-day repairs of the schools in the area. Exhibit 8-12 lists the number of schools in each area. In addition, the south area has added a satellite office on the west side where some of the trades workers report.

**EXHIBIT 8-12
NUMBER OF SCHOOLS BY AREA
1998-99**

SCHOOL TYPE	NORTH AREA	CENTRAL AREA	SOUTH AREA
Elementary	39	39	43
Middle	10	10	13
High	7	7	9
Vocational, Adult & Alternative Centers	6	5	7
Portables	517	742	832

Source: Broward County School District, Maintenance Department, 1998.

The Supervisor of Staff Development is responsible for planning, coordinating, and implementing training programs for maintenance staff. In addition, the supervisor is responsible for dealing with employee grievances, is involved in the hiring and firing processes, and is the union contract administrator. The position is new and has only been filled for approximately 11 months.

The staff development unit has developed a new employee's manual; created a career resource center; and has conducted training sessions in sexual harassment, cost estimating, indoor air quality, and lock-out/tag-out procedures. The department does not currently have a training budget because the Staff Development Supervisor started after the last budget process.

FINDING

The Broward County School District had an operational review of the Maintenance Department performed by a private consulting firm in 1996. A follow-up review was also performed to evaluate the implementation status of each recommendation in 1998. The follow-up review found that the Maintenance Department had made significant improvements. The majority of the recommendations had been implemented or were being addressed. The exceptions were three recommendations dealing with outsourcing, planning and development, and performance measures.

Exhibit 8-13 presents an overview of the recommendations, the status as of the follow-up review, and the current status.

**EXHIBIT 8-13
STATUS OF 1996 OPERATIONAL REVIEW RECOMMENDATIONS
1998**

RECOMMENDATION	1998 STATUS	CURRENT STATUS
Clarify mission and objectives.	Resolved	
Analyze cost of performing functions in house vs. privatizing.	Improved Department lacked documentation	Same
Re-evaluate organizational structure.	Resolved	
Develop plan to maintain aging schools.	Improved	Resolved Five Year Capital Budget
Develop performance measures.	Improved Positions established but not filled.	Improved Positions filled, training received.
Establish position to focus on human resource issues.	Resolved	
Evaluate whether COMPASS or other technology can be utilized to automate scheduling process.	Resolved	
Reduce travel time.	Resolved	
Work with Budget Department to develop realistic operating and capital budgets.	Resolved	
Review survey results and incorporate customer needs into mission and objectives.	Resolved	
Consider whether technology can be used to automate the work order process.	Resolved	

Source: Broward County School District, Maintenance Department, 1998.

As Exhibit 8-13 shows, the department has continued to work on the recommendations from the 1996 operational review. The department has progressed in developing performance standards. Staff was hired and they received training from S. Means in the development of standards. Further, the department has produced its first five-year capital improvements plan to manage the backlog of deferred maintenance.

The Maintenance Department does outsource a significant amount of work and has done some cost comparisons to prove the cost effectiveness of these contracts. However, the

department needs to consistently perform these cost comparisons and clearly document the studies.

The Maintenance Department has made steady progress in improving its efficiency and effectiveness. Measures taken by the department include:

- the use of night work crews to minimize disruption to the school day and increase the efficiency of workers;
- the use of night crews to increase the utilization of the main maintenance facility. The facility would not have enough parking and staging areas if all the crews worked on the same shift;
- the use of four ten-hour work days to minimize the time spent for traveling and breaks per shift;
- the use of contract labor to increase production during peak periods without hiring full-time employees;
- the utilization of mobile equipment to keep schools operating during equipment or power failures;
- the use of job-site reporting to minimize travel time; and
- the use of job-site materials storage to minimize logistics and travel time.

COMMENDATION

The Maintenance Department is aggressively implementing new processes to improve its efficiency and effectiveness.

FINDING

One recommendation of the 1996 operational review was to establish a position that focused on human resources issues. The department created this position and filled the position in January 1998. Exhibit 8-14 lists the training that has taken place since January 1998.

The benefits of this extensive training program can be seen in the reduction of grievances filed during the same period. Exhibit 8-15 shows a comparison of grievances filed in the period prior to the training program and the creation of the staff development position, and the period directly after implementation. An analysis of the two periods indicates that 59 grievances or 10 per month were filed in the first period and 20 grievances or two per month were filed in the second period. This is a dramatic decrease.

COMMENDATION

The Maintenance Department has established an effective staff development program.

**EXHIBIT 8-14
MAINTENANCE DEPARTMENT TRAINING
JANUARY 1998 TO PRESENT**

AREA OF TRAINING	PARTICIPANTS
1. Indoor air quality	All employees
2. Discipline & documentation	Supervisors
3. Performance evaluations	Supervisors and forepersons
4. Collective bargaining agreement	Supervisors and forepersons
5. Planning & appraisal system	Supervisors
6. Sexual harassment in the workplace	All employees
7. Forklift operation	Selected employees
8. Pest control application certification	Selected employees
9. Asbestos awareness	New employees
10. Lockout/tag out	New employees
11. Locks and hardware repairs	Selected employees
12. Conflict resolution & confrontation skills	Selected employees
13. Excelling as a first-time supervisor	Selected employees
14. Basic electricity (hardware)	Selected employees
15. Backflow prevention assembly	Selected employees
16. Dunham-Bush (vendor sponsored)	Selected employees
17. Specialty hardware	Selected employees
18. Protective relay application	Selected employee
19. Basic Windows 95	Selected employees
20. Access 97	Selected employees
21. Bookkeepers & budgetkeepers	Selected employees
22. LP gas qualification	Selected employee
23. Educational Technology	Selected employee
24. EPA's storm water permits/pollution prevention	Selected employee
25. Maintenance & repair estimating (R.S. Means)	Selected employee
26. Estimators orientation	Selected employee
27. Conquering workplace negativity	Selected employee
28. Electricians continuing education	Department electricians
29. Carpet & paint specifications	Selected employees
30. Technology – NT server administration	Selected employees
31. Advanced fire alarm control panels	Selected employees
32. Introduction to fire alarm control panels/communicator	Selected employees
33. Locksmith-safe penetration	Selected employees
34. Hazardous waste management	Selected employees

Source: Broward County School District, Maintenance Department, 1998.

**EXHIBIT 8-15
COMPARISON OF GRIEVANCES
AUGUST 1997 - JANUARY 1998 AND FEBRUARY 1998 - NOVEMBER 1998**

GRIEVANCES FILED FROM 8/1/97 TO 1/31/98	
Reason Cited	Number Filed
Working out of classification pay	9
Passed over for vacant position	8
Unjust suspensions	7
Transfers (involuntary/voluntary)	6
Pay/step increases due	4
Performance evaluations	2
Improper personnel file information	2
Unjust termination	2
Denial of leave time	2
Harassment	2
Unfair record of counseling	2
Overtime selection process	2
Violation of progressive steps	1
Supplemental pay	1
Unfair hiring practices	1
Breach of confidentiality	1
Denial of holiday pay	1
Invasion of privacy	1
Unfair other assignments	1
Reassignment/transfer	1
Safety - class action	1
Inclement weather - class action	1
CDL testing process – class action	1
GRIEVANCES FILED FROM 2/1/98 TO 11/1/98	
Reason Cited	Number Filed
Suspension – poor performance	1
Suspension - insubordination	4
Suspension – improper conduct	1
Suspension – unauthorized use of SBBC property	2
Suspension – excessive absenteeism	1
Removal – memos from file	3
Unsatisfactory evaluation	1
Working out of job classification	5
Tool replacement fund – class action	1
Recovery of loss time	1

Source: Created by MGT from data provided by Maintenance Department, 1998.

FINDING

The Broward County School District has identified a significant indoor air quality problem with its schools. With the help of a private industrial hygienist, the district has identified the source of the problem to be mold and mildew growth caused by water intrusion and malfunctioning HVAC systems.

In response to the problem, the District has developed a team approach that includes risk management, facilities construction, and maintenance. Risk management acts as the focal point for all complaints. Facilities construction has developed design standards to eliminate the problems from occurring in new construction. Maintenance is working to correct the conditions that are causing the problems. All three departments have made public presentations, at the requests of principals, to explain the situation and the steps being taken to correct the problem.

The district's private industrial hygienist has conducted surveys of all schools and prepared reports identifying the problem and the solution. The remedial work, which includes projects at 155 schools, has been prioritized and scheduled in the five-year capital plan. The availability of funds and contractors to perform the work, limit the district's ability to complete the work sooner than currently scheduled in the five-year plan. The industrial hygienist will conduct inspections of all work upon its completion.

As a result of this situation, the district has taken steps to avoid similar problems in the future. These steps include:

- The Facilities Construction Department has developed design specifications to avoid the construction problems that led to many of the problems.
- Maintenance has dedicated a crew to the maintenance of HVAC equipment. The procedures followed by this crew include:
 - annual inspection;
 - abatement of any found contaminants;
 - servicing of equipment to ensure operation according to specifications;
 - training of school based employees on preventive maintenance measures, monitoring the system, and system inspection; and
 - maintaining a log for all equipment.
- The industrial hygienist has written specific procedures for remediation work to eliminate mold and mildew problems.

COMMENDATION

The Broward County School District has developed a systematic approach to dealing with the serious problem of poor indoor air quality.

FINDING

The Maintenance Department has established a satellite office in the south area, which is in addition to the south area office. This satellite is located to serve a specific area and acts as a reporting office for the tradespersons assigned to it. The office is located at an existing school in an unused utility space and therefore did not require a new facility.

This reduces the travel time for the tradespersons and increases their efficiency. The initial response time, which is the time it takes the tradespersons to report to their first job-site school, has decreased by as much as 45 minutes. The time savings ranges from 39 percent to 75 percent.

The south area serves more schools and portable classroom units than the other two areas with fewer staff. Since the creation of the satellite office, the south area has completed 25 percent more work orders than the other areas and utilized 1,230 fewer hours in travel time, which represents a savings to the district of \$44,279. The savings was calculated by comparing travel time of the South Area with the North Area, and multiplying the difference by \$36 per hour (which is the average hourly salary and benefits for a maintenance mechanic).

Exhibits 8-16 shows evidence of increases in efficiency as a result of the establishment of the satellite office in the south area.

**EXHIBIT 8-16
INITIAL RESPONSE TIME CHANGE
PRIOR TO AND AFTER THE ESTABLISHMENT OF THE
SOUTH AREA SATELLITE OFFICE
(In December 1998)**

TRUCK NUMBER	#1007	#1064	#1140	#1651	#1718
Trade	AC	Electrical	AC	Plumbing	Plumbing
Average prior to satellite	60 min.	44 min.	39 min.	54 min.	60 min.
Average after satellite	15 min.	24 min.	24 min.	20 min.	24 min.
Reduction	75%	45%	39%	63%	60%

Source: Broward County School District, Maintenance Department, 1998.

COMMENDATION

The Maintenance Department has increased efficiency by establishing a satellite office in the south area.

FINDING

The Maintenance Department has determined that the establishment of a satellite office reduces travel time for the tradespersons and increases efficiency. A satellite office acts as a reporting place for the tradespersons and does not require shops or storage space, and therefore can be placed in a small, unused room in an existing facility. The materials needed for work orders can be delivered daily by a supervisor or foreperson.

RECOMMENDATION

Recommendation 8-9:

Establish satellite offices in the north and central areas.

The department has documented the savings achieved by using satellite offices and should expand this practice.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-----------|
| 1. The Director of Maintenance should work with the north and central area supervisors to locate facilities to house satellite offices. | May 1999 |
| 2. The supervisors should identify crews that will be assigned to the satellite offices. | June 1999 |
| 3. The supervisors should begin operation of the satellite offices. | July 1999 |

FISCAL IMPACT

The establishment of satellite offices in the north and central areas should produce the same level of decrease in travel time that was experienced in the south area. This represented approximately a 15 percent decrease for \$44,279. This level of reduction will project to a savings of approximately \$83,000 annually ($\$287,394 + \$265,484 = \$552,878 \times .15 = \$82,931$).

Based on the experience of the South area, there should be little or no costs associated with establishing satellite offices. These offices are only a reporting place for staff and can be housed in unused utility rooms or portables.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Establish Satellite Offices	\$83,000	\$83,000	\$83,000	\$83,000	\$83,000

FINDING

The Broward County School District has prepared a five-year facilities work program, which details projects for the next five years beginning in 1998-99. The plan identifies specific projects at specific schools and identifies needs totaling \$1,500,601,000.

Exhibit 8-17 lists the major project types and the amounts appropriated.

**EXHIBIT 8-17
FACILITIES WORK PROGRAM APPROPRIATIONS
1998-99 TO 2002-03**

ITEM	FIVE-YEAR TOTAL*
Debt Service	\$220,862
Existing Projects	70,120
Capacity Additions	499,111
Remodel/Renovate	75,942
Mold/Mildew	31,119
Technology	198,550
Health, Safety & Sanitation	41,900
Maintenance	87,800
Maintenance Transfer	78,000
ADA	19,000
Equipment	27,500
Vehicles	40,900
Land Purchase & Other	12,600
Contingency & Legal	25,500
Capitalized Cost	39,449
Cost of Living Adjustment	32,248
Total	\$1,500,601

Source: Broward County School District, Maintenance Department, 1998.
*In thousands of dollars.

The plan was developed by conducting a survey of the needs of each facility in the district. Projects were then prioritized and distributed over the five-year period. In addition to addressing maintenance and capacity needs, the plan also details projects to eliminate all indoor air quality problems in the district. These projects were identified by the district's consultant, as a result of a survey of all facilities.

COMMENDATION

The Broward County School District has prepared a comprehensive five-year facilities plan.

The five-year plan was developed in part by conducting a facilities needs survey. This was the first such survey the Broward County School District has conducted. An annual facilities survey is necessary in order to maintain an accurate condition assessment of the district's facilities. The results of the survey should continue to be used to update the five-year plan, re-prioritizing as needed.

FINDING

The five-year plan identifies approximately \$384,881,000 in deferred maintenance projects. This work has accumulated because the district has not maintained its facilities at a sufficient level. *The American School and University Magazine* conducts an annual survey of school districts to determine the average amount spent on the maintenance of facilities.

Exhibit 8-18 presents the results of this survey in comparison to the Broward County School District.

**EXHIBIT 8-18
ANNUAL MAINTENANCE SPENDING COMPARISONS
1997-98**

UNIT	DOLLARS PER SQUARE FOOT
National Median	\$2.53
Region 4*	\$1.92
Broward County	\$2.04

*Region 4 includes AL, FL, GA, KY, MS, NC, SC, and TN.

Source: *American School and University Magazine* and Broward County School District, 1998.

This level of expenditures indicates that the district is spending at a level comparable to other school districts in Region 4 however, at this level of spending, the district will still accumulate deferred maintenance. As can be seen, the Broward County School District is spending slightly more than the Region 4 median and approximately 24 percent less than the national median.

RECOMMENDATION

Recommendation 8-10:

Implement an ongoing process to identify deferred maintenance needs including the establishment and implementation of objectives and activities that will eliminate accumulation of deferred maintenance.

The fact that the Broward County School District has \$380 million in deferred maintenance indicates the facilities maintenance function has not been properly implemented. Deferred maintenance increases the cost of maintaining facilities (e.g. not painting on an appropriate cycle will allow weather damage to occur to exterior finishes, reducing the life of the finish material).

While the five-year facilities plan has budgeted approximately \$380 million for deferred maintenance, this only addresses existing deferred maintenance items. The Maintenance Department should identify the activities necessary to eliminate the ongoing accumulation of deferred maintenance.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-------------|
| 1. The Supervisor of Workload Systems should identify the historical activities necessary to maintain the district facilities. | May 1999 |
| 2. The Director of Maintenance and area supervisors should identify a comprehensive preventative maintenance program. | Summer 1999 |
| 3. The Director of Maintenance should prepare an annual plan that is tied to the goal of not accumulating deferred maintenance. | Fall 1999 |

4. The Director of Maintenance should present the plan to the Board for review and approval. November 1999

FISCAL IMPACT

This recommendation can be accomplished within the existing resources of the district. A savings is expected in future years; however, it cannot be quantified at this time.

FINDING

The Workload Systems unit is currently in the process of developing performance standards for maintenance tradespersons. The staff has received the necessary training and is using the COMPASS software to develop the historical data for the performance standards.

Performance standards, such as the time required to paint a door or replace a door lock, can be used to schedule work activities and increase efficiency. Performance standards have been shown to improve employee productivity by providing clear work expectations. Performance standards can also be used as a tool to monitor employee performance.

RECOMMENDATION

Recommendation 8-11:

Implement performance standards for maintenance tradespersons.

This recommendation should become a priority for the district. The implementation of performance standards should increase productivity and reduce the need for the additional maintenance funding.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Maintenance should make the development of performance standards the first priority for the Supervisor of Workload Systems. May 1999
2. The Supervisor of Workload Systems should develop performance standards. Summer 1999
3. The maintenance supervisors should implement the performance standards and monitor the productivity rates of their respective crews. Commencing in August 1999 Ongoing

FISCAL IMPACT

The implementation of performance measures has been shown to improve productivity by at least five percent. The projection of five percent increase in efficiency is based on previous studies conducted by the review team. MGT has conducted several studies for private and public entities where an increase in efficiency of up to 30 percent has been accomplished through business process reengineering and the implementation of performance standards. Increases of 10 to 15 percent have been attributed to the establishment of these performance standards.

This increase in productivity will eliminate the need for additional contracted labor or having additional staff. A five percent increase in productivity is the equivalent of hiring approximately 34 new staff. This will offset the need for additional maintenance funding by approximately \$1.5 million. (\$44,262 average salary including benefits x 34 staff members = \$1,504,922)

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Implement Performance Standards	\$500,000	\$1,000,000	\$1,500,000	\$1,500,000	\$1,500,000

FINDING

During the 1996 review of the Maintenance Department, a customer satisfaction survey was conducted. The results of this survey indicated that 74 percent of the customers were satisfied with the service provided by the Maintenance Department. However, the MGT review team received complaints about the quality of service and the lack of communication from the Maintenance Department. Customers complained that they were often unsure as to the status of a work order request and the scheduled completion for work orders.

RECOMMENDATION

Recommendation 8-12:

Increase communication with customers of the Maintenance Department by:

- **conducting an annual customer satisfaction survey;**
- **developing a reporting system on the status of work order requests; and**
- **issuing a schedule for all work at each school.**

The Maintenance Department is planning to develop a questionnaire that will be part of each work order. This questionnaire should allow the customer a chance to comment on the quality of the service. However, completing a questionnaire for each work order may prove to be cumbersome for the customer and difficult to analyze. An annual survey should provide a more effective tool for receiving feedback and developing better management strategies.

The customers also need to be kept informed of the status of their requests and the scheduling of work at their schools. Keeping customers informed is critical to positive relationships.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-----------|
| 1. The Director of Maintenance, in conjunction with the Supervisor of Workload Systems, should develop a customer communication plan including an Customer | June 1999 |
|--|-----------|

Satisfaction Survey and work order status reporting system.

2. Following the issuance of a memo explaining the plan, maintenance supervisory staff should visit schools and reinforce the implementation of the plan. Fall 1999

3. The director and the supervisors should utilize the feedback to better serve the customers of the Maintenance Department. Ongoing

FISCAL IMPACT

This recommendation can be accomplished within the existing resources of the district.

FINDING

During the first on-site visit of the performance review team, MGT found that members of the school and community perceived there was a discrepancy in the amount of maintenance work performed at schools in the western, or newer suburban section of the district, and schools in the eastern or older urban part of the district. It was reported that the older urban schools did not get as much attention as the newer suburban schools.

Exhibit 8-19 presents an analysis of the total amount of work performed at schools in the west versus schools in the east in the 1997-98 school year (Note: The district has determined that the eastern and western sections of Broward County are divided by Highway 441).

Exhibit 8-19 indicates that the district is spending \$1.75 per square foot in the eastern schools versus \$1.27 per square foot in the western schools. This discrepancy is logical because the schools located in the eastern side of the district are older and have accumulated more deferred maintenance. The public perception that the district is spending less in the east is probably due to the fact that the schools are older and in greater need of repair and renovation.

Recommendation 8-13:

Increase communication with the public regarding the amounts of maintenance funds being expended on schools.

Clear communication with the taxpayers is critical to the effective management of a school district. Effective communication requires constant effort and a communication plan.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Maintenance should develop a communications plan which will keep taxpayers informed on the activities of the department (especially as related to the maintenance of eastern and western schools). May 1999

**EXHIBIT 8-19
COMPARISON OF EAST AND WEST MAINTENANCE WORK
1997-98**

EAST

SCHOOL NUMBER	SCHOOL NAME	TOTAL GROSS SQUARE FEET	ACTUAL TOTAL OF WORK ORDERS	DOLLARS PER SQUARE FEET
	Elementary School			
0641	Bayview	40,229	\$136,254.49	\$3.39
0201	Bennett	57,743	\$75,587.50	\$1.31
0341	Bethune	102,265	\$99,382.51	\$0.97
0501	Broward Estates	61,039	\$164,064.03	\$2.69
1421	Coconut Creek	78,892	\$233,202.99	\$2.96
0231	Colbert	69,312	\$155,688.56	\$2.25
0331	Collins	42,429	\$133,178.55	\$3.14
0901	Cresthaven	79,376	\$54,983.81	\$0.69
0221	Croissant Park	96,271	\$93,010.56	\$0.97
1781	Cypress	75,337	\$240,700.90	\$3.19
0101	Dania	72,743	\$122,786.76	\$1.69
0011	Deerfield Beach	70,343	\$157,937.19	\$2.25
0391	Deerfield Park	105,533	\$ 94,910.62	\$0.90
0271	Dillard	87,250	\$124,021.61	\$1.42
3221	Drew	81,439	\$236,279.94	\$2.90
0851	Floranada	59,332	\$125,530.18	\$2.12
0921	Foster	56,124	\$213,999.00	\$3.81
0131	Hallandale	61,633	\$ 95,694.11	\$1.55
0491	Harbordale	44,098	\$206,864.37	\$4.69
0121	Hollywood Central	93,569	\$61,565.71	\$0.66
0111	Hollywood Hills	63,470	\$146,172.06	\$2.30
0831	Lake Forest	68,689	\$67,704.67	\$0.99
0621	Larkdale	79,864	\$93,854.62	\$1.18
0431	Lauderdale Manors	82,370	\$329,689.46	\$4.00
1091	Lloyd Estates	59,505	\$128,158.48	\$2.15
1671	Markham	72,044	\$171,291.90	\$2.38
1611	Martin Luther King	99,002	\$175,794.44	\$1.78
0841	McNab	60,398	\$89,148.70	\$1.48
0561	Norcrest	55,085	\$82,484.84	\$1.50
0521	North Andrew Gardens	81,068	\$85,118.21	\$1.05
1191	North Fork	71,845	\$80,423.74	\$1.12
0041	North Side	74,139	\$187,168.23	\$2.52
0031	Oakland Park	60,872	\$107,162.61	\$1.76
0461	Oakridge	74,554	\$377,884.94	\$5.07
0711	Orange Brook	55,734	\$96,106.73	\$1.72
1831	Oriole	73,234	\$392,748.35	\$5.36
1131	Palmview	71,731	\$234,291.27	\$3.27

EXHIBIT 8-19 (Continued)
COMPARISON OF EAST AND WEST MAINTENANCE WORK
1997-98

EAST

SCHOOL NUMBER	SCHOOL NAME	TOTAL GROSS SQUARE FEET	ACTUAL TOTAL OF WORK ORDERS	DOLLARS PER SQUARE FEET
1951	Park Ridge	80,356	\$195,659.98	\$2.43
0751	Pompano Beach	81,066	\$64,922.91	\$0.80
3121	Quiet waters	89,314	\$79,508.63	\$0.89
0151	Riverland	82,531	\$109,321.78	\$1.32
0681	Rock Island	64,012	\$83,413.88	\$1.30
0891	Sanders Park	71,675	\$102,593.73	\$1.43
1811	Sheridan Hills	72,219	\$78,913.58	\$1.09
0691	Stirling	74,362	\$85,662.28	\$1.15
0611	Sunland Park	78,843	\$70,621.33	\$0.90
0571	Tedder	57,265	\$56,264.21	\$0.98
3291	Thurgood Marshall	86,364	\$54,287.99	\$0.63
3481	Tradewinds	103,056	\$26,931.16	\$0.26
3321	Virginia S. Young	77,109	\$64,214.91	\$0.83
0321	Walker	111,071	\$266,349.49	\$2.40
0511	Watkins	106,424	\$67,612.50	\$0.64
0631	Westwood Heights	87,214	\$111,955.70	\$1.28
0191	Wilton Manors	96,261	\$72,191.56	\$0.75
3091	Winston Park	93,652	\$260,650.10	\$2.78
	Subtotal	4,151,355	\$7,521,922.36	\$1.81
Middle School				
0343	Attucks	118,820	\$239,997.56	\$2.02
1871	Crystal Lake	153,211	\$104,544.50	\$0.68
1071	Dandy	151,219	\$154,591.87	\$1.02
0911	Deerfield Beach	153,475	\$290,819.55	\$1.89
3471	Indian Ridge	187,285	\$104,391.40	\$0.56
1701	Lauderdale Lakes	140,252	\$261,812.12	\$1.87
0481	McNicol	120,673	\$109,079.66	\$0.90
0881	New River	187,746	\$81,105.22	\$0.43
0471	Olsen	192,484	\$70,488.04	\$0.37
0701	Parkway	179,306	\$487,593.01	\$2.72
0021	Pompano Beach	117,969	\$190,686.28	\$1.62
2121	Rickards	127,925	\$160,920.35	\$1.26
0251	Sunrise	149,314	\$239,356.92	\$1.60
	Subtotal	1,979,679	\$2,495,386.48	\$1.26
High School				
1741	Anderson	313,803	\$626,448.31	\$2.00
1681	Coconut Creek	287,607	\$236,183.71	\$0.82
1711	Deerfield Beach	276,595	\$649,703.37	\$2.35
0371	Dillard	379,009	\$1,471,961.30	\$3.88
0361	Ely	294,729	\$779,511.08	\$2.64

**EXHIBIT 8-19 (Continued)
COMPARISON OF EAST AND WEST MAINTENANCE WORK
1997-98**

EAST

SCHOOL NUMBER	SCHOOL NAME	TOTAL GROSS SQUARE FEET	ACTUAL TOTAL OF WORK ORDERS	DOLLARS PER SQUARE FEET
0951	Fort Lauderdale	211,998	\$357,323.26	\$1.69
0403	Hallandale	224,726	\$385,981.05	\$1.72
1661	Hollywood Hills	202,382	\$385,405.14	\$1.90
1241	Northeast	243,162	\$391,938.43	\$1.61
0171	South Broward	225,201	\$253,497.08	\$1.13
0211	Stranahan High	234,490	\$276,949.67	\$1.18
	Subtotal	2,893,702	\$5,814,902.40	\$2.01
	GRAND TOTAL	9,024,736	\$15,832,211.24	\$1.75

WEST

SCHOOL NUMBER	SCHOOL NAME	TOTAL GROSS SQUARE FEET	ACTUAL TOTAL OF WORK ORDERS	DOLLARS PER SQUARE FEET
	Elementary School			
2511	Atlantic West	68,956	\$75,650.34	\$1.10
2001	Banyan	82,554	\$175,738.89	\$2.13
0971	Boulevard Heights	76,243	\$223,769.46	\$2.93
0811	Broadview	74,251	\$81,915.77	\$1.10
1461	Castle Hill	76,375	\$112,168.21	\$1.47
1461	Castle Hill Annex	38,212	Included above	included above
2641	Central Park	93,467	\$132,852.88	\$1.42
2961	Chapel Trail	117,800	\$130,164.69	\$1.10
1211	Cooper City	87,449	\$81,527.13	\$0.93
3041	Coral Park	80,003	\$104,054.55	\$1.30
2551	Coral Springs	72,933	\$91,323.84	\$1.25
3111	Country Hills	99,754	\$180,638.64	\$1.81
2981	Country Isles	106,525	\$174,966.58	\$1.64
2801	Davie	87,375	\$108,147.00	\$1.24
0721	Driftwood	66,030	\$88,652.24	\$1.34
3461	Eagle Point	113,423	\$53,923.47	\$0.48
3441	Eagle Ridge Intermediate	107,092	\$112,512.50	\$1.05
3191	Embassy Creek	89,773	\$68,614.46	\$0.76
2942	Everglades	30,600	\$ 9,902.36	\$0.32
1641	Fairway	96,027	\$126,044.75	\$1.31
2541	Flamingo	92,642	\$171,807.17	\$1.85
2631	Forest Hills	73,115	\$128,779.74	\$1.76
2851	Griffin	82,756	\$116,883.66	\$1.41
3131	Hawkes Bluff	94,354	\$112,254.46	\$1.19
1761	Hollywood Park	76,398	\$45,953.43	\$0.60
2531	Horizon	77,279	\$66,939.73	\$0.87
1971	Hunt	83,882	\$151,680.88	\$1.81

**EXHIBIT 8-19 (Continued)
COMPARISON OF EAST AND WEST MAINTENANCE WORK
1997-98**

WEST

SCHOOL NUMBER	SCHOOL NAME	TOTAL GROSS SQUARE FEET	ACTUAL TOTAL OF WORK ORDERS	DOLLARS PER SQUARE FEET
3181	Indian Trace	96,256	\$119,208.38	\$1.24
3591	Lakeside	116,940	\$33,034.60	\$0.28
1381	Lauderhill	107,322	\$65,878.82	\$0.61
2741	Maplewood	77,860	\$72,407.01	\$0.93
1161	Margate	75,905	\$74,766.62	\$0.99
0761	Meadowbrook	69,818	\$128,853.10	\$1.85
0531	Miramar	82,775	\$114,551.24	\$1.38
1841	Mirror Lake	76,043	\$158,305.99	\$2.08
2691	Morrow	72,926	\$84,621.94	\$1.16
2671	Nob Hill	76,538	\$96,502.96	\$1.26
2231	North Lauderdale	77,639	\$219,593.38	\$2.83
1282	Nova Center-Nova Blanche Forman	82,348	\$201,469.16	\$2.45
1271	Nova Center-Nova Dwight Eisenhower	83,626	\$117,079.70	\$1.40
3311	Palm Cove	86,034	\$93,947.46	\$1.09
3571	Panther Run	106,424	\$56,511.24	\$0.53
3171	Park Springs	86,761	\$91,440.51	\$1.05
2071	Pasadena Lakes	88,872	\$154,312.46	\$1.74
2661	Pembroke Lakes	88,081	\$85,978.83	\$0.98
1221	Pembroke Pines	78,354	\$74,320.19	\$0.95
1631	Perry	72,171	\$52,347.02	\$0.73
0931	Peters	72,134	\$104,278.70	\$1.45
2861	Pines Lakes	81,640	\$57,411.83	\$0.70
2811	Pinewood	78,210	\$96,060.98	\$1.23
0941	Plantation	43,608	\$84,631.21	\$1.94
1251	Plantation Park	60,277	\$49,471.26	\$0.82
2721	Ramblewood	76,161	\$159,618.86	\$2.10
2891	Riverglades	87,720	\$58,549.26	\$0.67
3031	Riverside	82,211	\$93,950.67	\$1.14
1851	Royal Palm	104,496	\$172,069.27	\$1.65
3061	Sandpiper	82,724	\$110,574.80	\$1.34
3401	Sawgrass	87,374	\$57,021.93	\$0.65
2871	Sea Castle	94,324	\$102,745.73	\$1.09
1321	Sheridan Park	73,386	\$85,803.82	\$1.17
3491	Silver Palms	116,940	\$61,442.06	\$0.53
3081	Silver Ridge	94,035	\$187,764.19	\$2.00
1171	Sunshine	68,311	\$116,702.99	\$1.71
2621	Tamarac	91,527	\$155,447.38	\$1.70
0731	Tropical	83,212	\$155,449.73	\$1.87
1621	Village	96,397	\$82,960.12	\$0.86
2881	Welleby	91,024	\$88,169.70	\$0.97

EXHIBIT 8-19 (Continued)
COMPARISON OF EAST AND WEST MAINTENANCE WORK
1997-98

WEST

SCHOOL NUMBER	SCHOOL NAME	TOTAL GROSS SQUARE FEET	ACTUAL TOTAL OF WORK ORDERS	DOLLARS PER SQUARE FEET
0161	West Hollywood	81,923	\$46,453.33	\$0.57
2681	Westchester	93,781	\$130,947.02	\$1.40
Subtotal		5,789,376	\$ 7,279,522.28	\$1.26
Middle School				
1791	Apollo	134,724	\$127,111.66	\$0.94
2611	Bair	159,043	\$171,038.91	\$1.08
2561	Coral Springs	143,832	\$187,511.92	\$1.30
0861	Driftwood	135,911	\$220,485.29	\$1.62
3051	Forest Glen	147,910	\$198,140.65	\$1.34
1391	Lauderhill	153,750	\$454,746.42	\$2.96
0581	Margate	137,966	\$352,597.09	\$2.56
1311	Nova	131,823	\$54,373.74	\$0.41
1011	Perry	154,746	\$112,791.89	\$0.73
1881	Pines	140,737	\$198,380.37	\$1.41
2571	Pioneer	149,507	\$295,945.29	\$1.98
0551	Plantation	131,733	\$144,320.72	\$1.10
2711	Ramblewood	153,897	\$198,823.00	\$1.29
3431	Sawgrass Springs	146,139	\$112,969.94	\$0.77
1891	Seminole	136,133	\$187,412.65	\$1.38
2971	Silver Lakes	128,053	\$135,633.74	\$1.06
3331	Silver Trails	231,707	\$150,080.63	\$0.65
3151	Tequesta Trace	175,749	\$170,713.10	\$0.97
3001	Walter C. Young	186,775	\$486,871.04	\$2.61
2052	Westpine	151,793	\$175,907.47	\$1.16
Subtotal		3,031,928	\$4,135,855.52	\$1.36
High School				
1931	Cooper City	230,653	\$499,569.03	\$2.17
1151	Coral Springs	263,880	\$339,825.15	\$1.29
3391	Flanagan	341,670	\$279,104.31	\$0.82
0241	McArthur	204,662	\$330,601.72	\$1.62
1751	Miramar	277,184	\$367,425.04	\$1.33
1281	Nova	226,479	\$434,348.24	\$1.92
1901	Piper	287,081	\$414,573.48	\$1.44
1451	Plantation	301,101	\$286,201.21	\$0.95
2351	South Plantation	278,293	\$233,797.27	\$0.84
3011	Stoneman Douglas	311,242	\$296,777.70	\$0.95
2751	Taravella	266,975	\$246,153.70	\$0.92
2831	Western	260,175	\$220,431.82	\$0.85
Subtotal		3,249,395	\$3,948,808.67	\$1.22
GRAND TOTAL		12,070,699	\$15,364,186.47	\$1.27

Source: Created by MGT from data provided by Maintenance Department, 1998.

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|--|-------------|
| 2. The Director of Maintenance should present the plan to the Board. | August 1999 |
| 3. The Board should review the plan and approve its implementation. | August 1999 |

FISCAL IMPACT

This recommendation can be accomplished within the existing resources of the district.

8.6 Custodial Services

Custodial services are essential to keep schools clean, maintain a safe facilities environment, provide minor maintenance services, and both monitor and report facility repair needs to the appropriate administrators.

CURRENT SITUATION

School custodial staff, or facility servicepersons, in the Broward County School District are under the supervision of the school principals who are responsible for hiring, firing, and evaluating. Each maintenance area operation has a custodial supervisor who is responsible for supporting the custodial staff and the principals.

The custodial supervisors are responsible for:

- acting as an advisor to the principals and custodial staff;
- sitting in on hiring interviews;
- providing training for head custodians; and
- inspecting each school at least once a year.

The district has developed a training program for the custodial staff. Exhibit 8-20 lists the training courses and employees who are required to take them. Exhibit 8-21 lists the course descriptions.

**EXHIBIT 8-20
CUSTODIAL TRAINING PROGRAM
1998-99**

TRAINING COURSE	REQUIRED FOR
Custodial Basics	Facilities Service Personnel
Professional Custodian	Elementary Head Facilities Serviceperson Middle School Assistant Facilities Serviceperson
Professional Custodian & Master Custodian	Head Facilities Serviceperson at Middle, High, or Vocational Level Grounds position On-Site Repair position

Source: Broward County School District, Maintenance Department, 1998.

**EXHIBIT 8-21
CUSTODIAL COURSE DESCRIPTIONS
1998-99**

CUSTODIAL BASICS
<p>The purpose of this component is to provide newly hired facilities servicepersons with basic custodial training as well as providing all facilities persons with state and local mandated course work.</p> <p>Upon successful completion of this course, participants will be able to properly clean a facility in all areas including: restrooms, offices, classrooms, kitchen areas, auditoriums, and corridors. In addition, all facility personnel will become aware of the asbestos dangers, energy management systems, and current policies regarding school board procedures.</p>
PROFESSIONAL CUSTODIAN
<p>The purpose of this component is to provide facilities servicepersons an opportunity to receive in-depth custodial training through a state certified curriculum.</p> <p>Upon successful completion of this course, participants will be able to compute school allocations; understand policy for chemical, fire, and school safety; follow District procedures for ordering supplies; and operate heavy cleaning equipment used in waxing, buffing, and stripping of floors.</p>
MASTER CUSTODIAN
<p>The purpose of this component is to provide head and assistant facilities servicepersons with an opportunity to receive advanced training in the areas of minor maintenance.</p> <p>Upon successful completion of this course, participants will be able to complete minor repairs dealing with electricity, carpentry, plumbing, masonry, finishes, heating, ventilation, air condition, and lawn, shrub, and tree care.</p>

Source: Broward County School District, Maintenance Department, 1998.

The district has developed a Guidelines and Procedures Handbook for facilities service personnel. This handbook was revised in 1997 and includes the following topics:

- operational procedures which details cleaning procedures for the different kinds of spaces found in a school and for surfaces such as floors;
- cleaning checklist and guide that charts the frequency for cleaning rooms and surfaces; and
- building checklist and guide that details when and how to check and service building equipment.

The custodial allocation formula used by the district is complex and considers the following factors:

- building area, adjusted to exclude some rooms like mechanical rooms, and factored for some spaces like restrooms, which get a 200 percent

factoring. Elementary, middle and high schools are allocated one custodian per 21,000 square feet;

- teacher factor, one custodian for each eight teachers; and
- student population, one custodian for each 225 students.

The factor allocations are calculated and then averaged to arrive at the number of custodians for each school. The factors are slightly different for vocational and exceptional schools.

Custodial cleaning supplies are the responsibility of the school principal and part of the school's budget. Supplies are ordered from the central warehouse by the head custodian under the supervision of the principal.

FINDING

The Broward County School District has developed a detailed operations guide for the custodial staff. The guide details specific procedures to be followed in all the custodial operations and provides charts to specify the frequency of those tasks.

The district has also prepared and administered comprehensive training courses for the custodial staff. The basic training course is mandatory for all new hires; the advanced courses are mandatory for those being promoted. The staff receives a one-time \$200 benefit for taking and passing the advanced courses.

COMMENDATION

The Broward County School District is providing professional training and operating procedures for the custodial staff.

FINDING

In previous performance reviews, the MGT review team has seen districts assign an average of between 12,600 gross square feet per custodian and 21,500 gross square feet. Using these averages, it has been determined that the best practice for custodial staffing is approximately 19,000 gross square feet with .5 FTE positions allocated to non-cleaning activities. While there is no standard accepted by all industry professionals, 19,000 gross square feet is well within the range of the most recommended standard.

Exhibit 8-22 presents a comparison of the district's custodial staffing to this best practice. As can be seen, Exhibit 8-22 indicates that the district is allocating custodians at a ratio of approximately 1:20,500 square feet -- well above the best practice level.

COMMENDATION

The Broward County School District is allocating custodial staff in an efficient manner.

**EXHIBIT 8-22
COMPARISON OF CUSTODIAL ALLOCATIONS TO BEST PRACTICE
1998-99**

SCHOOL NAME	TOTAL* GROSS SQUARE FEET	CURRENT CUSTODIAL POSITIONS	SQUARE FEET PER CUSTODIAN	BEST PRACTICE (GSF/19,000)	OVER (UNDER) BEST PRACTICE
Elementary School					
Atlantic West	68,956	4	17,239	4.00	(0.50)
Banyan	82,554	4.5	18,345	4.00	0.00
Bayview	40,229	3	13,410	2.00	0.50
Bennett	57,743	3	19,248	3.00	(0.50)
Bethune	102,265	5.5	18,594	5.00	0.00
Boulevard Heights	76,243	4	19,061	4.00	(0.50)
Broadview	74,251	4	18,563	4.00	(0.50)
Broward Estates	61,039	3.5	17,440	3.00	0.00
Castle Hill	76,375	3.5	21,821	4.00	(1.00)
Castle Hill Annex	38,212	3	12,737	2.00	0.50
Central Park	93,467	5	18,693	5.00	(0.50)
Chapel Trail	117,800	6	19,633	6.00	(0.50)
Coconut Creek	78,892	5	15,778	4.00	0.50
Colbert	69,312	3.5	19,803	4.00	(1.00)
Collins	42,429	3	14,143	2.00	0.50
Cooper City	87,449	4.5	19,433	5.00	(1.00)
Coral Park	80,003	4	20,001	4.00	(0.50)
Coral Springs	72,933	4	18,233	4.00	(0.50)
Country Hills	99,754	5.5	18,137	5.00	0.00
Country Isles	106,525	4.5	23,672	6.00	(2.00)
Cresthaven	79,376	3.5	22,679	4.00	(1.00)
Croissant Park	96,271	5	19,254	5.00	(0.50)
Cypress	75,337	3.5	21,525	4.00	(1.00)
Dania	72,743	3	24,248	4.00	(1.50)
Davie	87,375	5	17,475	5.00	(0.50)
Deerfield Beach	70,343	3.5	20,098	4.00	(1.00)
Deerfield Park	105,533	4	26,383	6.00	(2.50)
Dillard	87,250	4.5	19,389	5.00	(1.00)
Drew	81,439	3.5	23,268	4.00	(1.00)
Driftwood	66,030	3.5	18,866	3.00	0.00
Eagle Point	113,423	5	22,685	6.00	(1.50)
Eagle Ridge Intermediate	107,092	5	21,418	6.00	(1.50)
Eisenhower	83,626	4.5	18,584	4.00	0.00
Embassy Creek	89,773	5	17,955	5.00	(0.50)
Everglades	30,600	3	10,200	2.00	0.50
Fairway	96,027	5	19,205	5.00	(0.50)
Flamingo	92,642	4.5	20,587	5.00	(1.00)
Floranada	59,332	3	19,777	3.00	(0.50)
Forest Hills	73,115	4.5	16,248	4.00	0.00
Forman	82,348	4.5	18,300	4.00	0.00
Foster	56,124	3	18,708	3.00	(0.50)
Fox Trail	106,424	4.5	23,650	6.00	(2.00)
Gator Run	30,600	3	10,200	2.00	0.50
Griffin	82,756	4	20,689	4.00	(0.50)
Hallandale	61,633	4	15,408	3.00	0.50
Harbordale	44,098	3	14,699	2.00	0.50
Hawkes Bluff	94,354	5	18,871	5.00	(0.50)

*includes permanent and portable square feet.

**EXHIBIT 8-22 (Continued)
COMPARISON OF CUSTODIAL ALLOCATIONS TO BEST PRACTICE
1998-99**

SCHOOL NAME	TOTAL* GROSS SQUARE FEET	CURRENT CUSTODIAL POSITIONS	SQUARE FEET PER CUSTODIAN	BEST PRACTICE (GSF/19,000)	OVER (UNDER) BEST PRACTICE
Hollywood Central	93,569	4.5	20,793	5.00	(1.00)
Hollywood Hills	63,470	3.5	18,134	3.00	0.00
Hollywood Park	76,398	3.5	21,828	4.00	(1.00)
Horizon	77,279	4	19,320	4.00	(0.50)
Hunt	83,882	4	20,971	4.00	(0.50)
Indian Trace	96,256	5.5	17,501	5.00	0.00
Lake Forest	68,689	3.5	19,625	4.00	(1.00)
Lakeside	116,940	4	29,235	6.00	(2.50)
Larkdale	79,864	4.5	17,748	4.00	0.00
Lauderdale Manors	82,370	4	20,593	4.00	(0.50)
Lauderhill	107,322	5	21,464	6.00	(1.50)
Lloyd Estates	59,505	3.5	17,001	3.00	0.00
Maplewood	77,860	4	19,465	4.00	(0.50)
Margate	75,905	4.5	16,868	4.00	0.00
Markham	72,044	3	24,015	4.00	(1.50)
Martin Luther King	99,002	4.5	22,000	5.00	(1.00)
McNab	60,398	3	20,133	3.00	(0.50)
Meadowbrook	69,818	3	23,273	4.00	(1.50)
Miramar	82,775	4.5	18,394	4.00	0.00
Mirror Lake	76,043	4	19,011	4.00	(0.50)
Morrow	72,926	3.5	20,836	4.00	(1.00)
Nob Hill	76,538	4	19,135	4.00	(0.50)
Norcrest	55,085	3	18,362	3.00	(0.50)
North Fork	71,845	3.5	20,527	4.00	(1.00)
North Lauderdale	77,639	5	15,528	4.00	0.50
North Andrew Gardens	81,068	4.5	18,015	4.00	0.00
North Side	74,139	3.5	21,183	4.00	(1.00)
Oakland Park	60,872	3	20,291	3.00	(0.50)
Oakridge	74,554	3.5	21,301	4.00	(1.00)
Orange Brook	55,734	3	18,578	3.00	(0.50)
Oriole	73,234	3.5	20,924	4.00	(1.00)
Palm Cove	86,034	4.5	19,119	5.00	(1.00)
Palmview	71,731	3	23,910	4.00	(1.50)
Panther Run	106,424	5	21,285	6.00	(1.50)
Park Ridge	80,356	4	20,089	4.00	(0.50)
Park Springs	86,761	4.5	19,280	5.00	(1.00)
Pasadena Lakes	88,872	4.5	19,749	5.00	(1.00)
Pembroke Lakes	88,081	4.5	19,574	5.00	(1.00)
Pembroke Pines	78,354	4	19,589	4.00	(0.50)
Perry	72,171	4	18,043	4.00	(0.50)
Peters	72,134	4	18,034	4.00	(0.50)
Pines Lakes	81,640	4	20,410	4.00	(0.50)
Pinewood	78,210	4.5	17,380	4.00	0.00
Plantation	43,608	3	14,536	2.00	0.50
Plantation Park	60,277	3	20,092	3.00	(0.50)
Pompano Beach	81,066	4	20,267	4.00	(0.50)
Quiet waters	89,314	4.5	19,848	5.00	(1.00)
Ramblewood	76,161	4.5	16,925	4.00	0.00
Riverglades	87,720	4.5	19,493	5.00	(1.00)

*includes permanent and portable square feet.

**EXHIBIT 8-22 (Continued)
COMPARISON OF CUSTODIAL ALLOCATIONS TO BEST PRACTICE
1998-99**

SCHOOL NAME	TOTAL* GROSS SQUARE FEET	CURRENT CUSTODIAL POSITIONS	SQUARE FEET PER CUSTODIAN	BEST PRACTICE (GSF/19,000)	OVER (UNDER) BEST PRACTICE
Riverland	82,531	3.5	23,580	4.00	(1.00)
Riverside	82,211	4.5	18,269	4.00	0.00
Rock Island	64,012	3	21,337	3.00	(0.50)
Royal Palm	104,496	6	17,416	5.00	0.50
Sanders Park	71,675	3.5	20,479	4.00	(1.00)
Sandpiper	82,724	4.5	18,383	4.00	0.00
Sawgrass	87,374	4.5	19,416	5.00	(1.00)
Sea Castle	94,324	4.5	20,961	5.00	(1.00)
Sheridan Hills	72,219	4	18,055	4.00	(0.50)
Sheridan Park	73,386	3.5	20,967	4.00	(1.00)
Silver Lakes	106,424	4.5	23,650	6.00	(2.00)
Silver Palms	116,940	5	23,388	6.00	(1.50)
Silver Ridge	94,035	4	23,509	5.00	(1.50)
Stirling	74,362	4	18,591	4.00	(0.50)
Sunland Park	78,843	3	26,281	4.00	(1.50)
Sunshine	68,311	4	17,078	4.00	(0.50)
Tamarac	91,527	5.5	16,641	5.00	0.00
Tedder	57,265	3.5	16,361	3.00	0.00
Thurgood Marshall	86,364	4	21,591	5.00	(1.50)
Tradewinds	103,056	5	20,611	5.00	(0.50)
Tropical	83,212	4	20,803	4.00	(0.50)
Village	96,397	5	19,279	5.00	(0.50)
Virginia S. Young	77,109	4	19,277	4.00	(0.50)
Walker	111,071	5	22,214	6.00	(1.50)
Watkins	106,424	4.5	23,650	6.00	(2.00)
Welleby	91,024	4.5	20,228	5.00	(1.00)
West Hollywood	81,923	3.5	23,407	4.00	(1.00)
Westchester	93,781	5	18,756	5.00	(0.50)
Westwood Heights	87,214	4	21,804	5.00	(1.50)
Wilton Manors	96,261	4	24,065	5.00	(1.50)
Winston Park	93,652	4.5	20,812	5.00	(1.00)
Subtotal:	10,184,179	519	19,642	536.00	(18.00)
Middle School					
Apollo	134,724	6.5	20,727	7.00	(1.00)
Attucks	118,820	5.5	21,604	6.00	(1.00)
Bair	159,043	8	19,880	8.00	(0.50)
Coral Springs	143,832	7	20,547	8.00	(1.50)
Crystal Lake	153,211	7.5	20,428	8.00	(1.00)
Dandy	151,219	7.5	20,163	8.00	(1.00)
Deerfield Beach	153,475	7.5	20,463	8.00	(1.00)
Driftwood	135,911	6.5	20,909	7.00	(1.00)
Forest Glen	147,910	7.5	19,721	8.00	(1.00)
Indian Ridge	187,285	8.5	22,034	10.00	(2.00)
Lauderdale Lakes	140,252	6	23,375	7.00	(1.50)
Lauderhill	153,750	7	21,964	8.00	(1.50)
Margate	137,966	7	19,709	7.00	(0.50)
McNicol	120,673	6.5	18,565	6.00	0.00

*includes permanent and portable square feet.

EXHIBIT 8-22 (Continued)
COMPARISON OF CUSTODIAL ALLOCATIONS TO BEST PRACTICE
1998-99

SCHOOL NAME	TOTAL* GROSS SQUARE FEET	CURRENT CUSTODIAL POSITIONS	SQUARE FEET PER CUSTODIAN	BEST PRACTICE (GSF/19,000)	OVER (UNDER) BEST PRACTICE
New River	187,746	9	20,861	10.00	(1.50)
Nova	131,823	6.5	20,280	7.00	(1.00)
Olsen	192,484	8.5	22,645	10.00	(2.00)
Parkway	179,306	8.5	21,095	9.00	(1.00)
Perry	154,746	8	19,343	8.00	(0.50)
Pines	140,737	7	20,105	7.00	(0.50)
Pioneer	149,507	7	21,358	8.00	(1.50)
Plantation	131,733	6	21,956	7.00	(1.50)
Pompano Beach	117,969	6	19,662	6.00	(0.50)
Ramblewood	153,897	8	19,237	8.00	(0.50)
Rickards	127,925	6	21,321	7.00	(1.50)
Sawgrass Springs	146,139	7.5	19,485	8.00	(1.00)
Seminole	136,133	6.5	20,944	7.00	(1.00)
Silver Lakes	128,053	7	18,293	7.00	(0.50)
Silver Trails	231,707	10	23,171	12.00	(2.50)
Sunrise	149,314	7.5	19,909	8.00	(1.00)
Tequesta Trace	175,749	8.5	20,676	9.00	(1.00)
Walter C. Young	186,775	9	20,753	10.00	(1.50)
Westpine	151,793	7.5	20,239	8.00	(1.00)
Subtotal:	5,011,607	243	20,666	264.00	(22.00)
High School					
Anderson	313,803	14	22,415	17.00	(3.50)
Coconut Creek	287,607	13	22,124	15.00	(2.50)
Cooper City	230,653	10.5	21,967	12.00	(2.00)
Coral Springs	263,880	12.5	21,110	14.00	(2.00)
Deerfield Beach	276,595	12.5	22,128	15.00	(3.00)
Dillard	379,009	15	25,267	20.00	(5.50)
Ely	294,729	13.5	21,832	16.00	(3.00)
Flanagan	341,670	16	21,354	18.00	(2.50)
Fort Lauderdale	211,998	10	21,200	11.00	(1.50)
Hallandale	224,726	9.5	23,655	12.00	(3.00)
Hollywood Hills	202,382	9.5	21,303	11.00	(2.00)
McArthur	204,662	9.5	21,543	11.00	(2.00)
Miramar	277,184	11	25,199	15.00	(4.50)
Northeast	243,162	9.5	25,596	13.00	(4.00)
Nova	226,479	10.5	21,569	12.00	(2.00)
Piper	287,081	13.5	21,265	15.00	(2.00)
Plantation	301,101	13	23,162	16.00	(3.50)
South Broward	225,201	10	22,520	12.00	(2.50)
South Plantation	278,293	12.5	22,263	15.00	(3.00)
Stoneman Douglas	311,242	15	20,749	16.00	(1.50)
Stranahan	234,490	10.5	22,332	12.00	(2.00)
Taravella	266,975	13	20,537	14.00	(1.50)
Western	260,175	14	18,584	14.00	(0.50)
Subtotal:	6,143,097	278	22,097	323.00	(45.50)
GRAND TOTAL	21,338,883	1,039	20,538	1123.00	(84.50)

*includes permanent and portable square feet.

Source: Created by MGT based on Maintenance Department data, 1998.

FINDING

The budget for custodial cleaning supplies is the responsibility of the school principal. The review team has found from previous performance reviews that spending for cleaning supplies can range from \$0.02 to \$0.18 per square foot, and has determined a best practice level at \$0.05 per square foot.

Exhibit 8-23 compares the current spending for custodial supplies with this best practice level. The analysis of custodial cleaning supplies budgets in Exhibit 8-23 indicates that schools are spending between \$0.01 and \$0.28 per square foot. This is an extremely wide range. When compared to the best practice of \$0.05 per square foot, the district is spending \$902,875 more than a best practice would indicate.

RECOMMENDATION

Recommendation 8-15:

Create a passive order system for custodial supplies and standardize the type and amount of custodial supplies used by each school.

The custodial supervisors, with input from the head custodians and the school principals, should develop standards for the amounts and types of custodial supplies to be used at schools and should develop guidelines for exceptions to the standards. These standards should be implemented by the central warehouse, which will deliver the appropriate amounts of materials to each school site each month.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------------------------------|
| 1. The custodial supervisors, with input from head custodians and school principals, should develop standards. | May-June 1999 |
| 2. The standards should be implemented by the central warehouse. | Summer 1999 |
| 3. The standards should be evaluated by the maintenance area supervisors and the area directors. | Beginning in June 2000 and Annually |

FISCAL IMPACT

The utilization of a passive ordering system and implementation of material standards, based on a best practice of \$0.05 per square feet, will produce an annual savings of approximately \$900,000. The fiscal impact of this recommendation is based on historical data supplied by the district. It is a projection; if circumstances change in the future, the projected fiscal impact will change. The recommendation will not have any fiscal impact on the Warehouse function.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Implement Passive Order System and Standards	\$900,000	\$900,000	\$900,000	\$900,000	\$900,000

**EXHIBIT 8-23
COMPARISON OF CLEANING SUPPLY BUDGETS TO BEST PRACTICES
1998-99**

SCHOOL NAME	TOTAL* GROSS SQUARE FEET	CUSTODIAL SUPPLY DOLLARS	DOLLARS PER SQUARE FOOT	BEST PRACTICE (.05 PER SQUARE FOOT)	COST AVOIDANCE
Elementary School					
Atlantic West	68,956	8,617.56	0.12	\$3,448	\$5,170
Banyan	82,554	9,001.83	0.11	4,128	4,874
Bayview	40,229	7,417.20	0.18	2,011	5,406
Bennett	57,743	3,167.79	0.05	2,887	281
Bethune	102,265	10,359.69	0.10	5,113	5,247
Boulevard Heights	76,243	6,846.55	0.09	3,812	3,035
Broadview	74,251	13,167.30	0.18	3,713	9,454
Broward Estates	61,039	2,236.27	0.04	3,052	(816)
Castle Hill	76,375	6,358.92	0.08	3,819	2,540
Castle Hill Annex	38,212	3,564.50	0.09	1,911	1,654
Central Park	93,467	11,319.73	0.12	4,673	6,647
Chapel Trail	117,800	17,557.68	0.15	5,890	11,668
Coconut Creek	78,892	10,229.62	0.13	3,945	6,285
Colbert	69,312	10,493.50	0.15	3,466	7,028
Collins	42,429	3,150.58	0.07	2,121	1,030
Cooper City	87,449	12,313.77	0.14	4,372	7,942
Coral Park	80,003	690.44	0.01	4,000	(3,310)
Coral Springs	72,933	12,788.87	0.18	3,647	9,142
Country Hills	99,754	9,498.98	0.10	4,988	4,511
Country Isles	106,525	14,381.48	0.14	5,326	9,055
Cresthaven	79,376	7,189.64	0.09	3,969	3,221
Croissant Park	96,271	15,226.52	0.16	4,814	10,413
Cypress	75,337	9,149.28	0.12	3,767	5,382
Dania	72,743	4,275.47	0.06	3,637	638
Davie	87,375	11,156.95	0.13	4,369	6,788
Deerfield Beach	70,343	11,487.92	0.16	3,517	7,971
Deerfield Park	105,533	9,421.16	0.09	5,277	4,144
Dillard	87,250	8,790.65	0.10	4,363	4,428
Drew	81,439	7,686.49	0.09	4,072	3,614
Driftwood	66,030	8,652.50	0.13	3,302	5,351
Eagle Point	113,423	16,445.31	0.14	5,671	10,774
Eagle Ridge Intermediate	107,092	22,106.69	0.21	5,355	16,752
Embassy Creek	89,773	8,158.58	0.09	4,489	3,670
Fairway	96,027	20,627.28	0.21	4,801	15,826
Flamingo	92,642	8,210.18	0.09	4,632	3,578
Floranada	59,332	5,529.22	0.09	2,967	2,562
Forest Hills	73,115	13,043.95	0.18	3,656	9,388
Foster	56,124	11,096.93	0.20	2,806	8,291
Griffin	82,756	11,734.67	0.14	4,138	7,597
Hallandale	61,633	9,107.35	0.15	3,082	6,025
Harbordale	44,098	6,491.76	0.15	2,205	4,287
Hawkes Bluff	94,354	8,977.75	0.10	4,718	4,260
Hollywood Central	93,569	11,481.72	0.12	4,678	6,804
Hollywood Hills	63,470	12,139.82	0.19	3,174	8,966
Hollywood Park	76,398	16,336.24	0.21	3,820	12,516
Horizon	77,279	10,983.14	0.14	3,864	7,119

*includes permanent and portable square feet.

**EXHIBIT 8-23 (Continued)
COMPARISON OF CLEANING SUPPLY BUDGETS TO BEST PRACTICES
1998-99**

SCHOOL NAME	TOTAL* GROSS SQUARE FEET	CUSTODIAL SUPPLY DOLLARS	DOLLARS PER SQUARE FOOT	BEST PRACTICE (.05 PER SQUARE FOOT)	COST AVOIDANCE
Hunt	83,882	10,794.18	0.13	\$4,194	\$6,600
Indian Trace	96,256	11,130.97	0.12	4,813	6,318
Lake Forest	68,689	6,741.68	0.10	3,434	3,308
Larkdale	79,864	3,471.52	0.04	3,993	(521)
Lauderdale Manors	82,370	5,627.07	0.07	4,119	1,508
Lauderhill	107,322	30,433.87	0.28	5,366	25,068
Lloyd Estates	59,505	10,726.95	0.18	2,975	7,752
Maplewood	77,860	4,535.34	0.06	3,893	642
Margate	75,905	9,159.40	0.12	3,795	5,364
Markham	72,044	6,668.71	0.09	3,602	3,067
Martin Luther King	99,002	11,158.50	0.11	4,950	6,209
McNab	60,398	5,992.26	0.10	3,020	2,972
Meadowbrook	69,818	11,865.42	0.17	3,491	8,374
Miramar	82,775	2,779.27	0.03	4,139	(1,360)
Mirror Lake	76,043	3,650.13	0.05	3,802	(152)
Morrow	72,926	8,308.08	0.11	3,646	4,662
Nob Hill	76,538	12,282.50	0.16	3,827	8,456
Norcrest	55,085	3,735.01	0.07	2,754	981
North Fork	71,845	4,666.20	0.06	3,592	1,074
North Andrew Gardens	81,068	9,114.43	0.11	4,053	5,061
North Lauderdale	77,639	9,465.90	0.12	3,882	5,584
North Side	74,139	10,632.86	0.14	3,707	6,926
Oakland Park	60,872	9,755.50	0.16	3,044	6,712
Oakridge	74,554	9,338.33	0.13	3,728	5,610
Orange Brook	55,734	10,770.64	0.19	2,787	7,984
Oriole	73,234	6,496.05	0.09	3,662	2,834
Palm Cove	86,034	1,216.48	0.01	4,302	(3,086)
Palmview	71,731	11,213.33	0.16	3,587	7,626
Panther Run	106,424	1,279.19	0.01	5,321	(4,042)
Park Ridge	80,356	10,948.18	0.14	4,018	6,930
Park Springs	86,761	8,907.75	0.10	4,338	4,570
Pasadena Lakes	88,872	9,244.96	0.10	4,444	4,801
Pembroke Lakes	88,081	6,101.58	0.07	4,404	1,698
Pembroke Pines	78,354	12,054.63	0.15	3,918	8,137
Perry	72,171	4,986.63	0.07	3,609	1,378
Peters	72,134	6,505.61	0.09	3,607	2,899
Pines Lakes	81,640	10,418.67	0.13	4,082	6,337
Pinewood	78,210	7,615.76	0.10	3,911	3,705
Plantation	43,608	3,228.52	0.07	2,180	1,049
Plantation Park	60,277	4,628.85	0.08	3,014	1,615
Pompano Beach	81,066	6,757.07	0.08	4,053	2,704
Quiet waters	89,314	9,496.54	0.11	4,466	5,031
Ramblewood	76,161	3,715.62	0.05	3,808	(92)
Riverglades	87,720	13,466.17	0.15	4,386	9,080
Riverland	82,531	8,857.61	0.11	4,127	4,731
Riverside	82,211	12,082.36	0.15	4,111	7,971
Rock Island	64,012	7,680.54	0.12	3,201	4,480

*includes permanent and portable square feet.

EXHIBIT 8-23 (Continued)
COMPARISON OF CLEANING SUPPLY BUDGETS TO BEST PRACTICES
1998-99

SCHOOL NAME	TOTAL* GROSS SQUARE FEET	CUSTODIAL SUPPLY DOLLARS	DOLLARS PER SQUARE FOOT	BEST PRACTICE (.05 PER SQUARE FOOT)	COST AVOIDANCE
Royal Palm	104,496	7,573.08	0.07	\$5,225	\$2,348
Sanders Park	71,675	8,476.01	0.12	3,584	4,892
Sandpiper	82,724	3,350.56	0.04	4,136	(785)
Sawgrass	87,374	2,947.02	0.03	4,369	(1,422)
Sea Castle	94,324	11,474.00	0.12	4,716	6,758
Sheridan Hills	72,219	7,141.42	0.10	3,611	3,530
Sheridan Park	73,386	4,127.39	0.06	3,669	458
Silver Palms	116,940	24,012.32	0.21	5,847	18,165
Silver Ridge	94,035	8,421.01	0.09	4,702	3,719
Stirling	74,362	11,090.85	0.15	3,718	7,373
Sunland Park	78,843	6,280.64	0.08	3,942	2,339
Sunshine	68,311	8,847.15	0.13	3,416	5,431
Tamarac	91,527	4,408.97	0.05	4,576	(167)
Tedder	57,265	8,588.08	0.15	2,863	5,725
Thurgood Marshall	86,364	12,244.01	0.14	4,318	7,926
Tropical	83,212	6,422.32	0.08	4,161	2,261
Village	96,397	11,128.78	0.12	4,820	6,309
Virginia S. Young	77,109	9,780.22	0.13	3,855	5,925
Walker	111,071	12,830.96	0.12	5,554	7,277
Watkins	106,424	5,823.98	0.05	5,321	503
Welleby	91,024	7,988.78	0.09	4,551	3,438
West Hollywood	81,923	9,206.60	0.11	4,096	5,111
Westchester	93,781	9,503.33	0.10	4,689	4,814
Westwood Heights	87,214	10,043.03	0.12	4,361	5,682
Wilton Manors	96,261	11,390.26	0.12	4,813	6,577
Winston Park	93,652	14,261.22	0.15	4,683	9,578
Subtotal:	9,524,161	1,085,738.24	0.11	476,208	609,530
Middle School					
Apollo	134,724	8,594.51	0.06	6,736	1,859
Attucks	118,820	2,081.84	0.02	5,941	(3,859)
Bair	159,043	4,285.52	0.03	7,952	(3,666)
Coral Springs	143,832	11,850.43	0.08	7,192	4,658
Crystal Lake	153,211	10,376.53	0.07	7,661	2,716
Dandy	151,219	16,080.49	0.11	7,561	8,519
Deerfield Beach	153,475	8,636.28	0.06	7,674	962
Driftwood	135,911	12,028.92	0.09	6,796	5,233
Forest Glen	147,910	23,313.07	0.16	7,396	15,917
Indian Ridge	187,285	7,013.63	0.04	9,364	(2,350)
Lauderdale Lakes	140,252	15,674.93	0.11	7,013	8,662
Lauderhill	153,750	1,843.02	0.01	7,688	(5,845)
Margate	137,966	8,854.52	0.06	6,898	1,957
McNicol	120,673	3,979.26	0.03	6,034	(2,055)
New River	187,746	36,112.31	0.19	9,387	26,725
Nova	131,823	6,890.88	0.05	6,591	300
Olsen	192,484	23,428.80	0.12	9,624	13,805

*includes permanent and portable square feet.

EXHIBIT 8-23 (Continued)
COMPARISON OF CLEANING SUPPLY BUDGETS TO BEST PRACTICES
1998-99

SCHOOL NAME	TOTAL* GROSS SQUARE FEET	CUSTODIAL SUPPLY DOLLARS	DOLLARS PER SQUARE FOOT	BEST PRACTICE (.05 PER SQUARE FOOT)	COST AVOIDANCE
Parkway	179,306	18,094.28	0.10	\$8,965	\$9,129
Perry	154,746	4,225.45	0.03	7,737	(3,512)
Pines	140,737	20,620.16	0.15	7,037	13,583
Pioneer	149,507	8,780.68	0.06	7,475	1,306
Plantation	131,733	9,412.45	0.07	6,587	2,825
Pompano Beach	117,969	14,705.98	0.12	5,898	8,808
Ramblewood	153,897	12,987.23	0.08	7,695	5,292
Rickards	127,925	11,104.87	0.09	6,396	4,709
Sawgrass Springs	146,139	18,322.52	0.13	7,307	11,016
Seminole	136,133	13,074.44	0.10	6,807	6,267
Silver Lakes	128,053	5,662.43	0.04	6,403	(741)
Silver Trails	231,707	7,583.09	0.03	11,585	(4,002)
Sunrise	149,314	8,670.19	0.06	7,466	1,204
Tequesta Trace	175,749	5,027.60	0.03	8,787	(3,759)
Walter C. Young	186,775	12,477.00	0.07	9,339	3,138
Westpine	151,793	13,313.60	0.09	7,590	5,724
Subtotal:	5,011,607	385,106.91	0.08	250,580	134,527
High School					
Anderson	313,803	14,823.76	0.05	15,690	(866)
Coconut Creek	287,607	21,147.62	0.07	14,380	6,768
Cooper City	230,653	17,106.23	0.07	11,533	5,573
Coral Springs	263,880	22,479.57	0.09	13,194	9,286
Deerfield Beach	276,595	43,327.84	0.16	13,830	29,498
Dillard	379,009	5,916.63	0.02	18,950	(13,033)
Ely	294,729	23,765.42	0.08	14,736	9,029
Flanagan	341,670	25,615.61	0.07	17,084	8,532
Fort Lauderdale	211,998	11,974.96	0.06	10,600	1,375
Hallandale	224,726	18,637.64	0.08	11,236	7,402
Hollywood Hills	202,382	19,991.46	0.10	10,119	9,872
McArthur	204,662	29,811.53	0.15	10,233	19,579
Miramar	277,184	4,571.01	0.02	13,859	(9,288)
Northeast	243,162	13,541.33	0.06	12,158	1,383
Nova	226,479	46,255.49	0.20	11,324	34,931
Piper	287,081	30,327.48	0.11	14,354	15,973
Plantation	301,101	16,207.59	0.05	15,055	1,153
South Broward	225,201	17,928.95	0.08	11,260	6,669
South Plantation	278,293	14,803.26	0.05	13,915	888
Stoneman Douglas	311,242	28,723.72	0.09	15,562	13,162
Taravella	266,975	16,175.50	0.06	13,349	2,827
Western	260,175	29,044.79	0.11	13,009	16,036
Subtotal	5,908,607	457,353.63	0.08	295,430	161,924
GRAND TOTAL	20,444,375	1,928,198.78	0.09	1,022,219	905,980

*includes permanent and portable square feet.

Source: Created by MGT based on Maintenance Department data, 1998.

8.7 Energy Management

Proper energy management is a vital tool for the efficient distribution of the school system's utilities. Energy audits and other sources of data are essential to control energy costs. Such data are used by management to determine priorities and to monitor and evaluate the success of energy management programs. While the purpose of the energy management program is to minimize waste, the program should also ensure the comfort of the building, and encourage energy awareness across the school system.

CURRENT SITUATION

The Broward County School District established its energy management program in 1986 when it installed an integrated district network containing the energy management system and the security system. The combination of these two systems had two benefits for the energy management system.

- Integrating the energy management system into the security system ensures that it will be maintained and in good operating condition.
- Additionally, the chillers for the HVAC system can be linked to deployment of the alarm system which ensures the cooling equipment is shut down when the alarm is turned on and the building is unoccupied.

The Education Technology Services (ETS) Department is responsible for coordination of energy management activities within the Broward County School District. This responsibility includes:

- promoting energy efficiency in school building operation, maintenance, design, and construction; and
- supervising installation, programming, and maintenance of electronic security system and energy consumption monitoring equipment in schools and at the school board's central monitoring station.

ETS currently maintains approximately 18,510 security/building control devices at 213 locations, 25 additional security dialer systems, and the school board's central security station. ETS staff involved with the energy management system include the Director of Customer System/Integration Services (approximately 10 percent of his time), three field technicians, one analyst, and one controls specialist who oversees installations. The present staffing is the result of a departmental reorganization in 1996 which left the program with no staff solely dedicated to energy management.

The energy management program contains the following components:

- **Energy Management** – all schools are on a computer-controlled system, which operates and monitors the HVAC system. This system is tied into the security system and controls security motion detectors, space temperature sensors, humidity sensors, chilled water temperature sensors, exterior lighting conductors, and photocells.

- **Exit Signs** – in conjunction with the Maintenance Department, ETS has begun retrofitting inefficient exit signs with efficient LED exit signs. The LED signs consume two watts as compared to 55 watts of the old signs. The District has collected \$31,556 in rebates from Florida Light and Power for this project. ETS projects the signs will save the District in excess of \$100,000 annually for the next 25 years.
- **Classroom Occupancy Sensors** – Occupancy sensors have been installed in the classrooms of four high schools. These sensors turn off lights when the room is unoccupied. A metered test at one high school indicated the sensors reduced classroom lighting operation by 22 percent. The installation of occupancy sensors is now required in all new construction.
- **Lighting Replacement** – The district has received \$19,523 in rebates from Florida Power and Light (FPL) for the installation of energy efficient lighting in the Technology and Support Services building. All new construction is required to have energy efficient lighting. Retrofitting the other school facilities with energy efficient lighting is expected to take place under the performance contracting, which will be discussed later.
- **Chiller Replacement and Air Conditioning System Upgrade** – Since 1991, the district has received rebate payments from Florida Power and Light for installing energy efficient chillers and air conditioning equipment. The district has also received a rebate for the installation of a thermal energy storage project at Morrow Elementary. These rebates have totaled \$630,640.43 to date.
- **Energy Watch Dog** – The Energy Watch Dog is a stand alone microchip-based device which more precisely controls the operation of HVAC equipment and therefore reduces runtime. A test installation determined that the Energy Watch Dog paid for itself in 12 months on a ten ton unit and in six months on a 30 ton unit. In February, the school board awarded a contract for the purchase of additional Energy Watch Dogs which are being installed by the Maintenance Department.
- **Energy Efficiency in New Construction** – In 1995, the Facilities Department added energy efficient measures to the mechanical and electrical specifications for all new construction. New and remodeled schools will have energy efficient HVAC equipment, classroom lighting occupancy sensors, LED exit signs, and energy efficient fluorescent lights with electronic ballasts. All new control systems will be compatible with the Andover Energy Management System, which will increase the ability of ETS to monitor and control the equipment.
- **Florida Power and Light Consolidated Billing** – Since January 1997, the district has been consolidating the 400 bills it receives

monthly for energy use. Thirty-five (35) bills have now been consolidated and eventually the district will only have to pay one bill. The consolidation of bills will increase the effectiveness of the district expenditures by making the bill paying process more efficient. The district was unable to project how long it would take to consolidate all the bills since this partly a function of the utility company.

- **Air Conditioning Operating and Maintenance Standards** – In conjunction with the efforts to control mold and mildew and to save energy, the Superintendent issued air conditioning operating and maintenance standards in October 1995.
- **Grant Funded Energy Project Pool** – The Florida Department of Community Affairs has awarded a \$500,000 grant to the district for enhancement of its energy management program. The district replaced chillers with these funds in 1997-98 and received rebates from Florida Power and Light.

The reorganization of ETS has caused the district to turn towards the use of performance contracting to continue its energy management projects. Proposals are now being evaluated from private contractors in response to the district's RFP for Energy Management Performance Contracting. Contracts will be awarded to three contractors for one year. Each contractor will be assigned to an area and additional contracts will be awarded based on the results of the first year. Each contract will be required to include one-third of the cost of a project manager.

FINDING

The Broward County School District is operating a comprehensive energy management program. It has taken advantage of rebate programs and new technology to increase its energy efficiency. In response to a reorganization of the ETS Department, which left no staff member entirely dedicated to the program, the Broward County School District has responded by shifting its direction to performance contracting. This initiative will enable the district to move forward with energy saving projects without full-time dedicated staff.

Between 1996-97 and 1997-98, the district's consumption of electricity decreased 2,409,806 KWH or 0.6 percent. This reduction came at the same time that student enrollment increased and new schools were opened.

COMMENDATION

The Broward County School District is operating an effective and comprehensive energy management program.

FINDING

While the district is operating a comprehensive program, it is not documenting the results of this program sufficiently. The MGT review team's request for the documented savings produced by each energy management program for the last five years could not be completely fulfilled.

The documentation of savings produced by new programs is critical to gaining ongoing Board and community support. An effective energy management program can save a school district substantial amounts of money to redirect to the classroom, but these programs will be cut when funds are limited, if the savings are not documented.

RECOMMENDATION

Recommendation 8-16:

Maintain accurate annual records of the savings produced by all energy management programs.

These records should be used to produce an annual report to the Board and the community to emphasize the importance of the program.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|--|
| 1. The Director of Customer System/Integration Systems should keep accurate records of all energy management programs. | Ongoing |
| 2. The Director of Customer Systems/Integration Systems should prepare an annual report to the Board and the community. | Annually
Commencing in
June 2000 |

FISCAL IMPACT

This recommendation can be accomplished within the existing resources of the district.

9.0 FINANCIAL MANAGEMENT

This section of the report reviews the budgeting, accounting, and other financial management functions of the Broward County School District and contains three major sections:

- 9.1 Budgeting
- 9.2 Financial Management
- 9.3 Internal Auditing

The areas of cash management, investments, and risk management are addressed in Chapter 10.0, Asset and Risk Management.

Effective financial management of a school system requires a sound financial plan that allocates limited resources to all units within the system to ensure that the educational needs of the students are met in an efficient manner. To be effective, a financial plan should have detailed policies, procedures, and internal controls to process the district's business transactions efficiently and to provide accurate, complete, and timely information to the administration and board to facilitate decision making. Providing quality and timely information to management to assist in making prudent financial decisions supports the mission of the school system.

BACKGROUND AND OVERVIEW

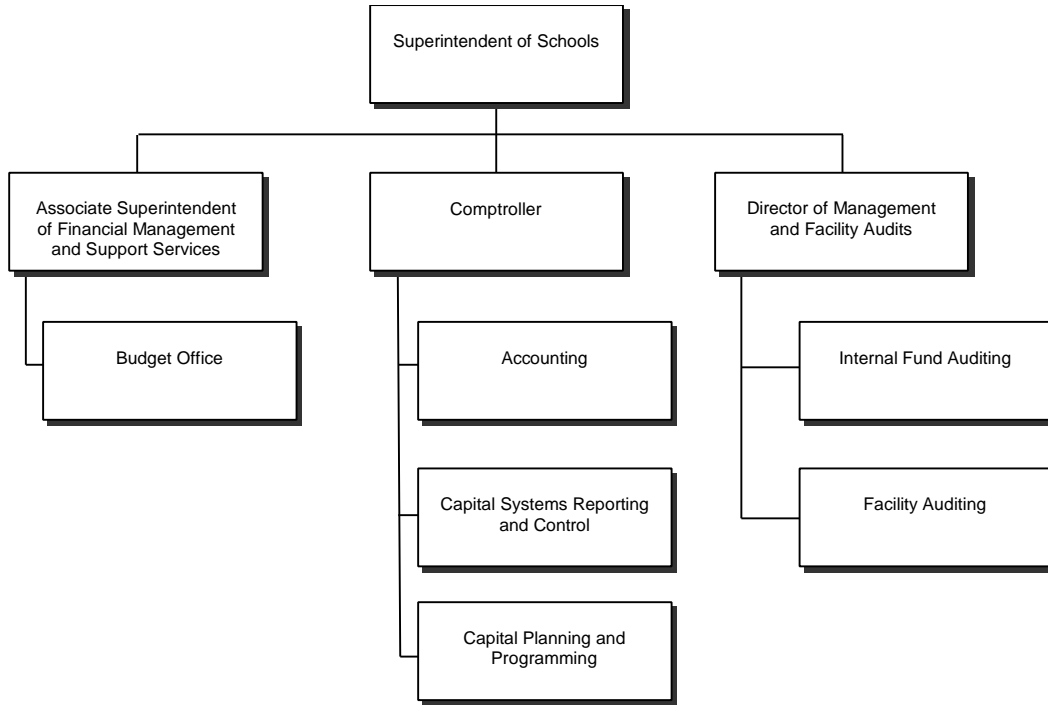
During 1997-98, the Broward County School District contracted with a private consulting firm to conduct an organizational and operational review of the financial management and purchasing functions of the district. The results of this review were released by the consulting firm subsequent to the on-site performance review performed by MGT of America, Inc. In most instances, recommendations made by MGT concur with the recommendations contained in the private consulting firm's report. However, there are a few instances in which the recommendations of the two reports differ. These differences have been addressed in the applicable sections of this chapter.

The budgeting functions for the district are split between the Budget Office, which is under the direction of the Associate Superintendent of Financial Management and Support Services, and the Capital Systems and Reporting Control Department which falls under the direction of the Comptroller's Office. Capital budgeting for the district is the responsibility of the Comptroller's Office, while all other budgeting functions are the responsibility of the Budget Office.

Financial Management, including accounting, is under the purview of the Comptroller who reports directly to the Superintendent. Also under the direct supervision of the Superintendent are the functions and responsibilities of the Internal Auditor. The Broward County School Board currently has a contract with a private accounting firm for external auditing services.

The organizational chart shown in Exhibit 9-1 provides an overview of the structure for the divisions addressed in this chapter. More detailed organizational charts are shown in later sections of this chapter.

**EXHIBIT 9-1
ORGANIZATIONAL STRUCTURE OF THE BUDGETING AND FINANCIAL
FUNCTIONS IN THE BROWARD COUNTY SCHOOL DISTRICT**



Source: Broward County School District, 1998.

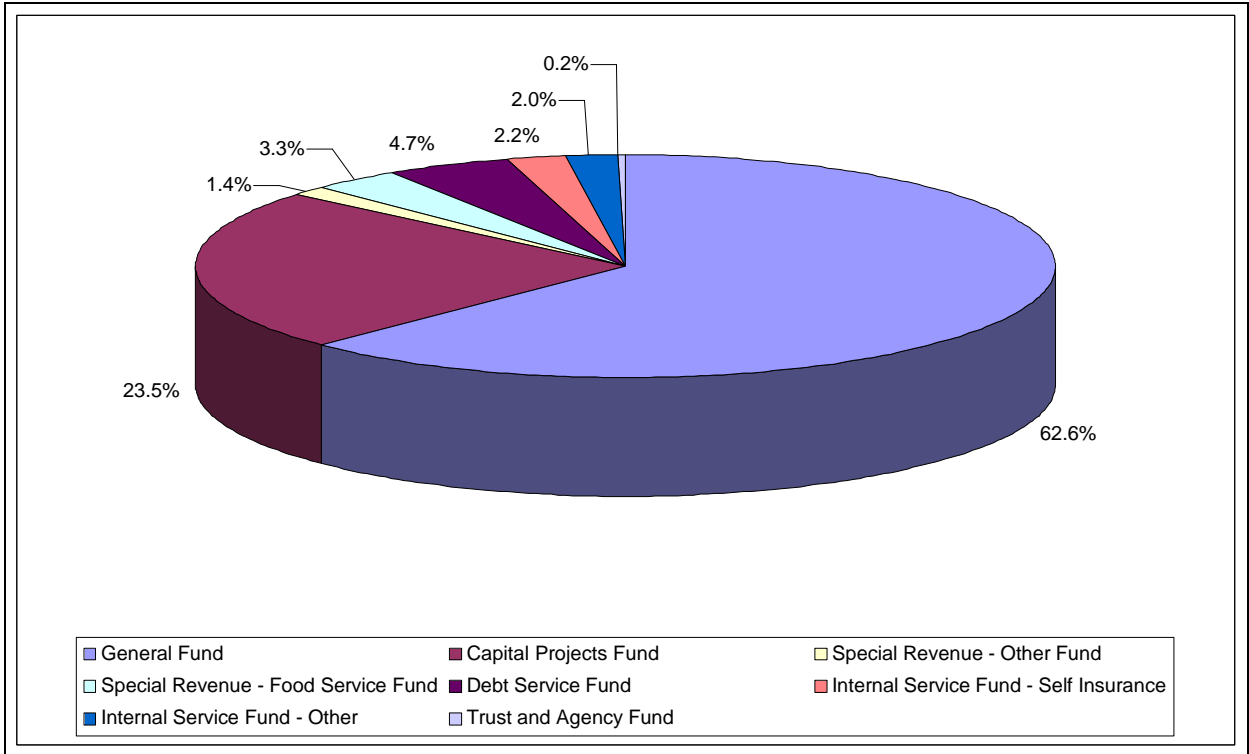
With an annual budget of over \$2.3 billion and over 20,000 employees, the Broward County School District is the largest accredited school district in the nation, and the fifth largest district in the nation.

The Broward County School District is one of the fastest growing school districts in the country. The district projects that student enrollment will grow by approximately 6,000 to 7,000 students every year. In addition, the district serves a multicultural/multi-ethnic population with students from 164 countries speaking 54 languages.

Exhibit 9-2 shows an overview of budget data for the district. The General Fund comprises 62.6 percent of the district's total budget, while the Capital Projects Fund amounts to 23.5 percent of total district spending.

Exhibit 9-3 summarizes school and student data. As one of the fastest growing districts in the nation, one of the largest problems facing the Broward County School District is school overcrowding. The district currently has 17 schools that are considered "critically overcrowded," a term defined by the district that means schools are overcrowded to the point that the quality of education begins to suffer. The district has built 57 new schools since 1987, and opened 10 new schools in the 1996-97 school year alone. Between the 1997-98 and 1999-2000 schools year, the district anticipates opening 14 new schools.

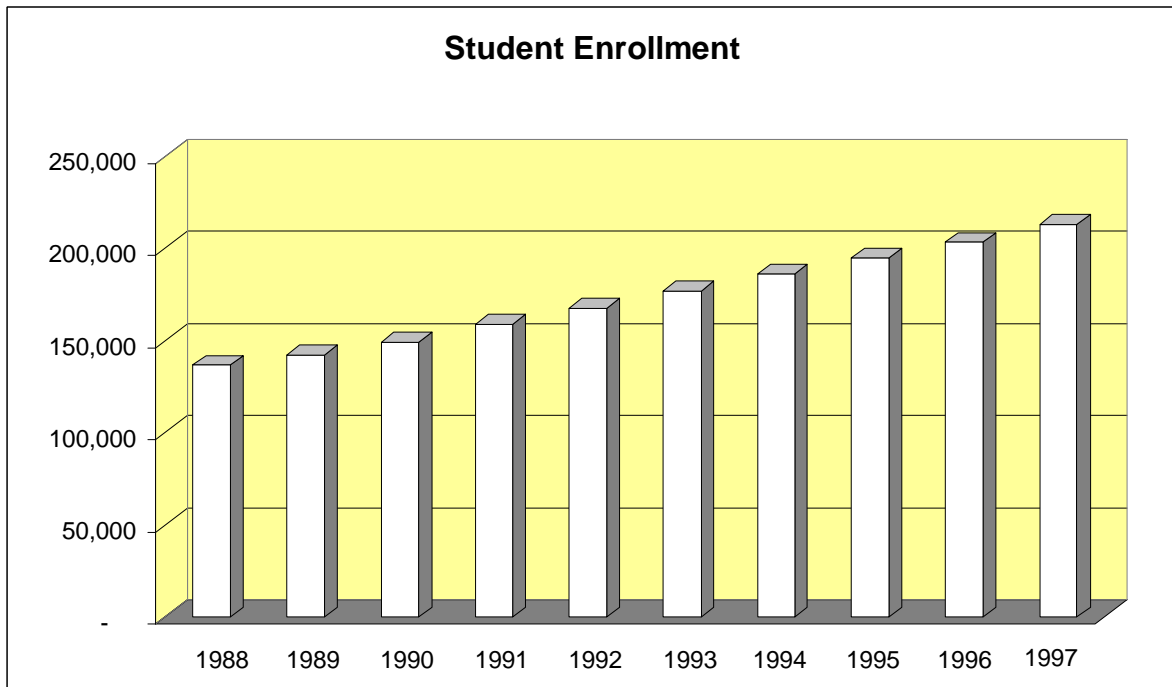
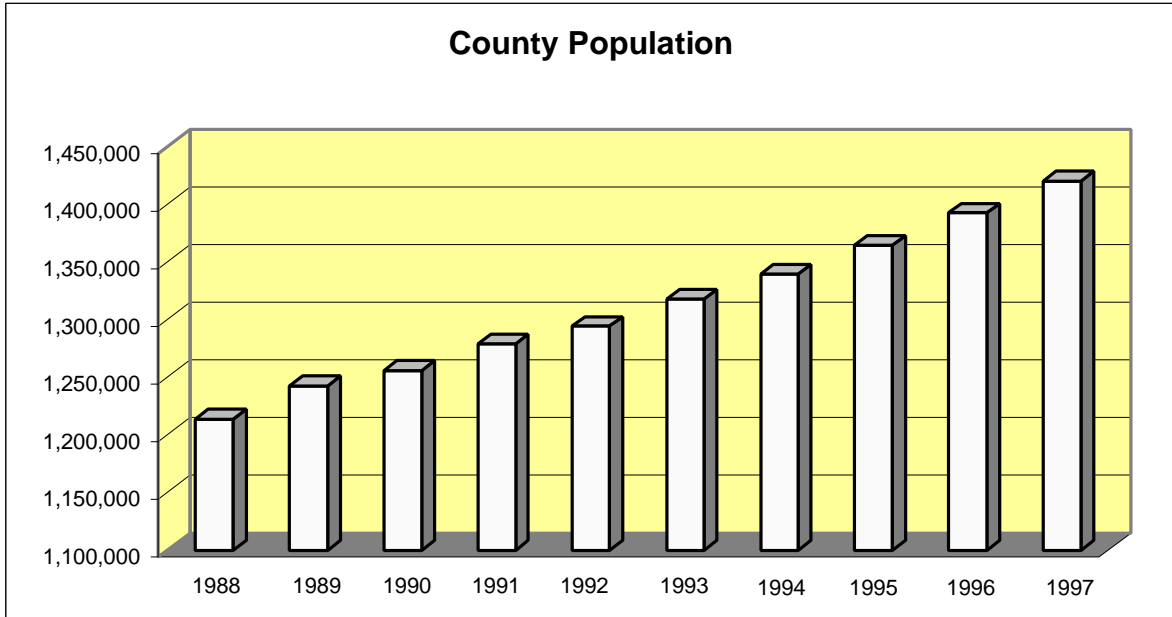
**EXHIBIT 9-2
OVERVIEW OF BUDGET FOR THE 1998-99 FISCAL YEAR
IN THE BROWARD COUNTY SCHOOL DISTRICT**



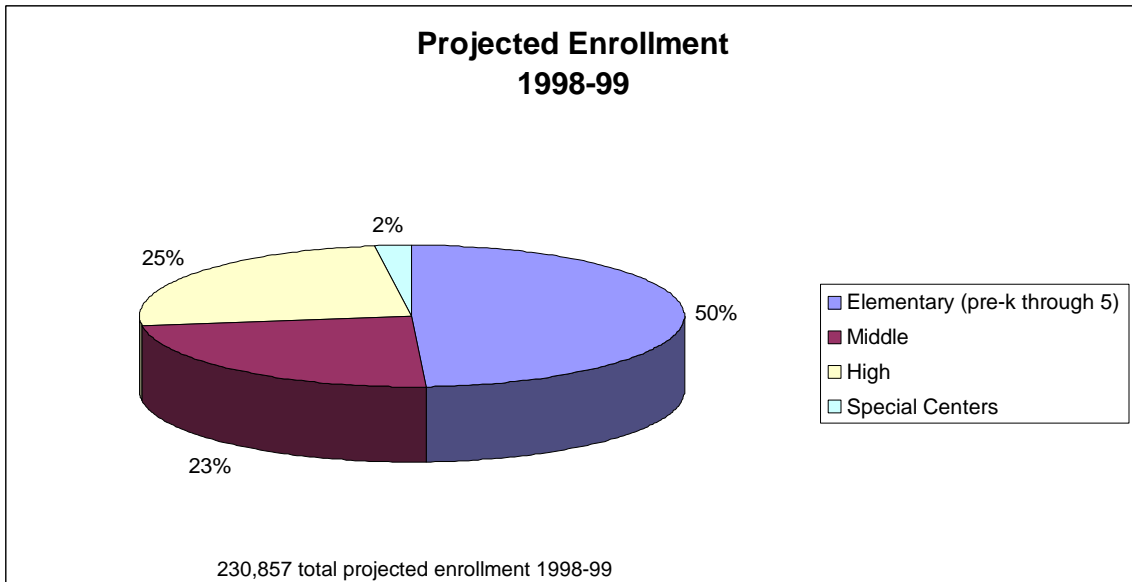
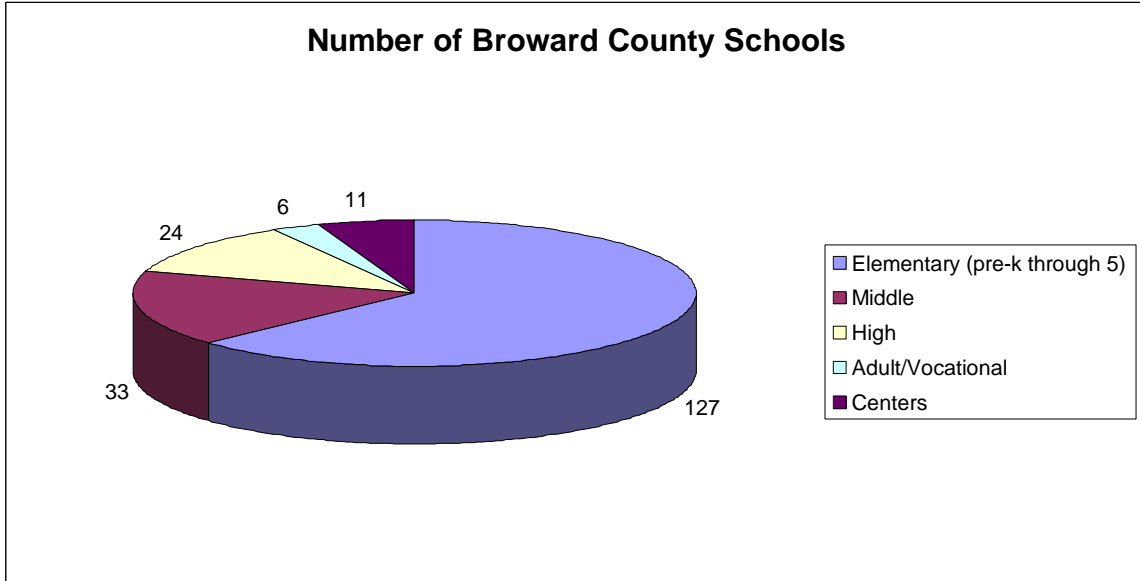
FUND	AMOUNT (000,000)	PERCENT OF TOTAL
General Fund	\$ 1344.7	62.58%
Capital Projects Fund	505.1	23.51%
Special Revenue - Other Fund	30.4	1.41%
Special Revenue - Food Service Fund	71.9	3.35%
Debt Service Fund	101.2	4.71%
Internal Service Fund - Self Insurance	47.7	2.22%
Internal Service Fund - Other	42.4	1.97%
Trust and Agency Fund	5.3	.25%
Total	\$ 2,148.7	100.00%

Source: Broward County School District, 1998.

**EXHIBIT 9-3
SELECTED DEMOGRAPHIC DATA IN THE
BROWARD COUNTY SCHOOL DISTRICT**



**EXHIBIT 9-3 (Continued)
SELECTED DEMOGRAPHIC DATA IN THE
BROWARD COUNTY SCHOOL DISTRICT**



Source: Broward County School District, Budget Office, 1998.

In November 1997, the Florida Legislature held a special session to address statewide school overcrowding issues. As a result, the Legislature authorized the spending of approximately \$2 billion to build more classrooms across the state. The Broward County School District will receive more than \$361 million in new funds for the 1998-99 school year as a result of this special session, \$282 million of which will be earmarked for new school construction to help relieve overcrowding, and \$79 million of which will support 1999-2000 student enrollment increases and address salary increases and improvements to programs.

Conversely, other changes at the state level are increasing the demands for facilities in the district. For instance, as a result of the passage of House Bill 2121 which changes the formula for calculating facility needs of schools in the state, Broward County will be losing 32,000 permanent student spaces that are needed to accommodate the large annual influx of students to the district. In addition, changes in provisions of state law limit the use of Public Education and Capital Outlay (PECO) and Capital Outlay and Debt Service (CO&DS) funds, as well as restricting the use of local capital outlay millage funds. There is potential that this issue will impact the General Fund as project costs that exceed 110 percent of the adjusted statewide average construction cost must be absorbed by operating funds.

These and other issues present challenges to the finance and budgeting functions for the district. Maintaining strict accountability for funding becomes an important issue for a district faced with so many demands.

Exhibit 9-4 presents the district's mission and priorities, as stated by the School Board.

**EXHIBIT 9-4
BROWARD COUNTY SCHOOL BOARD
MISSION AND PRIORITIES**

MISSION
"Commitment to Excellence"
We, the School Board of Broward County, Florida, commit ourselves to a philosophy of respect and high expectations for all students (pre-kindergarten through adult), teachers and staff; and, with community participation and partnerships, we will provide the process and support which will give our diverse, multicultural student population equal access to a quality education.
PRIORITIES
<ol style="list-style-type: none">1. Improving Student Achievement and School Effectiveness2. Addressing Growth3. Embracing, Celebrating, and Demonstrating Diversity4. Improving Student/Staff Safety and Security5. Increasing Student and Staff Accountability6. Expanding Partnerships7. Attracting, Retaining, and Training the Best Teachers, Principals and Support Staff8. Utilizing Technology to Improve Student Achievement9. Empowering Parents and Community through Participation

Source: The School Board of Broward County, Florida, 1998.

9.1 Budgeting

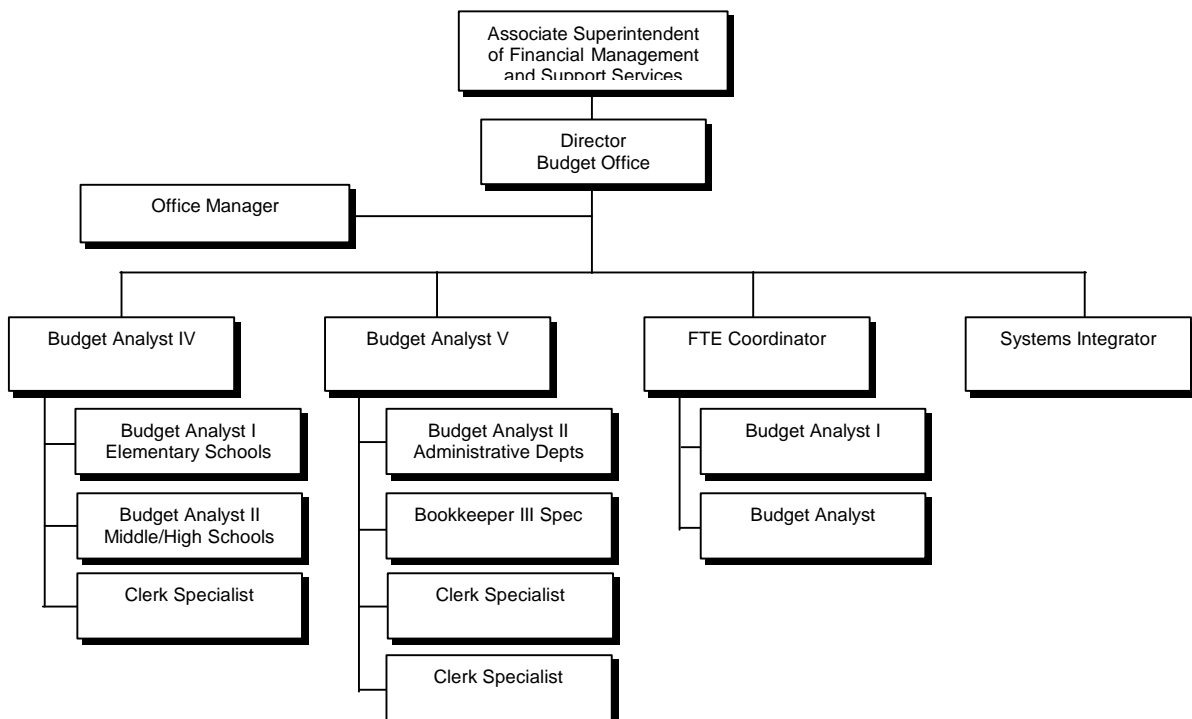
School districts allocate resources to programs and services through the budget process. As a result, it is one of the most important activities undertaken. As the focal point for key resource decisions, the budget process is a powerful tool. The quality of decisions resulting from the budget process and the level of their acceptance depends on the characteristics of the budget process that is used.

A budget process that is well-integrated with other activities of a school system, such as the planning and management function, provides better financial and program decisions and leads to improved operations. A process that effectively involves all stakeholders --- elected officials, administrators, employees and their representatives, citizen groups, and business leaders --- and which reflects the needs and priorities of all stakeholders will serve as a positive force in maintaining good public relations and enhancing citizen and other stakeholder overall impressions of the school system.

CURRENT SITUATION

The Budget Office in the Broward County School District is responsible for the preparation, modification, and monitoring of the operating budget of the school district while the Comptroller's Office is responsible for the preparation and monitoring of the capital budget. The Budget Office is staffed with 16 FTE employees, including a Director. The Budget Director reports to the Associate Superintendent of Financial Management and Support Services. Exhibit 9-5 depicts the organizational structure of the Budget Office.

**EXHIBIT 9-5
ORGANIZATIONAL CHART FOR THE
BUDGET OFFICE**



Source: Broward County School District, Budget Office, 1998.

The Budget Office is responsible for assisting in developing and maintaining school and district operational budgets, in addition to performing financial analysis to provide information for planning and management needs. Services provided by the department include the following:

- coordinate budget guidelines;
- compile school and department budgets;
- meet statutory requirements for budget and FTE reporting;
- provide reports to the Superintendent;
- develop financial impact statements;
- research statutes as needed to develop funding alternatives; and
- provide support to Area offices and schools.

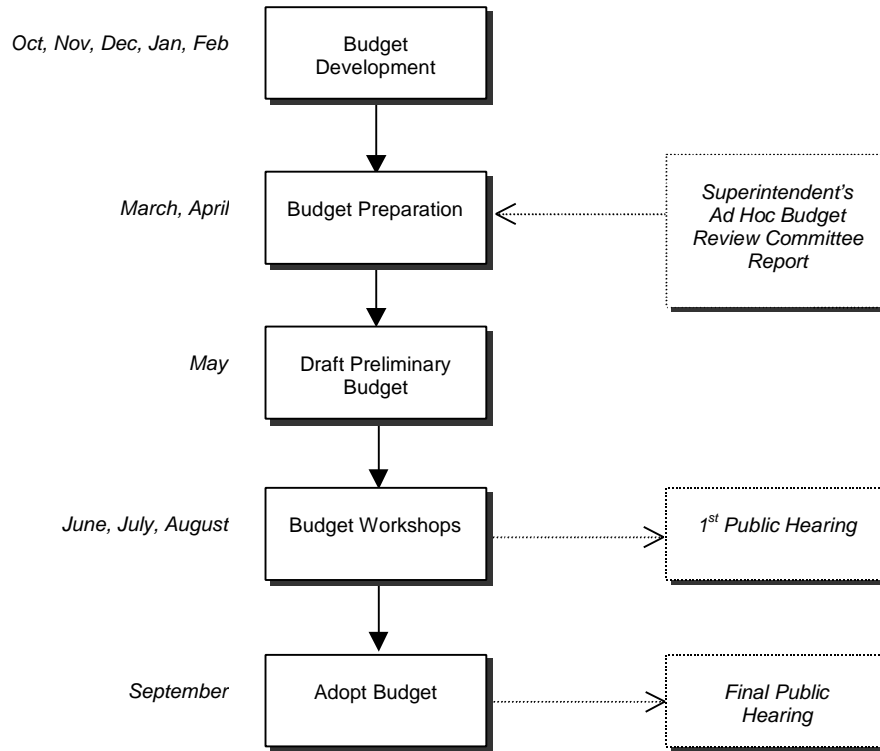
The Broward County School District has adopted the philosophy of school-based fiscal management, recognizing that each school is unique, having distinctly different populations and needs. Provisions of school-based management are designed to encourage flexibility in delivery of student services. Financial and program accountability is built into the system by linking each principal's evaluation to the success of the educational program and the efficient use of financial resources.

Under the direction of the Superintendent, annual budget instructions are issued to each school principal and area office, who in turn prepares the operating and capital budgets. Individual principals, area offices, and/or account managers develop program and budget requirements from information on projected student enrollment, student achievement, and fiscal guidance. Each budget is reviewed and approved by a school-level School Advisory Council before being submitted to Area Superintendents for review and approval. School Advisory Council members consist of school principals, teachers, educational support employees, students, parents, and business and community representatives (see Chapter 7). School budgets are consolidated by the Budget Office into a district budget for submission to the School Board and the State Department of Education. In addition, capital budgets are also reviewed by the Capital Budget Subcommittee for recommendation of final approval before the Superintendent's Ad Hoc Budget Review Committee.

The budget process is a year-long process beginning in the summer and ending with the approved budget by June of the following year. Exhibit 9-6 highlights the budget calendar for the 1998-1999 budget year.

The school district's budget calendar includes the dates of key events; describes the overall budget and planning process; and identifies roles, responsibilities, and assignments. The budget calendar identifies when and how stakeholders can participate in the process and takes into consideration key statutory deadlines. Other key school district organizational dates that affect participants in the budgetary process were taken into consideration when the school district's budget calendar was developed.

**EXHIBIT 9-6
BROWARD COUNTY SCHOOL DISTRICT
ANNUAL BUDGET CALENDAR**



Source: Broward County School District, 1998.

FINDING

The Broward County School District has received the Meritorious Budget Award for its budget for the past three years and the Distinguished Budget Presentation Award for the last two years. The Meritorious Budget Award is presented by the Association of School Business Officials (ASBO), a national organization that supports all school business administrators. The Government Finance Officers Association of the United States and Canada (GFOA) sponsors the Distinguished Budget Presentation Award.

The award programs are designed by school business management professionals and government officers and can be used by school districts and local governments to build solid foundations in the skills of developing, analyzing, and presenting budget information. Under the award programs, school districts and local governments submit their budgets for evaluation by review teams composed of accredited, experienced administrators, chief accountants, and auditors. Review teams, which are totally independent of the entity being reviewed, prepare commentary on the submitted budget, noting both strengths and weaknesses.

Preparing and presenting a budget document that conforms to ASBO or GFOA guidelines ensures that the school district is presenting consolidated and concise information to the public. The award process also assists school business officials in sharpening their budgeting skills and improving the presentation and communication of financial plans to the community. The benefits of earning an award include:

- enhanced credibility for the school district's budget with the community;
- enhanced report presentation;
- individual recognition;
- new ideas;
- increased visibility;
- confidential feedback on the budget document and on the budget process;
- continuing education credits; and
- professional growth for the budget staff.

COMMENDATION

The Broward County School District is commended for preparing and presenting a budget document that adheres to the standards established by the ASBO and GFOA and for attaining the Meritorious Budget Award and the Distinguished Budget Presentation Award.

FINDING

The Broward County School District has an Ad Hoc Budget Committee that assists with annual budget preparation efforts. The committee's purpose is to provide input into the processes for determining which programs are most effective in achieving the Board's vision and goals, and to make recommendations for new approaches that can be incorporated into the budget. Committee efforts enable the district to make the best use of limited resources. The committee, comprising representative principals, area and central office administrators, and parents, meets on a monthly basis from October through May.

The committee uses an established framework in which to review major budgetary issues and to formulate school budgetary guidelines. A review of minutes of the monthly committee meetings indicate that some functions of the committee include:

- assessing the broad overview of district needs and determining strategies for funding these needs;
- analyzing the impact of legislation; and

- developing strategies for lobbying efforts.

The Ad Hoc Budget Committee is comprised of individual subcommittees that concentrate on certain issues. Subcommittees change depending on the issues facing the budget in any particular year. The subcommittees include:

- School Budget Guidelines
- Capital Budget
- Summer School
- Federal Funding
- Safe Schools
- Innovation Zones
- Workforce Development
- Compensatory Education
- Medicaid

School-based management is accomplished in the Broward County School District through several mechanisms, including School Advisory Councils and School Improvement Plans (SIP). Each school has a School Advisory Council, the membership of which is approved by the School Board annually. Council members include the school principal, teachers, a Broward Teacher Union member, educational support employees, students, parents, and business and community representatives (see Chapter 7).

The structure and goals of the School Advisory Council are to ensure a collaborative decision-making process, allowing input from teachers, administrators, parents, and the community. Through these Councils, schools are responsible for linking their mission and goals to budgetary and funding concerns of how to achieve those goals.

New procedures established for the Capital Budgeting process include mechanisms to obtain input from all levels in the schools and the community, with input from teachers, principals, parents, and other stakeholders. The new process requires that stakeholders are charged with developing a capital request list, and then prioritizing the list. The list must be reviewed at the district level to ensure that statutory and funding requirements are met. The final capital budget is provided to stakeholders through the district's Internet Website. As projects are completed, dropped, or added to the capital plan, stakeholders have the opportunity to be involved. The Comptroller has established an open-door policy, welcoming all comments and questions regarding the capital plan.

In practice, the collaborative processes for budget preparation and decision making vary among campuses. Community members and parents interviewed during MGT's review had varied opinions about these processes; however, the majority of those interviewed stated they worked well and truly facilitated collaborative budgeting.

COMMENDATION

The Broward County School District is commended for the efforts to make the budgetary process a collaborative process, linking district goals and objectives and funding strategies.

FINDING

Developing and maintaining school budgets has become a complicated process, involving complex funding formulas and mandates. Many district employees who handle budgetary responsibilities find the process to be a frustrating and cumbersome task.

The Human Resources Development Department, with support from Area Business Analysts and the Budget Office, conducts an annual training program for all responsible for maintaining school budgets. The training is a mandatory eight-day event for all school administrators having primary budgetary responsibilities and for the Intern Principal Program. The training is designed to prepare school-based administrators to develop and monitor their school's budget accurately, cost effectively, and based on student outcomes.

The stated objectives of the training program are to:

- ensure participants correlate school improvement needs with budgetary planning;
- assist administrators in identifying various sources of revenue and funding allocations;
- help participants develop school-based budgets based on school board guidelines; and
- teach participants to monitor and adjust a budget based on changes in school needs.

Exhibit 9-7 shows a training agenda. As the agenda shows, in Module 1 administrators are provided information on fundamental budgeting concepts such as performance-based budgeting, linking budgets to student achievement, and operating as compared to other budgets. Module 2 provides detailed information on preparing a school-based budget such as staffing projections, FTE projections, and revenue projections. Modules 3 and 4 discuss ways to effectively monitor budgets, and provide procedures for performing year-end tasks.

The training curriculum includes numerous group discussion sessions and hands-on exercises. Some of the exercises include a budget scavenger hunt, distributing state dollars, a restricted categorical exercise, and FTE membership projection exercises.

Principals manage each school's fiscal and educational programs and are held accountable for financial performance, instructional programming, and student achievement. The Broward County School District maintains a strict policy for holding principals accountable for adherence to prescribed budgets. Each principal's written annual evaluation includes a discussion of the year-end budget, in addition to other financial responsibilities. Principals failing to keep expenditures within budget are required to state their reasons to Area Superintendents, the Associate Superintendent of Financial Management and Support Services, and the Superintendent. Interviews with principals and staff indicated that financial accountability at the school level is taken very seriously in the district.

**EXHIBIT 9-7
AGENDA FOR BUDGETING TRAINING FOR
SCHOOL-BASED ADMINISTRATOR PROGRAM**

MODULE 1		MODULE 3	
I.	Welcome/Introductions	VI.	Monitor & Adjustments
II.	Objectives/Agenda	A.	Welcome Jeopardy Review
III.	Performance Based Budgeting	B.	Special Programs
A.	System Priorities	1.	Title I
B.	School Improvement Goals	2.	Other Grants
C.	Budgeting versus Student Achievement	C.	Staffing Allocation & Placement Conferences (Budget)
IV.	Funding Allocation & Revenue Sources	1.	Purpose, Participants, and Outcomes
A.	Distribution of Funds	2.	Role Play Demonstrations
B.	Identification of School Revenue	D.	Monitoring a School-Based Budget
1.	Operating budget	1.	Monitor Budget – Prior to First Day
2.	Others	2.	Monitor budget Application
		3.	Student Counts – First Day, Ten Day, Twenty Day
		4.	Student Count Application
		5.	Monitor Budget – Reconciliation
		6.	FTE Counts – October, February
		E.	Summary – Action Ideas
MODULE 2		MODULE 4	
V.	Development of a School-Based Budget	VII.	Year End
A.	Welcome Jeopardy Review	A.	Welcome Jeopardy Review
B.	Projecting An Operating Budget	B.	February FTE
1.	Staffing Projections	1.	Principal's Budget Report – ACT 475
2.	FTE Membership Projection	2.	Rebudgeting
3.	Application	3.	Application
4.	Projection of Revenue	C.	Year End Budgeting Decisions
5.	Application	1.	Evaluation/Student Achievement/SIP Goals
C.	Building an Operating Budget	2.	Carryovers
1.	Data Collection	3.	Application
2.	Allotment Summary	D.	Summer School Budget
3.	Instructional Allocation	E.	Budget Calendars
4.	Restricted Categoricals	1.	Deadlines
5.	Non Restricted Categoricals & Staffing	2.	Applications
6.	Activity	F.	Current Concerns
D.	Summary	G.	Post Test & Evaluation

Source: Budgeting for School-Based Administrators, Participant Guide, Training & Development, 1997.

COMMENDATION

The Broward County School District is commended for its emphasis on financial accountability by training school-level administrators and staff, and by including budgetary outcomes in the principal annual evaluation process.

FINDING

Administrators and others responsible for administering a budget can access information and reports directly from the budgetary accounting system. All school offices are equipped with desktop computers for this purpose. Even though data can be viewed on-line, some individuals responsible for budgets prefer to wait until paper copies of month-end reports are printed by the Educational Technology Support (ETS) Department and shipped to the school sites.

All personnel changes (such as adding new hires, terminating employees, and recording employee pay or position changes) are entered into district records by the processing of a Personnel Action Form (PAF). The process for recording and entering PAFs is a cumbersome, time-consuming process that makes it difficult for managers and principals to monitor their budgets properly. That is, the amount of time between hiring a new employee, for instance, and actually getting the PAF entered into the system for the new employee, can take such a long time that budgetary and expenditure reports do not reflect the personnel action.

Interviews with campus staff, Payroll Department employees, and Budget Office employees indicated that this problem is so severe that campus staff have difficulty in monitoring expenditures. This problem is especially critical at the beginning of the school year when the district is hiring new employees. Statistics maintained by the Personnel Department show that the district processes 120,000 PAFs annually, the majority of which are processed at the beginning of the school year. In a survey conducted by MGT for this review, 50 percent of district administrators and teachers stated that there are major bottlenecks in this process.

In addition to the delays in processing PAFs, a recently completed external review of this process found that of PAFs tested, 80 percent of the errors found were due to schools not completing forms properly. Incorrect PAF information serves to delay the process even further.

RECOMMENDATION

Recommendation 9-1:

Improve the quality and timeliness of financial and budget data provided to administrators and others responsible for budgets so that accountability can be strengthened.

Providing more timely posting of information to the budgetary and financial system for personnel actions should provide more accurate financial information to system users, making it more reasonable to keep school spending within established budgets. Additionally, improving the accuracy of PAF processing will also help to improve the budget monitoring function.

Although the implementation of an automated HRMS system will serve to reduce processing time for PAFs, the district should take measures now to improve the processing of PAFs. These measures include using temporary personnel to assist with backlogs in entering PAFs and additional training for campuses and departments in order to reduce the error rate on PAFs.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Accounting and the Payroll Supervisor May 1999
should meet with the Personnel Director to determine ways of improving the timeliness of data entry for PAFs. Some suggestions include providing more training for department and campus personnel, and using temporary help to handle the backlog of entering PAFs to the system.

2. The Superintendent should set standards of how long it should take for a PAF to be processed. May 1999
3. The Superintendent should address the data entry problem in a meeting of the Ad Hoc Budget Committee to ensure that adequate resources are devoted to finding a solution to the problem. October 1999
4. The Director of Education Technology Services (ETS) should modify the budget keeper training program for budget administrators to incorporate information on obtaining timely information from the financial system so that users are not dependent upon month-end paper reports. June 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources. The district should consider using district employees from other departments to assist with the entering of PAF information during peak periods.

9.2 Financial Management

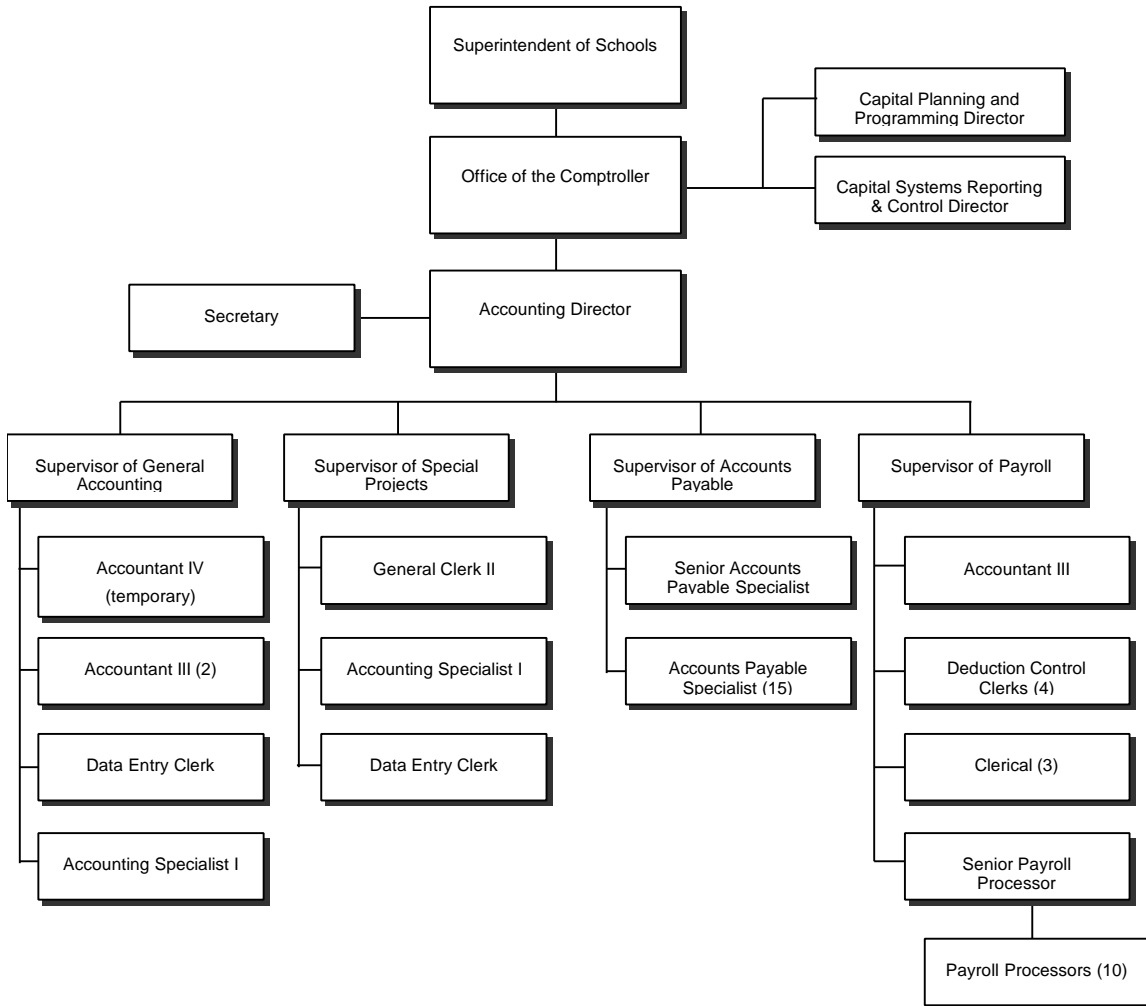
Financial services are concerned with the collection, disbursement, management, and accounting for all funds of a school district and, as such, is an integral part of its overall operation. The end result of financial activities is quality reports to be used by management in making critical decisions on a school district's ability to provide quality educational programs to students.

CURRENT SITUATION

Financial management functions in the Broward County School District include general accounting, accounts payable, payroll, special projects, capital planning, and programming and control. The majority of these functions fall under the direction of the Comptroller, who reports directly to the Superintendent. The treasury function falls under the supervision of the Associate Superintendent for Financial Management and Support Services. The treasury and cash management functions of the school district are discussed in Chapter 10, Asset and Risk Management. This section addresses financial operations.

Exhibit 9-8 depicts the organizational structure of the Comptroller's Office. As can be seen, the Comptroller's Office is comprised of three main departments: Accounting, Capital Systems Reporting and Control, and Capital Planning.

**EXHIBIT 9-8
ORGANIZATIONAL CHART FOR COMPTROLLER'S OFFICE
IN THE BROWARD COUNTY SCHOOL DISTRICT**



Source: Broward County School District, Comptroller's Office, 1998.

The primary mission of the accounting function is to provide the district with accurate and timely financial information and to maintain a comprehensive and effective accounting system for district fiscal accountability. Services provided by the accounting department include maintaining financial control and reporting for schools, departments, and the Board, as well as local, state, and federal agencies as required by law. The department also has responsibility for all accounting functions including payroll, accounts payable, Florida Education Finance Program (FEFP) cost accounting for schools, capital projects, federal and state grants, and the automated financial accounting system. The goals and objectives of the Accounting Department include:

- preparing the Comprehensive Annual Financial Report (CAFR);

- attaining the Certificate of Excellence in Financial Reporting awarded by the Association of School Board Officials (ASBO);
- compiling the Superintendent's Annual Financial Report in accordance with School Board policy and state law;
- developing and implementing the twice-monthly payroll schedule for all School Board employees; and
- improving services to schools and departments utilizing innovative uses of technology.

The Capital Planning and Programming Department is responsible for revising the Florida Inventory of School Houses (FISH) documents and plans; generating and maintaining the state-required Plant Survey; performing facility needs assessments; generating and maintaining capital facility databases and reports; and generating and revising all generic educational specifications and basic equipment lists.

To achieve these responsibilities, the department has established goals and objectives that include maintaining an accurate and up-to-date facility needs assessment database and maintaining the district's Plant Survey and generic facility planning document.

The Capital Systems Reporting and Control Department is responsible for establishing and maintaining capital project reporting software through the Wide Area Network (WAN) to Board members, project managers, and senior management. The department also is responsible for producing capital project and financial reports. Goals and objectives of the department include the establishment and maintenance of capital project reporting software.

This chapter of the report deals with the accounting and capital budgeting functions under the purview of the Comptroller's Office; facility and construction functions are addressed in Chapter 8, Facilities Use and Management.

In July 1998, the Comptroller's Office was formed in part to address concerns raised in past audits and in a Grand Jury Report released late last year that cited many problems with the district's construction and facilities functions. The Grand Jury Report, released to the public in November 1997, noted that the district was under such pressure to open new schools in order to relieve overcrowding that it wasted millions of taxpayer dollars and jeopardized children's health and safety.

Summary findings of the Grand Jury Report include:

- numerous schools with excessive repairs shortly after opening;
- newly opened schools lacking basic safety equipment such as fire hydrants;
- repeated use of prototypes having design problems, leading to numerous schools with duplicate problems; and

- district employees not following policy and procedures when dealing with building contractors.

The Grand Jury Report contained several recommendations, one of which was that the district should bolster its oversight and inspection staff to ensure quality, on-time construction. To accomplish this, the Superintendent established the Office of the Comptroller, who, in addition to overseeing the district's accounting function, also is responsible for tracking school construction projects, producing reports, and dealing with construction-related finance issues and disputes. The responsibilities for building and designing schools are now separated from the financial and inspection aspect of the projects. The Associate Superintendent for Facilities and Construction Management continues to oversee the designing and building of schools. In addition, the Management and Facility Audits Department now has a staff to conduct facilities and construction audits. The internal audit function is addressed in Section 9.3 of this chapter.

The accounting operation of the Comptroller's Office is staffed with 63 full-time positions, including five administrative positions, seven technical positions, and 51 clerical positions. Exhibit 9-8 shows the organizational structure of the Comptroller's Office.

The Accounts Payable processes transactions with a staff of 17 employees, including the supervisor. Most invoices are sent directly to the processors, although some are first routed to the school sites or departments for verification prior to payment processing.

The Payroll Section is staffed with 20 employees, including the Payroll Supervisor. The district maintains a processing schedule with nine separate payroll calendars. In addition, the section generates numerous supplemental payroll cycles as well and manually issued paychecks.

Payment transactions for both accounts payable items and employee pay are handled by the Accounts Payable Section and the Payroll Section, respectively, up to the point of disbursement. Clerks in the General Accounting Section are responsible for review, verification, and disbursement of all checks.

Accounting, budgeting, and purchasing systems are maintained through a nine-year old batch processing system developed and supported by Geac Computer Corporation. Payroll transactions are entered into a separate system initially developed by Integrated Systems, Inc., and installed in the district in 1991. Both systems operate on a mainframe AS/400 system. The district maintains a service contract for the financial system, and the Geac Corporation provides continuing support for the system.

However, the ISI payroll system was originally not intended for the use to which it operates, and numerous modifications have been necessary over the years. As a result, the product's developer no longer provides support for the payroll system.

The district has recently implemented Y2K upgrades for the financial system, and is currently working on upgrading the payroll system. In June 1998, a Request for Proposals (RFP) was issued for a Human Resources Management System, and the district anticipates having the new system operational by the 2001.

All computer systems are maintained by the Educational Technology Services (ETS) Department with a systems management function housed in the Treasury Department. The systems management function provides support to financial users of the system. Responsibilities of the system management section include:

- assigning user passwords;
- developing and conducting training for new users;
- conducting refresher courses for existing users;
- implementing and tests system upgrades; and
- maintaining help desk for system users.

Due to the problems experienced with the excessive modifications made to the payroll system, the district has set a policy to avoid performing modifications to the financial system.

FINDING

MGT's review of selected general ledger account reconciliations indicates that controls surrounding the reconciliation process are weak. Some weaknesses found include accounts that are not reconciled on a regular basis, reconciliations being performed by employees who are also in charge of entering transaction activity for the accounts being reconciled, reconciliations not being prepared properly, and reconciliations not being approved.

During 1998, the department lost two key employees due to employee turnover, and as a result, the reconciliation process was allowed to lapse for several months. In July 1998, the department hired a temporary accountant to assist with account reconciliations, and this temporary accountant was able to get several, although not all, reconciliations up to date. However, at the time of the MGT review, the accountant had been reassigned to assist with other accounting duties, again allowing the account reconciliation process to lapse.

Some of the accounts that have not been reconciled since August 1998 include:

- Deposits Receivable Due From Other Agencies
- Salary and Wages Payable
- Retirement Funds Payable
- Employee Insurance Payable
- Medical Reimbursement Payable

The accounts having gone unreconciled since June 1997 include:

- Fringe Benefits Clearing
- Withholding Taxes Payable
- Credit Union Payable
- Accounts Receivable
- Prepaid Expenses

The purpose of preparing general ledger reconciliations is to ensure that monthly activity is entered properly to the accounting records of an entity. Account reconciliations should be performed in a timely manner so that any mistakes or discrepancies discovered can

be rectified immediately. Furthermore, good separation of duties require that the four main functions be separated in an accounting operation:

- record keeping duties;
- custody responsibilities;
- reconciliation functions; and
- the approval function.

In other words, an individual either generating activity on an account, or approving of the entries made to an account, should not be the individual in charge of reconciling the account. Without proper separation of duties, mistakes or irregularities may go undetected. The Broward County School District has at least two accounts that are reconciled by individuals directly involved with entering or monitoring activity for the accounts. These accounts include the financial aid bank account and the fixed asset general ledger account.

The MGT review found that reconciliations are not being prepared properly so that discrepancies can go undetected. The example in Exhibit 9-9 shows an illustration of how an account reconciliation should be prepared as compared to how some are prepared in the Accounting Department. The difference in the two illustrations in Exhibit 9-9 is that the first one merely summarized the activity on the account for the month, while the second illustration provides details on the \$120,000 balance. Many of the account reconciliations reviewed in the Broward County School District were merely an analysis of activity on the account.

A supervisor or manager in the Accounting Department needs to review all reconciliations on a regular basis to ensure that they are completed timely and properly, and that any stale reconciling items are investigated and documented. Because the district is not requiring that reconciliations be reviewed and approved, errors and irregularities are occurring. For example, an outstanding receivable on the deposits receivable reconciliation dating back to 1991 resulted in a refund to the district when the item was investigated in 1998.

RECOMMENDATION

Recommendation 9-2:

Strengthen controls over the reconciliation process.

The Director of Accounting should establish a standard set of procedures for preparing bank and account reconciliations in the district. The procedures should include a detailed time schedule for preparing reconciliations. In most cases, reconciliations should be completed by the tenth of the following month to allow for adequate review and research when necessary.

In addition, reconciling procedures should include a list of all bank and general ledger accounts to be reconciled with the person responsible for preparing them. All reconciliations should be approved by a supervisor and reviewed by the director on a monthly basis.

**EXHIBIT 9-9
BANK RECONCILIATION ILLUSTRATION**

Illustration A		
<i>3-2-1 Corporation</i>		
<i>XXX Reconciliation as of January 31, 199X</i>		
Beginning balance		<u>\$100,000</u>
Debits	\$55,000	
Credits	\$40,000	
Adjustments	<u>\$5,000</u>	
Ending balance		<u>\$120,000</u>
<i>Illustration "A" reflects monthly activity on the account.</i>		
Illustration B		
<i>3-2-1 Corporation</i>		
<i>XXX Reconciliation as of January 31, 199X</i>		
Balance per general ledger		<u>\$120,000</u>
ABC receivable	\$25,000	
XYZ receivable	\$15,000	
GHI receivable	\$10,000	
PQR receivable	\$20,000	
JKL receivable	\$30,000	
MNO receivable	<u>\$20,000</u>	
Balance per subsidiary ledger		<u>\$120,000</u>
Difference		\$0
<i>Illustration B details what the account balance is actually contains.</i>		

Source: MGT of America, Inc., 1998.

The Director of Accounting should move the responsibility for preparing financial aid bank account and the fixed asset account into the General Accounting Section to obtain a greater separation of duty. Once a comprehensive set of procedures has been established for account reconciliation, all employees responsible for preparing reconciliations should be trained in the new procedures.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Accounting should prepare procedures for reconciling bank and general ledger accounts. May 1999
2. The Comptroller should approve the procedures. June 1999

3. The Director of Accounting should meet with the Director of Risk Management, Safety, and Benefits to coordinate the transfer of fixed asset reconciliation responsibility over to the Finance Department. August 1999
4. The Director of Accounting should meet with the Supervisor of Special Projects (Grants Accounting) to coordinate the transfer of the responsibility for the Financial Aid Bank Account to the General Accounting Section. August 1999
5. The Director of Accounting should provide adequate training to applicable accounting personnel to ensure compliance with the new procedures. August 1999 and as needed thereafter

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The responsibility for the accounts receivable function has been delegated to various employees in the Accounting Department, but there is no overall coordination of the billing and account maintenance functions. Two instances discovered during the course of this review indicate the problems associated with the lack of control surrounding the receivable function. In one instance, a receivable had gone uncollected since 1992. In other instance, the district had sent billings, but because there was no one responsible for follow-up, receivables had gone uncollected until recently. The amounts related to these two instances were not significant (less than \$5,000), but because of the lack of oversight, the district faces a potential loss of funds. Without a coordinated effort to track and follow-up on accounts receivable transactions, the district could be allowing funds to go uncollected.

RECOMMENDATION

Recommendation 9-3:

Strengthen the accounts receivable process.

The accounts receivable function should be assigned to an individual in the Accounting Department. In addition, the department should develop specific procedures on handling receivable accounts. The procedures should include a regular reconciliation process, a billing and review process, and a collections process --- each of which should be handled by different individuals for optimal control. Part of the billing and review process should include a process for follow-up on uncollected amounts owed to the district. A supervisor should review all receivable reconciliations to ensure that all past due amounts are investigated on a timely basis.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Accounting should draft procedures for the administration and monitoring of accounts receivable. May 1999

2. The Comptroller should approve the new procedures. June 1999
3. The Director of Accounting should reassign the responsibilities in the Finance Department to ensure that the receivables process is given adequate staffing. July 1999
4. The Director of Accounting should implement the new procedures and train the necessary employees. July 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

Accounts payable invoices are received by the Accounts Payable Section daily, either by U.S. mail or by district mail. All invoices are time and date stamped, and submitted to the appropriate payable clerk for processing.

When the accounts payable clerk receives an invoice, the system is checked to determine whether the goods were received on-line by the department or school site. If goods have been received on-line, the payable clerk can proceed with the payment process. However, if there is no indication that the goods have been received by the department or school site, the invoice is routed to the appropriate department for payment approval. All invoices requiring follow-up by campuses are entered into the payable system, but are flagged with a "hold" status. A review of accounts payable reports showed that almost 4,000 invoices were on hold awaiting proper receiving information from campuses. The number of invoices on hold is high because invoices are frequently lost or misplaced after being sent to schools.

MGT reviewed 25 selected payment documents showing that slightly more than half were paid in a timely manner --- 30 days or less. However, of all 12 invoices paid late, 10 were three to six months past due before payment occurred.

Interviews with accounts payable staff indicated that untimely submission of invoices is a problem with particular schools or departments, indicating that the problem is not one involving the process, but rather the individuals responsible for handling the approval process.

RECOMMENDATION

Recommendation 9-4:

Link the timely submission of invoices for payment to the principal evaluation process.

The untimely submission of invoices by some school sites causes many problems for the district including a potential loss of funds due to late fees or discounts lost, and unnecessary time spent by employees handling vendor phone calls and in tracking lost or misplaced invoices.

Principal evaluation forms contain a section called "Responsibility for Overall Administration and Supervision of the School." In this part of the annual review, each principal is evaluated on several factors including:

- monitoring of fixed assets (property inventory);
- integration of technology in all aspects of the school's operation;
- personnel records, including records of grievances;
- school budgets;
- payroll, overtime, and noninstructional compensatory time records;
and
- all previous audit exceptions and follow-up of corrective actions.

Setting a standard turnaround time of three days, a reasonable amount of time to allow for mailing and research by school personnel, in which departments and schools are to return invoices for processing, and placing an evaluation item on timely submission of invoices on the principal evaluation form would lend accountability to the payment process at the school level.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Finance should meet with area directors to discuss the problem of timely submission of invoices. July 1999
2. The Director of Finance should request that all principal evaluations include a review of late invoices submitted to the central office for payment. August 1999
3. All area directors should begin including a review of payment timeliness in the principal annual evaluation process. October 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The 16 clerks working in the Accounts Payable Section do not field telephone calls from vendors. According to the Accounts Payable Supervisor, most vendor telephone calls involve inquiries for past due invoices. When vendors call the Accounts Payable Department with problems or questions, staff follow unwritten policy and request that the vendor call the school site directly to inquire about the status of an invoice.

This practice, while initially saving time for the payable clerks, is not a customer-friendly practice. In addition, school personnel do not have access to the accounts payable system and cannot determine the status of an invoice in the system. This requires that the payment clerks eventually perform the requested research.

The accounts payable staff do not log the number of vendor inquiries, but staff indicate that the number is significant.

RECOMMENDATION

Recommendation 9-5:

Improve customer service by fielding vendor phone calls and questions.

A common function of typical accounts payable operations is the fielding of vendor telephone calls. It is generally considered poor customer service to request the caller to call someone else. The Broward County School District, like many other accounts payable operations, divides the workload among clerks so that a clerk handles the same vendors on a month-to-month basis. This practice allows clerks fielding vendor calls to establish a relationship with a vendor which is helpful to both the vendor and the clerk doing the research.

The primary reason that the payable clerks do not handle the telephone calls is that they believe that, by having to deal with the vendors directly, schools and departments not submitting timely invoices will be motivated to do so. However, this approach has had little effect in accelerating the submission of invoices, and it results in the accounts payable clerks eventually having to research many items.

If the focus were changed to getting invoices to the Accounts Payable Section on time, there would be fewer vendors calling to inquire about late payments.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Finance should direct the Accounts Payable Supervisor to ensure that all vendor telephone calls should be handled by the payable clerks. May 1999
2. The Director of Finance should direct all payable clerks to attend customer service training. July 1999

FISCAL IMPACT

Customer service training can be provided by the Director of Finance or his representative.

FINDING

The Broward County School District has no formal mechanism to track the submission and payment of invoices. That is, though accounts payable clerks believe they have a good idea of which departments and school sites need improvement in submitting invoices, there is no firm data to support this knowledge.

One way to document the causes of payment delays in the system is to measure, track, and report on the various stages of the payment process. For instance, the amount of time between the receipt of an invoice and the entering of it into the payment system is one measure, and the amount of time between receipt of an invoice by a department and the receipt of the invoice by the Accounts Payable Section is another measure.

Many agencies find such measures useful because they help to clearly identify where in the process bottlenecks occur.

RECOMMENDATION

Recommendation 9-6:

Track and report the submission and processing of information to determine ways to improve the timeliness of payments.

The Accounting Department should track payment data on a sample of documents monthly. The data obtained from this tracking can be used to increase payment timeliness and to assist departments in improving the invoice approval process.

On a quarterly basis, the Accounts Payable Section, with assistance from other areas in the Finance Department or temporary employees, should review documents paid from each department and school location. Information obtained from this review should include:

- invoice date
- date received by the department or school site
- date received by the Accounts Payable Section
- date entered into payment system
- date paid
- amount of invoice
- amount of discount lost, if any

This information should be summarized into a report that is distributed to the applicable department head or principal, area directors, and assistant/associate superintendents. Each department or school site not having an average turnaround time of 30 days or less for the payment of invoices should be required to draft an action plan detailing how the submission process will change so that invoices can be paid on a more timely basis. At the request of departments, the Accounts Payable Section should be available to assist departments in improving their procedures.

A similar review performed in the City of Austin's Finance Department resulted in overall improved processing time for payments, and individual departmental accountability increased for processing and submitting invoices in a timely manner. In addition, a project such as this should be administered at the senior level to encourage accountability.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Comptroller and the Director of Accounting should meet to discuss an accounts payable processing review. July 1999
2. The Comptroller and the Director of Accounting should determine how to conduct the review, what variables will be measured, and how the project is to be staffed (whether to use current employees or whether to use temporary employees). This discussion should also determine a August 1999

process for selecting sample documents. For instance, the ETS Department could assist by generating a sample list of documents to be tested, or an individual could be assigned to select sample documents. The district may want to exclude some types of payments from the review process such as manual checks, recurring payments, and employee reimbursements.

- | | |
|---|----------------|
| 3. The Comptroller and the Director of Accounting should determine how to conduct the review, what variables will be measured, and how the project is to be staffed (whether to use current employees or whether to use temporary employees). | August 1999 |
| 4. The Comptroller should present a plan to the Superintendent. | September 1999 |
| 5. The Superintendent should approve the plan for reviewing accounts payable transactions. | September 1999 |
| 6. The Accounting Director should conduct training for the quarterly accounts payable testing. | September 1999 |
| 7. The Accounting Director should begin quarterly testing of documents. | October 1999 |
| 8. The Accounting Director should compile and report on the results of the testing. The results can also be used to commend those departments and school sites that process invoices in an efficient and timely manner. | December 1999 |
| 9. All departments and schools sites not achieving an average payment turnaround time of 30 days should submit an improvement plan to the Superintendent. | January 2000 |
| 10. The Accounts Payable Section should begin assisting departments and school sites with improving the payment process, as necessary. | March 2000 |
| 11. The Director of Accounting should direct the Accounts Payable Section to continue with quarterly testing and reporting until notified otherwise. | Ongoing |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

When a payable clerk receives an invoice that must be forwarded to a department or school site for proper receiving, the clerk enters the invoice into the system and places a hold on the invoice so that it will not be paid. Often, when the payable clerk receives the approved invoice from the department or school site, the original entry to the payment system must be canceled and the invoice re-entered. This is necessary when the information entered, such as price or quantity, has been changed. The payment does not allow for changing an entry that has already been made to the system. In addition, in cases where the payment has been delayed and the vendor issues a new invoice, the payable clerk is not aware that the invoice has already been entered and re-enters the newly submitted invoice.

This process leads to excessive data entry and maintenance by accounts payable staff. Currently, the number of documents entered in the payment system with a "hold" status amounts to approximately 4,000. The "hold" file is not routinely reviewed by staff because they reportedly do not have time for this task.

RECOMMENDATION

Recommendation 9-7:

Eliminate the step of entering documents which are on hold.

Eliminating the step of entering documents which are on hold will save the accounts payable staff a considerable amount of time. Since the hold file is seldomly, if ever reviewed, there is no need to enter documents before they have been approved for payment.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Accounting should direct the Accounts Payable Supervisor to eliminate the step of entering invoices which are on hold. May 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The Integrated Systems, Inc. (ISI) payroll system is a cumbersome system requiring a large number of manual transactions. Some of the manual processes performed regularly by payroll clerks include the following:

- manual calculations every pay cycle for employees who have been overpaid and are placed on repayment schedules;
- manual entries required to record general ledger expense distributions for payroll;

- tax sheltered annuity (TSA) payments requiring manual check requests rather than being paid automatically (currently there are approximately 30 TSAs); and
- manual calculations required for supplemental paychecks.

Due to a significant number of programming modifications made to the system and the system's age, the system is no longer supported by its developer. Users of the system are prevented from making changes to improve the way that payroll is processed because of the numerous modifications already made. In addition, the ETS Department is not willing to make further modifications to the system for two primary reasons: the department is scheduled to implement a new payroll system, and ETS staff time is devoted largely to dealing with Year 2000 issues.

In June 1998, the district issued an RFP for a new HRMS system, which is to include a system for processing payroll.

RECOMMENDATION

Recommendation 9-8:

Create a payroll process improvement team so that the payroll process can be improved before implementation of a new system.

The district should ensure that when implementing the new HRMS system that ineffective and cumbersome processes are not incorporated into the new system. The Payroll Department needs to totally re-think the way that current functions are performed.

The district should form a process improvement team to review current operations in the processing of the district's payroll and develop a plan for improvement before the new system is implemented. The process review team should visit other school districts or local governments that have model payroll processes to research new ways of processing payroll transactions.

The process improvement team should include members of the payroll, human resources, and internal auditing departments. The team should meet on a regular basis for the purpose of reviewing current processes and developing better processes to be run on a new system. The team should review and study processes from other Florida school districts.

Note: A recently completed external review of the Payroll Department recommended the addition of two additional payroll processors. While this may provide a solution to some of the problems in the Payroll Department in the short term, MGT believes that adding staff will not be an effective long-term strategy for improvement. The current payroll system is largely an inefficient manual process, and any improvements are hindered by the design of the current payroll system. MGT recommends that the way to address payroll processing issues is to streamline the processes with the implementation of the planned HRMS system upgrade.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-------------------------------------|
| 1. The Director of Accounting should appoint members to the payroll process improvement team. | May 1999 |
| 2. The payroll process improvement team should begin meeting on a regular basis. | June 1999
and monthly thereafter |
| 3. The process improvement team should research other agencies using systems similar to the system planned for implementation. The team should plan site visits to review the systems and to discuss implementation planning and processes used with payroll managers in other districts. | Ongoing |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The Broward County School District maintains a schedule of nine payroll calendars: five monthly cycles, two bi-weekly pay cycles, and two weekly supplemental payrolls. This results in processing a payroll almost every day of the week. Last year, 281 payrolls were processed by the Payroll Department. In addition, there are an excessive number of manually produced pay checks and supplemental payrolls; since July 1, 1998 the department has processed 22 supplemental payrolls averaging 1,500 paychecks each. As discussed in Recommendation 9-1, the root cause for the excessive processing of payrolls is due to the lengthy processing of PAFs.

RECOMMENDATION

Recommendation 9-9:

Collapse the number of regularly scheduled payroll calendars, and reduce the number of supplemental payrolls.

The Payroll Department could increase its efficiency and reduce operating costs if the payroll calendars were collapsed into two regular pay cycles and one supplemental pay cycle every other week. The district should collapse all pay cycles into two: one for teachers and one for all other employees.

In addition, the Payroll Department should develop strict guidelines for issuing manually produced pay checks to further reduce the amount of processing performed by the department. Many other districts have set policies governing the circumstances under which manually issued checks are prepared. For example, the Lee County School District does not issue a supplemental or manual paycheck unless not doing so will result in an employee not receiving a regular 75-hour paycheck. In other words, if not issuing a manual check results in the employee receiving less than a normal regular paycheck, the Payroll Department will issue a check; but if the request for a manual check involves a pay increase or overtime, Lee County employees are required to wait until the next scheduled pay day.

Another exercise, used in both the Lee County and Clay County School Districts, that helps to lower the volume of manual checks issued in a district is to require the timekeeper responsible for entering employee time to document in a written letter the reason that a manual check is necessary. This letter is then approved by a senior manager such as a deputy or associate superintendent. This exercise provides for a degree of accountability in the payment process, and in circumstances where employee pay adjustments are a recurring problem, the timekeeper or payroll clerk can be provided additional training and counseling.

Note: The report of the private consulting firm recommends collapsing the payroll calendars from nine to four. MGT recommends the district take a more aggressive approach to streamlining the payroll process. Other schools districts in Florida, including the Lee, Brevard, and Clay County School Districts maintain two payroll calendars and have achieved a high degree of efficiency and reduced payroll processing costs.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|----------------|
| 1. The Director of Accounting should direct the Payroll Supervisor to collapse the current nine payroll cycles into two cycles. | July 1999 |
| 2. The Payroll Supervisor should draft a schedule of revised payroll cycles, including a schedule of biweekly supplemental payrolls. | August 1999 |
| 3. The Superintendent should approve the new payroll cycles. | September 1999 |
| 4. The Director of Accounting should draft a set of guidelines to be used when determining whether manual checks will be issued to employees. | September 1999 |
| 5. The Superintendent should approve the guidelines and inform all district personnel of the new guidelines. | September 1999 |
| 6. The Payroll Supervisor should implement the new payroll cycles. | January 2000 |

FISCAL IMPACT

Implementation of this recommendation will result in efficiency and cost savings to the district. Efficiency savings can be realized by consolidating the payroll calendars. Cost savings can be achieved by reducing the number of supplemental and manual checks issued.

To calculate the cost savings for this recommendation, historical data from July 1, 1998 (the beginning of the fiscal year) were used. The district has averaged .885 supplemental payrolls per week since July 1, 1998, and each payroll averages approximately 1,500 checks. By reducing the number of supplemental payrolls to one every two weeks and by strengthening the guidelines for issuing manual checks, the number of manual and supplemental checks should be reduced by 75 percent (104

supplemental payrolls processed currently, as compared to 26 supplemental payrolls as proposed in this recommendation). However, to be conservative for the purpose of calculating a fiscal impact estimate, we will assume that the number of supplemental paychecks issued will be reduced by 30 percent. The fiscal impact is calculated as follows:

Number of supplemental and manual checks issued annually (.885 X 52 weeks X 1,500 checks)	69,030
Assumed reduction in checks issued	<u>30%</u>
Number of checks eliminated annually	20,709
Per check savings*	<u>\$3.00</u>
Total annual savings	\$62,127

- Refer to Recommendation 9-10 for an explanation of the \$3.00 per check processing cost.

The timeline for this recommendation estimates an implementation date of January 2000. Therefore, cost savings for the 1999-2000 fiscal year will be \$31,065.

RECOMMENDATION	1999-2000	2000-01	2001-02	2002-03	2003-04
Reduce Supplemental and Manual Payroll Checks	\$31,065	\$62,130	\$62,130	\$62,130	\$62,130

FINDING

Currently, 45 percent of Broward County School District employees are using direct deposit for their paychecks. Other districts in Florida, including the Clay and Lee County School Districts, have direct deposit participation rates ranging from 85 to 90 percent. School districts and other entities with high direct deposit participation rates report having reduced payroll processing costs and more efficient payroll operations.

RECOMMENDATION

Recommendation 9-10:

Implement a mandatory direct deposit program.

The use of direct deposit is more efficient for payroll processing and for employees themselves. While the actual payroll processing is not significantly affected by employee use of direct deposit, the decreased volume of checks processed should result in tremendous time saving for the Payroll Department. Savings under a mandatory direct deposit program include processing costs in addition to efficiency savings from the elimination of sorting, distributing, and safeguarding of paychecks.

The use of direct deposit also results in increased employee efficiency in that employees do not need to physically make trips to the bank or credit union in order to deposit their paychecks each payday. In emergency situations, such as bad weather, employees would not have to face hardship due to not getting to the bank.

The district should make arrangements for debit accounts to be established at local financial institutions for those employees who do not maintain a bank account. Debit accounts allow funds to be credited to an account that the employee can then access by use of a debit card (**Note:** Fairfax County Public Schools has an effective debit account system and the Brevard County School District has recently implemented this type of account).

Many other government entities have mandatory direct deposit policies, and have experienced significant savings in processing costs as a result. Some of these entities include the Brevard County School District (FL), the state of Florida, Texas Comptroller of Public Accounts, and Fairfax County Public Schools in Virginia. In addition, the Texas Comptroller reimburses employee expenses by direct deposit.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|--|
| 1. The Superintendent should appoint a committee to research the implementation of a mandatory direct deposit program. Committee members should include the Comptroller, Payroll Supervisor, representatives from the Personnel Department, and ETS representatives. | June 1999 |
| 2. The Superintendent should draft a policy stating that all employees are required to use direct deposit for receipt of their pay checks. | June 1999 |
| 3. The committee should develop an implementation strategy for the mandatory direct deposit program. Implementation should be phased in, beginning with all new employees. | August 1999 |
| 4. A promotional campaign should be initiated informing employees of the benefits of direct deposit. | Begin in October 1999;
Completed by
January 2000 |

FISCAL IMPACT

This fiscal impact is calculated using certain assumptions that project a conservative cost savings. Mandatory direct deposit should result in the elimination of approximately 190,000 regular paychecks. Cost studies conducted in governmental operations in Texas including the City of Austin and the Texas Comptroller of Public Accounts, show that the cost of processing a single paycheck ranges between approximately \$1 and \$25. This cost range includes computer services, bursting, sorting, and distributing.

A study conducted by the Texas Comptroller of Public Account showed that the State of Texas saved \$2.84 per paycheck by implementing a mandatory direct deposit policy. Although direct deposit requires the printing and distribution of a pay stub, savings are realized in several ways including:

- paper used to print direct deposit pay stubs is less costly than check stock;
- expensive encoding inks are not required to print direct deposit check stubs;

- the controls and safeguards surrounding the safekeeping of check stock and signature plates are not required for printing direct deposit check stubs;
- postage savings for paychecks that are mailed to employees; and
- the elimination of processing stop payment requests and re-issuance of lost paychecks is avoided under direct deposit.

Although a study of processing costs in the Broward County School District has not been conducted, for the purpose of this fiscal impact estimate we have used a check processing cost of \$3 as determined in the Texas study. Using the \$3 estimate, annual savings and gains in productivity are calculated to be approximately \$570,000 annually. Assuming a phased-in implementation, allowing Payroll Department employees adequate time to process employee direct deposit information, cost savings would not fully accrue until the 2000-01 school year.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Establish a Mandatory Direct Deposit Policy	\$285,000	\$570,000	\$570,000	\$570,000	\$570,000

FINDING

The Management and Facility Audits Department recently began testing payroll preparation procedures during their annual visits to schools to audit the student activity funds. These payroll tests have revealed several weaknesses in the payroll preparation process in schools including a lack of standard practices among schools, a lack of standardized forms used in the schools, school payroll clerks making verbal changes to employee pay records without documenting the changes, and lack of verification of calculations such as overtime. In addition, errors in calculating and submitting payroll records contribute to the high number of manual checks and supplemental payrolls processed by the Payroll Department.

Interviews with Payroll Department staff found that one cause for these problems may be the lack of training received by school payroll clerks. School payroll clerks have the option to attend annual training conducted for a variety of processing functions, but only 30 minutes of the training actually pertains to payroll processing.

RECOMMENDATION

Recommendation 9-11:

Establish a more rigorous training program for school payroll clerks, make attendance mandatory, and develop standardized forms and reports for school use.

The Payroll Department should develop a detailed training program for school payroll clerks. In addition, to encourage more standardized processes among all schools, the

department should develop procedures and processes to be used at campus sites. All school payroll clerks should be required to attend regular training.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-------------|
| 1. The Director of Finance should direct the Payroll Supervisor to develop a standardized set of payroll forms and procedures to be used in departments and in schools. | May 1999 |
| 2. The Director of Finance should direct the Payroll Supervisor to develop a comprehensive training program for all payroll clerks. | May 1999 |
| 3. The Payroll Supervisor should develop a set of standardized forms and procedures for payroll processing. | Summer 1999 |
| 4. The Payroll Supervisor should develop a training program for all district payroll clerks. | Summer 1999 |
| 5. The Payroll Supervisor, along with other employees in the Payroll unit, should conduct training for all payroll clerks. | Fall 1999 |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

9.3 Internal Auditing

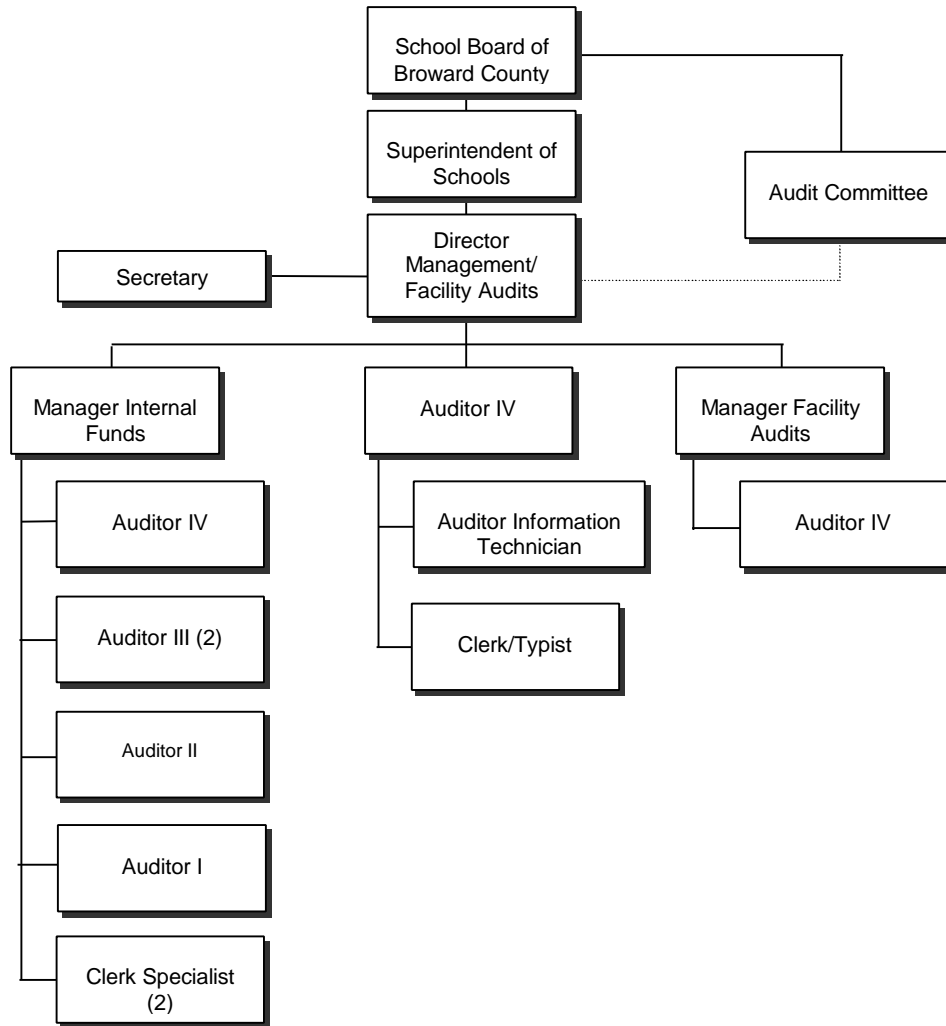
The Internal Audit function is a major element of management and internal control. Within a school district, internal audit function is an independent appraisal function established within an organization to examine and evaluate its activities as a service to the organization. The objective of internal auditing is to assist members of the organization in the effective discharge of their responsibilities. To this end, internal auditing furnishes them with analyses, appraisals, recommendations, counsel, and information concerning the activities reviewed. The audit objective includes promoting effective control at reasonable cost.

Recently, internal audits have also focused on management and operational reviews that consider overall management performance in addition to the efficiency and effectiveness of the financial activities of a school district.

CURRENT SITUATION

The internal audit function in the Broward County School District is housed in the Office of Management/Facility Audits and staffed with 15 positions including the director. Exhibit 9-10 shows the organizational structure for the department.

**EXHIBIT 9-10
ORGANIZATIONAL STRUCTURE OF THE OFFICE OF
MANAGEMENT/FACILITY AUDITS
IN THE BROWARD COUNTY SCHOOL DISTRICT**



Source: Broward County School District, Management and Facility Audits Department, 1998.

The internal audit function is split into four sections:

- internal fund audits
- facility audits
- operational audits
- information technology audits

In the Broward County School District, the office's responsibilities include providing:

- audit and oversight of the district's capital construction program;
- school internal fund audits of schools and centers;

- financial, compliance, and management reviews of the district's departments and functions; and
- assistance to district personnel in implementation of audit recommendations from both internal and external audits.

The goals and objectives of the office, as described in the annual budget, are the following:

Internal auditing is an independent appraisal function established within the school system to examine and evaluate its activities as a service to the organization. The primary objective of the Office of Management/Facility Audits (MFA) is to protect the assets management of the School Board in the effective discharge of their responsibilities. To this end, MFA furnished them with analyses, recommendations, counsel, and information concerning the activities reviewed.

As the organizational chart in Exhibit 9-10 shows, the district maintains an Audit Committee. The Audit Committee is comprised of one representative appointed by each School Board member, one appointee selected by the Superintendent, and two at-large members. The purpose of the Audit Committee is to assist and advise the School Board and the Superintendent in matters pertaining to the fiscal management of the school district. The committee also works closely with the Management and Facility Audits Department.

FINDING

Responsibilities of the Audit Committee include:

- review budget and financial data prepared by district staff and assist the Board in interpreting information;
- review and evaluate financial and budget report formats, and make recommendations for changes to enhance effectiveness of financial reporting;
- participate in the selection of independent auditing firms, determine areas to be emphasized in external audits, review proposals by competing firms, prepare appropriate comments for the Board to consider, and assist in the development of audit contracts with firms selected by the Board;
- review the Internal Auditor's plan for the annual audit and make recommendations concerning areas to be emphasized;
- review the independent accountant's annual management letter recommendations on internal control and accounting procedures;
- periodically evaluate the effectiveness of the Internal Audit plan;

- monitor corrective action agreed to be taken on internal and external audit recommendations; and
- review policies and procedures affecting the financial areas .

Many of the members serving on the Audit Committee are Certified Public Accountants (CPAs) or leaders in the business community.

COMMENDATION

The Office of Management/Facility Audits is commended for its efforts to inform management and the School Board of the importance of the internal audit function and the need for cooperation from all organizational units throughout the Broward County School District.

FINDING

The Office of Management/Facility Audits performs audits of the books and records of the school's internal funds. Last year, the Internal Audit Department began using a streamlined program for those schools having clean audits in the prior year, while still using a comprehensive audit program for those schools with significant audit findings from prior years. The streamlined audit procedures allow the department to conduct audits in a more efficient manner.

COMMENDATION

The Office of Management/Facility Audits is commended for the use of the streamlined audit guide to achieve efficiency and time savings.

FINDING

Auditors in the Management and Facilities Audits Department, as well as employees in the Internal Accounts Section of the Treasury Office, report that school bookkeepers do not receive adequate training. Some bookkeepers are hired without prior experience in bookkeeping tasks. As a result, accounting procedures among schools vary, and internal controls are sometimes not in place. For example, even though the district has a policy that all funds should be deposited daily, many schools are not making a daily deposit.

Staff in the Internal Accounts Department assist bookkeepers with questions and problems they may have, but one-on-one counseling is not an efficient method of training. Staff in the Management/Facilities Audits Office report that many school bookkeepers do not understand the reasons for having good internal controls.

RECOMMENDATION

Recommendation 9-12:

Develop a standardized training program for all school bookkeepers, with an emphasis on increase internal controls for schools.

School bookkeepers should be trained on standardized accounting procedures and on internal controls. All bookkeepers should receive internal control training to help them to understand the importance of internal controls. In addition, strengthened internal controls and more standardized practices among schools will help to improve the efficiency of the internal audit function.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Internal Accounts Instructor in the Treasury Department should direct the Manager of Internal Audits to prepare a detailed training program for school bookkeepers. The training should include an in-depth discussion of internal controls and should include an internal control self-assessment for all school bookkeepers. July 1999

2. The Internal Accounts Instructor should prepare a training curriculum with a detailed section included for internal controls. August 1999

3. The Internal Accounts Instructor should coordinate with the Internal Accounts trainers to ensure that all areas of bookkeeping procedures are covered and to ensure that no areas are overlapping. September 1999

4. The Internal Accounts Instructor should conduct school bookkeeper training. November 1999 and quarterly thereafter

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The Office of Management/Facility Audits develops an annual audit plan that is approved by the Audit Committee and by the School Board. Exhibit 9-11 displays the audit plan for the upcoming fiscal year.

The audit plan, although an aggressive one, does not provide an estimate of hours necessary for the planned audits, nor does it provide a risk assessment and prioritization of the areas planned for audit. Risk assessment, prioritization, and an hourly budget provides the Audit Committee and the Director of Management/Facility Audits with the opportunity to optimize the audit assurance they can achieve with their available time. All audit activities are competing for limited auditor time, and without a consideration of audit priorities weighed against available hours, the district will not be able to adequately assign resources to audits.

**EXHIBIT 9-11
OFFICE OF MANAGEMENT/FACILITY AUDITS
AUDIT PLAN FOR THE 1998-1999 FISCAL YEAR**

Internal Funds	
1.	Perform all audits for the 1998-99 fiscal year on a timely basis.
2.	Update audit program to include testing of new procurement procedures including M/WBE requirements, facility rentals, athletics, bookstore, and yearbook procedures.
Food Service	
1.	Perform audit of free and reduced meal program in conjunction with the internal funds audit process at selected schools.
Payroll	
1.	Perform review of payroll procedures in conjunction with the internal funds audit process at the schools.
2.	Perform unannounced payroll check/pay advise distributions at selected work locations.
Inventories	
1.	Perform year-end physical inventory observations.
2.	Conduct unannounced cycle counts of various inventories during the fiscal year.
Grants-Contracts Services	
1.	Perform audits of grants-contract services as required by terms and conditions of contracts.
Procurement/Payables	
1.	Perform audit of consultant/training professional service contracts used throughout the district.
2.	Perform review of grants administration and the payment process for grant expenditures.
EDP Audits	
1.	Perform audit of Plan 4 Technology Update project; retrofit of facilities for classroom computers throughout first phase of the project.
2.	Perform data analysis of on-line financial data and develop audit reports using ACL audit software.
3.	Provide assistance of Internal Audit staff and bookkeepers with hardware and software support, trouble-shooting, etc.
Year 2000	
1.	Continue to monitor the progress of this project as the established project teams follow their systems project work plan for Year 2000 computer application requirements.
Special Assignments	
1.	Reserve a limited number of auditor days for special assignments requested by the Superintendent and the School Board.
Other Activities	
1.	Continue membership on various School Board Committees where participation is required or requested when not interfering with the auditors' attest function.
2.	Conduct inservice programs for administrative and school staff in various financial areas that are audited.
3.	Continue development of quality assurance program within the office by providing training seminars to keep abreast of the latest developments in the accounting/auditing profession.
4.	Conduct audit/investigations and assist the district in investigations related to financial issues in the schools system (internal funds, payroll, procurement, vendor payments, etc.).
Facility Audits	
1.	Perform review of new construction and major renovation work in progress at selected sites.
2.	Perform review of minor construction projects under \$500,000.
3.	Review of construction change orders.
4.	Monitor construction in progress on selected projects, which includes progress payment reviews, adherence to contract terms and conditions as well as site visitations and attending construction meetings.
5.	Review contract and procedures related to the Facilities and Construction activities as needed.
6.	Assist external auditors in the performance of construction audits assigned through the RFP process.
7.	Review of land acquisition procedures for construction projects.

Source: Broward County School District, Proposed Audit Plan for 1998-99.

RECOMMENDATION

Recommendation 9-13:

Perform a risk assessment and prioritization of each area to be audited.

The risk assessment should include, but not be limited to consideration of the following:

- annual budget amounts;
- liquidity of assets;
- potential loss and risk;
- quality of internal control system;
- external audit concerns;
- major changes in operations, programs, systems, and controls;
- date and result of last audit;
- extent of government regulations; and
- management requests.

Additionally, in assessing audit risk, the Director of Management/Facility Audits should refer to the *Standards for the Professional Practice of Internal Auditing*, Section 520.041, regarding the assessment of audit risk in planning audit activities.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Director of Management/Facility Audits should perform a risk analysis of each area to be audited for the upcoming fiscal year. | May 1999 |
| 2. The Director of Management/Facility Audits should prioritize all planned audits based on the risk assessment conducted as described above. | June 1999 |
| 3. The Director of Management/ Facility Audits should assign hours to each planned audit, taking into account the priority of each area being audited. | Summer 1999 |
| 4. The Director of Management/Facility Audits should amend the audit plan, if necessary, based on the above risk assessment, and present the revised plan to the Audit Committee and the School Board. | August 1999 |

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

The Office of Management/Facility Audits voluntarily follows *Government Auditing Standards*, referred to as “Yellow Book Standards”, issued by the United States General Accounting Office. All audit organizations conducting audits in accordance with these standards are required to periodically undergo an external quality control review.

As cited in the management letter prepared by the district's external auditor, the Management/Facility Audits Office does not undergo an external quality control review. The district has planned for an external review, but due to the turnover in management of the Management/Facility Audits Office, as well as a large turnover of staff in the last year, the quality review has been postponed.

RECOMMENDATION

Recommendation 9-14:

Contract with an outside firm to conduct an external quality control review.

The reason for an external quality control review is to determine the quality of the work performed by the Office of Management/Facility Audits. An external quality control review includes determining the auditors' qualifications and independence, assessing whether audit reports and workpapers include all significant statements and supporting documentation, and evaluating the audit organization's quality control review process.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Audit Committee should engage an external audit firm to conduct a quality control review of the district's Internal Audit Department. May 1999

FISCAL IMPACT

The Management/Facility Audits Office has budgeted to fund the quality control review in the current fiscal year. Therefore, there is no additional fiscal impact to this recommendation.

FINDING

Operationally, internal auditors should be independent when obtaining evidence in the sense of being free from direction or constraint by the managers of the organization. This independence is enhanced by giving the internal audit function the authority and responsibility to report to a high level such as the Board of Education. Under such a reporting authority, the internal audit function is free of direction or constraint by management of the organization under audit and the internal auditors can be without fear of job or compensation retribution. Independence, in both fact and appearance, is necessary so that the internal auditors are free from any undue influence by management to report findings in a favorable light. In addition, internal auditors should maintain independence so those employees who report instances of fraud or abuse do not feel threatened in doing so.

Section 11.45 (3)(a)1, Florida Statutes, permits school districts to employ internal auditors. Auditors hired pursuant to this law must report directly to the Board or Board's designee. Additionally, Government Auditing Standards, Section 3.19 states that a local government auditing organization should achieve organizational independence by being accountable to the head of the governmental entity and should be organizationally located outside the staff or line management function of the unit under audit. The

standards further state that organizational independence is enhanced when the audit organization reports regularly to the entity's independent audit committee.

The Office of Management/Facility Audits in the Broward County School District reports to the Superintendent. Although there have been no reports of the department lacking independence in fact, the department is lacking independence in appearance. Having the Management/Facility Audits Office report to the Superintendent puts the district at risk of having the internal auditor's independence compromised.

RECOMMENDATION

Recommendation 9-15:

Move the Office of Management/Facility Audits so that it reports directly to the School Board.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-----------|
| 1. The School Board should direct the Superintendent to reorganize the Office of Management/Facility Audits so that it reports directly to the Board. | May 1999 |
| 2. The Office of Management/Facility Audits should begin reporting directly to the School Board. | July 1999 |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

10.0 ASSET AND RISK MANAGEMENT

This chapter of the report focuses on the management and protection of the Broward County School District's assets. The major functions of asset and risk management are reviewed and in the following two sections:

- 10.1 Asset Management
- 10.2 Risk Management

10.1 Asset Management

The asset management operation in the Broward County School District is examined in the following subsections:

- 10.1.1 Cash and Investments
- 10.1.2 Fund Balances
- 10.1.3 Tax Collections
- 10.1.4 Fixed Assets

10.1.1 Cash and Investments

An effective cash and investment management program ensures that the district will have sufficient cash to meet daily and ongoing operating requirements. The objectives of a well-managed cash and investment management program are to:

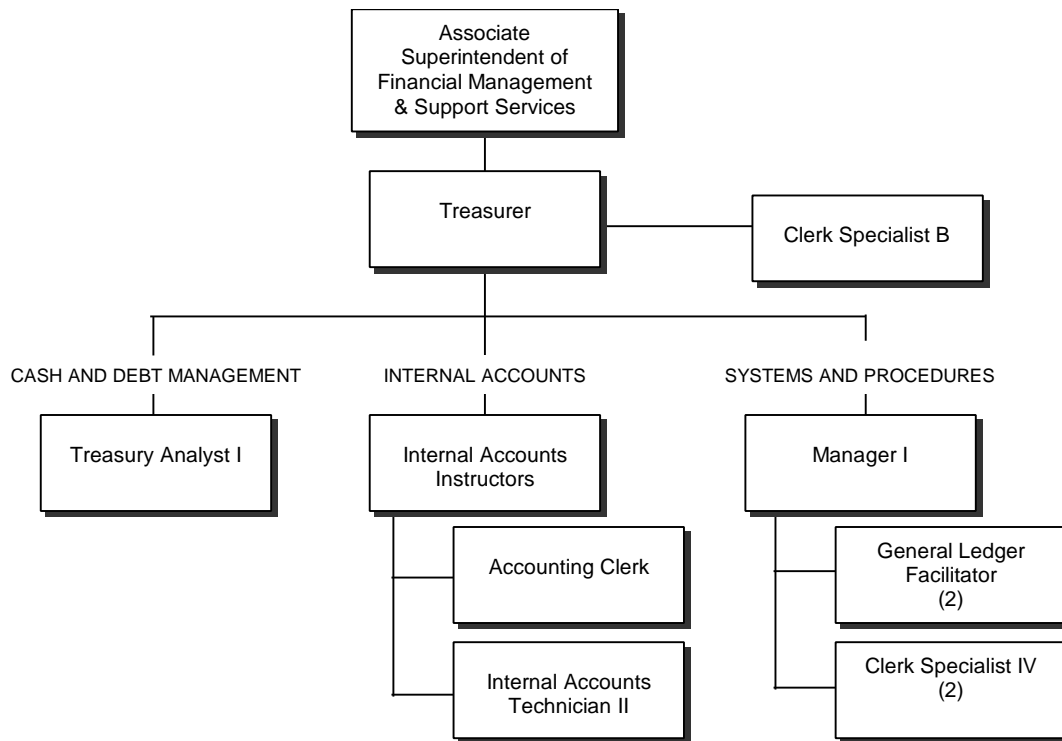
- have sufficient cash on hand for payroll, payments to vendors, and other financial obligations;
- invest surplus cash in safe, profitable securities;
- have extra cash in reserve for unexpected cash requirements (fund balance); and
- maintain sound, cost-effective relationships with financial institutions.

CURRENT SITUATION

The Treasurer has the overall responsibility for cash and investment management functions in the Broward County School District. The management of the daily operational activities for cash and investments and the maintenance of adequate fund balances are shared between the Treasurer and the Treasury Analyst who reports directly to the Treasurer. The Treasurer, as shown in the organizational chart in Exhibit 10-1, reports to the Associate Superintendent of Financial Management and Support Services. Exhibit 10-1 also shows the functions that report to the Treasurer. These include Internal Accounts Instructors and the Systems and Procedures Manager.

Internal Accounts Instructors are responsible for training all school bookkeepers, interpreting policy and procedures for school bookkeepers, and reviewing and monitoring all monthly activity reports submitted by school bookkeepers.

**EXHIBIT 10-1
ORGANIZATIONAL STRUCTURE OF THE TREASURY OFFICE
IN THE BROWARD COUNTY SCHOOL DISTRICT**



Source: Broward County School District, 1998.

The Systems and Procedures Manager is responsible for providing support to all users of the financial and accounting system. This support includes developing and conducting training classes, preparing and maintaining user manuals, and testing new software releases. This position works closely with the personnel in the Education Technology Services (ETS) Department. Systems support also maintains a help desk, providing users with telephone support for the financial system.

In addition to system support responsibilities, the Systems and Procedures Manager is responsible for preparing, editing, and maintaining all district procedures that have financial implications. These procedures are referred to as Standard Practice Bulletins.

The Broward County School District manages cash and investments of over \$550 million. The district maintains its cash for operations in five bank accounts at First Union Bank. The district competitively bids its depository contract for banking services every three years with an option to renew. The district's current depository contract was effective through December 1998; a Request for Proposals (RFP) for banking services was issued in August 1998.

The goal of the cash management system is to maximize the yield of invested funds while at the same time protecting the assets of the district. Idle cash is invested in various instruments with various maturity dates, depending on the anticipated future cash requirements.

Florida Statutes authorize the School Board to invest its funds in obligations of the United States Government or instruments that are fully guaranteed by the U.S. Government, bonds of the same district, obligation of the Federal Farm Credit Banks, the Federal Home Loan Bank, or the Federal Home Loan Mortgage Corporation, and obligations guaranteed by the Government National Mortgage Association. Investments may include repurchase agreements as long as U.S. Government securities, in excess of the balance, are pledged as collateral.

In addition, Florida Statutes allow the School Board to purchase individual or pooled investments through the State Board of Administration (SBA). Funds invested with the SBA are invested in the pooled investment account.

Exhibit 10-2 shows the cash and investments as of June 30, 1997.

**EXHIBIT 10-2
BROWARD COUNTY SCHOOL DISTRICT
CASH AND INVESTMENTS AS OF JUNE 30, 1997
(\$ IN THOUSANDS)**

	CARRYING AMOUNT	FAIR MARKET VALUE
Cash, Cash Equivalents and Short-Term Investments:		
State Board of Administration Pooled Investment Account	\$340,445	\$340,445
Federal Home Loan Bank Notes	74,942	75,048
Deposits	7,581	7,588
Total Cash, Cash Equivalents and Short-Term Investments	422,968	423,081
Cash and Investments with Trustee:		
Funds held by Trustee for Certificates of Participation for Debt Service	14,147	14,147
Funds held by Trustee for Certificates of Participation issued by the Corporation	112,646	112,646
Funds held in Trust by the State	2,159	2,159
Funds held by Trustee – Other	151	151
Total Cash and Investments with Trustee	129,103	129,103
Investments:		
Other	81	81
Total Investments	81	81
Total Cash and Investments	\$552,152	\$552,265

Source: Broward County School District, Office of the Treasurer, 1998.

FINDING

Exhibit 10-3 presents the five operating accounts maintained by the district at First Union Bank.

**EXHIBIT 10-3
OPERATING ACCOUNTS AT
FIRST UNION BANK
1998-1999**

DISTRICT ACCOUNT	TYPE OF ACCOUNT	ACCOUNT DESCRIPTION
Treasurer's Pool Account	Zero Balance Account	District's central disbursement account
Payroll Account	Interest Bearing	District's payroll disbursement account
Food Services Account	Zero Balance Account	District's food services account
Student Financial Aid Account	Interest Bearing	District's account for receipt and disbursement of PELL Grant funds
Disbursement Account	Zero Balance Account	Disbursement Account

Source: Broward County School District, Office of the Treasurer, 1998.

COMMENDATION

The Broward County School District is commended for the efficient management of its bank accounts.

Consolidating bank accounts into a limited number of five contributes to an efficient cash management operation. Limiting the number of bank accounts maintained eliminates the amount of time spent on tracking, monitoring, and reconciliation that must be performed.

FINDING

In response to the investment crisis in Orange County, California, and other reported investment losses by local governments in Florida, the Florida Legislature passed Senate Bill 2090 that applies to all units of local government. The new law, which became effective October 1995, requires school districts to adopt a written investment policy that specifies investment must be limited to the following:

- SBA Local Government Surplus Funds, trust funds, or any intergovernmental investment pool authorized pursuant to the Florida Interlocal Cooperation Act;
- Securities and Exchange Commission registered money market funds with the highest credit rating from a nationally-recognized rating agency;

- savings accounts in state-certified qualified public depositories;
- certificates of deposit in state-certified qualified public depositories;
- direct obligations of the U.S. Treasury; and
- federal agencies and instrumentalities.

To ensure adequate oversight and administration of district investments, the Broward County School District recently formed an Investment Committee. Committee members include the Treasurer, Associate Superintendent for Financial Management and Support Services, North Area Superintendent, Comptroller, Director of Accounting, and a high school principal. The committee meets quarterly to discuss investment risk, investment strategies and goals, portfolio performance, investment distribution, and selection of brokerage firms.

The district invests all idle funds (e.g., funds not needed for district operations on a given day) in the SBA Local Government Surplus Trust Fund. Investments outside of the SBA are presented to the Board quarterly for post approval.

COMMENDATION

The Broward County School District is commended for forming the Investment Committee to ensure adherence to state investment policy statutes and accountability for investment management.

FINDING

The Systems and Procedures Section, which falls under the supervision of the Treasurer, is in charge of providing support to users of the finance and purchasing system. The responsibilities of this section include identifying training needs, developing and conducting training classes, updating and modifying training and user manuals, providing individual training on an as-needed basis, and providing help desk services to system users. In addition to providing support for users, the Manager of Systems and Procedures is instrumental in establishing procedures for the accounting and purchasing functions. The Manager of Systems and Procedures also works closely with the ETS Department to coordinate the testing of new software and other system initiatives.

Due to the nature of the Treasurer's function, the Treasurer is not able to provide adequate support for the Systems and Procedures Section. The systems support function needs to be located in a department that can provide a level of supervision and guidance commensurate with responsibilities of supporting the financial system.

RECOMMENDATION

Recommendation 10-1:

Move the function of systems support and procedures documentation to the Comptroller's Office.

The Comptroller's Office currently has a section in charge of providing network technology support to the department. The systems support functions currently located in the Treasurer's Office should be combined with the support function which already exists in the Comptroller's Office.

Many large entities (including the Hillsborough County School District, Richmond Public Schools, the City of Austin, Texas, and the City of Houston, Texas) are creating accounting systems support functions directly in the finance or accounting departments rather than housing the function in the technology department. The systems support function should continue to work closely with the Education Technology Services Department in the district, but should be placed in closer contact with users in the Comptroller's Office.

A recently completed external review of the district recommends moving this position into the Education Technology Services (ETS) Department. MGT recommends moving the position directly into the Comptroller's Office so that the help desk and systems support can be dedicated solely to accounting and finance operations. Placing this function in ETS runs the risk of pulling away financial support resources to work on broader technology issues such as the Year 2000 computer requirements. District staff indicated that they agreed that the position should be moved, and that it would be appropriate to be placed either in the ETS Department or in the Comptroller's Office.

In addition, the external review report recommends moving the accounts payable check processing and disbursement functions under the direction of the Treasurer. MGT believes that including the accounts payable and disbursement functions under financial operations maintains a necessary separation between the receipt and investment of funds and the disbursement of funds. Coordinating the cash management function with the disbursement function can be addressed through regular communication channels. District staff indicated that they agree with moving the accounts payable check processing, but due to necessary staffing changes have postponed the implementation of this recommendation.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Associate Superintendent of Financial Management and Support Services should direct the Manager of Systems and Procedures to begin reporting to the Comptroller under the Network Support Group. July 1999
2. The Manager of Systems and Procedures should direct all staff to begin reporting to the Comptroller's Office. July 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The Manager of Systems and Procedures is currently responsible for maintaining the Standard Practice Bulletins that guide all district financial operations. These responsibilities include identifying policies that need procedures, writing procedures, editing procedures written by other departments, and distributing procedures to all users. The current Standard Practice Bulletins are organized in large binders and indexed.

A review of the Standard Practice Bulletins found that many of these bulletins are outdated, with some having revision dates as far back as 1985. For example, the following bulletins were dated between 1983 and 1991:

<u>No.</u>	<u>Standard Practice Bulletin</u>	<u>Date</u>
A-122s	Labor Distribution – Secondary Schools	1987
A-124	Time/Space Attribution Base	1990
A-12e	Labor Distribution – Elementary Schools	1987
A-126v	Labor Distribution – VTAE Centers & Community Schools	1987
A-133	Transportation – Use of Buses for Extra-Curricular Activities	1983
A-136	Reimbursement for Travel Expenditures	1991
A-137	Sick Leave Bank	1986
A-139	Workers’ Compensation Pay Procedures	1988
A-143	Athletic Expenditure Procedures	1985
A-152	Procedures for Preparing Standard Practice Bulletins	1990

Many of the bulletins are dated between 1992 and 1994, including Instructions for Completing Remittance Advice (cash receipts), 1992; Sick Leave Incentive Pay Procedure, 1992; Time and Attendance Recordkeeping, 1992; Authorized Signature Master File, 1994; Long Distance Calling Procedure, 1994; Administration and Accounting for After School Child Care Program, 1994; Accounting for Adult & Vocational Financial Aid Fees, 1992; and Accounting for Federal PELL/Federal Supplemental Education, 1994. Of the 45 procedures listed in the Standard Practice Bulletins Index, only six are dated 1997 or 1998. In addition, there are some current procedures that are not listed in the Standard Practice Bulletins Index including procedures for purchasing, personnel, and accounting for fixed assets.

RECOMMENDATION

Recommendation 10-2:

Move the responsibility for maintaining Standard Practice Bulletins to the Finance Department, and ensure that all bulletins are kept up-to-date and maintained in a standard format.

The responsibility for maintaining the financial and accounting procedures for the district should be placed under the direction of the Director of Finance. The director should first ensure that a comprehensive review of all procedures is performed to identify outdated or missing procedures. All outdated procedures should be updated and included in the Standard Practice Bulletins in a standardized format.

A regular review of all Standard Practice Bulletins is important to ensure that all procedures are current at all times. Reviews should be conducted at least annually, or more frequently should circumstances warrant.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|--------------|
| 1. The Comptroller should direct the Director of Finance to take over the responsibility for maintaining the Standard Practice Bulletins. | May 1999 |
| 2. The Director of Finance should assign the responsibility for maintaining Standard Practice Bulletins to an accountant in the General Accounting section. | May 1999 |
| 3. The Director of Finance and the accountant should review all current Standard Practice Bulletins to determine which bulletins need updating. | Summer 1999 |
| 4. The Director of Finance should direct the accountant to update all outdated bulletins. In addition, the accountant should rewrite all bulletins to conform to a standard format. | Fall 1999 |
| 5. The Director of Finance should approve all rewritten and updated Standard Practice Bulletins. | January 2000 |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

10.1.2 Fund Balances

Fund balances or reserve balances are established by school districts to function similar to a savings account. Fund balances can serve as a source of funds in case of an emergency, a source of cash to pay bills in case the outflow of expenditures temporarily occurs faster than the inflow of revenue, or a place to build up savings to make large purchases not affordable within a single year (e.g., a new computer system).

FINDING

Over the last few years, fund balances in the Broward County School District have ranged between just over \$81 million to almost \$94 million. Exhibit 10-4 shows the fund balance history for the district for the past four years. After experiencing draws against reserves in 1992-93 and 1993-94, the district has increased fund balances in proportion to the increase in the size of the total general fund budget. The fund balance contained in the 1996-97 Comprehensive Annual Financial Report, the most current audited financial statements, was almost \$94 million.

As recommended by the Government Finance Officers Association (GFOA), school districts should maintain a fund balance of approximately three percent of anticipated revenues.

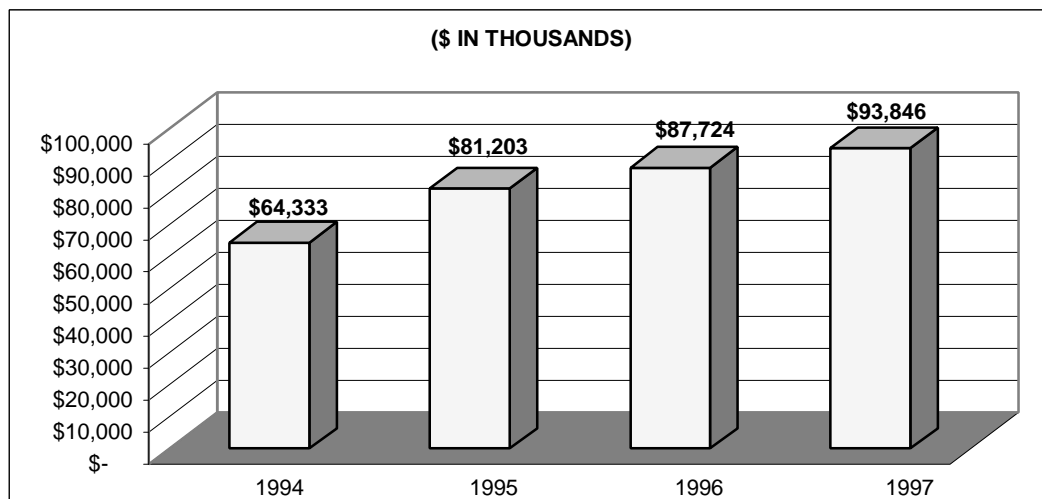
COMMENDATION

The district is commended for establishing an adequate fund equity balance.

10.1.3 Fixed Assets

Fixed asset management involves the manner in which assets are purchased and accounted for, and the maximization of the disposal of surplus or obsolete equipment so that it is turned back into productive channels.

**EXHIBIT 10-4
FUND BALANCE FOR FISCAL YEARS
1993-94 TO 1996-97**



Source: Broward County School District, Office of the Treasurer, 1998.

CURRENT SITUATION

The Broward County School District's general fixed assets amounted to almost \$1.9 billion as of June 30, 1997. General fixed assets are defined as tangible items of a nonconsumable nature, the value of which is \$750 or more, and the normal expected life of which is one year or more.

General fixed assets are recorded as expenditures in the Governmental Funds and capitalized and disposed of at historical cost in the General Fixed Assets Account Group. Contributed fixed assets are recorded as general fixed assets at estimated fair market value at the date the asset is received. No depreciation has been provided on general fixed assets nor has interest been capitalized.

Fixed assets owned by the Proprietary Fund, primarily equipment, are stated at cost. Straight-line depreciation has been provided over the estimated useful lives of these assets, which range from three to five years. When fixed assets are sold or retired, the related cost and accumulated depreciation are removed from the accounts and the resulting gain or loss is reflected in the statement of revenues, expenses, and changes in retained earnings.

Exhibit 10-5 provides a summary of fixed asset accounts of the Broward County School District as of June 30 1997, the latest available audited numbers.

Property records are maintained on an old mainframe computer system. All purchases of fixed assets are accumulated in a mainframe system report referred to as the ACT 021, and used to monitor the purchase of tangible personal property by all locations throughout the district. This report identifies all purchases coded to the specific object codes and, in conjunction with information obtained from the Purchasing and Accounts Payable systems, outlines individual purchases of equipment and motor vehicles with the corresponding information fields necessary to establish a detailed property record.

The ACT 021 report is initiated by payment transactions of purchase orders coded to the appropriate object codes. The report is generated weekly and contains the following information:

- purchase order number
- vendor number
- identification number
- item number
- building/room number
- purchase order line number
- invoice number
- ship-to location
- purchase order description
- effective date of purchase
- MSA coding
- check number
- vendor
- unit price

**EXHIBIT 10-5
SUMMARY OF FIXED ASSETS AS OF JUNE 30, 1997
(NUMBERS IN THOUSANDS)**

	<u>JUNE 30, 1996</u>	<u>ADDITIONS</u>	<u>DELETIONS</u>	<u>JUNE 30, 1997</u>
Land	\$104,973	\$3,255	\$0	\$108,228
Land Improvements	39,289	4,656	0	43,945
Buildings and Fixed Equipment	1,126,547	135,795	0	1,262,342
Furniture, Fixtures, and Equipment	218,580	51,040	1,875	267,745
Audio Visual	1,506	255	0	1,761
Computer Software	5,315	2,929	0	8,244
Motor Vehicles	50,599	11,095	407	61,287
Construction in Progress	190,970	73,548	135,795	128,723
Total Fixed Assets	<u>\$1,737,779</u>	<u>\$282,573</u>	<u>\$138,077</u>	<u>\$1,882,275</u>

The following is a summary of the Internal Service Fund fixed assets at June 30, 1997 (in thousands):

	<u>Printing Services</u>
Machinery and Equipment	\$558
Accumulated Depreciation	(359)
Net Fixed Assets	<u>\$199</u>

Source: Broward County School District, Property and Inventory Control Department, 1998.

This information is used by the Property and Inventory Control Department to schedule inventory technicians to permanently engrave the property and to establish detailed property records within the Property and Inventory Master File. The Property and Inventory Master File is the computerized database used by the district to maintain detailed records of property. The Master File also serves as the subsidiary ledger that details and supports the capitalized value of the district's general ledger. The Master File is not integrated with the district's mainframe accounting system.

Each property item is accounted for as a separate electronic record and given a unique identification number that is assigned by the system. In addition to the unique identification number, each record contains descriptive information including location of the asset, serial number, and date of acquisition. All information is manually entered into the Master File by data entry staff.

The department performs an annual reconciliation of the Master File database to the mainframe general ledger accounts. Additions to the property records are tracked through accounting object codes for equipment, computers and related technology, buses, and vehicles including trucks. Deletions, including surplus and salvaged items, are also adjusted.

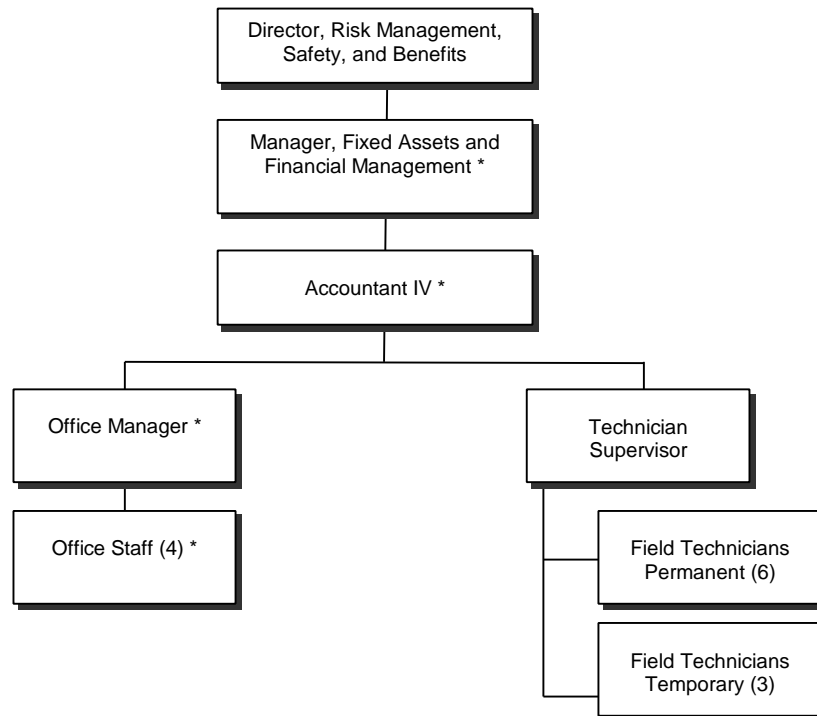
The Property and Inventory Department is part of the Risk Management, Safety, and Benefits Department. Prior to being housed in this department, the fixed asset control function was a part of the Finance Department. However, to obtain a better separation of duties and to better facilitate the property and casualty insurance function in the district, responsibility for fixed asset control was moved in 1993.

The primary responsibilities of the Property and Inventory Department include:

- permanently identifying all tangible property in a manner accepted by the rules of the auditor general;
- maintaining detailed records of all tangible property owned by the district; and
- conducting annual inventories of all district-owned tangible property.

As shown in the organizational chart in Exhibit 10-6, some staff have dual responsibilities for fixed asset control and for risk management functions.

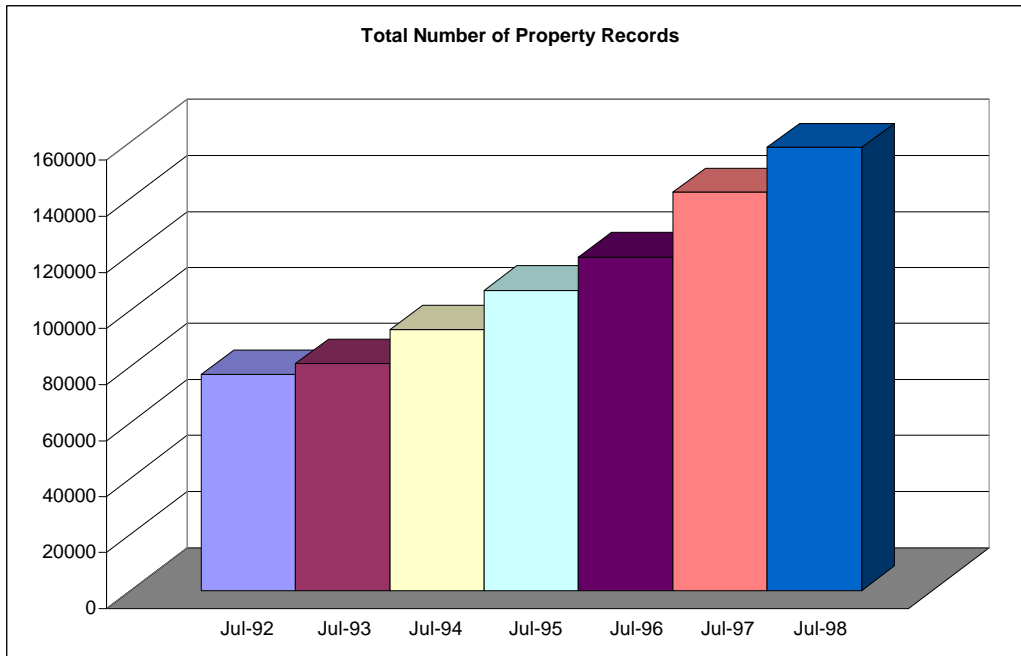
**EXHIBIT 10-6
ORGANIZATIONAL STRUCTURE OF THE
PROPERTY AND INVENTORY DEPARTMENT IN THE
BROWARD COUNTY SCHOOL DISTRICT**



Source: Broward County School District, Property and Inventory Department, 1998.
* Denotes positions that have both fixed asset and risk management responsibilities.

Exhibit 10-7 shows the growth of the district in terms of the number of property items maintained by the Property and Inventory Department.

**EXHIBIT 10-7
GROWTH IN PROPERTY INVENTORY
IN THE BROWARD COUNTY SCHOOL DISTRICT
1992 – 1998**



Source: Broward County School District, Risk Management, Safety, and Benefits Department, 1998.

FINDING

The Broward County School District maintains a strict policy for accountability for fixed assets. The Board has designated that principals be the custodians of property at the schools and that directors or supervisors be the custodians of property for the central office support services departments. According to Board policy, a custodian is defined as:

The person to whom the custody of School Board property has been delegated by the School Board of Broward County, Florida.

Custodians are responsible for the safeguarding of all fixed assets, and for ensuring that the proper paperwork is filed in cases of missing assets. The custodian is also responsible for the proper transfer of assets from one location to another to ensure the integrity of the accounting records.

The Property and Inventory Control Department recently started a new review program to monitor and report on the safeguarding of fixed assets. Thus far, approximately 30 schools have been reviewed under the new program. Under the program, Property and

Inventory Control staff visit each school to conduct a complete physical inventory of fixed assets. In addition to the physical count of inventory, Property Inventory Control staff also review procedures used at each school site, including documentation of equipment on loan or equipment that has been transferred.

Upon completion of the review, the Property and Inventory Control Department issues a report assessing the quality of fixed asset safeguarding, with a list of suggestions for improvement as necessary. Each custodian and area supervisor receives a copy of the report, and each custodian is required to respond to the report in writing.

COMMENDATION

The Broward County School District is commended for the high degree of accountability placed on fixed asset custodians.

RECOMMENDATION

Recommendation 10-3:

Submit all fixed asset reports to the School Board.

Although the district has done a good job in placing a high degree of accountability on the fixed asset custody function, the findings brought to light in the Property and Inventory Department's reviews should be given even higher priority by reporting the results to the School Board. The Clay County School District, for example, reports missing assets to the School Board on an annual basis. Since this reporting process is a new process in Broward County, reporting results to the Board should indicate to all fixed asset custodians the importance of the asset protection function.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|---|
| 1. The Superintendent should direct the Director of Risk Management, Safety, and Benefits to submit findings from the property control reviews to the School Board. | May 1999 |
| 2. The Director of Risk Management, Safety and Benefits should prepare a property control report, summarized by location, for Board meetings. | July 1999
and semi-annually thereafter |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The current tracking system for fixed assets is very labor intensive since items must be individually and manually entered. The Broward County School District currently uses a stand-alone database system to track fixed assets. The system, referred to as the Property Inventory Master File database, does not interface with the mainframe accounting system. Assets are entered to the Master File database by data entry clerks in the Property and Inventory Control Department.

According to Property Control Procedures (Background Information and Operation Process), Property and Inventory Control personnel use a computerized report, referred to as the ACT 021 Report, to monitor the purchase of tangible personal property by all locations in the district. The ACT 021 Report is generated from the mainframe by identifying all purchases from the Purchasing and Accounts Payable systems. Property and Inventory personnel review the ACT 021 Report weekly, using the information contained in the report to schedule inventory technicians to permanently engrave any newly acquired equipment.

On a regular basis, Property and Inventory Control staff visit school sites and departments to inspect, tag, and record newly acquired assets. Any missing information, such as serial numbers, is researched by Property and Inventory Council staff in order to complete the data entry of detailed property information to the Property and Inventory Master File database. The technician first inspects the asset to ensure that it meets the requirements for capitalization according to district policy and state regulations. Upon determination that the asset should be capitalized, the technician engraves a unique identification number into the asset and records various data such as asset description, model number, serial number, and location. This information is collected throughout the day and submitted to a data entry clerk for manual entry into the Master File database.

Annual inventory counts of fixed assets are conducted by Property and Inventory Control technicians. According to internal procedures for scheduling fixed asset inventories, the amount of time necessary to complete fixed asset audits is as follow:

<u>Type of School</u>	<u>Estimated Time to Complete</u>
Elementary	1-2 days
Middle	5-10 days
High	2-4 weeks

The Broward County School District is currently in the process of obtaining a bar coding system to increase efficiency in the tagging and tracking of fixed assets. A Request for Proposals (RFP) will be issued for a bar coding system in Spring 1999. The RFP will require that a bar coding system be implemented within 90 days following vendor selection.

Although there are no plans in the near future to obtain a new fixed asset accounting system, the proposed bar coding system should be adaptable to any fixed asset accounting system acquired by the district in the future.

RECOMMENDATIONS

Recommendation 10-4:

Implement new procedures requiring all fixed asset custodians to conduct fixed asset inventory counts, and eliminate two positions.

Other Florida school districts, including the Clay, Hillsborough, and Brevard County School Districts, have implemented procedures for fixed asset custodians to perform annual inventory counts instead of relying on the fixed asset control operation for this function. This practice places the responsibility for the inventory function at the school or department level, allowing the fixed asset control function to operate with minimal staff. To satisfy Section 10.400 of the Rules of the Auditor General, these districts conduct independent audits of the inventory function based on representative samples of items having high values and high desirability. Typically, the independent audit is conducted by employees in a property management role.

Broward Property and Inventory Control staff should train all fixed asset custodians to perform annual inventory counts, with the Property and Inventory Control technicians performing follow-up audits to ensure that inventory counting procedures were followed properly. Follow-up audits, however, should be performed on a representative sample of assets. Assets having high values, such as computer equipment and peripherals, should be the focus of the representative audits.

In addition to requiring fewer Property and Inventory Control staff to conduct annual inventory counts, the inventory process can be accomplished faster by having fixed asset custodians performing the counts.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|---------------------------------------|
| 1. The Director of Risk Management, Safety, and Benefits should draft new procedures requiring that all fixed asset custodians perform annual fixed asset inventory counts. | May 1999 |
| 2. The Superintendent should review and approve the new procedures. | June 1999 |
| 3. The Director of Risk Management, Safety, and Benefits should direct the Manager of Fixed Assets and Financial Management to conduct training on the new procedures for both Property and Inventory Control staff and for all fixed asset custodians. | August 1999 |
| 4. All fixed asset custodians should begin conducting their own fixed asset inventory counts. | September 1999 |
| 5. The Manager of Fixed Assets and Financial Management should direct the Property and Inventory Control technicians to begin follow-up audits on a sample of fixed assets. | Commencing in October 1999
Ongoing |

FISCAL IMPACT

Delegating the function of conducting inventory counts to fixed asset custodians will allow the Property and Inventory Control Department to function with fewer staff. It is estimated that implementation of this recommendation will allow for the reduction of two

technicians in the department. This savings is estimated to be approximately \$58,700 on an annual basis as calculated below:

Average salary for technicians	\$26,060
Multiply by fringe benefits factor	x 1.33
Average salary and benefits for each technician	\$29,341
Average salary and benefits for two technicians	\$58,682

The savings will accrue from shifting the responsibility for conducting the inventory to the custodians. There is no cost for these audits since the Property Control employees will no longer be conducting full inventory counts and they can instead perform the recommended audits.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Eliminate Two Technicians	\$0	\$58,700	\$58,700	\$58,700	\$58,700

Recommendation 10-5:

Revise procedures requiring that all fixed asset custodians enter detailed property information into the fixed asset system.

Though the district is not planning to replace the fixed asset accounting system in the near future, they realize that replacement will occur within the next few years. In designing and developing a new system, the district should consider having all fixed asset custodians, or their designees, enter all detailed fixed asset information on-line.

The Clay County School District in Florida uses this practice, resulting in staffing efficiencies at the district property control level. All fixed asset custodians are trained to input fixed asset information on-line and to tag and otherwise identify equipment. An employee from the Property Control Department then performs spot checks to ensure that all information is being entered timely and correctly.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|---|
| <p>1. Upon implementation of a new fixed asset accounting system, the Director of Risk Management, Safety, and Benefits should draft new procedures for the entry of fixed asset information into the system.</p> | <p>Upon implementation of a new fixed asset accounting system</p> |
| <p>2. The Superintendent should review and approve the new procedures.</p> | <p>Upon implementation of a new fixed asset accounting system</p> |

FISCAL IMPACT

By implementing this recommendation, it is possible that data entry positions in the district can be eliminated. However, due to the indefinite timing of implementing a new fixed asset system, the cost savings should not be estimated at this time.

10.2 Risk Management

An effective risk management program provides cost-effective insurance and loss-control techniques that minimize financial liability for the district and its employees. Increasing costs for health, property, and liability insurance coverage have demanded that school district administrators develop risk management programs that focus on cost containment. Sound risk management involves:

- identifying operational areas where hazardous situations may occur or opportunities for physical property loss may exist in order to minimize exposure for potential financial loss; and
- analyzing the cost effectiveness of health, workers' compensation and property insurance, as well as alternative insurance coverage such as self-insurance and other current industry trends.

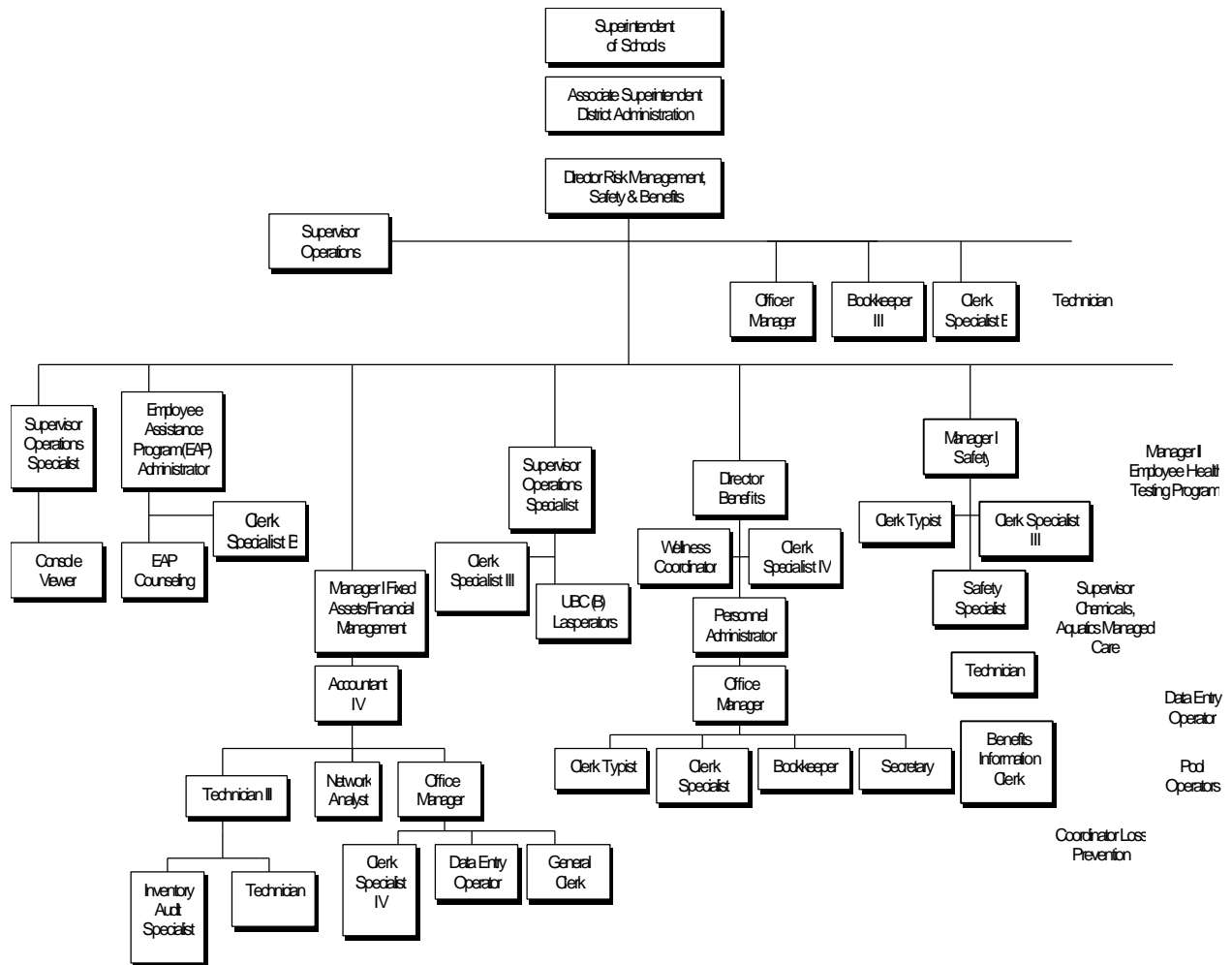
CURRENT SITUATION

The Director of Risk Management, Safety and Benefits has the overall responsibility for risk management functions in the Broward County School District and reports to the Associate Superintendent for District Administration. Chapter 4 of the report contains MGT recommendations for change in the organizational structure. In Chapter 4 we recommend that the Department no longer be housed under the Division of District Administration; instead, the function should be moved reside under the Division of Operations.

The Risk Management, Safety, and Benefits Department is currently staffed with 80 employees, including the Director, and has seven vacant positions. Most positions are funded through General Revenue Funds. Five positions are funded at no direct cost to the district through health carriers in conjunction with health insurance contracts and include an EAP Coordinator, a Clerk Specialist IV, a Clerk Specialist III, a Clerk Typist III, and a Wellness Coordinator. Fourteen (14) positions are funded through Capital Funds including a UBCI Senior Supervisor, a Clerk Specialist III, and 13 UBC Inspectors.

Exhibit 10-8 presents the department's existing organizational chart.

**EXHIBIT 10-8
ORGANIZATIONAL STRUCTURE OF THE
DEPARTMENT OF RISK MANAGEMENT, SAFETY, AND BENEFITS**



Source: Broward County School District, Department of Risk Management, Safety, and Benefits, 1998

The Director of Risk Management, Safety, and Benefits is responsible for planning, organizing, and directing all activities related to benefits administration and risk management as well as employee and student safety and health management. The duties and responsibilities as contained in the director's position description include, but are not limited to, the following:

- developing and administering a customer-based delivery system for all benefits including retirement and tax sheltered annuities;
- developing a comprehensive wellness program which integrates the resources of all insurance vendors;
- acting as liaison between the Board and the defense attorneys in defense of actions against the Board to include preparing background and research data for use in litigation and testifying as Board's representative in such legal actions;
- consulting and advising the Facilities Maintenance and Purchasing Departments in implementing insurance requirements, toxic substances, and environmental regulation compliance;
- researching and recommending Risk Assessment, Energy Management and Chemical Control practices and procedures for county-wide adoption to comply with state and federal standards;
- developing and administering the district's comprehensive emergency management program;
- overseeing establishment of efficient procedures for inventory and identifying all tangible property owned by the School Board;
- augmenting and maintaining effective health, safety and toxic substance control programs for employees and students;
- representing the district at regulatory hearings, legal action, and legislative meetings within areas of jurisdiction;
- coordinating the management of swimming pools and overseeing the Aquatics Supervisor and pool operators while directing the aquatic safety program to assure compliance with educational principles as well as appropriate safety procedures;
- performing and promoting all activities in compliance with equal employment and nondiscrimination policies of the Board;
- reviewing current developments, literature, and technical sources of information related to job responsibility;
- participating in training programs;

- ensuring sound safety procedures;
- complying with federal and state laws, and Board policies; and
- performing other duties as assigned.

The Director of Risk Management has supervisory responsibility for 13 positions. The positions include the Supervisor, Operations Specialist, Employee Assistance Program Administrator, Manager of Fixed Assets and Financial Management, UBCI Senior Supervisor of Inspections and Code Compliance, Director of Benefits, Manager of Safety, and Supervisor of Chemicals, Aquatics, and Managed Care. Other positions without supervisory responsibility, which require close reporting and monitoring by the Director of Risk Management due to the nature of the work, include Office Manager, Bookkeeper III, Clerk Specialist B (two positions), Technician, and Manager of Employee Health Testing Program.

Exhibit 10-9 presents the Risk Management Department's budget for 1997-98 as compared with current budget allotment for the 1998-99 fiscal year. An analysis of these budgets indicates an increase in the amount of 12.5 percent for the current year over last year's budget.

**EXHIBIT 10-9
RISK MANAGEMENT DEPARTMENT
ACTUAL BUDGET FOR 1997-98
AND CURRENT ALLOTMENT FOR 1998-99**

GENERAL FUND CATEGORY	ACTUAL BUDGET 1997-98	CURRENT BUDGET ALLOTMENT 1998-99	PERCENTAGE INCREASE/ (DECREASE)
Salaries	\$ 1,740,532	\$1,997,103	14.74%
Employee Benefits	585,596	694,889	18.66%
Purchased Services	6,082,486	7,279,536	19.68%
Materials/Supplies	133,626	179,172	34.08%
Capital Outlays	560,564	10,000	(98.21%)
Other Expenses	53,006	142,505	168.84%
Total Budget	\$9,155,810	\$10,303,205	12.53%

Source: Broward County School District, Risk Management Department, 1998.

The Risk Management Department ensures the district is fully insured through a competitively bid process with respect to health insurance using a premium per employee coverage and property insurance coverage. The district is self-insured for its general liability, automobile liability, and workers' compensation programs. A third-party administrator is hired through a competitive bid process. This administrator is used to process claims for self-funded lines of insurance and for advising the district on recommended coverage amounts and other insurance aspects.

The Risk Management Department uses insurance consultants to prepare bid specifications, review quotes, and assist with making insurance carrier recommendations to the Board. A minimum of three quotes for each line of insurance

is required. Foster, Higgens & Mercer Co. of New York was selected, through the competitive bid process conducted by the Purchasing Department, as the district's insurance consultant in 1996. The contract commenced in July 1996 for a period of three years with an annually renewable clause for two years. The contract was renewed for 1997 and 1998.

10.2.1 Risk Management Staff

FINDING

The Director of Risk Management Department has acquired risk management experience with the Board since 1979 and has prior experience with the U.S. Department of Labor Occupational Safety, Health, and Insurance. The Director of Benefits had several years of experience working in risk management prior to being employed by the district. The majority of his 20-year tenure with the district has been spent in the area of risk management.

The Supervisor of Chemicals, Aquatics, and Managed Care has a background in chemistry and 12 years of related experience. The Employee Assistance Program Administrator has in excess of eight years of broad experience in special education prevention programs working with students and families prior to the two-year tenure with the district. The Manager of Safety has an undergraduate degree in fire science and business, and years of safety inspection experience to include ten years of management experience with the district with a retired fire department lieutenant on staff.

The Fixed Assets and Financial Management Section has incorporated personnel with strong accounting, auditing, and information systems backgrounds to include enhancement of workers' compensation claims auditing to strengthen management controls for reducing overpayment of claims and associated recoveries. The Manager of Fixed Assets and Financial Management continues to assume expanding roles and is pursuing the Associate in Risk Management license (ARM) from the Association of Risk Managers.

COMMENDATION

The Broward County School District is commended for employing a highly qualified, professional management team to operate the Department of Risk Management, Safety, and Benefits.

10.2.2 Districtwide Risk Management Initiatives

FINDING

The Risk Management Department has developed comprehensive procedure manuals.

- Volume I addresses safety-related items such as bio-hazardous waste, disposal of chemicals, drug and alcohol testing, inspection

program procedures, motor vehicle records procedures, workers' compensation, and managed care procedures.

- Volume II contains items relating to accounting for benefits, including flexible spending accounts, bookkeeping procedures, dental contract monitoring procedures, disability billing procedures, life insurance claims processing, and retirement processing.

The Risk Management Department has also developed a comprehensive Occupational Safety and Health Program (safety program) to govern the safety aspects of the district's risk management initiatives. Safety and health requirements for district employees and students are incorporated in the Safety Program Manual. Requirements are based on guidelines provided by various state and federal agencies. Agencies include the Florida Occupational Safety and Health Act (FOSHA), Florida Department of Labor and Employment Security (FDLES), Department of Education (DOE), Environmental Protection Agency (EPA), Health and Rehabilitative Services (HRS), and the Occupational Safety and Health Administration (OSHA).

The Risk Management Department requires that all district employee groups be involved with the safety program, and the department provides regularly scheduled activities to promote safety awareness, co-worker participation, and safety education and training. Implementation of the safety program satisfies the minimum requirements covered under Sections 255.440 and 255.442, Florida Statutes. The district has developed a catastrophic preparedness plan. The plan includes an Emergency Preparedness Manual identifying critical procedures and outlining department responsibilities. Procedures also address essential steps to back up electronic file in the event of disaster.

The Safety Program Manual provides a specific safety and health program for employees of the Broward County School District. This Employee Safety and Health Program has been developed by utilizing information from the code of Federal Regulations-Occupational Safety and Health Administration (CFR-OSHA), Florida Department of Labor and Employment Security (DLES) and the National Safety Council.

The Safety Program Manual addresses the following critical issues:

- management's commitment and involvement;
- how safety committees will operate;
- what employee training will be provided;
- how first aid procedures will be used;
- how accident investigations will be performed;
- what recordkeeping procedures and documents will be maintained;
and
- what safety rules, policies, and procedures have been established.

COMMENDATION

The Broward County School District is commended for developing a comprehensive, districtwide safety program for district employees and students, and maintaining up-to-date written program guidelines (also see Chapter 15, Safety and Security).

FINDING

The Safety Section of the Risk Management Department is required to perform site safety and audit inspections annually for approximately 234 schools and work sites of the district's facilities pursuant to Section 235.06, Florida Statutes. The Safety Section includes staff certified by the State Fire Marshall to conduct fire safety component of the inspections required. The Fire Department has the option of joint inspection work and such work is provided to the district no charge. The inspections are performed in accordance with the Florida Department of Education, Office of Educational Facilities, Comprehensive Safety Inspection, and State Board of Education (Administrative Rule 6A-2, Part III, Section B).

Risk Management staff are also responsible for indoor air quality, including asbestos, radon, lead paint abatement, mold, mildew, or inadequate ventilation. Inspections of dry chemical fire suppression systems and water-operated fire suppression systems are performed for hire by outside contractors. The Safety Section is currently pursuing a proposed plan to hire an additional safety inspector to address an increased workload of safety inspections. The staff and offices are located at the Sail Boat Bend Facilities with other Risk Management staff.

Exhibit 10-10 provides a summary of safety inspections performed during the past three years.

**EXHIBIT 10-10
SAFETY INSPECTIONS CONDUCTED
1995-96, 1996-97, AND 1997-98**

FISCAL YEAR	NUMBER OF INSPECTIONS COMPLETED	PERCENTAGE INCREASE OR (DECREASE)
1995-96	216	--
1996-97	229	6%
1997-98	230	0.5%

Source: Broward County School District, Risk Management Department, 1998.

Exhibit 10-11 provides examples of deficiency descriptions and corrective action required as a result of safety inspections performed during the 1997-98 fiscal year. This exhibit also shows the number of times the deficiency has been cited during prior safety inspections and the number of times the deficiency appears in selected reports for various sites during the 1997-98 fiscal year. The report dates reviewed were 8/13/97, 9/9/97, 12/3/97, and 1/30/98.

**EXHIBIT 10-11
EXAMPLES OF SAFETY INSPECTIONS FOR 1997-98
PURSUANT TO ADMINISTRATIVE RULE 6A-2
PART III SECTION B, FLORIDA STATE BOARD OF EDUCATION**

DEFICIENCY DESCRIPTION/ CORRECTIVE ACTION	RULE 6A – 2 NUMBER/ SUBPARAGRAPH	NUMBER OF TIMES DEFICIENCY CITED BEFORE	SCHEDULED DATE FOR CORRECTION	CORRECTIVE ACTION TAKEN (YES, NO, OR DON'T KNOW)
Install Tile At Water Fountain	120/01	4	6/7/98	Yes, Per Work Order As Of 12/8/98
Remove Paper Covering Window	80/05	1	8/19/98	Yes, 8/20/98 Done On-Site; No Work Order Needed
Install Sign For Emergency Escape	89/11	5	5/17/98	Yes, Per Inspection Of 12/7/98
Install Light Covers	77/01	3	6/7/98	No, Per Inspection Of 8/18/98
Provide Separate Room For Washer And Dryer	110/03	7	6/7/98	No, Per Inspection Of 8/18/98
Install Strobe Light	88/06	5	8/14/98	Yes, Per Inspection Of 12/7/98
Install Detetors	87/01	4	8/14/98	No, Per Inspection Of 8/18/98
Seal Vertical Openings	84/03	4	8/14/98	Yes, Per Inspection Of 8/18/98
Install Fire Blankets	97/22	1	5/17/98	No, Per Inspection Of 12/7/98

Source: Broward County School District, Risk Management Department, 1998.

The reasons cited for corrective action not being taken by safety section staff (as shown in the right column above) include unavailability of supplies and parts needed, required facilities design and unavailability of funding, code changes requiring action by the Facilities Department; and space additions required to facilitate the necessary change. The corrective actions are prioritized and primarily based on the seriousness of the change required, funding requirements, and risk-based considerations.

The consequence of not taking corrective action results in the failure to enforce compliance with safety guidelines, duplication of inspection efforts utilizing a limited staff, and ultimately exposing the district to safety risks in light of known at-risk factors.

RECOMMENDATION

Recommendation 10-6:

Enforce compliance with safety guidelines through monitoring and corrective action follow-up to maximize safety implementation, and allow for increased utilization of staff in other areas (also see Section 15.1 of Chapter 15, and Recommendations 15-1 and 15-2).

The Risk Management Department should work closely with other district administrators to enhance compliance with safety guidelines to increase safety, improve efficiencies, and maximize utilization of resources. In doing so, the staff should be available to address workloads in other areas such as loss prevention. Corrective action should be monitored and progressive measures taken to enforce compliance by those responsible for repetitive violations. The lack of corrective action taken, as shown in Exhibit 10-11, is not a result of insufficient staffing; rather, we found that there has been weak enforcement by management.

The presence of numerous safety inspection deficiencies, supported by documentation of deficiency citations, are indicative of unresolved safety risks which keep the district in an increased risk position. As a result of MGT's on-site interviews, inspection of safety inspection records, and follow-up interviews with inspection staff and management relating to safety issues, we found the need for increased attention by management to ensure that corrective action is achieved in a timely manner. The safety issues should be aggressively pursued to minimize risk and ultimately ensure safety to students, district employees, and the public.

FINDING

The Uniform Building Code Inspections (UBCI) Section is responsible for conducting job performance responsibilities relating to building and construction projects. This section currently operates with a staff of a senior supervisor, 13 inspectors, and a clerk specialist. The section is responsible to ensure that all projects are completed in a timely and efficient manner in accordance with contract documents, Board policies, codes and regulations, and other criteria as necessary. During the past year, the Superintendent mandated separation of inspection functions from the Facilities and Construction Department in response to a Grand Jury Report resulting from an investigation. The investigation included allegations by the community regarding poor construction of schools and questionable policies, including:

- ensuring the independence and competence of inspectors;
- maintaining staff to support construction growth;
- resisting political pressure to open a school that is not finished; and
- disbanding the use of professional licenses by employees who conduct private jobs.

This section is a viable candidate for privatization due to the cyclical nature of the work, particularly workload swings related to new construction projects and periods of

reduced workload when no new construction takes place. Consequently, the Director of Risk Management requested staff to compile quantitative data as a part of a cost/benefit analysis for privatization of this function. Exhibit 10-12 provides information on privatization efforts provided by the district.

As shown in Exhibit 10-12, Broward County School District staff conducted an initial estimate for considering privatization using the low bid quote information obtained by the Miami-Dade County School District to project cost savings for privatization of the UBC inspections function. The construction costs for the facilities work program and remodeling costs were considered and projected as a five-year expense with the percentage of construction costs applied to determine the five-year cost of privatizing the inspector's function. The five-year costs of private inspectors of \$2,854,631 was subtracted from the five-year operation expense of \$6,367,551 to produce a projected five-year cost savings of \$3,512,920.

**EXHIBIT 10-12
COST SAVINGS ANALYSIS FOR
PRIVATIZATION OF THE UBC INSPECTIONS FUNCTION**

RESOURCE OPTIONS	CONSTRUCTION COSTS FOR FACILITIES WORK PROGRAM*	PERCENTAGE OF CONSTRUCTION COSTS**	SUBTOTAL FOR UBCI COSTS	TOTAL UBCI COSTS
UBCI Department Five-Year Operation Expense	\$575,052,663	1.11%		\$6,367,551
Private UBCI Contractors – Five-Year Total Remodeling	\$75,941,864***	0.67%	\$508,810	
Five-Year Total New Construction	\$499,110,799****	0.47%	\$2,345,821	
Five-Year Cost of Private Inspectors				\$2,854,631
Five-Year District Cost Savings				\$3,512,920

Source: Broward County School District, Risk Management Department, 1998.

* From June 9, 1998, District Facilities Work Programs, 1998-99 to 2002-03.

**Cost Percentage for district derived from UBCI Cost/Construction Costs Cost Percentages for Private Contractors from Miami-Dade County Contract Based on a \$3 to 4.5 million project.

***Based on Department Expenditures and Projections for 1998-1999.

****Supporting documentation provided to MGT in support of 5-year estimated appropriations for total cost of capacity additions and for remodeling/renovation considered necessary by the district to house UBCI Inspections staff.

Exhibit 10-13 provides information compiled by the Risk Management Department to demonstrate the cost savings in support of the analysis presented above. It includes a summary of 1998-99 expenses and encumbrances as of November 30, 1998 and projected costs for UBC Inspectors for the 1999-2003 school years. The total projected cost for UBC Inspectors for 1999-2003 totals \$6,367,551 which ties to the total cost figure in the right column above.

**EXHIBIT 10-13
PROJECTED COSTS FOR THE UBC INSPECTION PROGRAM
1999-2003**

TYPE OF COST	BUDGETED AMOUNT	1998-99 EXPENSES & ENCUMBRANCES AS OF NOVEMBER 30, 1998	PROJECTED UBC INSPECTOR COSTS 1999-2003
Salaries - regular	\$810,493.00	\$810,493.00	\$4,213,763.60
Salaries – overtime & part-time	0	67,258.46	201,775.38
Benefits	261,483.00	280,270.46	1,233,632.94
Travel – Mileage	0	18,792.75	477,335.85
Repairs	0	0	32,000.00
Water	0	0	0
Printing	0	198.05	2,400.00
Purchased Services	0	0	0
Supplies	0	4,053.63	48,643.56
Equipment	150,000.00	145,278.80	150,000.00
Registration Fees	0	180.00	8,000.00
Total	\$1,221,931.00	\$448,773.69	\$6,367,551.33

Source: Broward County School District, Risk Management Department, 1998.

RECOMMENDATION

Recommendation 10-7:

Privatize the building and construction inspection functions.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Associate Superintendent of District Administration should direct the Director of Risk Management to privatize the UBCI function. May 1999

2. The Associate Superintendent of District Administration should present cost/benefit analysis for privatization of the UBCI function to the Board and make the recommendation to privatize. Summer 1999

3. The Associate Superintendent of District Administration and the Director of Risk Management should present the privatization plan and new organizational structure to the Board for approval. Summer 1999

4. The Board should approve the privatization plan and new organizational structure. August 1999

- | | |
|---|-------------|
| 5. The Associate Superintendent of District Administration should notify the Assistant Superintendent for Human Resources and the Risk Management Director of the organizational changes and notify employees of these changes. | August 1999 |
| 6. The Assistant Superintendent for Operations should proceed with privatization efforts and issue a Request for Proposals to obtain inspection services through privatization. | Fall 1999 |
| 7. The Assistant Superintendent for Operations should implement the new structure. | Fall 1999 |

FISCAL IMPACT

Privatization will result in a net cost savings of approximately \$63,600 annually which is the savings of hiring the private inspectors over UBCI inspectors. The annual cost of hiring 13 UBCI inspectors is calculated at \$48,811 per inspector using an average salary of \$36,700 and a 33 percent benefits ratio at \$634,543 per year (\$3,512,920 for five years as shown in Exhibit 10-12). The projected cost of hiring the private investigators is \$570,926 per year (\$2,854,631 for five years as shown in Exhibit 10-12).

The calculation is as follows:

\$634,543 – Current Cost for UBC Inspectors
 -\$570,926 – Cost for Private Investigators
 \$ 63,617 – Projected Annual Net Cost Savings

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Privatize UBC Inspections	\$63,600	\$63,600	\$63,600	\$63,600	\$63,600

10.2.3 Employee Benefit Packages

FINDING

The Broward County School District has compiled and disseminated employee benefit handbooks and other attractive printed documents which provide comprehensive information relating to each type of available benefit. The cost to the district for employee benefits as used by the Budget Department is estimated at 28 percent of the employee’s salary plus \$2,300 which equates to approximately 33 percent of the employee’s salary. This percentage is considered about average when compared to other large districts which MGT has reviewed. Benefit coverage for dependents is available, but must be paid by the employee. Basic coverage provided by the district may be enhanced through upgrades available at the employee’s expense. The district provides automated on-line enrollment capabilities through the Internet. Employees working three hours or more are entitled to health insurance coverage.

Exhibit 10-14 provides a synopsis of the benefits offered to employees and associated costs to the district and employees for various types of coverage. As can be seen, the Broward County School District offers an extensive array of benefits to employees.

COMMENDATION

The Broward County School District is commended for its comprehensive employee benefits package and information provided to employees.

**EXHIBIT 10-14
SUMMARY OF EMPLOYEE BENEFITS
AND ASSOCIATED COSTS
PAID BY DISTRICT AND EMPLOYEES**

TYPE OF BENEFIT	TYPE OF COVERAGE	TOTAL COST	AMOUNT PAID BY DISTRICT	AMOUNT PAID BY EMPLOYEE
Vision	Basic	\$3.76	\$3.76	\$0
Life Insurance	Basic	\$.19 per \$1,000 of salary; 1.25 x salary, capped at \$50,000	\$.19 per \$1,000 of salary; 1.25 x salary, capped at \$50,000	\$0
Disability	Basic	\$.46 per \$1,000 of salary	\$.46 per \$1,000 of salary	\$0
HMO	HIP	\$149.39 per month; POS \$292 per month; PPO \$218 per month	\$149.39 per month; POS \$292 per month; PPO \$218 per month	POS \$80; PPO \$6
HMO	Humana	\$175.15 per month; POS \$188.72 per month; PPO \$236.60	\$175.15 per month; POS \$188.72 per month; PPO \$224.77*	PPO \$11.83
Dental	Basic – American Dental	\$9.30 per month	\$9.30 per month	\$0
Dental	Enhanced – American Dental	\$9.80 per month	\$9.30 per month	\$.50
Dental	Basic - Oral Health Services	\$9.46 per month	\$9.30 per month	\$.16
Dental	Enhanced - Oral Health Services	\$10.25 per month	\$9.30 per month	\$.95
Dental	Indemnity Plan - Shenandoah	\$15.86 per month	\$10.80 per month	\$5.06
Dental	Delta Dental		\$10.80 per month	\$6.88

Source: Broward County School District, Risk Management Department, 1998.

10.2.4 Analysis of Insurance Coverage and Claims

FINDING

The Broward County School District carries a comprehensive package of insurance coverage. A third-party administrator advises the district on coverage needed and compiles comprehensive data on behalf of the district's insurance coverage, costs, and claims. The total insured property values for the Board's Property Program is \$2,549,728,069. The amount of total program limit is \$400,000,000 with \$150,000 additional property limits.

Exhibit 10-15 provides information, as provided by the Department of Risk Management, regarding the types of policies, annual premiums, and applicable description of property, limits, coverage, and deductibles.

The Broward County School District uses fully insured plans to provide district employees with health insurance. Two health insurance providers, acquired through a Request for Proposal (RFP) process, include Humana and HIP Health Plan of Florida. The carriers offer a health maintenance organization (HMO), a point-of-service (POS) plan, and a preferred provider organization (PPO) plan.

As will be addressed later in this section, information retrieved through telephone interviews with peer Florida school districts was used to compare health plan offerings. Four of the five peer districts MGT contacted are fully insured, and provide a combination of HMO, POS, and PPO plans similar to the Broward County School District. The Miami-Dade County School District and Duval County School District offer a combination of HMO, POS, and PPO plans, while the Palm Beach County School District offers a combination of HMO and POS. Exhibit 10-16 presents survey results from information compiled in past school district reviews and during on-site interviews in the Broward County School District.

The district's health needs are currently covered by Humana which is one of the two health care providers. A recent RFP resulted in the Board's selection of an alternative provider due to increased rates offered by Humana and other issues which include a lack of commitment to ensure that certain products and services are guaranteed district employees. At the time of the on-site review, Humana had protested the bid award and the Board attorney has advised the Board to continue its contract with Humana until such time that the bid protest issues are resolved so that continued coverage is provided to employees. The Board attorney has also advised that the provider has been "non-responsive" with respect to commitments relating to quality of service and type of prescriptions made available. A review of Board meeting minutes, on-site interviews, and other documentation regarding this issue found that Humana agreed to provide the same coverage through January 1999 and will continue such coverage for another year, or sooner if the bid protest is resolved prior to that date.

**EXHIBIT 10-15
SUMMARY OF INSURANCE COVERAGES
CARRIED BY THE BROWARD COUNTY SCHOOL DISTRICT
1997-98**

POLICY TYPE	COMPANY NAME	ANNUAL PREMIUM	GENERAL SYNOPSIS OF PROPERTY, LIMITS, COVERAGE, & DEDUCTIBLES
Governmental/Institutional Package/Drop Down	United National Insurance Co.	\$702,000	Property, General/auto Liability – All Risk & Replacement; \$700,000 Occurrence Excess/\$300,000 Occurrence SIR; PIP \$10,000 per Florida Statutes
Excess WC/EL OD	Continental Casualty	\$153,198	Statutory (WC) Occurrence; \$5,000,000 (EL) Occurrence; Retention \$550,000 Occurrence; annual Installment Rate .0196/\$100 Payroll (\$772,091,295)
Boiler & Machinery (All locations excluding Human Resource Center)	American Manufacturers Mutual	\$28,109	Limit \$50,000,000 any one accident; Deductible \$10,000 any one accident
Boiler & Machinery (Human Resource Center Only)	Kemper Group	\$475	\$50,000,000 any one occurrence; \$1,000 any one accident
Accidental Death & Dismemberment	Hartford Life Insurance Co.	\$350	Limits \$25,000 Line of Duty; \$25,000 Fresh Pursuit; \$75,000 Intentional Death (Covers Security Officers)
Petroleum Liability	FPLIPA	\$2,564	Limits \$,000,000 each incident/\$2,000,000 Aggregate (incl defense cost up to aggregate limit)
Excess Property	Various carriers	\$4,645,916	Various program limits, carriers and limit structures
Health Occupational	CIGNA fire Underwriters Ins. Co.	\$37,725	\$1,000,000/each medical incident; each incident/\$3,000,000 aggregate \$12 per student)
Football Insurance	Hartford Life Insurance Company	Paid by Students	Tryout season, regular season, and spring practice
Student Accident Ins.	Hartford Life Insurance Company	Paid by Students	During School & 24 hour coverage.
Catastrophic Insurance	Mutual of Omaha Insurance Company	\$42,705	\$5,000,000 excess medical plan for all athletes, \$25,000 deductible (lifetime benefit), \$600,000 sport disability cash benefit plan, no deductible
Board Member coverage	Western Surety Company	\$1,532	Total premium for bond coverage of Board Members
Total		\$5,614,574	

Source: Broward County School District, Risk Management Department, 1998.

**EXHIBIT 10-16
COMPARISON OF HEALTH INSURANCE PLANS IN PEER SCHOOL DISTRICTS**

SCHOOL DISTRICT	NUMBER OF EMPLOYEES	FULLY INSURED	PLAN OPTIONS	SELF-INSURED	NUMBER OF YEARS SELF-INSURED
Broward	23,000	✓	2 HMOs 2 PPOs 2 POSs 1 Kids HMO		N/A
Duval	13,000	✓	3 HMOs 2 POSs		N/A
Hillsborough	18,500		4 HMOs 1 POS 1 PPO		N/A
Orange	15,200		2 HMOs 1 PPO	✓	8
Palm Beach	15,800	✓	1 HMO 1 POSs		N/A
Pinellas	12,900	✓	4 HMOs		N/A

Source: Past Health Plan Telephone Survey for Peer Districts and On-site Interviews, November 1998.

The Broward County School District reviewed the cost of health plan alternatives in June 1998. The review of lower cost health plan alternatives as a means of containing health insurance costs for the district has not been done on a routine or consistent basis in the past. Prior to the June 1998 review, the district conducted a review of health care providers costs approximately three years ago.

RECOMMENDATION

Recommendation 10-8:

Regularly pursue and implement lower cost health plan alternatives as a means of containing health insurance costs.

During the district's most recent health insurance procurement process, alternative health plan options were explored and are currently being considered during the period pending the resolution of bid protest proceedings (i.e., the same basic health plan design was requested that the district had under its previous health care contracts).

Health plan research by Employers Health Coalition, Inc. of Tampa, Florida shows that the most effective ways to lower costs include:

- adjusting plan design so that more cost-effective managed-care options are used (i.e., driving discounts through volume such as wider use of lower cost HMOs, rather than providing more plan options to employees or perhaps even a self-insured managed-care health plan);

- participating in purchasing alliances or coalitions;
- requesting detailed information on administrative fees and negotiating lower administrative fees;
- increasing the use of utilization reviews;
- requiring employees to bear a greater share of health insurance premium costs; and
- offering incentives for healthy lifestyles and increasing coverage for prevention-oriented benefits.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-------------|
| 1. The Risk Management Director should identify and implement lower cost health plan alternatives as a means of containing health insurance costs on a routine annual basis. The assistance of an actuary who specializes in health insurance programs should be used with future insurance plan proposal preparation and evaluation processes. | Summer 1999 |
| 2. The Risk Management Director should use data obtained from the comparative analysis and make informed decisions regarding health plan changes that will ensure increased cost effectiveness. | Fall 1999 |

FISCAL IMPACT

Since the district uses a health insurance actuary to assist with insurance plan proposal preparation and evaluation, the district should secure advisory services in achieving optimal coverage at the best price as is the practice in industry and a practice used in other large school districts under similar circumstances. The cost of additional services to assist with identifying lower cost plan alternatives has been estimated at \$15,000. This figure is based on quotes obtained by MGT during the Hillsborough County School District performance review. The benefit of achieving lower cost plan alternatives or lower premiums offered by carriers is considered to be significant.

Recommendation	1999-2000	2000-01	2001-02	2001-02	2003-04
Contract for Insurance Actuary Advisory Services	(\$15,000)	(\$15,000)	(\$15,000)	(\$15,000)	(\$15,000)

10.2.5 Workers' Compensation Insurance

FINDING

The workers' compensation program in the Broward County School District is self-insured. The district purchases excess workers' compensation insurance coverage to limit exposure to specific individual claims and provide liability protection. The excess coverage goes into effect for workers' compensation claims that exceed \$400,000.

Exhibit 10-17 presents the total number of workers' compensation claims for 1995-96 through 1997-98 and the total expenditures. Workers' compensation records are maintained by the district's third-party administrator.

Risx Facs Reports compiled by the third-party administrator were analyzed by MGT to determine the history of claims. The Risx Facs reporting system provides an accounting for all loss programs filed by accident date. An analysis of claim registers reported by period was prepared by MGT. Accident sources include water, ground floor, assault, and exertion and common accidents reported include slip and falls, human violence, and food product injuries.

**EXHIBIT 10-17
NUMBER OF WORKERS' COMPENSATION CLAIMS
1995-96 THROUGH 1997-98**

CRITICAL FACTORS	1995-96	1996-97	1997-98
Number of Claims for All Loss Programs	3,469	3,833	2,933
Percent of Increase/Decrease in Claims		10.5%	(23%)
Total Experience	\$18,417,909	\$14,703,953	\$11,232,533
Number of Employees			23,000
Emp./Claims Ratio			7.84%
Claim Frequency*			12.75%

Source: Created by MGT using information obtained from the Risk Management Department. 1998.

* $\text{Claim Frequency} = \frac{\text{Number of Claims} \times 100}{\text{Number of Employees}}$

Exhibit 10-18 shows the total loss and claim information in the Broward County School District at \$18 million, \$14 million, and \$11 million, for the 1996 through 1998 fiscal years, respectively. Claims information on peer school districts, including the Miami-Dade and Duval County School Districts, were compared to the Broward County School District workers' compensation data. We found the claim amounts reported by Broward County are relatively high when compared to these other school districts.* The Miami-Dade County School District, for example, reported \$16.9 million, \$19 million, and \$13.5 million, respectively with a district of 35,000 employees. Duval County reported \$5.9 million, \$4.9 million, and \$5.4 million, respectively with a district size of 15,000 employees. A ratio of dollars per employee calculated for the Broward, Miami-Dade, and Duval County School Districts is \$488, \$386, and \$360, respectively for 1997-98.

*Information on the volume of claims in other districts was obtained through phone calls made by MGT to these districts.

**EXHIBIT 10-18
SUMMARY OF CLAIMS REGISTER
FOR ALL LOSS PROGRAMS BY ACCIDENT DATE
FOR FISCAL YEARS 1996 THROUGH 1998**

FISCAL YEAR	NET PAYMENTS TO DATE	RESERVE AMOUNT	TOTAL LOSS AND CLAIM EXPERIENCE	AMOUNT OF PERCENTAGE INCREASE OR (DECREASE) AND TOTAL CLAIM EXPERIENCE
1995-96	\$11,845,624.34	\$6,572,285	\$18,417,909	
1996-97	\$7,157,648.71	\$7,546,305	\$14,703,953	(20%)
1997-98	\$3,696,278.54	\$7,536,255	\$11,232,533	(23.5%)
TOTAL	\$22,699,552	\$21,654,845	\$44,354,395	

Source: Compiled by MGT from Risx Facts Report, 1998.

The three-year trend shows a decrease in the overall claims in the Broward County School District between 1995-96 and 1997-98, representing a cumulative net decrease of 12.5 percent. The number of claims increased from 3,469 in 1995-96 to 3,833 in 1996-97, representing an increase 10.5 percent. The number of claims were reduced to 2,933 in 1997-98, representing a 23 percent decrease from the prior year.

The workers' compensation trends does show that the school district is processing a reduced number of claims which results in decreased costs as a result of fewer accidents which decreases the workload associated with monitoring of claims through the post-audit process. Other benefits include reduced employee absenteeism and a decrease in staff resources required to process claims.

RECOMMENDATION

Recommendation 10-9:

Explore effective workers' compensation models used by other school districts (e.g., light duty program, full salary program, and workers' compensation employees placement programs) to reduce claims.

To reduce the number of claims, the Broward County School District, should examine programs used effectively in other school districts. For example:

- A full spread light duty program is one used to place employees who have physical restrictions in temporary light duty jobs to prevent further mental and physical disability of employees on workers' compensation and enable the individual to work in another position until he/she can return to employment in the job for which he/she was hired.
- The full salary program permits employees to receive a full salary during the first few weeks of the disability period through the use of

borrowed sick leave used to supplement workers' compensation in order for the employee to achieve economic stability, concentrate on getting well, and aspire to return to work.

- The employee placement program provides budgetary incentives to administrators through salary supplements at the rate of two thirds and one third of the annual salary for the first two years, respectively, for accepting employees who are not expected to return to their original position due to the nature of the injury.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Risk Management, Safety and Benefits should review effective workers' compensation models used in other districts (e.g., Miami-Dade County). May 1999
2. The staff of the Department of Risk Management, Safety and Benefits should develop a cost/benefit analysis of other workers' compensation programs. June 1999
3. The Director of Risk Management, Safety and Benefits should make a recommendation to the Board regarding the feasibility and cost/benefit analysis for adopting effective workers' compensation models considered appropriate for the district. Summer 1999

FISCAL IMPACT

The fiscal impact for the effective workers' compensation models to be adopted by the district is undetermined at this time.

FINDING

The district has increased the monitoring practices of workers' compensation claims and strengthened its oversight role in response to overpayments detected through the monitoring process during the 1996-97 and 1997-98 school years. Overpayment of workers' compensation claims and related expenses were identified at \$90,000 and \$130,000 during the 1996-97 and 1997-98 fiscal years, respectively. The district has reported a 100 percent success rate in collection of payments relating to reimbursements for overpayments.

The bookkeeper, who reports directly to the Director of Risk Management, Safety and Benefits, is charged with the responsibility of reviewing workers' compensation claims on a post-audit basis. The Accountant IV within the Fixed Assets and Financial Management Section has been instrumental in establishing enhanced audit procedures for detecting payments.

During the on-site review, the workers' compensation claims audit records were inspected and supporting documented procedures were reviewed. Post-audit

procedures of workers' compensation claim payments include a review of the basis for each claim, review of attorney fees charged to ensure charges are not excessive, review of physician invoices to verify services provided, and the reasonableness of charges. Records were also reviewed to detect duplicate payments, if any, and related documents for corrective action.

COMMENDATION

The Broward County School District is commended for strengthening oversight of workers' compensation claim payments, collection efforts and improved post-audit procedures.

The Broward County School District should continue to enhance monitoring activities of workers' compensation claims to minimize overpayments and maximize reimbursements of overpayments.

11.0 PURCHASING AND WAREHOUSING

This chapter reviews the purchasing and warehousing functions of the Broward County School District. This chapter is divided into the following two major sections:

- 11.1 Purchasing
- 11.2 Warehousing

An optimum organizational structure for the purchasing operation in a school district the size of Broward County School District is essential to a smooth and efficient operation. Staff performing functions within the Purchasing and Warehousing Department report to the Director of Purchasing. The major responsibility of the Director of Purchasing is to coordinate the purchasing and warehousing of a variety of materials, supplies, and equipment.

The responsibilities of the Department of Purchasing and Warehousing include, but are not limited to:

- support instructional and instructional programs;
- purchase, warehouse, and distributed needed materials;
- maintain a clean, safe, and efficient storage warehousing facilities;
- meet all procurement regulations;
- provide timely delivery services for warehoused supplies;
- inventory all warehoused supplies;
- keep delivery equipment and vehicles in good repair;
- efficiently manage resources;
- fulfill special procurement needs of the district; and
- meet space needs through maintaining an effective space utilization of available warehousing facilities, conducting needs assessments for items in need of warehousing, and maximizing overall utilization of resources.

The mission statement of the Purchasing Department was provided in draft during the time of the performance review as follows:

...to provide responsive, responsible and efficient procurement services to the school district while maintaining the highest level of professional ethics and integrity. We achieve our mission by dedication to excellence in customer service, providing avenues to access to businesses, pursuing the best cost savings, identifying new sources of supply, encouraging competitive pricing, and developing and maintaining positive relationships with vendors while complying with all laws of the state of Florida.

Purchasing is one of the most highly specialized activities in school business administration. Purchasing includes activities related to obtaining materials, supplies, and equipment that are required to operate schools and serve educational programs. Purchasing has become a major function in educational resource management. This function involves the expenditure of significant funds and requires adherence to principles and practices of sound management.

Efficient warehousing services are essential to timely and effective delivery of support for educational programs. An efficient purchasing and warehousing function should have management systems in place to ensure that supplies, equipment, and services are procured from the best source, in the correct quantities, and at the best price for the specified quality. Storage and delivery systems should be in place to ensure the most efficient receipt and distribution processes.

CURRENT SITUATION

The Purchasing Department in the Broward County School District is charged with conducting business pursuant to the *Purchasing Department Procedures Manual*, as specified in the priority shown below:

- *Constitution and Laws of the United States of America;*
- *Constitutions and Laws of the state of Florida;*
- *Policies of the School Board of Broward County, Florida, specifically:*
 - *Policy 3320 – Purchasing Policies;*
 - *Policy 7007 – Minority Business Enterprise Program;*
 - *Policy 2081 – Contracts by Individual Schools;*
 - *Policy 6302 – Use of Consultants; and*
 - *Policy 2313 – Contracts-Leases-Agreements-Rentals of Tangible Personal Property and Educational Services.*
- *Code of Ethics for Personnel Authorized to Purchase Pursuant to School Board Policy 3320;*
- *Standard Practice Bulletins relating to any referenced Policy; and*
- *Purchasing Department Procedures Manual.*

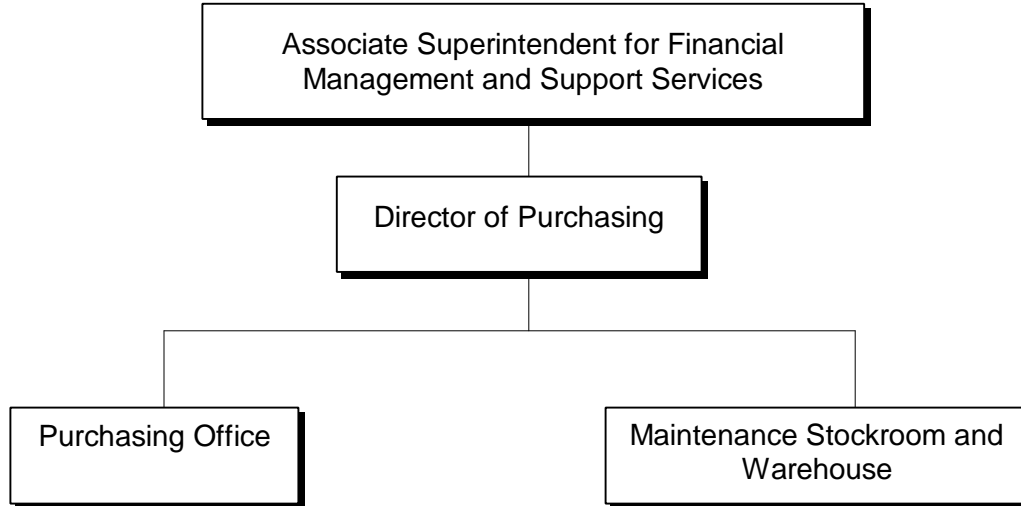
The Superintendent distributed correspondence on June 17, 1997 to reaffirm to principals and departments the *Code of Ethics for Personnel Authorized to Purchase Pursuant to School Board Policy 3320* which was adopted by the School Board of Broward County on January 15, 1987. The Code affects persons who have contact with a potential or current vendor, in addition to persons having responsibility for expenditures of funds. The Code addresses conflicts of interest and other business practice policies required to be established, documented, and distributed in accordance with management practices of the industry. The Code of Ethics includes the following:

- *grant all vendors equal consideration insofar as state and federal statutes and the School Board of Broward County, Florida, policies permit;*
- *strive to obtain, without prejudice, the maximum value for each dollar of expenditure;*
- *decline personal gifts or gratuities in exchange for favorable consideration;*
- *conduct business with potential and current suppliers in an atmosphere of good faith, devoid of intentional misrepresentation;*
- *demand honesty in sales representation whether offered through the medium of a verbal or written statement, an advertisement, or a sample of the product;*
- *strive consistently to increase the knowledge about the goods and services purchased;*
- *make every reasonable effort to obtain an equitable and mutually agreeable settlement of any controversy with a vendor, insofar as State Statutes and the School Board of Broward County, Florida, policies permit;*
- *accord a prompt and courteous reception insofar as conditions permit to all who communicate on legitimate business missions, whether by letter, by telephone, or in person; and*
- *cooperate with professional associations and governmental agencies for the purposes of promoting and developing sound business practices.*

Exhibit 11-1 illustrates the current organizational structure of the Purchasing Department within the Division of Financial Management and Support Services. The Purchasing Department is one of four departments reporting to the Associate Superintendent for Financial Management and Support Services. The other departments reporting to the Associate Superintendent include Transportation Services, Food and Nutrition Services, and Maintenance. The primary responsibility of the Director of Purchasing is the supervision of the managers of Purchasing and Warehousing Services along with the overall responsibility for the efficient operation of those services.

In the Broward County School District, warehousing operations are maintained in three facilities: (Central Warehouse), maintenance (Maintenance Stockroom), and furniture (Furniture Warehouse). "B-Stock" and "C-Stock" are also warehoused. B-Stock are items previously purchased and used by a school which are in good condition that can be reassigned to another school. C-Stock are items not suitable for reassignment or that are surplus and will be disposed.

**EXHIBIT 11-1
CURRENT ORGANIZATIONAL STRUCTURE OF THE
DEPARTMENT OF PURCHASING AND WAREHOUSING**



Source: Broward County School District, Purchasing and Warehousing Department, 1998.

11.1 Purchasing

An efficient procurement system responds to the needs of its users. Purchasing is an essential function in the Broward County School District in that instructional materials, supplies, and equipment necessary for the delivery of educational services must be procured in the most efficient and cost-effective manner.

The budget for the Purchasing and Warehousing Department totaled \$4.57 million for the 1997-98 fiscal year and is estimated at \$4.60 million for the 1998-99 fiscal year. Exhibit 11-2 provides a summary of revenue and operating expenditures for the 1995-96 through 1998-99 fiscal years.

**EXHIBIT 11-2
SUMMARY OF REVENUE AND OPERATING
EXPENDITURES FOR PURCHASING, CENTRAL WAREHOUSE,
AND MAINTENANCE STOCKROOM**

OPERATING UNIT	ACTUAL DOLLARS 1995-96	ACTUAL DOLLARS 1996-97	ACTUAL DOLLARS 1997-98	BUDGETED DOLLARS 1998-99
Purchasing	\$1,396,678	\$1,432,164	\$1,578,963	\$1,588,682
Central Warehouse	1,784,008	1,783,766	1,762,195	1,761,871
Maintenance Stockroom	896,821	1,082,726	1,238,726	1,253,752
Total	\$4,077,507	\$4,298,656	\$4,579,884	\$4,604,305

Source: Broward County School District, Purchasing and Warehousing Department, 1998.

CURRENT SITUATION

The Department of Purchasing and Warehousing is divided into two separate areas for the purchasing and warehousing functions. Exhibit 11-3 illustrates the structure of the Department of Purchasing and Warehousing in more detail. As can be seen, reporting to the Director of Purchasing are a Manager of Maintenance Stockroom and Warehousing, a Supervisor of Purchasing, a Business Manager, a Purchasing Agent V, a Purchasing Agent Specialist, a Business Affairs Specialist, and a Supervisor III of Mail Services.

The Supervisor of Purchasing is responsible for overseeing a Bid Document Specialist, 11 Clerk Specialists, and one Clerk Typist. The Business Manager is not responsible for supervision of staff. The Purchasing Agent V is responsible for the supervision of five Purchasing Agents and three Buyers, for which each are assigned a Clerk Specialist (Bid Clerks). The Purchasing Agent Specialist has the responsibility for managing eight Clerk Specialist positions. The Supervisor of Mail Services is responsible for one Foreman and 11 mail services truck drivers.

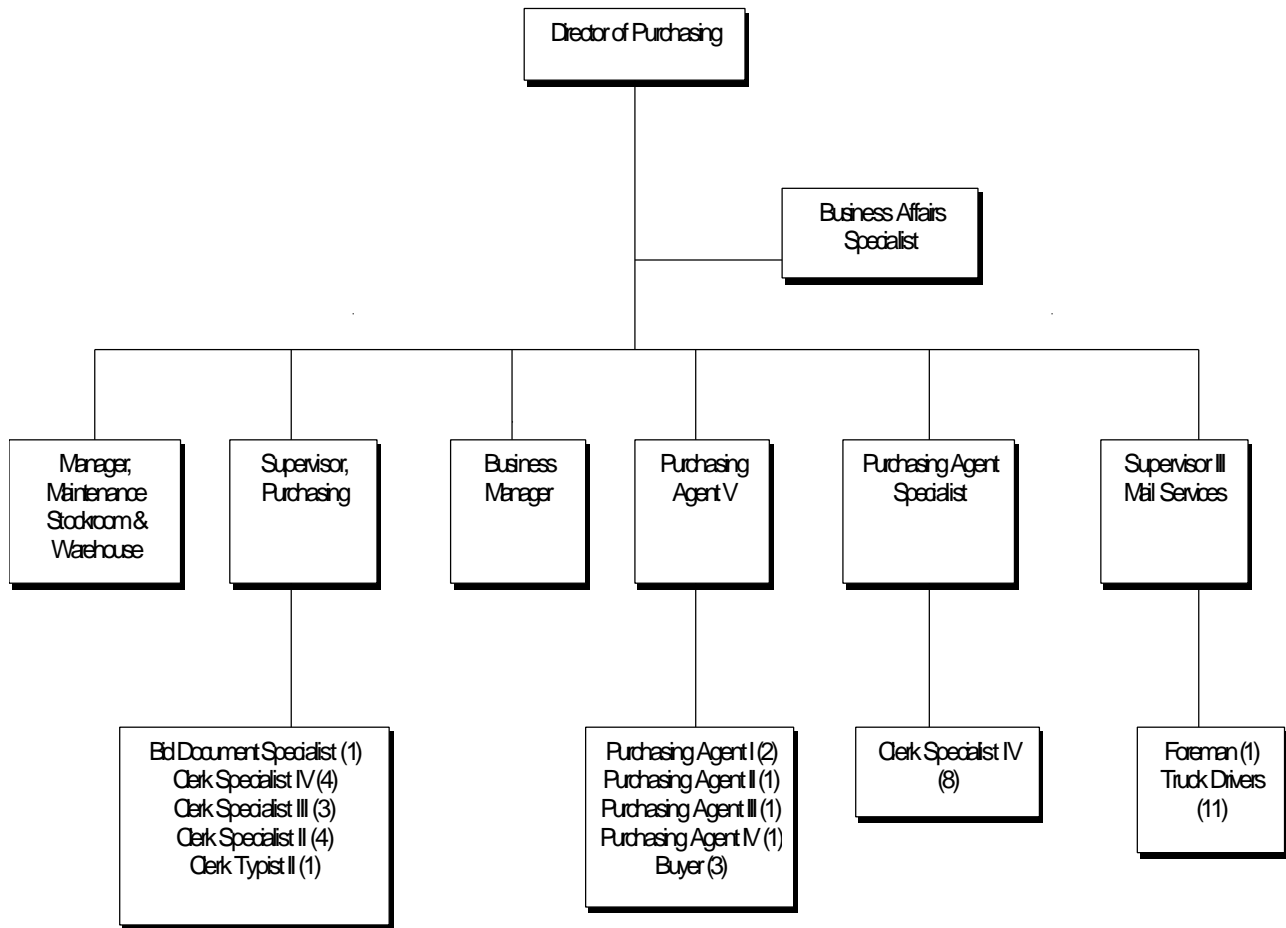
The Purchasing Agent V is responsible for supervising and coordinating professional purchasing activities of the Purchasing Agent and Buyers. The Purchasing Agent V monitors requisition processing according to commodity codes. The position oversees processing timelines and is responsible for resolving bottlenecks in the requisition and purchase order process. This agent ensures that purchasing agents and buyers consider best cost and quality as well as market trends when making purchases. The agent is responsible for buying more sophisticated, highly technical, and critical items. Further, the Purchasing Agent V provides technical guidance to school administrators who originate requests or the purchase of electronic and other specialized equipment and services.

Purchasing Agents supervised by the Purchasing Agent V conduct purchasing of materials, supplies, and equipment to support a myriad of diverse instructional and technical programs to include food service programs facilitated by the Purchasing Agent II and technical products facilitated by the Purchasing Agent IV. The Purchasing Agent IV positions perform duties similar in nature to the Purchasing Agent V. The Purchasing Agent IV focuses on price comparisons and technical specifications for technical products; performs the formal bid process in these areas; and works with committees of teachers, curriculum planners, principals, and department heads in formulating and upgrading specifications and evaluating bids related to technical products.

The Purchasing Agent Specialist is responsible for providing leadership for the eight Clerk Specialist IV/Purchasing Agent Assistants in the processing of bid and purchasing documents. The goal of the Purchasing Agent Specialist is to assure that there is standardization concerning all bid and purchase order documents.

Additional clerical support is provided by clerical staff of the Purchasing Department to facilitate all associated clerical functions in purchasing equipment, supplies, and services for the school district under the direction of the Supervisor of Purchasing. The Supervisor of Purchasing supervises one Bid Document Specialist responsible for

**EXHIBIT 11-3
DETAILED STRUCTURE OF THE DEPARTMENT OF PURCHASING AND WAREHOUSING**



Source: Broward County School District, Purchasing and Warehousing Department, 1998.

providing leadership of personnel involved in the creation and editing of bid documents to ensure that all bid documents are properly formatted and grammatically correct in accordance with standard purchasing practices. Also reporting to the Supervisor of Purchasing are four Clerk Specialists IV (Purchasing Agent Assistants) positions, three Clerk Specialists III, four Clerk Specialists II, and one Clerk Typist.

The Business Manager is responsible for supervising personnel involved in bookkeeping and budget activities and other financial transactions to assure budgets, internal accounts, accounts receivable, accounts payable, and payroll accounts are kept accurately and funds are spent properly in a responsible and accurate manner. No Purchasing Department personnel report directly to the Business Manager.

As will be seen in the sections which follow, the purchasing and warehousing functions in the Broward County School District are well operated and, for the most part, are efficient and effective. The recommendations provided below are suggested improvements to make the purchasing and warehousing operations even more efficient and effective.

FINDING

The Broward County School District's Purchasing Department is overstaffed in support positions. The primary area of overstaffing is the Clerk Specialist/Purchasing Agent Assistant position. The district uses a ratio in excess of one Clerk Specialist (Purchasing Agent Assistant or Bid Clerk) for each Purchasing Agent (Buyer) position. This ratio shows excessive clerical support when comparing the number of clerical staff to total staff in the Broward County School District and other school districts as shown in Exhibit 11-4.

RECOMMENDATION

Recommendation 11-1:

Reduce Clerk Specialists/Purchasing Agent Assistants by six positions to reduce administrative support and improve efficiencies.

The size of the administrative support staff should be reduced by six positions to achieve a lower ratio of Clerk Specialists/Purchasing Agent Assistants providing clerical support to Buyer positions (Exhibit 11-4). This reduction in staff will achieve a more efficient ratio, more effective utilization of staff resources, and reduced costs. A conservative reduction of six positions will reduce the percentage of clerical staff currently from 58.62 percent (see Exhibit 11-4) to a percentage of 47.83 percent (see Exhibit 11-5) which is closer to the average percentage of 48.67 percent (see Exhibit 11-4) for clerical staff in other school districts which MGT has reviewed. This recommended reduction will result in a ratio of .625 Clerk Specialists/Purchasing Agent Assistants for each Purchasing Agent/Buyer position in addition to the Bid Document Specialist Position and Clerk Typists which provide necessary clerical support --- a decrease from the original ratio of 1.0. The standard accepted practice is less for than 1.0 FTE or Clerk Specialist/Purchasing Agent Assistant for each Purchasing Agent/Buyer position, specifically, a desired range of approximately .5 to .75.

**EXHIBIT 11-4
COMPARISON OF PURCHASING DEPARTMENT STAFF
IN LARGE SCHOOL DISTRICTS**

SCHOOL DISTRICT	NUMBER OF SCHOOLS	NUMBER OF PROFESSIONAL STAFF	NUMBER OF CLERICAL STAFF	TOTAL STAFF	PERCENTAGE OF PROFESSIONAL STAFF	PERCENTAGE OF CLERICAL STAFF
Broward County	201	12*	17	29	41.38%	58.62%
Fairfax County	230	17	6	23	73.91%	26.09%
Prince George's County	180	7	4	11	63.64%	36.36%
Hillsborough County	181	4	6	10	40.00%	60.00%
San Diego County	204	14	11	25	56.00%	44.00%
Dallas Independent School District	200	4	11	15	26.67%	73.33%
Average for Selected School Districts	204	9.67	9.17	18.83	51.33%	48.67%

Source: Created by MGT, 1998.

*The Business Manager and Supervisor of Purchasing are included as professional staff.

**EXHIBIT 11-5
COMPARISON OF PURCHASING DEPARTMENT STAFF
IN LARGE SCHOOL DISTRICTS WITH REDUCED
CLERICAL SUPPORT IN THE BROWARD COUNTY SCHOOL DISTRICT**

SCHOOL DISTRICT	NUMBER OF CLERICAL STAFF USING A REDUCTION BY SIX POSITIONS FOR BROWARD COUNTY	TOTAL STAFF WITH REDUCTION FOR BROWARD COUNTY	PERCENTAGE OF PROFESSIONAL STAFF	PERCENTAGE OF CLERICAL STAFF
Broward County	11	23	52.17%	47.83%
Fairfax County	6	23	73.91%	26.09%
Prince George's County	4	11	63.64%	36.36%
Hillsborough County	6	10	44.00%	
San Diego County	11	25	56.00%	44.00
Dallas Independent School District	11	15	26.67%	73.33%
Original Average for Selected School Districts From Exhibit Above	9.17	18.83	51.33%	48.67%

Source: Created by MGT, 1998.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Associate Superintendent for Financial Management and Support Services and Director of Purchasing and Warehousing should recommend to the Superintendent that six Clerk Specialist/Purchasing Agent Assistant positions be eliminated. May 1999

2. The Superintendent should submit the request to the Board for approval. May 1999

3. Following Board approval, the six Clerk Specialist/Purchasing Agent Assistant positions should be eliminated. July 1999

4. The Director of Purchasing should reassign roles and responsibilities among remaining Clerk Specialists/Purchasing Agent Assistants. Summer 1999

5. The Associate Superintendent for Financial Management and Support Services and Director of Purchasing should monitor Purchasing Department staff roles and responsibilities to determine if further reductions can be made. 1999-2000
School Year
Ongoing

FISCAL IMPACT

The annual savings realized will be approximately \$161,000. The calculation is based on salary and benefits using the district's average base salary of \$20,200 (as provided in current budget information) and benefits at 33 percent for six Clerk Specialist II positions. This reduction should commence in the 1999-2000 school year.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Eliminate Six Clerk Specialists/Purchasing Agent Assistants	\$161,000	\$161,000	\$161,000	\$161,000	\$161,000

FINDING

The Broward County Vendor List of approximately 14,000 vendors is maintained on-line as a component of the automated purchasing system. The district currently has no system in place to update its vendor list. MGT reviewed a sample of 26 vendors retained in the Vendor List to determine the accuracy of the vendor profile information and to determine if the vendor list is current. Based on our analyses, reviews of vendors and commodity codes contained in the vendor list, and contacts with vendors, we determined that the 10 of the 26 vendors could not be located through the information provided in the vendor profile information representing a 38 percent error rate. One company representative stated that there had been no contract with the Broward County School District during the past two years.

Exhibit 11-6 provides examples of inaccurate information in the vendor profiles.

**EXHIBIT 11-6
LIST OF VENDOR PROFILES NEEDING UPDATES**

VENDOR NUMBER	VENDOR NAME	BRIEF DESCRIPTION OF SERVICES	TYPE OF INACCURATE INFORMATION
35222	C & S Distributors of Am.	Roofing, Cables, Coolers	Incomplete telephone number
55643	D & S Auto Color, Inc.	Abrasives, Sandblasting	Incorrect telephone number
75860	Farrey's Wholesale	Doors, Frames, Oil, Bins	Incorrect telephone number
116630	JN Equipment	Filters, Air Gauges	Non-working telephone number
167160	ODDO Publishing, Inc.	Books, Magazines	Non-working telephone number
182770	Quadram Co.	Job Entry Devices	Missing telephone number
220355	T & L Fasteners	Bolts, Metal, Cotter Pins	Non-working telephone number
236640	Wadsworth Inc. Corp.	Books, Magazines	Non-working telephone number
248420	Xerox Corporation	Chemicals, Supplies	Incorrect telephone number
248960	Young Oil Company	Butane, Propane, Coal	Missing telephone number

Source: Created by MGT, 1998.

RECOMMENDATION

Recommendation 11-2:

Update and maintain an accurate vendor list to reflect current vendors and contact information for those who conduct business with the school district.

Sample items from the vendor list which was provided to us for analysis during our on-site visit were tested for accuracy and to ensure that vendors listed were current. Our efforts to contact vendors using this vendor list resulted in our inability to contact 10 (out of 26) vendors who were no longer in business, had a changed telephone number, or had a telephone number which was incomplete in the vendor profile. We concluded that the vendor list provided to MGT from the database as the official and current listing is, in fact, outdated. The Purchasing Department will increase its efficiency and effectiveness by maintaining valid contact information in vendor files.

IMPLEMENTATION STRATEGIES AND TIMELINES

1. The Director of Purchasing should establish procedures to update the vendor list for review by the Associate Superintendent for Financial Management and Support Services. May 1999
2. The Director of Purchasing should update the vendor list and supporting documentation. Summer 1999
3. The Purchasing Agent V should implement an administrative procedure and establish clear goals to maintain current vendor information. Summer 1999

4. The vendor list should be updated regularly on a schedule determined by the district (Note: MGT recommends a annual update process). Ongoing

FISCAL IMPACT

This recommendation can be accomplished with existing resources. If implemented, the purchasing operation will be more efficient and effective.

FINDING

The Broward County School District uses a fully automated on-line requisition/purchase order system. The fully automated on-line purchasing system was implemented in January 1992 and is considered to be user-friendly. For example, the system provides a daily report for monitoring outstanding purchase orders available for review by the Purchasing Agent V and staff. Also, the system is reported to be easy to use by staff and management. Evidence in support of the efficiency and user-friendliness of the on-line purchasing system is based on MGT observations of system utilization during the on-site review, interviews with Purchasing Department staff, and review of documentation provided by the Director of Purchasing regarding the on-line purchasing system. The Director of Purchasing indicated that he receives requests from other Purchasing Departments for information on the system operations and shares information about the system with purchasing colleagues on a routine basis.

The purchasing process consists of four major steps:

- Schools/departments/centers enter a requisition on-line based on user needs.
- The requisition is approved by appropriate administrator.
- The approved on-line requisition is automatically forwarded to the appropriate buying module's query listing of requisitions.
- The buyer reviews requisitions to determine the purchasing procedure for each requisition based on Board Policy 3320. Thresholds and bid requirements are outlined below. Exhibit 11-8 provides a summary of the process by threshold amount level, and also compares the district's standards to state and federal threshold levels. A narrative description of Policy 3320 (as contained in Exhibit 11-7) is provided below.
 - Requisitions less than \$5,000 and not available from a contract award do not require any quotations or bids to process into a purchase order.
 - Requisitions greater than \$5,000 and less than \$15,000, and not available from a contract award, require that at least three vendors be contacted for written quotations. At least two M/WBE vendors should be contacted from a list of vendors offering the

product or service. The determination will be based upon the lowest quotation received meeting all specifications, terms, and conditions. This determination will allow the Purchasing Department to process the requisition into a purchase order to the vendor with the lowest quotation.

- Requisitions greater than \$15,000, and not available from a contract award, require the Purchasing Department to prepare a formal bid or RFP. The recommended award is based on the vendor complying with all specifications, terms, and conditions of the bid or RFP. The recommendation is presented to the School Board for approval. Board approval allows the Purchasing Department to process the requisition into a purchase order.

**EXHIBIT 11-7
REQUISITION/PURCHASE ORDER PROCESS
AS COMPARED WITH STATE AND FEDERAL REGULATIONS**

ACTION REQUIRED BY PURCHASING AGENT/BUYER	DISTRICT THRESHOLD	STATE THRESHOLD	FEDERAL THRESHOLD
Determines not available from contract award, no bid or competitive quote required and price is reasonable	not in excess of \$5,000	not in excess of \$5,000	not in excess of \$2,500
Determines not available from contract award, solicits at least three written quotations, contacts at least two M/WBE vendors, and determines best prices and quality	in excess of \$5,000 and not in excess of \$15,000	in excess of \$5,000 and not in excess of \$15,000	in excess of \$2,500 and not in excess of \$25,000
Determines not available from contract award, prepares formal bid or RFP, awarded to vendor meeting all specifications, and selected vendor submitted to School Board for approval	in excess of \$15,000	in excess of \$15,000	in excess of \$25,000

Source: Created by MGT from data provided by the Department of Purchasing and Warehousing and Board Policy 3320, 1998.

COMMENDATION

The Broward County School District is commended for implementing a fully automated, on-line, and user-friendly requisition and purchase order system.

FINDING

Exhibit 11-8 provides the major steps in the flow of a requisition/purchase order.

**EXHIBIT 11-8
REQUISITION/PURCHASE ORDER PROCESS
FOR THE ON-LINE PURCHASING SYSTEM**

STEPS IN THE PURCHASING PROCESS	PROCESS ACTION STEP
STEP 1 - Requisition Organization	Schools/departments/centers enter a requisition on-line based on user needs
STEP 2 - Reviewed in Accounting Budgeting	Requisition is approved by appropriate administrator
STEP 3 – Administrator Approval	Approved on-line requisition is automatically forwarded to the appropriate buying module's query listing of requisitions
STEP 4 – Arrives in Purchasing	Purchasing Agent/buyer reviews requisitions to determine purchasing procedure for each requisition based on Policy 3320
STEP 5 – Approved in Accounting/Budgeting	Requisition is processed and converted into a purchase order
STEP 6 – Purchase Order Created	Five-part copies are distributed as follows: 1 – Vendor 2 – Accounts Payable 3 – Originating Location 4 – Receiving Location 5 – Property and Inventory

Source: Department of Purchasing and Warehousing, 1998.

The Purchasing Department processed 58,395 purchase orders during the 1997-98 school year representing a one (1) percent increase in purchase orders over the prior year. Exhibit 11-9 provides a schedule of purchase orders and percent change for the past two years which correlates the increase of purchase orders to the continued growth in the district. Exhibit 11-10 shows the number of purchase order lines and percent changes for the past three years. Exhibit 11-11 provides the value of purchase order lines processed and the percentage changes for the past three years.

**EXHIBIT 11-9
NUMBER OF PURCHASE ORDERS
AND PERCENT CHANGES
1996-97 AND 1997-98**

PURCHASE ORDERS		PERCENTAGE INCREASE OR (DECREASE)
1996-1997	1997-1998	
57,812	58,395	1%

Source: Broward County School District, Purchasing and Supply Department, 1998.

**EXHIBIT 11-10
NUMBER OF PURCHASE ORDER LINES *
AND PERCENT CHANGES FOR
THREE YEARS**

CATEGORY	1995-1996	1996-1997	1997-1998
Purchase Order Lines	71,927	82,254	79,725
Percent Change		11.45%	(2.0%)

Source: Broward County School District, Purchasing and Supply Department, 1998.

*Note: Multiple items may be ordered on a single purchase order -- thus, purchase order lines provide a more accurate description of workload for some analyses.

**EXHIBIT 11-11
VALUE OF PURCHASE ORDER LINES
AND PERCENT CHANGES FOR
THREE YEARS**

CATEGORY	1995-1996	1996-1997	1997-1998
Value of Purchase Order Lines	\$317 million	\$280 million	\$450 million
Percent Change		(11.0%)	60.0%

Source: Broward County School District, Purchasing and Supply Department, 1998.

Despite the conservative increase in the volume of purchase orders during the past year and the use of a fully automated on-line requisition/purchase order system, improvements are needed for more timely processing of requisitions. Our analysis of documentation and survey results found a need for some improvements in the purchasing function.

Delays in the processing of purchase orders were evident from several sources:

- According to the survey conducted by MGT, 39 percent of administrators surveyed indicate there is a need for some or major improvement in the purchasing process. This response was compared with results of other districts surveyed previously by MGT which found that 33 percent of the respondents considered improvements to be necessary. Also, 51 percent of Broward teachers in the district reported that major bottlenecks exist in many administrative processes causing unnecessary time delays as compared with 48 percent in other districts who reported the same.

- The diagnostic review by MGT found that small businesses are not always timely paid; however, payment processing times are improving. While delays in the processing of purchase orders may sometimes be caused in areas outside the Purchasing Department, for example, pending approval in the Accounting/Budgeting Department, the delays adversely impact the total processing time from requisition to purchase orders for which the Purchasing Department is ultimately responsible.
- A review of a sample of requisition/purchase orders found a substantial delay in processing for several items (these are described below).

Previously, in Exhibit 11-8, the steps in the purchasing requisition process were illustrated. Exhibit 11-12 illustrates the range in processing time for a random sample of 24 requisition/purchase orders. A representation of the sample test population using minimum and maximum number of days of processing was selected to represent findings of the sample test. The minimum length of time was one day from the time the requisition was originated until the purchase order was created. The maximum length of time was 22 days from origination to creation. Four of the 24 items were processed during a period in excess of ten days. When considering the 24 sample test items, the average length of time for processing was found to be eight days. The major reason found for the processing delays was time used for the approval process. This delay in the purchasing process has adversely impacted timely payments to vendors.

**EXHIBIT 11-12
REQUISITION/PURCHASE ORDER PROCESSING TIME
FOR MINIMUM AND MAXIMUM SAMPLE
(OUT OF 24 TESTED)
NOVEMBER 1998**

STEPS IN PROCESS	DAYS IN PROCESS FOR THE MINIMUM AND MAXIMUM SAMPLES (OUT OF 24)	
	MINIMUM	MAXIMUM
Requisition Origination	--	--
Reviewed in Accounting/Budgeting	0	0
Administrator Approval	0	2
Arrives in Purchasing	0	0
Approved in Accounting/Budgeting	0	20
Purchase Order Created	1	0
Total Days to Process Purchase Order	1	22

Source: Created by MGT from data obtained from Department of Purchasing and Warehousing, 1998.

Exhibit 11-12 shows a 20-day lag for a sample item pending approval in accounting/budgeting. This represents the maximum days in a single processing step and where the processing delay occurred. Buyers are required to note the reason for delays in the daily on-line report which is reviewed by the Purchasing Agent V for timeliness. MGT found reports (which are designed in the system to provide information regarding the significant reason for processing delays) to contain missing information

from buyers which caused these reports to be less effective as management controls. Delays were due to the department head or principal not providing timely approval.

A review of sample requisitions outstanding, randomly selected from reports, found that three of 15 items pending for more than one week were without comment as to the reason for the pending status. Exhibit 11-13 illustrates the number of days the three items were pending without comment. The Purchasing Agent V indicated a period of one week was considered to be a reasonable length of time for pending status; beyond one week causes reason for concern, because requisitions in the buyer's queue are expected to be processed within a time period of less than one week or to contain a documented reason for delay. A timely turnaround is also defined by MGT as five working days to process requisitions into purchase order upon receipt into the buyer's queue. The standard of measure used by the district to define timely, turnaround for processing requisitions into purchase orders upon receipt into the buyer's queue is two working days, not to exceed a five-day turnaround. Although state of Florida guidelines followed by the district (Section 230.22, F.S.) and the School Board Policies (Policy 3320) do not mandate a turnaround time for the processing of requisition, a generally accepted purchasing procedure used in the industry allows for a turnaround within a week

**EXHIBIT 11-13
NUMBER OF DAYS OUTSTANDING FOR
PENDING REQUISITIONS OF SAMPLED ITEMS
NOVEMBER 1998**

DAYS OUTSTANDING		
SAMPLE 1	SAMPLE 2	SAMPLE 3
9	14	17

Source: Created by MGT from data available from Department of Purchasing and Warehousing, 1998.

RECOMMENDATION

Recommendation 11-3:

Develop a plan to streamline the requisition/purchase order process to include documentation of reasons for delays to facilitate corrective action.

The requisition/purchase order process should be streamlined to reduce the amount of time necessary to process requisitions and purchase orders. The Purchasing Director should develop a plan to be incorporated into criteria for monitoring the requisition/purchase order system. The Broward County School District should ensure that timesaving reductions are implemented through monitoring to achieve the full benefits of the on-line integrated requisition/purchase order system. The monitoring and documentation of reasons for each delay should allow for corrective action which will also result in more timely vendor payments.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Purchasing Agent V should review reports generated by the automated integrated requisition/purchase order system on a regular basis and initiate steps for incorporation into the monitoring process to ensure greater efficiency through more timely processing of requisitions and purchase orders. May 1999

2. The Purchasing Agent V should work with appropriate staff to ensure that requisitions and purchase orders are processed in a timely manner and that documentation is provided for delayed processing. Corrective action should be taken to ensure maximum efficiency and customer service. Summer 1999
Ongoing

FISCAL IMPACT

The recommendation can be implemented within existing resources. If implemented, purchasing operations will be more efficient and effective.

FINDING

Exhibit 11-14 shows the bid protest rate for the two years in the Broward County School District. There are currently 14,096 vendors registered with the Purchasing Department. Vendors who submit bids offering goods and services to the Broward County School District may file complaints in the event bidding practices appear to be unfair. During our review, it was determined that the number of bids prepared per year average about 400. Using this average for bids prepared, and comparing this number with the number of protests filed during the 1996-97 and 1997-98 school years, the bid protest rate is 9.0 percent and 10.75 percent, respectively, for the two years as shown in Exhibit 11-14.

**EXHIBIT 11-14
BID PROTEST RATE
1996-97 AND 1997-98 SCHOOL YEARS**

SCHOOL YEAR	AVERAGE NUMBER OF BIDS PREPARED PER YEAR	NUMBER OF BID PROTESTS FILED	PERCENTAGE OF BIDS PROTESTED BY VENDORS
1996-97	400	36	9.0%
1997-98	400	43	10.75%

Source: Broward County School District, Purchasing Department, 1998.

As part of our analysis, we reviewed bid protests filed by vendors. We found that the vast majority of bid protests filed are resolved by the Director of Purchasing. Protests not resolved by the Director of Purchasing appear as an agenda item before the Broward County School Board for resolution by either accepting or rejecting the protest. Exhibit 11-15 shows the number of bid protests filed during the past two years and percentages resolved by the director and those sent to the School Board.

**EXHIBIT 11-15
 BID PROTEST RESOLUTION STATISTICS
 1996-97 AND 1997-98**

SCHOOL YEAR	TOTAL NUMBER OF PROTESTS FILED	PERCENTAGE OF PROTESTS RESOLVED BY DIRECTOR	PERCENTAGE OF PROTESTS REJECTED BY THE BOARD	PERCENTAGE OF PROTESTS ACCEPTED BY THE BOARD
1996-97	36	83%	14%	3%
1997-98	43	81%	12%	7%

Source: Broward County School District, Purchasing Department, 1998.

The number of bid protests filed with Broward County School District was found to be higher than those in other districts where comparison data where available, including the Duval, Palm Beach, and Brevard County School Districts. Bid protests for these school districts were minimal. For example, Duval County received one and zero bid protests for the 1996-97 and 1997-98 school years, respectively. Brevard County received no bid protests for the same period. Palm Beach County received two bid protest during 1997-98, both of which were resolved by the Purchasing Director.

Reasons for vendors filing bid protests in the Broward County School District included alleged controlled bid procedures, untimely receipt of bids, and inconsistencies with specifications. Other common reasons for bid protests include lack of understanding of reason for bid rejections, the belief that a protest will result in a reversal of decisions, and the opportunity to have the decision reviewed for possible re-evaluation. In addition, the Broward County School District does not currently require protest bonds.

RECOMMENDATION:

Recommendation 11-4:

Increase efforts to minimize the number of bid protests through improved vendor relations regarding the bid process.

Improved vendor relations through the use of meetings between the Purchasing Department staff and vendors to review reasons for bid awards decisions will decrease the number of formal protests being filed. Such meetings will provide an opportunity for explanation as to why the disgruntled vendor was not awarded the bid prior to formal protest procedures being filed and should also allow for corrective action in the event of errors being discovered in the bid award process. The use of protest bonds could also reduce the number of bid protests, especially frivolous protests, since the vendor would be required to have a bond filed to accompany a protest which would be retained by the district in the event the protest was found not to be valid.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Purchasing and Warehousing should incorporate into the purchasing procedures provisions for meetings between purchasing staff and vendors to review bid awards and address reasons for protests. May 1999

2. The Director of Purchasing and Warehousing should recommend to the Board that procedures be adopted and incorporated into the purchasing process to require protest bonds of vendors who protest. Frivolous protests will result in bond proceeds being retained by the district. June 1999
3. The Board should accept the recommendation to incorporate protest bonds. August 1999
4. Vendors should be notified of the requirement to obtain protest bonds when filing protests and encouraged to attend a meeting with Purchasing staff to achieve an understanding of the circumstances surrounding the bid award prior to considering formal protest filings. Fall 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The Broward County School Board Policies and Procedures Manual encourages minority vendor participation in the bidding process. The Broward County School District awarded 258 bids between July 1, 1993 through July 30, 1998 to vendors identified as minority and women-owned business enterprises (M/WBE). The objective of minority vendor participation is to ensure equal opportunities within the business community for minority or women-owned business enterprises. Minority vendors are grouped by ethnicity and include African American, Hispanic, White Female, and Other.

Exhibit 11-16 provides the percentages for participation of selected comparison school districts (where data were available) by ethnicity of vendor. As can be seen, the Broward County School District has demonstrated a high level of participation by minority vendors.

**EXHIBIT 11-16
PERCENTAGE OF M/WBE BIDS
FOR THE PAST TWO YEARS**

SCHOOL DISTRICT	AFRICAN AMERICAN	HISPANIC	WHITE FEMALE	OTHER	TOTAL
Broward	12.25%	11.58%	1.37%	8.17%	33.37%
Miami-Dade	15.85%	37.68%	7.00%	0%	60.52%
Palm Beach	0%	0.47%	0.62%	0%	1.09%
State of Florida	2.86%	0.27%	0.79%	0.34%	4.26%
Fairfax County Public Schools (VA)	0.6%	1.5%	1.6%	2.3%	6.0%

Source: Created by MGT from data supplied by various school districts, 1999.

COMMENDATION

The Broward County School District is commended for exemplary efforts to include minority business participation in the bidding and award process.

FINDING

The Broward County School District is currently pursuing the implementation of procurement cards. The goals identified by the district for the use of procurement cards are to:

- reduce the cost of processing small dollar purchases;
- increase the efficiency of the district's purchasing activities;
- eliminate the need for the support fund currently being used by schools for small-dollar purchases; and
- streamline the vendor payment process.

The district is in the initial stages of exploring the feasibility of card use and establishing procedures for the use of procurement cards. Benchmarks currently used by the district include the state of Florida contracts, the Miami-Dade County School District, and the Volusia County School District. The following progress has been made to date:

- An agenda item was presented to the School Board to approve utilization of the Volusia County School District procurement card bid by the Broward County School District. (Note: The intent was to link the RFP and use the Volusia County School District procurement card provider in the Broward County School District procurement card program).
- The School Board of Broward County raised questions concerning the merits of the program.
- An executive summary was being prepared to explain the program goals and merits.

Steps to implement the procurement card program, as outlined by the district, include:

- provide an Executive Summary of the program to the School Board and seek approval to utilize the Volusia County bid;
- create an implementation team;
- develop an implementation plan;
- establish policies and procedures;
- enroll suppliers;

- create training materials;
- establish program parameters with the bank;
- begin pilot program;
- evaluate results; and
- expedite program implementation.

A list of 38 vendors have been compiled by the Purchasing Department to identify companies who have agreed to do business with the Broward County School District using a purchasing card. Cost savings estimates have been made to project quantifiable savings. For example, a major supplier, Office Depot, has offered the Board a 53 percent discount instead of the current 52 percent discount which represents an additional one percent discount for procurement card purchases.

Exhibit 11-17 provides a list of vendors who have agreed to use of a purchasing card and who have conducted business with the district during the 1997-98 school year. The amounts paid to vendors is used to estimate cost savings if a procurement card system is implemented.

The advantages of procurement card use experienced by other school districts, governmental agencies, and private sector operations include the following:

- more timely payments to vendors;
- workload reductions;
- paper reductions;
- reduced expenses resulting from automated payments;
- additional discounts offered by vendors;
- decreased vendor calls and inquiries;
- improved customer satisfaction;
- enhanced documentation and audit trail;
- streamlined procurement processes;
- implementation of best practices;
- enhanced financial accountability;
- increased management controls; and
- enhanced internal controls.

RECOMMENDATION

Recommendation 11-5:

Fully implement a procurement card program.

School district officials have met to consider implementation of a procurement credit card program and have pursued a pilot program, the results of which were not available during the review. Implementation of the procurement card should eliminate the need for confirming purchase orders as well as reducing the number of purchase orders under certain dollar limits.

**EXHIBIT 11-17
EXAMPLE OF ESTIMATED COST SAVINGS
USING THE PROCUREMENT CARD**

NAME OF VENDOR	PAYMENTS TO VENDOR FOR PURCHASES DURING 1997-98	TOTAL ESTIMATED PAYMENTS USING PROCUREMENT CARD	ESTIMATED SAVINGS
Ace Office Supply	\$82,636	\$81,810	\$826
Ace Educational Supply	\$470,322	\$465,619	\$4,703
AFP Industries	\$889,758	\$880,860	\$8,898
Apricot Office Supply	\$895,377	\$886,423	\$8,954
Beckley Cardy	\$182,529	\$180,704	\$1,825
Blumberg Office Supply	\$298,404	\$295,420	\$2,984
Corporate Express of Florida	\$810	\$802	\$8
Data Control	\$635	\$629	\$6
Florida A&M Tape & Pack	\$2,774	\$2,746	\$28
Gaylord Brothers	\$27,521	\$27,246	\$275
Global Associates	\$232,589	\$230,263	\$2,326
K-Data Products	\$54,992	\$54,442	\$550
LAMFIS Inc.	\$787,182	\$779,310	\$7,872
Martin Associates	\$1,194	\$1,182	\$12
Merid	\$379,554	\$375,758	\$3,796
Nelson Adams	\$11,310	\$11,197	\$113
Office Depot	\$199,955	\$197,955	\$2,000
Prospect Hinson Office	\$1,194	\$1,182	\$12
School Specialty	\$173,550	\$171,815	\$1,735
Windtree Enterprises	\$65,234	\$65,582	(\$348)
Boises Cascade Office Products	\$279	\$276	\$3
Summit Learning	\$12,363	\$12,239	\$124
Audio Visual Solutions	\$30,955	\$30,645	\$310
Early School Materials	\$198	\$196	\$2
Lakeshore Learning	\$174,304	\$172,561	\$1,743
Insta-Learn By Step	\$778	\$770	\$8
Central Audio Visual	\$1753,01	\$1,735,481	\$17,530
Lingui Systems	\$67,237	\$66,565	\$672
Didax	\$2,536	\$2,511	\$25
TOTAL	\$6,799,181	\$6,731,189	\$67,992

Source: Created by MGT, 1998.

School districts issue and use procurement cards as credit cards for school district employees. Certain spending limits and purchase restrictions should be established for use of the card. Periodic encumbrances could be made for budgetary control. Payments for procurement card expenditures should be paid monthly to the issuing bank in a consolidated payment. To assure compliance with interrelated procedures, such as fixed asset accountability, appropriate personnel should review purchases. The use of procurement cards should eliminate the labor intensive requisition to purchase order process, and reduce the volume of payments processed annually. Ultimately, each procurement card will be issued to an individual and accountability will be maintained at the individual level by the supervisor with overall monitoring by the Purchasing Department.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|------------------------------|
| 1. The Associate Superintendent of Financial Management and Support Services should aggressively pursue implementation of the procurement card program and coordinate with staff from Purchasing, Finance, Accounts Payable, Accounting, and other pertinent departments in their efforts to implement a procurement card system. | May 1999 |
| 2. Appropriate staff should visit and interview other procurement card users. | Summer 1999 |
| 3. Staff should review card capabilities with major providers such as American Express, Visa, and MasterCard. | Summer 1999 |
| 4. Staff, working through the Purchasing Department, should obtain approval to move forward with a Request for Proposals. | August 1999 |
| 5. A procurement card vendor should be selected. | October 1999 |
| 6. The Director of Finance should identify the finance staff to be assigned to manage the card program. | October 1999 |
| 7. Staff should conduct a needs assessment to determine which employees will be issued cards. | Fall 1999 |
| 8. Appropriate finance staff should expand pilots of the program with schools and departments as appropriate. | Fall 1999 |
| 9. Training should be provided on the use of procurement cards. | September -
December 1999 |
| 10. The procurement card should be fully implemented. | January 2000 |

FISCAL IMPACT

The benefits resulting from the use of a procurement card system, including greater staff resource utilization, are difficult to quantify in terms of cost savings. Cost savings resulting from the amounts of time saved are considered to be significant, as reported by other large schools districts (Fairfax, Duval, Brevard) and will result in more effective utilization of resources. Reported benefits include improved vendor relations, improved payment turnaround time to vendors, expedience in obtaining procurements, employee empowerment, reduced work flow, decreased number of purchase orders, decreased processing time, decreased number of checks issued from accounts payable, improved accountability for purchases, and improved employee and employer relations. While efficiencies are expected from the use of the purchasing card, other school districts (including Duval and Brevard Counties) have not reported position cuts as a result of purchasing card implementation.

An estimated savings expected from current vendors offering to accept procurement card purchases is estimated at \$68,000 per year. Since 1999-2000 will be the first year of implementation, only one-half of the savings is being projected.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2002-04
Implement Procurement Card Program	\$34,000	\$68,000	\$68,000	\$68,000	\$68,000

FINDING

The Broward County School District benefits from collaborative purchasing efforts with outside agencies and other governmental units. The Purchasing Department regularly monitors external contracts for competitive pricing opportunities for the school district. The staff participates in local purchasing cooperatives in an effort to identify best purchasing opportunities. Such associations provide for more efficient bidding in terms of operational savings as well as savings due to better pricing. Purchasing staff also regularly link with bids of other governmental units instead of developing new bids for items currently on valid bid lists. These partnerships with other agencies reduce the amount of time spent on the solicitation process.

Exhibit 11-18 provides examples of purchase partnering with other agencies external to the Broward County School District. In addition to the collaborate efforts detailed in Exhibit 11-18, one of the most potentially beneficial groups to the Broward County School District is the National Association of Purchasing Management (NAPM). In 1997, the Director of Purchasing was invited to become a member of a select group of purchasing executives to participate in testing and implementing the National Association of Purchasing Management's monthly survey of economic activity in the non-manufacturing sector. This survey provides national benchmarking of the economy based upon purchasing managers' input. Specifically, the survey examines the economy and economic indicators nationwide. Other affiliate groups include:

- Council of Great City Schools
- Florida Regional Minority Purchasing Council, Inc.
- Governmental Purchasing Association of Southeast Florida, Inc.
- National Institute of Governmental Purchasing

**EXHIBIT 11-18
EXAMPLES OF PURCHASE PARTNERING AND
COLLABORATIVE EFFORTS WITH EXTERNAL UNITS
NOVEMBER 1998**

COLLABORATIVE EFFORT	PARTNERS/COLLABORATORS	EFFICIENCY OR SAVINGS
Contracts: <ul style="list-style-type: none"> ■ Concrete Core Cutting Drilling ■ Playground and Park Equipment ■ Power Operated Filing System 	Miami-Dade County	Savings to school district of labor time for preparation and evaluation of bids
Purchase of Miscellaneous Signs	Collier County	Savings to school district of labor time for preparation and evaluation of bids
Furniture Contracts	Broward County Government, Duval County Schools, Lee County Schools, Martin County Schools, Miami-Dade County Schools, Palm Beach County, Pinellas County Schools, Palm Beach County Schools	Contract savings of labor time for preparation and evaluation of bids
Welding supplies	Broward County Government	Volume purchases by Broward County
Prevention, maintenance, service and repairs of irrigation pumping stations	Broward County Government	Volume purchases by Broward County
Petroleum products – oils, lubes and greases	Broward County Government	Volume purchases by Broward County
Janitorial tools, supplies and equipment	School Board of Miami-Dade County	Volume purchases by the Miami-Dade County Schools
Welding gases	School Board of Miami-Dade County	Volume purchases by the Miami-Dade County Schools
Student lockers	Broward County School District Office of Procurement City of Jacksonville	Volume purchases by the City of Jacksonville
State Contracts for Blank Computer Diskettes	State of Florida	School district staff time savings and volume purchases

Source: Broward County School District, Purchasing Department, 1998.

- Florida Association of Public Purchasing Officials

Participants in these groups share similar procurement activities and include a broad array of governmental entities such as:

- Broward County School District
- Palm Beach County Public Schools
- Miami-Dade County Government
- Broward County Government
- City of Ft. Lauderdale
- Volusia County Public Schools
- Lee County School District
- Duval County Public Schools
- Pinellas County Public Schools
- Palm Beach County Government
- Martin County Public Schools
- Department of Administrative Services State Purchasing (Florida)

Although preliminary data on the advantages of partnerships have not been collected at this time, experiences in other districts have found that dollars savings can result.

COMMENDATION

Purchasing staff are commended for pursuing collaborative and partnership opportunities with external agencies.

The Director of Purchasing should continue to participate in the NAPM Purchasing Executives Group to follow through on their original purpose and goals to develop professional contracts, improve productivity through better contracts, and add value to the school district. The purchasing services staff should be encouraged to participate in such activities at various levels within their respective organizations.

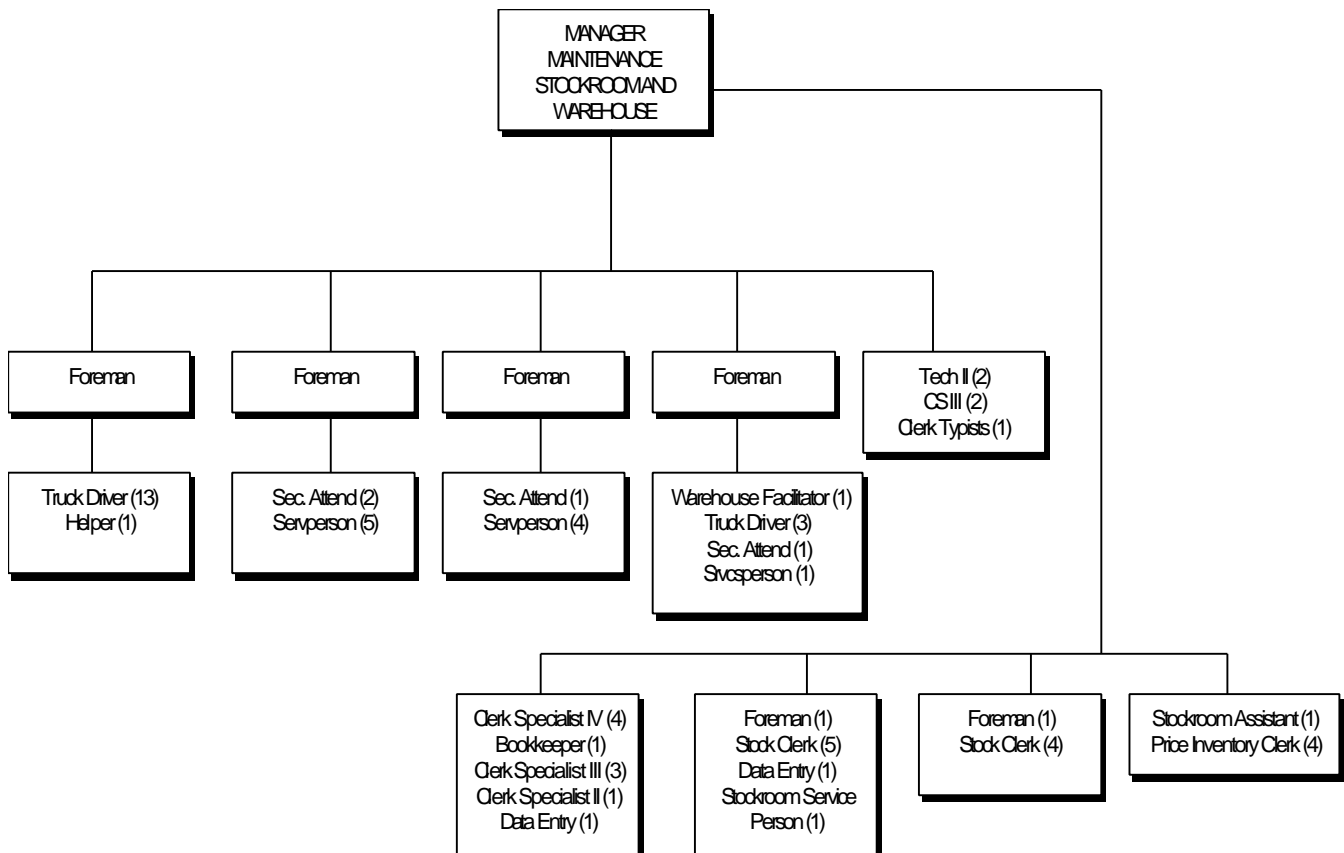
11.2 Warehousing

The mission of Maintenance Stockroom and Warehouse is to provide professional direct and non-direct support to all schools and offices in the most efficient manner, at the least cost, and in compliance with Board policies and procedures. Timely, appropriate supplies are an important element in a school district's operation. An efficient warehousing, storage, and delivery mechanism is imperative to ensure effective services at optimum costs.

CURRENT SITUATION

The Broward County School District's Maintenance Stockroom and Warehouse staff perform several primary functions including inventory receipt; inventory control; and distribution of supplies, materials, and equipment. Exhibit 11-19 illustrates the current organizational structure of Warehousing and Supply Services.

**EXHIBIT 11-19
ORGANIZATIONAL CHART OF MAINTENANCE STOCKROOM AND WAREHOUSE**



Source: Broward County School District, Warehousing and Supply Services, 1998.

The Manager of the Maintenance Stockroom and Warehouse oversees the warehousing functions including six foremen, two technicians, ten clerk specialists, one clerk typist, one bookkeeper, two data entry operators, one stockroom assistant, and one stockroom service person. The six foremen have reporting responsibility for 16 truck drivers, one helper, four section attendants, 10 warehouse service persons, a warehouse facilitator, and nine stock clerks. The stockroom assistant supervises four price inventory clerks.

For 1997-98, the central warehouse budget exceeded \$1.76 million and is estimated at \$1.76 million for 1998-99. Exhibit 11-20 provides a summary of actual operating expenditures for the past three years and budgeted dollars for the 1998-99 school year.

**EXHIBIT 11-20
CENTRAL WAREHOUSE OPERATING EXPENDITURES
FOR 1995-96, 1996-97, 1997-98,
AND BUDGETED EXPENDITURES FOR 1998-99**

BUDGET CATEGORY	ACTUAL DOLLARS 1995-96	ACTUAL DOLLARS 1996-97	ACTUAL DOLLARS 1997-98	BUDGETED DOLLARS 1998-99
Salaries and Benefits	\$1,733,460	\$1,745,102	\$1,723,119	\$1,705,507
Supplies and Materials	\$8,960	\$7,096	\$7,875	\$13,774
Contracted Services	\$38,374	\$30,105	\$30,978	\$42,590
Other expenses	\$3,214	\$1,463	\$223	\$0
Total Expenditures	\$1,784,008	\$1,783,766	\$1,762,195	\$1,761,871

Source: Broward County School District, Budget Office, 1998.

For 1997-98, the maintenance stockroom budget exceeded \$1.23 million and is estimated at \$1.25 million for 1998-99. Exhibit 11-21 provides a summary of actual operating expenditures for the past three years and budgeted dollars for the 1998-99 fiscal year.

**EXHIBIT 11-21
MAINTENANCE STOCKROOM OPERATING EXPENDITURES
FOR 1995-96, 1996-97, 1997-98, AND
BUDGETED EXPENDITURES FOR 1998-99**

BUDGET CATEGORY	ACTUAL DOLLARS 1995-96	ACTUAL DOLLARS 1996-97	ACTUAL DOLLARS 1997-98	BUDGETED DOLLARS 1998-99
Salaries and Benefits	\$867,781	\$1,064,136	\$1,220,457	\$1,218,752
Supplies and Materials	\$6,574	\$4,588	\$5,196	\$10,000
Contracted Services	\$22,466	\$14,002	\$12,900	\$25,000
Other expenses	\$0	\$0	\$173	\$0
Total Expenditures	\$896,821	\$1,082,726	\$1,238,726	\$1,253,752

Source: Broward County School District, Budget Office, 1998.

Exhibit 11-22 shows ending inventory levels for the prior two years for the central warehouse, and Exhibit 11-23 shows the warehouse space, dollar value of inventory per site, and 1997-98 dollar value of losses. As shown, the value of losses is insignificant when compared to the total inventory value.

**EXHIBIT 11-22
ENDING INVENTORY VALUES FOR WAREHOUSING SERVICES
1996-97 AND 1997-98
(excluding B Stock in 1997-98)**

	1996-97	1997-98	Percent Increase/ (Decrease)
ENDING INVENTORY VALUE	\$ 6,995,213	\$5,396,552	(23%)

Source: Broward County School District, Warehousing and Supply Services, 1998.

**EXHIBIT 11-23
WAREHOUSING FACILITIES
June 30, 1998**

WAREHOUSE TYPE	SQUARE FOOTAGE	INVENTORY VALUE	1997-98 LOSSES
Central Warehouse	76,000	\$4,805,372	\$1,393
Maintenance Stockroom	23,000	\$591,180	\$4,868
Total	99,000	\$5,396,552	\$6,261

Source: Broward County School District, Warehousing and Supply Services, 1998.

FINDING

The Broward County School District is maintaining high levels of inventory in some commodity categories. A recent report issued by the district's Internal Audit staff recommended reductions in inventory and the Purchasing Department has achieved reduced levels of materials and supplies in the warehouse. While we concur with recommendations to reduce inventory and commend the Purchasing Department for the follow-up action taken, we consider remaining inventory levels to be excessive.

MGT's on-site inspections of warehouse facilities included a walk-through of all facilities. The warehouse management processes were observed by sight inspections using indicators such as space management and utilization, the manner of storing supplies, methods used to ensure orderliness and safety, the type of items stored giving consideration to the limited amount of storage at the school or department location, and the ability to retrieve supplies in a timely manner.

An example of inefficient use of the warehouse facility is demonstrated by MGT's observation of several small boxes of red pens used by teachers for overhead projector transparencies being stored in a large storage bin. The space for storing these pens is not efficient use of this space increasing the costs of storing the pens in the warehouse. In addition, the small size of the boxes is conducive for storage in teacher supply cabinets or small supply closets. As a result of this and similar observations during the walk-through, MGT determined that a 36 percent reduction in inventory is reasonable considering the potential for "just-in-time" materials which continue to be stored there.

The supplies inventory on June 30, 1998 was recorded at approximately \$5.4 million dollars. Exhibit 11-24 presents an analysis of the dollar value of each type of inventory tracked by category except for the B-Stock Warehouse of damaged goods which was not tracked. The percentages are provided to illustrate the distribution of assets warehoused by facility. A \$5.4 million inventory value at year end lends itself to the need for effective planning to consider the cost of warehousing items, ensure proper cash management for district funds, and ensure proper safeguarding of assets.

**EXHIBIT 11-24
DOLLAR VALUE OF INVENTORY BY CATEGORY
1997-98**

TYPE OF INVENTORY	DOLLAR VALUE	PERCENT OF TOTAL
Central Warehouse	\$2,500,624	46%
Maintenance Stockroom	2,304,748	43%
Furniture Warehouse	591,180	11%
Total	\$5,396,552	100%

Source: Created by MGT, 1998.

Maintaining higher inventory levels than necessary creates an environment conducive to waste and loss. Waste and loss occur not only as a result of the supplies inventory being lost or spoiled, but also as a result of opportunity costs associated with idle cash and the costs to store these materials.

RECOMMENDATION

Recommendation 11-6:

Reduce the inventory levels maintained in the school district by at least 36 percent below the amount recommended in the Internal Audit Report.

The district has achieved reduced levels of inventory through follow-up action taken in response to the district's Internal Audit staff recommendation. In spite of the district's efforts to achieve reduced levels of inventory as evidenced by the 23 percent decrease in ending inventory levels as shown in Exhibit 11-23, inventory levels should be reduced further.

The level of inventory maintained by the school district at the Central Warehouse should be substantially reduced by changing the routine retention of supplies at the warehouse to the school sites and reducing the supply and maintenance inventories for items where it is cheaper and more expedient to initiate "just in time" delivery. For example, during the on-site review, we found items at the warehouse (such as audio-visual transparencies and pens) which are conducive for storage at the school sites.

A greater reduction in inventory items maintained will reduce costs of storing the inventory and a smaller inventory will require less physical space. A reduced inventory should also help increase cash flow. A reduction of approximately \$1.9 million in inventory (about 36 percent) should enable the school district to earn approximately \$116,566 in investment interest using a conservative investment rate for accruing interest at six percent. This amount of 36 percent is based on our review of the recent

report issued by the district's Internal Audit staff and is also based on our analysis of warehouse supplies.

The recommendation for reduced inventory levels is based on MGT's physical observations of warehouse supplies whereby a reasonableness estimate of approximately 36 percent was made to achieve greater reductions in inventory levels. Many supplies observed appeared to be unnecessarily stored or excessive in quantity when considering costs to store inventory. Consideration was given to purchasing methods which include just-in-time inventory, drop shipments, volume discounts, and bulk purchases while also considering limited storage availability at the schools and departments where the inventory is to be temporarily stored and used. The appearance of dated supplies and types of items were used as indicators of inventory turnover rates based on observations. Decreasing the size of the inventory should also enable a decrease in the number of staff responsible for the function of receiving, storing, and distributing goods.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|----------------|
| 1. The Director of Purchasing and Warehousing should work with staff and users to evaluate items in the current inventory to determine which items should be delivered directly to users and eliminated from the Warehousing facilities. | May 1999 |
| 2. The Director of Purchasing and Warehousing should work with the Manager of Maintenance Stockroom and Warehousing to effectuate changes. | Summer 1999 |
| 3. Central Warehouse procedures and purchasing changes should be communicated to users. | August 1999 |
| 4. The Director of Purchasing and Warehousing should ensure that items scheduled for elimination are phased out of the warehouse. | September 1999 |

FISCAL IMPACT

A reduction in the inventory would enable the Broward County School District to earn approximately \$85,000 in interest annually (\$1.9 million in cash instead of inventory, reduced by an estimated 25 percent provision or \$475,000 allocated for perpetual purchases of supplies to be used throughout the year due to the just-in-time method of inventory used by the district, for a net savings amount of \$1,425,000, multiplied by six percent).

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Reduce Inventory and Accrue Interest Earnings	\$85,000	\$85,000	\$85,000	\$85,000	\$85,000

FINDING

With a reduction in inventory at the warehouse, there will be a need for fewer warehouse service personnel and drivers. For 1997-98, the Warehouse Stockroom budget was \$1.76 million dollars including salaries, benefits, supplies, materials, contracted services, and other expenses. A significant portion of the salary and benefit costs are for supply and delivery personnel. The reductions in supply inventory recommended above (Recommendation 11-5) should allow for fewer warehouse staff and driver positions.

RECOMMENDATION

Recommendation 11-7:

Reduce warehouse service positions and drivers in the Central Warehouse Stockroom.

These recommended reductions are conservative estimates and are not intended to represent a full corresponding 36 percent reduction in personnel. MGT's recommendation is for five fewer drivers and three warehouse service positions. Five drivers and three warehouse service position provide for flexibility to allow programs to function adequately (total of 17 truck driver positions x 36 percent = 6.12 positions; five positions are being recommended instead of six). Currently, 10 warehouse service positions are in the warehouse; seven would remain.

Operating costs such as utilities and custodial staff are not identified for savings considering space and corresponding operating costs should be more efficiently utilized for alternative purposes.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|----------------|
| 1. The Director of Purchasing and Warehousing should work with appropriate staff to evaluate the optimal minimum level of warehouse service positions and drivers for the warehouse with reduced inventory levels. | Summer 1999 |
| 2. The Director of Purchasing and Warehousing should identify warehouse service positions and drivers no longer essential considering the recommended reduction in supply inventory and distribution. | August 1999 |
| 3. The Director of Purchasing and Warehousing should develop a plan to reduce the number of employees no longer essential to maintain a minimal level of supply inventory and distribution. | August 1999 |
| 4. The Director of Purchasing and Warehousing should eliminate the non-essential positions. | September 1999 |
| 5. The Director of Purchasing and Warehousing should process the changes through the appropriate process. | October 1999 |

- | | |
|--|---------------|
| 6. The Director of Purchasing and Warehousing should develop an implementation plan. | November 1999 |
| 7. The Director should communicate the changes to those impacted. | December 1999 |
| 8. The Director of Purchasing of Purchasing and Warehousing should implement the plan. | January 2000 |

FISCAL IMPACT

The implementation of this recommendation will save approximately \$200,000 annually by reducing five driver positions at \$40,000 each for salary and benefit costs. Since full implementation will not occur until the 2000-01 school year, one-half the cost savings is projected in 1999-2000. In addition, three warehouse service positions at a cost of \$40,000 each including benefits results in an annual savings of \$120,000 per year, for a total reduction of \$320,000 annually and \$160,000 in the first year.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Reduce Warehouse Positions	\$160,000	\$320,000	\$320,000	\$320,000	\$320,000

FINDING

Approximately 23 vehicles are assigned to the various warehousing locations used for distribution of warehouse items and materials. Exhibit 11-25 identifies vehicles used in warehousing functions.

**EXHIBIT 11-25
NUMBER OF WAREHOUSING VEHICLES BY LOCATION
1997-98**

VEHICLE LOCATION ASSIGNMENT	NUMBER OF VEHICLES ASSIGNED
Central Warehouse	15
Furniture Warehouse	2
B-Stock	2
Maintenance Stockroom	4
TOTAL	23

Source: Warehousing and Supply Services, 1998.

A substantial reduction in the supply inventory and the related functions such as warehousing, control, and distribution, as noted previously, will enable a reduction in the vehicles need to fulfill delivery responsibilities. Fewer deliveries and delivery staff will make several vehicles in the fleet non-essential.

RECOMMENDATION

Recommendation 11-8:

Reduce the number of vehicles in the central warehouse fleet by five.

A conservative estimate of five vehicles is recommended for reduction. The Broward County School District will benefit from a one-time positive cash flow of approximately \$5,000 (five vehicles estimated at \$1,000 each) from the sale of non-essential vehicles. In addition, estimated annual operating savings from a reduction in fuel, repairs, and maintenance, and insurance of approximately \$17,780 will be realized (based on district estimates for vehicle operations).

IMPLEMENTATION STRATEGIES AND TIMELINE

- 1. The Director of Purchasing and Warehousing should identify the non-essential vehicles and proceed with the sale. Summer 1999
- 2. The Director of Purchasing and Warehousing should follow the Board policies and procedures for inventory reduction. Fall 1999

FISCAL IMPACT

The Broward County School District should receive approximately \$5,000 from the sale of five non-essential vehicles (based on \$1,000 value each), and save approximately \$17,780 annually in vehicle operating costs. The estimate of operating costs is based on vehicle operating data maintained by the Broward County School District. The capitalized fuel system report and work order system report (which reflect all labor and materials) were used to determine the estimated costs for vehicle operations. The estimated annual cost for vehicle operations is \$3,556 per vehicle with an annual total savings of \$17,780 for five vehicles.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Reduce Vehicle Operating Costs	\$17,780	\$17,780	\$17,780	\$17,780	\$17,780
Sell Vehicles	\$5,000	\$0	\$0	\$0	\$0

FINDING

During the on-site examination of warehouse facilities, MGT consultants reviewed internal controls used in the warehouse. We observed the inventory management procedures used by the district in accounting for inventory and we conducted physical inventory counts to assess the safeguarding of assets. In reviewing inventory management procedures, controls were analyzed to gain an understanding of operational procedures in space by the district, the process flow for physical receipt and disbursement of inventory was reviewed, informal interviews were conducted with warehouse staff, documentation to account for inventory was reviewed, and limited inventory counts were performed. Physical inventory counts were conducted by randomly selecting items from stock (e.g., status reports and related supporting documentation used to reconcile inventory disbursement).

A randomly selected sample of the supply warehouse inventory found discrepancies between the recorded and actual inventories. Exhibit 11-26 illustrates the sample items

test counted and the resulting variances. Of the 10 items chosen for this test count, six actual counts were not in agreement with the recorded counts resulting in a 60 percent exception or error rate.

**EXHIBIT 11-26
SAMPLE TEST COUNT CONDUCTED BY MGT
OF CENTRAL WAREHOUSE ITEMS
NOVEMBER 1998**

INVENTORY ITEM	NUMBER OF ITEMS COUNTED	NUMBER OF ITEMS REPORTED	DIFFERENCE
Terry Towels	426	411	15
Scoops	72	72	0
Serving Spoons	24	26	(2)
Pastry Brush	111	112	(1)
Cook Fork	76	79	(3)
Transparencies	1,332	1,228	104
Baking Pans	72	71	1
Child Work Vehicle	42	42	0
Projection Markers	123	123	0
Wagon	25	25	0

Source: Created by MGT, 1998.

A randomly selected sample of the maintenance stockroom inventory also found discrepancies between the recorded and actual inventories. Exhibit 11-27 illustrates the sample items counted and the resulting variances. Of the 10 items chosen for this count, the actual count for four items was not in agreement with the recorded counts resulting in a 40 percent exception or error rate. The right column shows the difference between the number of items counted and the number of items reported.

**EXHIBIT 11-27
SAMPLE TEST COUNT CONDUCTED BY MGT
OF MAINTENANCE STOCKROOM ITEMS
NOVEMBER 1998**

INVENTORY ITEM	NUMBER OF ITEMS COUNTED	NUMBER OF ITEMS REPORTED	DIFFERENCE
Fence Tension Bar	0	0	0
Gutter Downspout	28	31	(3)
Screw #6X3/4	42	44	(2)
Screw 12X1-1/2	36	37	(1)
FTV Galvanized	33	33	0
Faucet	57	57	0
Spring	3	3	0
Cassette Lid	0	0	0
Receptacle	10	18	0
Lenses	173	238	(65)

Source: Created by MGT, 1998.

A randomly selected sample of the furniture warehouse inventory also found discrepancies between the recorded and actual inventories. Exhibit 11-28 illustrates the sample items counted and the resulting variances. Of the five items chosen for this test count, only one item showed a discrepancy between the actual count and the recorded count resulting in a 20 percent exception or error rate.

**EXHIBIT 11-28
SAMPLE TEST COUNT CONDUCTED BY MGT
OF FURNITURE WAREHOUSE ITEMS
NOVEMBER 1998**

INVENTORY ITEM	NUMBER OF ITEMS COUNTED	NUMBER OF ITEMS REPORTED	DIFFERENCE
Filmstrip and Cassette	42	42	0
Library Kickstand	18	19	(1)
Oak Table	40	40	0
Sand	61	61	0
Mod Panel	41	41	0

Source: Created by MGT, 1998.

RECOMMENDATION

Recommendation 11-9:

Enhance internal controls to better safeguard assets and strengthen reconciliation procedures.

Internal controls over the district's assets should be strengthened to accurately and timely account for all inventory items in the warehouse facilities. Perpetual inventory systems and supporting documentation should be adequate to allow for the accountability of all items on hand at any given time using physical counts and applicable reconciliation procedures. Warehouse inventory controls should be established and implemented by management to achieve these goals.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Purchasing and Warehousing should work with appropriate staff to review and evaluate the existing procedures used to account for the receipt of inventory items received in warehouse facilities and the methods in which inventory items are released to include all reports and supporting documentation of the perpetual inventory system. Summer 1999

2. The Director of Purchasing and Warehousing should work with appropriate staff to conduct a sample test for physical inspection of inventory items on hand through a limited physical inventory count using current stock status reports, identify differences, and perform a reconciliation using the current perpetual inventory system. Reconciliation procedures should be enhanced by ensuring that staff reconciles "Direct Out Material Request" and "Stock Request" documents on a daily basis to enhance accountability of inventory items. August 1999

3. The Director of Purchasing should identify systems enhancements needed to enhance warehouse inventory September 1999

controls and enhance reconciliation procedures to ensure accountability of inventory levels on hand in a timely and accurate manner.

- 4. The Director of Purchasing should work with appropriate staff to document procedures to include revisions, adopt such procedures, and distribute procedures to staff. October 1999
- 5. The Director of Purchasing should periodically review and update warehouse inventory controls and related documentation. Ongoing

FISCAL IMPACT

This recommendation can be implemented within existing resources. If implemented, operations will be more efficient.

FINDING

In spite of excessive levels of inventory, the district has been able to minimize spoilage. Our analysis of the district’s dollar value of inventory spoilage for the central warehouse found that spoilage in the furniture warehouse was minimal. Spoilage amounts of \$28 for 1996-97 and \$230 for 1997-98 represents an insignificant amount when compared to the total inventory value and spoilage amounts recorded in other categories provided in Exhibit 11-29.

**EXHIBIT 11-29
DOLLAR VALUE OF INVENTORY
SPOILAGE BY CATEGORY
FOR 1996-97 AND 1997-98**

TYPE OF INVENTORY	1996-97	1997-98
Central Warehouse	\$2,806	\$1,163
Maintenance Stockroom	not available	\$4,868
Furniture Warehouse	\$28	\$230
Total	\$2,834	\$6,261

Source: Created by MGT from district data, 1998.

COMMENDATION

The Broward County School District has achieved minimal spoilage of inventory in the warehouse.

The dollar value of inventory spoilage of \$2,834 and \$6,261 for 1996-97 and 1997-98 was compared to ending inventory values for warehousing services for the same period. The amount of spoilage as compared to total ending inventory values for 1996-97 and 1997-98 represents .0405 and .1160 percent, respectively, which is considered insignificant.

FINDING

Presently, the Central Warehouse has an inventory in excess of 7,000 items. The Purchasing Department periodically uses advisory committees to determine bidding and purchasing needs, and to ensure that proper specifications and quantities are utilized during the procurement process. The Central Warehouse contains a substantial amount of forms, instructional materials, and instructional stock.

RECOMMENDATION

Recommendation 11-10:

Conduct an annual survey of warehouse users.

The results of an annual survey should help determine the proper items to store in the warehouse, and the optimum levels of supplies in the warehouse for stocked items such as forms. An annual survey of principals and department heads should be used to provide input for supply staff.

In the effort to reduce the Central Warehouse, miscellaneous items stored in the warehouse that are obsolete or outdated (e.g., instructional materials) should be discarded or properly destroyed. Users should be consulted on a continuous basis to provide assurance that support staff are responsively meeting user needs for instructional supplies and services.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|---------------|
| 1. The Director of Purchasing and Warehousing should develop a survey of school principals and department heads to determine warehousing needs annually. | Summer 1999 |
| 2. The survey should be sent to all principals and department heads, with a cover letter ensuring a commitment to provide efficient services to schools and departments. | Summer 1999 |
| 3. The Director of Purchasing and Warehousing should determine the appropriate staff to analyze the survey findings. | Fall 1999 |
| 4. The Director of Purchasing and Warehousing should compile and review survey findings. | November 1999 |
| 5. The Director of Purchasing and Warehousing should meet with appropriate staff to determine the status of inventoried items. | December 1999 |
| 6. Based on the survey results, the Director of Purchasing and Warehousing should establish procedures to streamline the inventory. | December 1999 |

7. The survey should be conducted annually.

Ongoing

FISCAL IMPACT

This recommendation can be implemented within existing resources. If implemented, operations will be more efficient and customer service will be enhanced.

NOTE: Subsequent to MGT's November 1998 on-site review of the Purchasing Department, we received and reviewed a report prepared by a private consulting firm regarding recommendations related to the Purchasing Department (received by MGT on December 23, 1998). The consulting firm's report and recommendations were reviewed to ensure consistencies with MGT findings and recommendations. As a result of our review of the report, no major inconsistencies were found between the two reports. It should be noted, however, that instead of reducing clerical staff, as recommended by MGT in Section 11.1, the private consulting firm recommended pooling clerical staff.

12.0 ADMINISTRATIVE AND INSTRUCTIONAL TECHNOLOGY

This chapter provides a review of administrative and instructional technology use and support in the Broward County School District. When reviewing the administrative technology capacity and performance, MGT examines the computing resources; the infrastructure and its support of the overall operations of the school system; the administrative applications and the degree to which they satisfy user needs; and the organizational structure within which the administrative technology support personnel operate.

In reviewing instructional technology, MGT analyzes all areas that contribute (or should contribute) to the effective use of technology in the classroom. This includes broad areas such as the technology plan, the organizational structure and the infrastructure to more specific resources available in the classroom, such as the type of hardware employed, the method of selecting software, and the access to outside resources. Other critical factors assessed include staff development for teachers, school-level technology support and maintenance, and the equitable distribution of technology among schools.

The five major subsections of this chapter are:

- 12.1 Organization and Staffing
- 12.2 Infrastructure
- 12.3 Software
- 12.4 Professional Development
- 12.5 Technical Support

12.1 Organization and Staffing

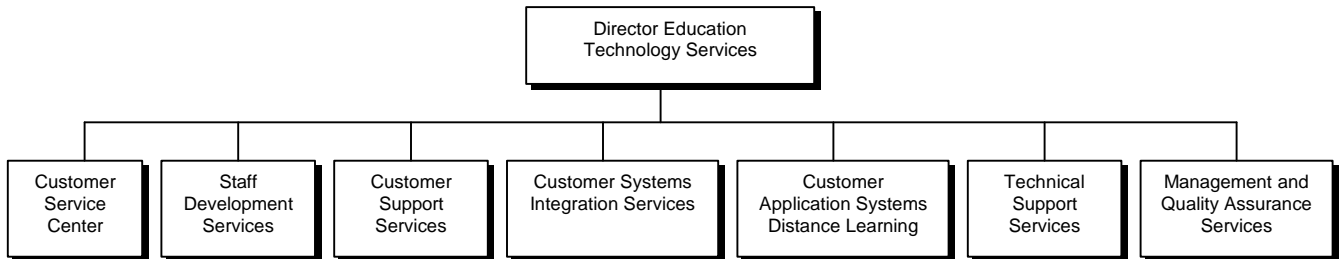
Administrative technology provides the backbone for the support of all daily operation of the services provided by the Broward County School District. The ideal administrative technology support organization has a clear understanding of the entire range of information resources and services to be provided to its users. It also has a unified organizational structure, effectively integrated applications, clear responsibilities for data ownership and management by each end-user, well defined development procedures to be used when designing or acquiring new applications, and an overarching mission to meet user needs. Furthermore, the effective administrative technology support unit prepares for and readily adapts to new technologies and in so doing, improves its functionality over time.

The ideal instructional technology support unit includes personnel that are extremely familiar with school operations; very knowledgeable about the technologies that are used for instructional purposes; and well versed in technology-oriented instructional materials. Personnel must also be proficient in using networks for instructional purposes; experienced in conducting technology related training in all areas, including integrating technology into the curriculum; and very closely associated with the curriculum areas to ensure that all instructional technology initiatives are consistent with the school district's instructional programs and that they positively influence the teaching and learning process.

CURRENT SITUATION

Education Technology Services (ETS) serves as the primary technology support unit for the Broward County School District and continue the business and instructional technology functions. Exhibit 12-1 illustrates the organizational structure of Education Technology Services.

**EXHIBIT 12-1
CURRENT ORGANIZATIONAL STRUCTURE
EDUCATION TECHNOLOGY SERVICES IN
THE BROWARD COUNTY SCHOOL DISTRICT**



Source: Broward County School District, Education Technology Services, 1998.

The unit is headed by a Director, includes 165 positions, and is composed of the following seven subsections:

- Customer Service Center – oversees the Help Desk function.
- Staff Development Services – coordinates internal and external training on administrative applications and instructional technology.
- Customer Support Services – maintains the mainframe and creates mission critical programming solutions.
- Customer Systems Integration Services – implements and upgrades the electrical, network capabilities, and end user devices for schools and administrative offices.
- Customer Application Systems/Distance Learning – responsible for new application development (or acquisition) and implementation.
- Technical Support Services – provides technical support for networking, produces operating systems programming solutions, and sets technology standards.
- Management and Quality Assurance Services – responsible for developing and administering RFPs, procurements, payment of bills, personnel, budget preparation and management, and quality assurance services.

ETS supports and maintains the following systems and equipment for the school district:

- instructional and staff workstations (both desktop and portable), printers, scanners, and other peripherals;
- administrative workstations (both desktop and portable), printers, scanners, and other peripherals;
- campus and department local area networks (both wired and wireless), including wiring, hubs, routers, transmitters/receivers and other devices;
- servers, including instructional lab servers, CD-ROM servers, video servers, file and print servers, database servers, and internet proxy caching servers;
- a Wide Area Network (WAN) linking all sites into one countywide Intranet;
- telephone systems; including primary systems; integrated voice response/management systems, and automatic dialing systems;
- learning resource management systems, including library automation systems;
- distance learning systems;
- video capturing, broadcast, receiving, and distribution systems;
- radio systems;
- office copier, imaging, and document management systems;
- paging systems;
- intercom; and
- facsimile systems.

ETS is in the process of implementing the *Information Technology Plan* developed with the Center of Educational Leadership and Technology (CELT). The plan intends to accomplish the following goals:

- All district departments and offices, school classrooms, media centers and offices will be electronically networked and equipped, providing staff, students and administration equitable access to information technologies for teaching, learning, and management.
- All high school graduates will be prepared to use appropriate technology upon entrance into the work force and/or higher education.

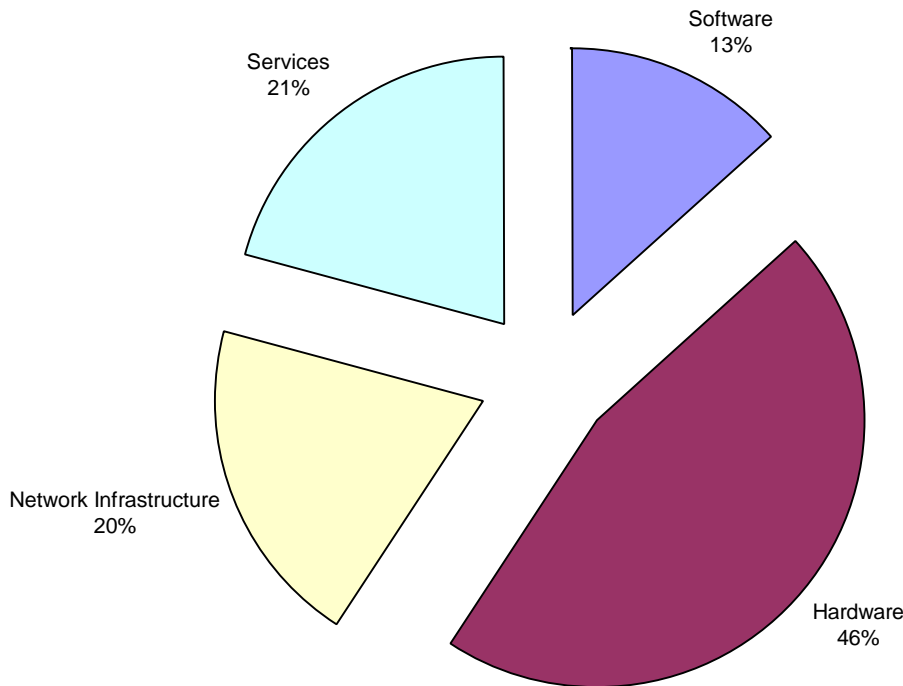
- New and emerging technologies will be incorporated into school curriculum and will serve as integral elements of school improvement and accountability.
- Organizational productivity and efficiency will increase as technology is infused into the workplace.
- Student, teacher, staff, and administration effectiveness will improve concurrently with the infusion of technology into their respective workplaces.
- The Broward County community will perceive schools as resources, and the number and quality of partnerships and cooperative endeavors will increase.
- The decision-making process will be enhanced as technology improves and facilitates the communication process.
- Improved communication among schools, home, community, and institutions of higher education will result.
- Improved student achievement will be attained.

The district is in the process of implementing a five-year plan to address each of these goals. The plan has an estimated cost of \$272,364,000. Of this amount, \$55,818,000 was projected to be spent by the end of the 1997-98 plan year, leaving \$216,546,000 yet to be expended. This is the amount of projected expenditures incorporated into the current Five-Year Capital Work Plan adopted by the School Board on June 9, 1998. Actual expenditures as of the end of the 1997-98 plan year were \$50,998,000. Assuming that the student population increases by 50,000 (as projected by the district) during the five-year period, an additional \$33-43 million will be necessary to keep pace with growth. The breakdown of the proposed expenditures is shown in Exhibit 12-2.

Hardware spending comprises 46 percent of budgeted purchases. The majority of the hardware spending is in the form of student workstations to equip each classroom. The technology plan seeks to place four workstations in each classroom for student use. The district is funding two workstations for each classroom and leaving the remaining two to be purchased by the school. According to the Plan 4-Implementation Schedule (Version 5.8), schools have sufficient technology budgets to cover their portion of the hardware initiative. Schools have responded to the technology plan by increasing the amount of their non-capital funding spent on technology from \$6,677,813 in 1994-95 to \$32,000,000 in 1997-98. Additionally, the expectation is that schools will use a portion of their Instructional Technology Initiative Funds from the state to cover the cost of the workstations.

The plan uses phases to provide equipment. High schools occupy the highest priority in the plan due to the limited time that students can be exposed to new technology before entering the workforce or seeking further education. Currently, middle schools are receiving the majority of the effort.

**EXHIBIT 12-2
FIVE-YEAR PLAN ESTIMATED BUDGET BY SPENDING AREA**



Source: Broward County School District, Technology Plan, 1996.

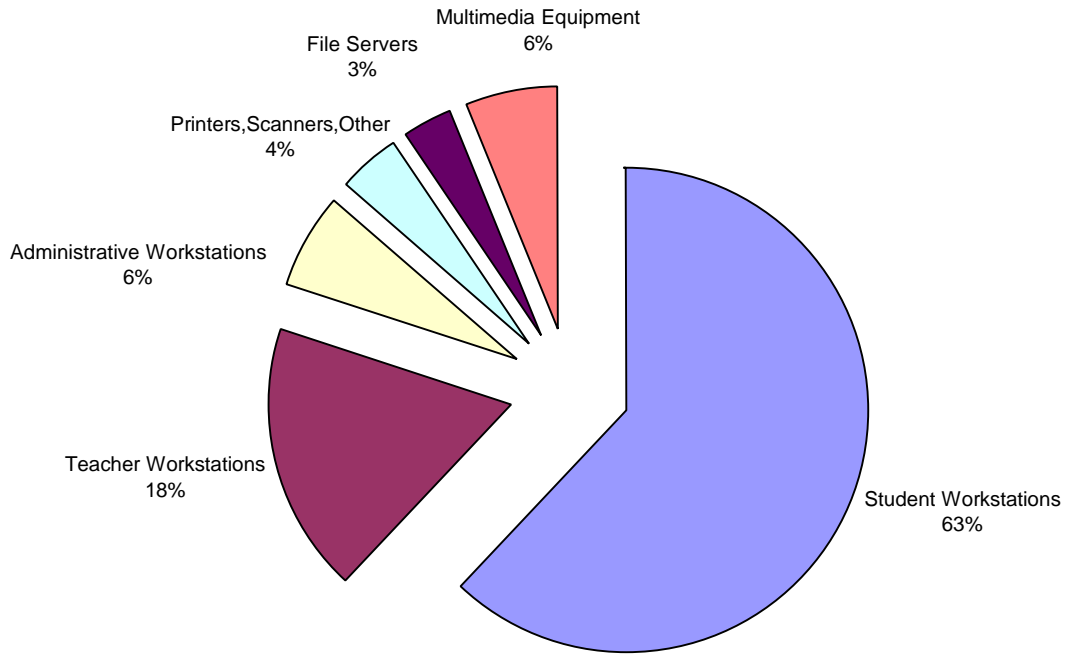
The teacher workstation expenditure category is the second largest among hardware purchases due to the teacher laptop initiative (see Exhibit 12-3). The goal of the teacher laptop program is to increase technology access and utilization for teachers. By providing a portable computer, a teacher can take the computer home at night to learn new applications as well as to use for class preparation.

Administrative workstations, peripherals, file servers, and multimedia equipment comprise the rest of the hardware needs.

In order to link the schools together and move to a more integrated information management system, the district has installed an interim Wide Area Network (WAN), while it works with a private consulting firm to develop a plan for a more permanent networking solution. The project, originally known as the Wide Area Network Project, has been renamed the Wide Area Network/Integrated Communications Infrastructure (WAN/ICI) Project. Within the networking budget, the WAN/ICI Project accounts for 37 percent of estimated expenditures. This is not surprising given the magnitude of the task of connecting approximately 250 sites to the network (See Exhibit 12-4).

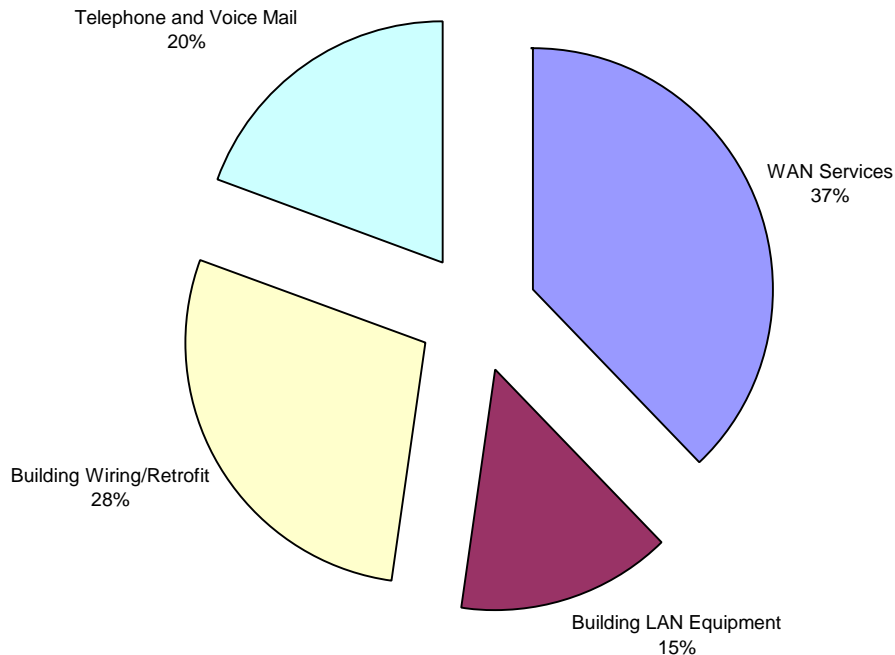
The placement of AS/400 servers at each site approximately five years ago has reduced the need to purchase more servers immediately. However, upgrades and harddrive replacements will be necessary in the short term. Additionally, some schools will still need Local Area Networks (LANs) installed. Fifteen (15) percent of the budget deals with building LAN equipment.

**EXHIBIT 12-3
FIVE-YEAR PLAN BUDGET ESTIMATES FOR HARDWARE**



Source: Broward County School District, Technology Plan, 1996.

**EXHIBIT 12-4
FIVE-YEAR BUDGET ESTIMATE FOR NETWORKING INFRASTRUCTURE**



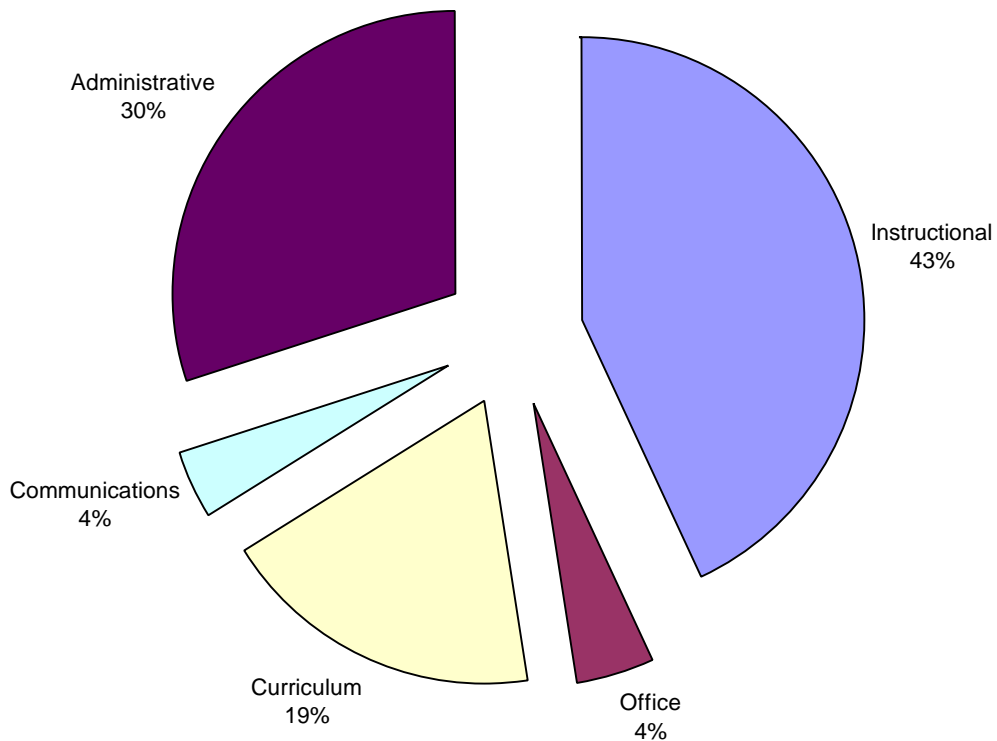
Source: Broward County School District, Technology Plan, 1996.

As shown in Exhibit 12-5, the building wiring and retrofits consumes \$11,290,000 or 28 percent of the five-year plan's budget for networking infrastructure. This is an important component of the technology plan given the varying age and standards of some of the district's facilities. In order to prepare all facilities in the district for interconnectivity, several steps must be taken, including:

- upgrading the EMS system;
- improving the phone system; and
- adding electrical power.

An additional, necessary component for the upgrade is the installation of a LAN for each site. As a result of the initiative, each classroom has been wired for phone, upgraded electrical, and Internet linkage.

**EXHIBIT 12-5
FIVE-YEAR PLAN BUDGET ESTIMATE FOR SOFTWARE AND MEDIA**



Source: Broward County School District, Technology Plan, 1996.

Instructional software serves as one of the primary concerns of the technology plan. As can be seen, budgeted expenditures on instructional software stand at \$11,500,000 or 43 percent of the software estimated budget. Overall, instructional software absorbs six percent of the total estimated budget. Part of the funding for instructional software relates to the district's commitment to implementing a total learning system that will benefit students at each level of development and achievement. The importance of

instructional software verifies the commitment of the district to using technology to impact a student's learning process directly.

Administrative technology absorbs only 30 percent of the software budget. A large portion of the budget deals with the effort to integrate the FAST, ISI, and COMPASS systems. FAST or the Financial Application System Technology system is an on-line and batch processing accounting system used by the district for general accounting and finance. The application takes information from the accounts payable, purchasing, and budget control modules through the financial controller to combine and process the information in the general ledger. ISI, or the employee database, keeps employee records, tracks employee data, and processes payroll checks for all district staff. The COMPASS system is an on-line, real time application that:

- accepts and tracks work orders;
- estimates dates, labor, and materials requirements;
- performs inventory control;
- records time and work execution;
- tracks costs;
- generates preventative maintenance schedules; and
- stores past maintenance histories

Each of these functions serves those employees dealing with facilities and transportation. Once these systems are connected, the majority of administrative functions will be interfaced to decrease redundancy and increase productivity.

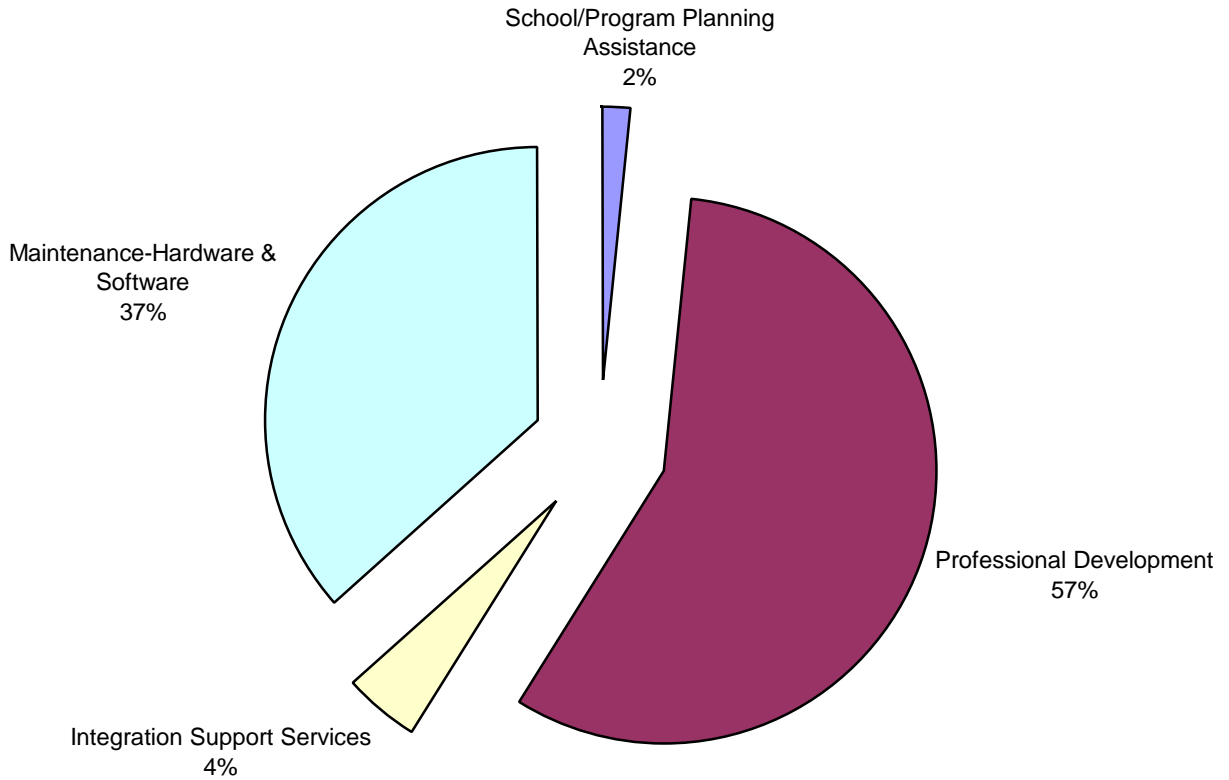
Considerable effort has been made to supply administrative computing access to the individual schools. The district currently gives administrative staff at schools access to the following automated systems:

- Employee database (ISI)
- General ledger (FAST)
- Teacher In-Service
- Payroll
- Personnel management
- Substitute teacher finder
- Applicant tracking system
- Summer school hiring system
- Student database (TERMS)
- Property inventory
- Work order system (COMPASS)

Additionally, the district is in the process of connecting these systems together.

The final category of the five-year plan budget is technology service and support, which comprises 21 percent of the overall budget (see Exhibit 12-6). Professional development takes 57 percent or \$23,790,000 of the budget for technology services. Overall, it is the second highest specific budget item (21 percent of the total estimated budget). Furthermore, these funds will be augmented with regular district budget and individual school sources.

**EXHIBIT 12-6
FIVE-YEAR PLAN BUDGET ESTIMATE FOR
TECHNOLOGY SERVICES AND SUPPORT**



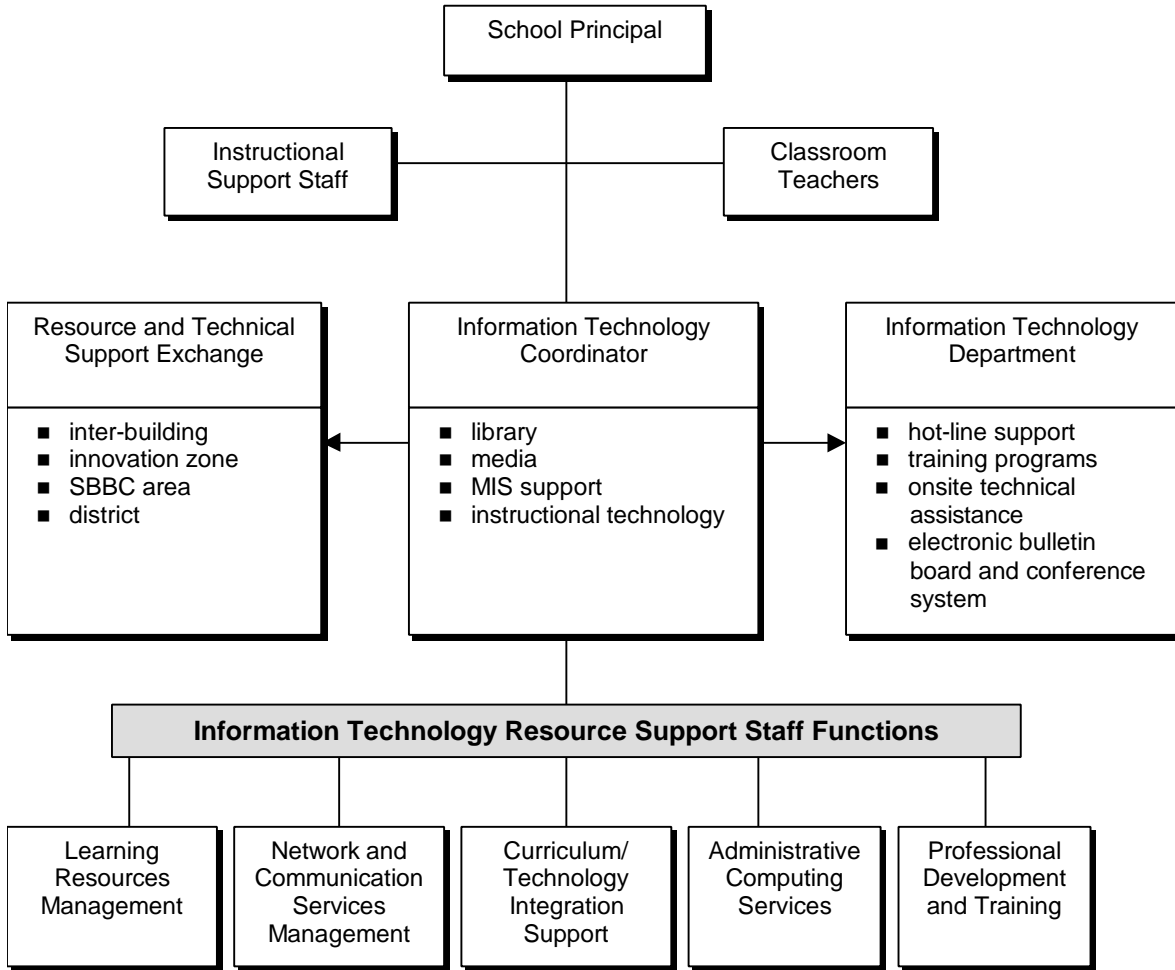
Source: Broward County School District, Technology Plan, 1996.

Maintenance for hardware and software draws \$15,330,000 or 37 percent of the funds. The integration support services deals with all actions related to:

- standards and procurement
- monitoring and evaluation
- project management
- facility design
- curriculum integration
- network integration
- administrative systems integration

Organizationally, it is proposed that the individual schools establish a site-based team to deal with technology issues that benefit from being part of a large organization. Exhibit 12-7 details the proposed technical support structure for schools. The size and type of school determines the degree to which these functions would be needed and put into place. As indicated in the exhibit, the school would not operate in a state of isolation, but interface more efficiently with technical support at ETS.

**EXHIBIT 12-7
SCHOOL-LEVEL ORGANIZATIONAL STRUCTURE FOR TECHNOLOGY SUPPORT**



Source: Broward County School District, Technology Plan, 1996.

In order to provide an integrated, learning-centered technology solution, applications must be developed that maximize the strengths and reach of the district's technology resources. Exhibit 12-8 details the application area groupings included in the technology plan.

**EXHIBIT 12-8
APPLICATION AREA GROUPINGS IN THE TECHNOLOGY PLAN**

<p>Curriculum Development and Instructional Management</p> <ul style="list-style-type: none">■ Curriculum database■ Learning management■ Instructional resources■ Test item banks■ Assessment management■ Statistical data analysis <p>Instructional Technology</p> <ul style="list-style-type: none">■ Discipline-specific software■ Integrated learning systems■ Multimedia■ Classroom software■ Software distribution■ Technology skills■ Modeling and simulation■ Research databases <p>Administrative Applications</p> <ul style="list-style-type: none">■ Student information■ Financial management■ Personnel management■ Inventory and fixed assets■ Food services■ Transportation■ Facilities management■ Maintenance management <p>Information Processing</p> <ul style="list-style-type: none">■ Word processing■ Forms management■ Relational databases■ Spreadsheet■ Desktop publishing■ Document publishing■ Image processing■ Project management <p>Learning Resource Management</p> <ul style="list-style-type: none">■ Acquisitions■ Cataloguing■ Circulation■ Information search/retrieval■ Online catalog■ Serial control■ Document delivery <p>Communication Services</p> <ul style="list-style-type: none">■ Voice, video, and data■ Electronic mail■ News and bulletin boards■ School/county calendar■ Voice messaging■ Electronic conferencing■ Internet / telecommunications access■ Energy management and security■ Distance learning
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Source: Broward County School District, Technology Plan, 1996.

FINDING

Given the importance and critical function of information technology in today's school district, it is imperative that ETS be placed in the appropriate position, organizationally. By placing ETS under the Associate Superintendent of Accountability, Technology, Strategic Planning and School Improvement, it lacks the necessary autonomy and fails to attain a position on par with its importance. Interviews with administrators confirmed MGT's perception. Over 70 percent of administrators interviewed noted that ETS should be elevated to the same level as associate superintendents. Additionally, approximately 20 percent of teachers interviewed expressed concerns regarding the joining of technology and research and evaluation functions.

Currently, there is an emphasis on technology led by the past Superintendent. However, if Broward is going to sustain its emphasis on technology, it is necessary to formalize its importance from an organizational standpoint. In addition, given the size of the district and the multiplicity of demands, it is necessary to grant ETS more decision-making authority of facilitate faster response times to technology-related issues.

RECOMMENDATION

Recommendation 12-1:

Move ETS from its current location into a new Technology Division headed by a Chief Information Officer (CIO) directly under the Superintendent.

Many corporations have concluded that information technology can be a more significant resource if it attains the appropriate influence within the organization. As noted above, in the Broward County School District MGT found a lack of autonomy and importance given the placement of ETS. Other school districts have established a CIO position that reports either to the CEO or the deputy executive. Based on the experience of other school districts, by elevating the function to this level, the organization:

- confirms that information technology is an agency-wide resource;
- ensures that priorities will be determined on how they best support the overall mission of the organization; and
- increases the probability that sufficient financial resources will be consistently allocated to the technology function.

Although to varying degrees the advantages of elevating ETS to a higher level are present now, the change would improve its ability to deliver services. Given the responsibilities ETS has to support instructional technology initiatives, placing it in a higher and more influential position should facilitate its efforts to be a stronger resource for schools. This is one area that demonstrates the failure to be a true agency-wide resource and to fulfill the overall mission of the organization. The move to equivalence with the associate superintendents symbolizes the importance of technology to the district. In addition, the new location should enable technology to more easily and effectively work with every division. Since technology influences each facet of the provision of education, it is appropriate that it be given greater autonomy and more control over its funding.

To accomplish this recommendation, a new CIO position must be created and the current Director of ETS position must be eliminated. Moreover, by raising the stature of ETS in the organization, the division will be in a better position to serve the technology needs of schools. The greatest areas of need in schools are training and technical support. With the increased influence that should accrue to ETS as a result of this organizational change, and the addition of a district Instructional Technology Coordinator, the structure will be in place to improve the support to schools.

In addition, we have frequently seen school districts where the IS function was located under various assistant/associate superintendents and those particular administrative areas usually received higher priorities from IS than did the administrative areas under other assistant/associate superintendents. Most frequently this has worked to the disadvantages of schools. The most glaring example of this situation MGT has encountered recently was in Prince George's County Public Schools (Maryland).

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|--------------|
| 1. With the concurrence of the School Board, the Superintendent should create a new Chief Information Officer (CIO) position as a replacement for the ETS Director position. | May 1999 |
| 2. The Superintendent or Director of Personnel should prepare a job description for the new CIO, advertise the availability of the position, interview the top candidates, and select the most qualified individual to fill the position. | Summer 1999 |
| 3. The selected candidate should assume the CIO position. | October 1999 |
| 4. The CIO for ETS should report directly to the Superintendent. | October 1999 |

FISCAL IMPACT

The annual cost for the new Chief Information Officer position should be approximately \$142,100. This calculation is based on a salary of \$106,810 plus benefits of 33 percent. The salary figure comes from creating the new CIO position at Grade 35 and assuming a middle step level (step 7). This position would replace the current ETS position; the increase in cost to the district is about \$12,800 annually. This calculation is based on eliminating the \$97,208 salary of the director and the associated benefits of \$32,078 and providing a base salary of \$106,810 plus \$32,078 in benefits.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Create and Fill a Chief Information Officer Position	(\$12,800)	(\$12,800)	(\$12,800)	(\$12,800)	(\$12,800)

FINDING

The School Board of Broward County adopted a *School and District Technology Usage* policy (#5306) on August 6, 1996. In order to “assure that technology shall play a predominant role, this policy provides guidance for appropriate technology utilization and integration into the curriculum, as well as infusion into school/district administration and management.” As evidenced by this policy, the Board recognizes the importance of technology in preparing students for the 21st Century. The very first statement in the policy summarizes the importance of technology, by stating that the “School Board of Broward County, Florida adheres to the belief that technology should play a vital role in meeting the needs of a broad range of abilities, disabilities, cultural backgrounds and ethnic populations represented in the district schools.”

The policy addresses the critical components of a sound technology program, some of which include:

- establishment of a single technology system encompassing teaching, learning, and management;
- implementation of a wide area network that will integrate voice, video, and data;
- identification of the desired outcomes that technology will provide;
- creation of a district Technology Advisory Committee; and
- guidance on the development and maintenance of web pages.

COMMENDATION

The Broward County School Board is commended for providing guidance to the district in the use of technology through the *School and District Technology Usage* policy.

This policy is more comprehensive than others we have seen and one which other district should emulate.

FINDING

Interviews with directors and managers of ETS revealed concerns over the inability to fill vacancies and the problems related to understaffing. Mid-level managers concur and fear retention will become a significant issue if vacancies continue to exist. Additionally, professional development suffers during such periods of overutilization. Technology changes rapidly, necessitating continual education to ensure competency in new products and technologies. However, given the demands currently placed on employees and a lack of discretionary technical staff, training efforts must be minimized.

Some reasons cited by directors included the fact that the south Florida area is a difficult market for governmental organizations since private employers generally have higher pay scales, and the fact that, until recently, outsiders who joined ETS had to start at Step 1 which limited the salaries they could be paid.

Based on data taken from the Information Builders study of Florida information technology salaries, the midpoints of salaries offered by the district fall short of the state average by as much as \$12,000. For example, the midpoint for a Programmer I, which ETS has four vacant positions, is \$29,333. The average starting salary for this position in Florida is \$38,577.

Another factor is that technical staff are part of a bargaining unit so that salaries are locked into those schedules. In addition, pay grades 25 and higher are classified as administrators and the district must hold the number of administrators to a minimum. This tends to limit the number of senior network analysts, network engineers, and systems programmers they are able to hire. Still another factor that aggravates this situation is the high demand in both the public and private sectors for programmers due to technical issues related to year 2000 initiatives.

Of the 165 positions allocated ETS, 28 were not filled at the time of the on-site visit. The title and number of positions vacant included the following:

- Accounting Specialist II (1)
- Clerk Specialist IV (1)
- Customer Service Specialist II (1)
- Customer Service Specialist III (1)
- Customer Service Analyst III (4)
- Operations Analyst (1)
- Programmer I (3)
- Programmer Analyst (4)
- Supervisor – Computer Operations Weekend Shift (1)
- Systems Analyst I (1)
- Systems Analyst III (4)
- Systems Integrator II (1)
- Systems Integrator III (1)
- Systems Integrator IV (2)
- Systems Programmer II (2)

These positions are located in all areas of ETS operations and include clerical as well as highly technical positions. Seventeen (17) percent of positions were vacant at the time of the November on-site visit. The percent is not as critical as the specific positions vacant. The concentration of network and programming positions presents the greatest dilemma.

RECOMMENDATION

Recommendation 12-2:

Fill the vacant technology positions with private contractors.

ETS should continue to seek to fill its vacancies with full-time staff; however, because of the problems that have been experienced in hiring such personnel, in-house staff should be augmented with independent contractors. Employing contractors will allow ETS to more expeditiously implement its technology plan. Public and private entities increasingly employ contractors to lower benefits costs, gain more personnel with specialized skills, and to deal with the shortage of technically sophisticated employees in

major market areas. Some of the same advantages will accrue to the Broward County School District.

Contracting firms attract labor by paying slightly higher than major labor competitors. These firms make money by providing employees to clients slightly below the costs associated with having a permanent employee.

Contracting for programming services will be greatly facilitated by the recent contract ETS has established that includes 17 companies who can provide various types of technical support. Using this contract, ETS should move quickly to augment its technical staff.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-----------|
| 1. The Director of ETS, working with the heads of the units having vacancies, should assess the technical support needed and determine which positions need to be filled most promptly. | May 1999 |
| 2. This group should evaluate the qualifications of the companies on the contract and make decisions regarding contractors. | May 1999 |
| 3. The contractors should begin work. | June 1999 |

FISCAL IMPACT

Although contractors provide management greater flexibility in labor utilization, they tend to cost approximately the same. While contractors may not need to be paid benefits, many provide contract employees and require a premium to cover their personnel expenses. Consequently, the savings accrued from not providing fringe benefits may actually be reflected back in higher contract costs over the length of the agreement.

FINDING

In 1994, the Broward County School District contracted with the Center for Educational Leadership and Technology (CELT) to develop a comprehensive technology plan. The *Information Technology Plan* offers a vision for the future of schools in Broward County, recommends a technology application framework, and provides a blueprint for implementing 11 discrete components. The 11 discrete components addressing each area of technology utilization include:

- Curriculum and Assessment
- Instructional Technology
- Professional Development
- Administrative Computing
- Communications/Network Infrastructure
- School Facilities, Learning Environment Design and Construction
- Organization and Staffing
- Standards, Procurement, and Maintenance
- Policy and Procedures

- Program Monitoring and Evaluation
- School/Program Level Planning.

The plan offers a broad-based and well-conceived framework for moving the Broward County School District into the 21st Century.

While the plan provides a list of goals, no mechanism for verification is present. Specific goals or benchmarks need to be created to judge the success of the implementation of each objective of the plan. Likewise, a method of evaluation needs to be put into place. Obviously, the installation of computers in each classroom and the rewiring and retrofitting of schools provide a highly visible benchmark, but the integration of technology into curriculum, level of customer satisfaction, and accessibility issues are harder to observe.

RECOMMENDATION

Recommendation 12-3:

Create a structured method of gauging and reporting performance related to implementing the individual tasks or processes associated with the Technology Plan.

Several ETS administrators note that more than 100 projects run concurrently and it is impossible to ascertain the status of each project. Furthermore, given the lack of integration of software applications and systems, it is important to consider integration, connectivity, and convertibility when conceptualizing new projects. Individual project updates available through the Intranet allow the project load to be reviewed. Likewise, if updates outline the status and nature of the project, better decisions can be made regarding integration.

The additional information serves the following purposes:

- increases the accountability on projects;
- provides more information for joint coordination and system linkage;
- supplies data for estimating the implementation time associated with different project types; and
- guides the planning process by granting more timely information on goal attainment.

For this system to be a successful tool, project managers and other district leaders need to endorse the system. A subcommittee of the Technology Committee could consider alternative formats and prepare guidelines for implementation. Additionally, the subcommittee through consultation with the Director of ETS, could determine the list of employees granted access to the information. Once an agreeable format is located, project managers should enter initial project statements, goals, and planned outcomes as well as a status report for each project.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-----------|
| 1. The Director of ETS, or his designee, should convene a subcommittee of the Technology Advisory Committee to determine the method of summarizing project status and relevant participants. | May 1999 |
| 2. The Director of ETS, or his designee, should request project summaries from each project manager. | June 1999 |
| 3. The Director of ETS, or his designee, should obtain necessary approvals for inclusion on the Intranet. | June 1999 |
| 4. The Director of ETS, or his designee, should request the staff to produce pages for inclusion on Intranet. | July 1999 |

FISCAL IMPACT

This change can be implemented utilizing current resources.

FINDING

Despite the emphasis on instructional technology by the Board through its *School and District Technology Usage* policy and the prominent role of instructional technology in the Technology Plan, no one in ETS is charged with providing guidance, direction, and visionary leadership for instructional technology. The adverse conditions resulting from this situation are that there is no one to:

- serve as the primary resource for schools regarding effective strategies and helpful educational resources;
- serve as the administration's expert on classroom uses of technology;
- serve as the primary instructional technology support resource for the Technology Advisory Committee;
- coordinate districtwide technology-oriented teacher training;
- provide guidance to the network implementation efforts to ensure the WAN and LANs adequately satisfy instructional needs;
- monitor the adequacy of district instructional technology support;
- facilitate decisions on, and the acquisition of, instructional software by schools; or
- provide visionary leadership to all instructional technology efforts.

During interviews, the absence of district coordination of instructional technology efforts was frequently cited by school personnel as a district weakness. Several district staff also identified this shortcoming.

As technology becomes more pervasive, its use in the classrooms of Broward County and elsewhere is growing rapidly. Where once networks were a luxury, they are becoming a necessity. As schools install networks, there is an increasing demand for network support and assistance. Similarly, as schools acquire more technology, there is an increasing need to assist them with hardware acquisitions. These and other factors necessitate closer coordination of instructional technology support by the district.

Instructional technology is evolving such that networks are playing an ever increasing role. Only a few years ago, for example, there was very little interest in the Internet. Today, schools everywhere are aggressively seeking to obtain access to this powerful resource. Thus, if instructional technology is to flourish, there must not only be strong attention paid to the technical aspects of implementing the networks, but there must be careful consideration given to the specific requirements schools have for making successful instructional use of those networks.

RECOMMENDATION

Recommendation 12-4:

Create a position of Instructional Technology Coordinator and locate this position in Educational Technology Services.

While the support for technology will be enhanced by placing the coordinator in Educational Technology Services, it is imperative that close ties be maintained with the Curriculum and Instruction Department. One way of accomplishing this would be for the coordinator to participate regularly in meetings of curriculum supervisors and/or other Curriculum and Instruction Department staff members. This would ensure that the strategies and initiatives being employed by the department receive appropriate technology support and that communications are effective and ongoing.

IMPLEMENTATION STRATEGIES AND TIME LINE

1. With the approval of the Board, the Superintendent should create a new position of Instructional Technology Coordinator. May 1999
2. The Director of Educational Technology Services, with the assistance of two or three members of the Technology Committee, should prepare a job description for the coordinator, advertise the availability of the position, interview the top candidates, and select the most qualified individual to fill the position. Summer 1999
3. The selected individual should occupy the position of the Instructional Technology Coordinator. October 1999

FISCAL IMPACT

The annual cost for a new position of Instructional Technology Coordinator will be approximately \$73,000. This calculation is based on a salary of \$55,000 for a

comparable director's position, plus benefits of 33 percent. The chart below reflects that cost over the next five years.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Create Instructional Technology Coordinator Position	(\$55,000)	(\$73,000)	(\$73,000)	(\$73,000)	(\$73,000)

FINDING

Given the professional development and instructional technology training needs of a school district the size of Broward County, the Instructional Technology Coordinator alone will not be able to provide the necessary support. Additional technology support personnel will be required in order to enhance professional development opportunities for teachers, monitor technical support at the campuses, facilitate the selection of instructional software by schools, and perform the many other tasks that will arise for this new instructional technology support unit.

RECOMMENDATION

Recommendation 12-5:

Create two positions to support the Instructional Technology Coordinator.

These individuals should be responsible for providing educational software package summaries, training materials, training seminars, and information beneficial to incorporating technology into the teaching. Furthermore, these employees should provide support services to the Instructional Technology Coordinator.

IMPLEMENTATION STRATEGIES AND TIME LINE

1. With the approval of the Board, the Superintendent should create two new instructional technology support positions. May 1999
2. The Director of Educational Technology Services and the Instructional Technology Coordinator, with the assistance of two or three members of the Technology Committee, should prepare a job description for the instructional technology support personnel, advertise the availability of the positions, interview the top candidates, and select the two most qualified individuals to fill the positions. Summer 1999
3. The selected individuals should occupy the positions. October 1999

FISCAL IMPACT

The annual cost of the two new instructional technology support personnel will be approximately \$106,400. This calculation is based on a salary of \$40,000 (which is the approximate salary of comparable positions (e.g., a systems support specialist) plus benefits of 33 percent. The chart below reflects that cost over the next five years. The

estimate for 1999-2000 is 75 percent of the total cost due to the position being filled in October 1999.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Create Instructional Technology Support Positions	(\$79,800)	(\$106,400)	(\$106,400)	(\$106,400)	(\$106,400)

FINDING

As part of the implementation component of the *School and District Technology Usage* policy, the Superintendent was directed to establish a Technology Advisory Committee. This Committee is chaired by the Associate Superintendent of Accountability, Technology, Strategic Planning, and School Improvement. The Committee's charge is to provide input, advice, and assistance in the implementation of the *School and District Technology Usage* policy.

In order to be effective, the Technology Advisory Committee must be balanced with respect to school level and geographical location within the district. Members serve one year terms and are eligible to be re-appointed for additional terms not to exceed three consecutive years. The policy specifies 17 different categories of individuals who are to make up the committee. Those categories include:

- seven instructional personnel, including teachers, counselors, etc.;
- four school-based administrators;
- two members each from the DAC and the PTA;
- six computer liaisons, including one from each of the three levels, one from vocational education, and two from district departments;
- one representative from the Facilities Department;
- three representatives from the Educational Programs Department (curriculum, training, etc.);
- the Director, Nova Schools;
- seven chief MIS Officers or upper management representatives from business/major corporations that are not suppliers of technology products to the school district;
- one representative from each of the five local institutions of higher education;
- two high school students and one adult/vocational students;
- three representatives from the Division of Accountability, Technology, Strategic Planning, and School Improvement;

- representatives of technology consultants under contract to the school board (ex officio members), upon invitation of committee chairperson;
- one representative from the Broward Teachers Union;
- one representative from the Broward County Public Library System;
- an appointee by each school board member;
- one representative from each Area Office designated by the area superintendent; and
- others as designated by the Superintendent.

Given the above categories, there are almost 70 members of the Technology Advisory Committee. The group meets quarterly. In addition to the quarterly meetings, the Technology Advisory Committee accomplishes its business through subcommittees. For example, there is a standards committee that addresses standards for personal computers and there is a staff development committee that provides advice and guidance on staff development efforts.

COMMENDATION

The Broward County School District is commended for establishing a Technology Advisory Committee to provide advice and guidance to the district as it implements the Technology Plan.

Given the rapid pace of technological change and the corresponding changes in its use in education, it is of paramount importance to receive feedback from the technology community as well as district staff with regard to best practices in educational technology use. The district has created a Technology Advisory Committee and effectively used its guidance in decision-making.

FINDING

While it is commendable that the Technology Advisory Committee, as currently configured, provides extensive representation of stakeholders, its size makes it unwieldy and less efficient than it should be. Although the composition of the Committee may be politically attractive, it is too large to effectively provide the oversight that is required.

When MGT discussed the Technology Advisory Committee with its members and other district staff, approximately 80 percent indicated that the current configuration is too large and prevents sufficient dialogue. MGT consultants are primarily concerned with how this dialogue translates into oversight. A smaller group can be responsible for these activities and meet more regularly to take the concerns of district staff into account and prepare issues for the review of the full Committee.

RECOMMENDATION

Recommendation 12-6:

Create an Executive Technology Advisory Committee and empower it to monitor and provide advice on all technology operations.

The purpose of the Executive Technology Advisory Committee should be to monitor the various technology endeavors of the school district and serve as the core of the Technology Advisory Committee. It should meet on a regular monthly basis. To be effective, the committee should not be too large, yet it must include representatives of the various constituencies of the district. Thus, the group should number between 16 and 22 members, and include among its membership, teachers, principals, at least one local higher education representative, a community member knowledgeable in technology (but not an employee of a technology company), and central office administrative staff including the instruction, finance and ETS areas. Committee members should have an understanding of technology and its uses, at least within their respective areas.

The Executive Technology Advisory Committee should be led by the chairman and vice-chairman of the Technology Advisory Committee and establish its own operating procedures. The composition of an Executive Technology Advisory Committee should be decided by the full committee.

There are numerous responsibilities this group could assume, including:

- review and update the Technology Plan annually;
- establish recommended lists of instructional courseware;
- monitor the level of technology support available to schools and devise strategies for improving it as necessary;
- assist in the establishment of technology budgets;
- oversee the distribution of state instructional technology incentive funds;
- provide advice on and help set priorities for administrative technology development efforts;
- devise a policy governing the acceptance of donated equipment;
- provide advice and guidance on the types and amount of staff development that should be available;
- develop hardware, software, network and videoconferencing equipment standards and keep them up-to-date;
- monitor the progress of district technology projects;

- monitor the equity of technology in schools;
- offer advice on technology grant applications/proposals; and
- recommend revisions in policies and procedures that impact technology use.

The new Executive Technology Advisory Committee should work jointly with subcommittees and provide leadership to the Advisory Committee. The presence of an Executive Committee will:

- reduce the amount of time each Technology Advisory Committee member must devote to the functions of that committee; and
- spread the responsibility for contributing to the system's technology strategies among a large number of people throughout the system.

Except to address some highly urgent issue, the full Executive Technology Advisory Committee should meet only once per month. Interactions between the members would, of course, continue during the intervening time via telephone and electronic mail. When the committee is to address a major issue (e.g., standards, the allocation of state funding, etc.), a subcommittee should be formed. The subcommittee should include one or two members of the Executive Technology Advisory Committee, plus two to five others from the system and/or the community who are knowledgeable on the subject. That group should meet and examine the issue as much as necessary and conclude their work by preparing recommendations to the full committee. At its next regular meeting, the full committee should accept (with amendments if it deems appropriate) the recommendation and take steps to implement the desired action. Using this strategy, Executive Technology Advisory Committee members should normally be able to discharge their responsibilities for this function by devoting three or less hours per month.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should appoint appropriate representatives from the school district to serve as members of the Executive Technology Advisory Committee. May 1999
2. The Executive Technology Advisory Committee should hold an organizational meeting and begin its work as an addition to the Technology Advisory Committee and a more substantive technology resource to the district and the Board. June 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources.

12.2 Infrastructure

Infrastructure is the underlying system of cabling, phone lines, hubs, switches, and routers that connects the various parts of a wide area network. The infrastructure also includes the mainframe, the processors that support district communications, and the individual workstations.

Of all technology resources, infrastructure is one of the most important. If a sound infrastructure is in place, most users will have a means of accessing people and information throughout their organization and beyond, greatly facilitating their ability to accomplish the responsibilities of their job. Increased efficiency and effectiveness will be the result. Without an infrastructure, such capabilities are available only on a piecemeal basis, usually to individuals who have the vision and the resources to create this capability for themselves.

Given the capabilities and benefits that will accrue, many organizations, both public and private, are finding that to achieve the desired level of success, the organization must invest adequately in an infrastructure. This is particularly true in a school system environment which typically has a central office and multiple school sites spread over a wide area.

MGT's review of equipment involves an analysis of the type of hardware resources available for staff, teacher, and student use. While computers are the predominant resource, in the classroom other relevant technologies include, but are not limited to, videodisc players, televisions, and networking equipment. With respect to computers used for instruction, it is important that they have sufficient power and speed to support the use of recently developed multimedia courseware and the effective access of the Internet/WWW. It is preferable that such computers are networked but, as a minimum, they should be capable of being networked. Similarly, computers that are used for administrative purposes also need sufficient power and speed if they are to effectively use the more advanced software tools available for data storage, manipulation and analysis. They, too, should be networked.

CURRENT SITUATION

The Broward County School District employs an IBM 9672/R41 mainframe central processing unit and four IBM 9404 AS/400 computers as the core of the technology unit. A distributed Wide Area Network (WAN) provides Intranet, Internet, and communication services to each site in the school district. Each local site operates off of an AS/400 server that supports the Local Area Network (LAN) for the school and links the school to the mainframe. The district is in the process of linking the environmental and safety control systems to the WAN to allow centralized control and monitoring of these functions.

As part of the Technology Plan, ETS is in the process of implementing Plan 4. Plan 4 is a version of the Technology Plan that is designed to:

- upgrade the connectivity of schools;
- provide a laptop to each teacher;

- install four computers per classroom; and
- improve districtwide administrative technology resources.

Fifty (50) percent of all end-user equipment is funded through ETS. Many funded schools possess only half of the desired equipment. Some schools have failed to raise sufficient funds for the 50 percent match and only operate with two machines per classroom.

As part of this process, an interim Wide Area Network (WAN) has been installed to serve 225 sites within the district. ETS installed and made operational the interim WAN in only 17 months. Each site uses an AS/400 connected to a central access server at ETS as its point of entry. This configuration allows each school to send and receive email as well as access the Internet and the district Intranet. Email and Internet access are available currently and the district Intranet is near completion. Additionally, ETS is working with an outside consulting firm to develop a long-term WAN solution that would integrate all of the major systems serving the district sites. This "C1" project will bring all of the major technology systems, such as security, energy management, and records together, to allow for centralized monitoring and control. Likewise, the system will allow each site access to an array of resources ranging from student data to distance learning transmissions.

COMMENDATION

ETS is commended for implementing an interim WAN and initiating the process of developing a comprehensive integrated WAN.

The Broward County School District has established an interim WAN solution. When the district failed to obtain the resources necessary to implement an ideal WAN, it opted for an interim solution to address its functional needs. Through the district's foresight, a network was put into place that can serve as the backbone for new development while providing much needed services in a time manner. In addition, given the rapid changes in video requirements and the commitment to expanding technology-based classroom resources, the interim WAN serve as an ideal starting point for the transition into the 21st Century. MGT consultants consider Broward's experience to be a role model for other districts and a leader among school districts within Florida and the United States.

The new WAN will offer greater connectivity and faster access to resources inside and outside of the district. As distance learning plays a larger role in education, having a cutting edge WAN will allow the district to use this method of teaching to its fullest potential.

FINDING

The dependability of hardware determines the usefulness of technology as both an administrative and instructional tool. In the Broward County School District, the repair and maintenance of hardware is administered in four ways:

- a metrology repairperson comes and repairs a machine;
- a vendor under a five year warranty agreement responds;

- an on-site technology representative deals with the repair issue; or
- a teacher, administrator, or student deals with the problem.

Given the large volume of hardware purchases made by ETS, maintenance costs should be shifted more toward the vendor. ETS currently requires that new workstations, MAC and Windows-based, come with a five-year, on-site warranty. Additionally, vendors must supply to ETS a technical support specialist for the duration of the warranty period to aid in dealing with hardware problems.

All RFPs issued for new equipment clearly state in Section 25 that “it is a requirement of this bid that all bid items have a five year warranty” beginning on the date that the installation acceptance form is signed. Additionally, Section 25 requires that the vendor contact the school within 24 hours of being notified and complete needed repairs within ten business days. By including Section 25, potential vendors are notified that all service remains the responsibility of the vendor for five years. Moving responsibility from the district to the vendor decreases the district’s cost for maintenance and repair on new equipment. Eventually, as equipment is replaced, repair services could become almost exclusively provided by vendors.

While the move to requiring vendors to provide service appears cost effective, the process does not seem to work in the manner intended. When surveying school administrators and other school personnel, the responsiveness of vendors seems inadequate. Several administrators and numerous teachers indicate that vendors tend to return calls at their convenience and can take over a month to come out and examine problem equipment. In addition, several teachers indicated that more could be done by ETS to insure compliance, but little action has been taken.

RECOMMENDATION

Recommendation 12-7:

Enforce the requirements related to the five-year warranty on new equipment.

Without a system of accountability, some vendors will neglect their contractual duties. A method of accounting for successes and failures should be implemented and administered by the Director of ETS. Also, the language of Section 25 of the RFP and vendor contracts should be changed to reflect a penalty for non-compliance. The usefulness of the district’s hardware will be increased by supplying teachers and administrators with more reassurance that nonfunctioning equipment can be returned to operation in a timely manner.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Standards Subcommittee should determine the appropriate amount for the penalty. May 1999
2. The Director of ETS or designee should establish a tracking system for compliance, and gain approval for altering the language in RFPs and contracts. Summer 1999

3. ETS should begin using adjusted language and implement the tracking system.

August 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The Technology Standards Subcommittee determines the minimum standards for hardware purchases. The subcommittee is comprised of 30 people including principals, district administrators, and technology specialists who research, evaluate, and write hardware purchasing standards. The standards serve as the baseline for vendor proposals for equipment provision. An important key to the successful use of standards relates to the goals behind what is stipulated. The characteristics of the equipment requested determine the life of the equipment. Although less 'cutting edge' equipment may afford the district the ability to purchase more equipment, computers based on older standards lessen the usable life span of the machine.

Ninety (90) percent of school administrators and teachers interviewed reported that the standards set by the Technology Standards Subcommittee are insufficient for purchasing the best product for the price. Also, some teachers observed that the products purchased are out of date by the time of delivery and installation. MGT believes the delivery times and standards should be brought closer together to ensure a longer useful life span for the products.

When examining the standards set forth in district RFPs for supplying computers, all but the Windows 95 Workstation for the Student General Classroom requires the most up-to-date technology (400 Mhz and 64 MB of RAM at the time). The Student General Classroom computer only requires a 200 Mhz processor and 32 MB of RAM. Although purchasing a less expensive computer allows for additional units to be purchased, the life expectation of the machine is limited. While the most up-to-date hardware will possess a 36 to 48 month life cycle, by purchasing an older model the life cycle is decreased even before the time of purchase.

RECOMMENDATION

Recommendation 12-8:

Require the purchase of state-of-the-art hardware for all applications.

The district has put forth considerable effort to purchase hardware with long life cycles. However, it is important that the same effort be applied to the computers that serve as the general classroom computers. Given limited space in labs and the mobility of students, it is important that classrooms be able to use the most updated software and that the hardware purchased be able to satisfy class needs for the longest period of time possible.

IMPLEMENTATION STRATEGY AND TIMELINE

1. The Technology Standards Subcommittee should implement change in computer requirements. Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

12.3 Software

While the price of hardware is generally declining, the cost of software is increasing. This is primarily because software actually translates into personnel costs (i.e., software development is usually a labor-intensive activity that requires skilled technicians who earn relatively high wages). As a result, the task of selecting software for use in any organization is becoming more difficult. This is particularly true of an educational entity, because the types of software such organizations use is more diverse than the software used by other governmental agencies or private corporations.

CURRENT SITUATION

The Broward County School District supports the following functions with technology-based solutions:

- **Personnel and Payroll**
 - Employee Database (ISI)
 - Inservice System
 - State Staff Database
 - Applicant Flow
 - Retirement
 - Summer School
 - Pre-Clearance
- **Finance**
 - Financial Application System Technology (FAST)
 - COMPASS
 - Warehouse and Textbook Ordering System
- **Students**
 - TERMS
 - EDULOG
 - Point of Sale

The individual packages supported by ETS include:

■ **Productivity**

- MS Office Suite (Excel, Word, Power Point)
- FileMaker
- FileMaker Pro Server
- Claris Draw
- Claris Works
- Claris Impact
- PageMaker
- Project
- HyperStudio
- HomePage
- FrontPage
- BRIO
- TERMS

■ **Internet**

- Netscape
- Internet Explorer
- Acrobat Reader

■ **Utilities**

- Norton Anti-Virus
- SAM Anti-Virus
- Norton Utilities
- Disk First Aid
- Apple Printer Utility
- FoolProof
- At Ease
- ANAT
- Retrospect

■ **Communications**

- Apple Remote Access
- MobileComm Messaging
- WhiteKnight/SmartCom

■ **Connectivity to Mainframe**

- Appleshare
- Windows NT
- MS/ StarNine Mail
- MacMainframe
- MacMidrange
- TCPAccess
- Attachmate Extra

FINDING

Given the wide range of applications used at schools throughout the district and the demands of supporting multiple packages and platforms, software standardization is necessary. An effort has been made to standardize productivity tool use in administrative offices with the acceptance of one office suite package. The District is just beginning standardization in other areas, such as:

- word processing
- spreadsheets
- integrated packages
- database management systems
- desktop publishing
- document production
- form processing and management
- image processing
- project management
- presentation graphics

The following benefits are realized through software standardization:

- Support and assistance for users can be provided much more effectively and economically if there is a limited set of software packages that must be supported.
- Economies of scale will be possible since purchases of one or two packages can be made in large quantities, thereby realizing considerable savings through bulk purchasing.
- Training becomes more manageable and economical since there is a limited set of software packages on which users must be trained.
- The transfer of documents between departments will be facilitated because the use of common software packages will eliminate the incompatibilities that arise from using different packages.
- As employees move from one place in the system to another, they will be able to adapt more easily to a new environment if they are familiar with the software in use in the new location.

COMMENDATION

ETS is commended for initiating a process to standardize administrative productivity tools.

The most forward thinking organizations, including school districts, are in the process of standardizing productivity tools. The experience of industry has demonstrated the importance of standardization for the business process. The Broward County School District is to be commended for being a leader in productivity tool standardization. In a period of greater school district decentralizing, greater autonomy in decision-making has

led to less software standardization. Specifically, this lack of standardization has magnified problems related to software tool compatibility in other school districts.

Furthermore, ETS is to be commended for initiating the transition in an efficient and cost effective manner. Users indicated that after overcoming the transition's learning curve that they are happy with the added benefits accompanying standardization.

FINDING

Although some standardization seems to be occurring in productivity tools, such as the move to Microsoft Office Suite, more attention needs to be given to the connectivity between these packages. The major administrative software systems tend to operate as stand-alone solutions addressing specific needs. Consequently, analyses of multiple incompatible databases necessitates the creation of custom programs for querying which can be quite costly.

RECOMMENDATION

Recommendation 12-9:

Strengthen the process to replace administrative software with software appropriate for use with a relational database design.

Some strides have been made in this regard through the use of the FAST, ISI, and COMPASS systems. However, more attention should be given to integration issues. For example, the use of the data warehouse in conjunction with BRIO software provides some connectivity. However, interviews with school administrators and teachers indicate that the system is not fully operational. In some cases, school administrators feel that the integration between systems fails to meet their needs and does not offer an easily accessible format for gathering information. One example is the lag time between when the personnel allocation for school changes and when it is reflected in the budget. With site-based budgeting, it is imperative to have real time updating to allow for proper decision-making.

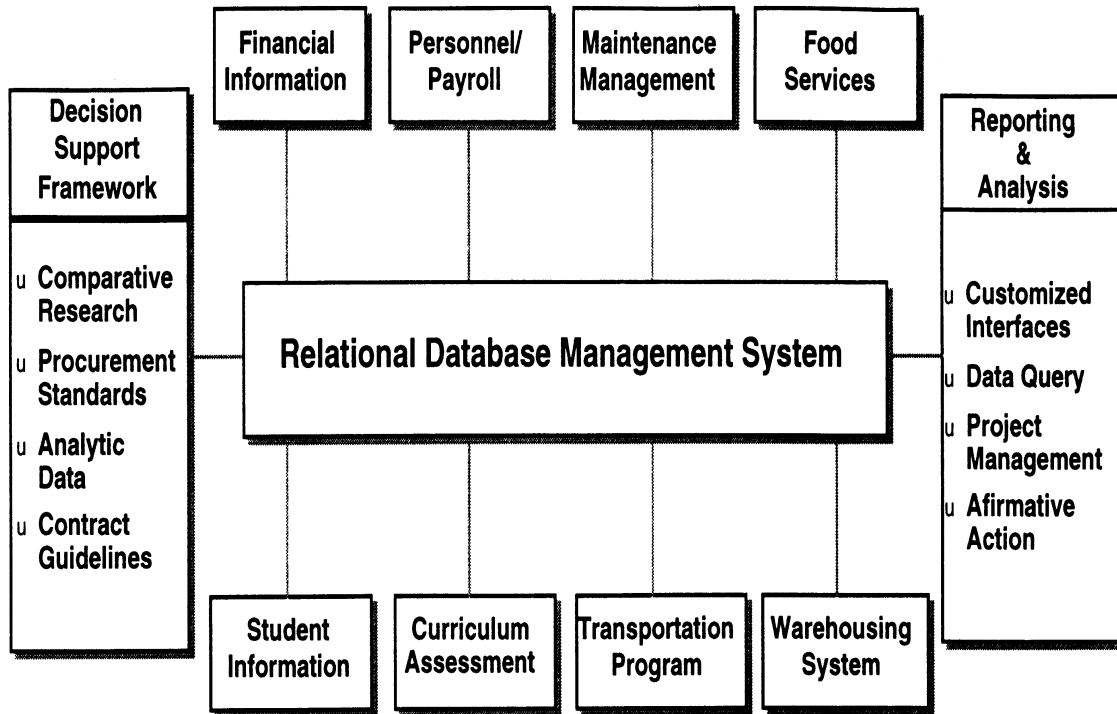
Although the RFP used to contract for districts systems emphasize connectivity, more attention needs to be give to end-users and their needs. The MGT review confirms that, thorough attention has been directed at macro-level connectivity issues, more attention needs to be given to micro-level actions.

The Technology Plan outlines the structure of a comprehensive and relational management system for the district. Exhibit 12-9 illustrates the design.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|----------|
| 1. The Director of ETS, or his designee, should oversee the complete implementation of the BRIO link. | May 1999 |
| 2. A new subcommittee of the Technology Advisory Committee should be created given the responsibility for ensuring software connectivity. | May 1999 |

**EXHIBIT 12-9
RELATIONAL INFORMATIONAL MANAGEMENT SYSTEM**



Source: Broward County School District, Technology Plan, 1996.

FISCAL IMPACT

Since the process will be implemented as new software products are added, no additional cost applies to the change.

FINDING

The ability of schools to gain access to ETS data as well as to transmit data to ETS are of great importance. The vast majority of the school-based reporting functions are electronic. A few of the major advantages that accompany the use of electronic transmissions include:

- decreases the need for paper storage and management;
- eliminates the extra step of 'keying' data into a database upon receipt;
- improves the reliability of data;
- increases the productivity of administrative staff; and
- allows for on-site data retention and verification.

Data access permit administrators and those interacting with students to make better decisions on how to deal with the needs of individual students.

MGT confirmed the inadequacy of the documentation through a review of information provided to schools. MGT found that the current method of data transference fails to satisfy the needs of school personnel. Five different site administrators described in detail how data must be placed into software for transference, but little guidance is provided on how to accomplish the process. Additionally, the same administrators indicated that when changes occur in the system, solutions or updates are not offered to employees responsible for the data transmission. Instead, a document indicating the new format or requirement is the only documentation issued. Without the necessary instructions, school administrators are left to determine the best way to accommodate the changes. Numerous school administrators state that their current staff lack the training necessary to quickly and efficiently produce their own solution that provides all of the requisite elements.

RECOMMENDATION

Recommendation 12-10:

Provide school administrators with sufficient documentation for operating software utilized in data transference.

New technology-related requests should be accompanied by documentation indicating how the change can be achieved. A simplistic, action-oriented document, specifically developed for the software package undergoing the change, should be included with each memo requesting alterations. For example, one administrator reported that during the last data reporting change, he was unable to make contact with a knowledgeable technician for several weeks and the problem could easily have been solved by providing some documentation regarding how the change should occur.

IMPLEMENTATION STRATEGY AND TIMELINE

- | | |
|---|-------------|
| 1. The Director of ETS should instruct ETS personnel to produce documentation to accompany data transmission change orders and to be posted on the district Intranet. | May 1999 |
| 2. The ETS Director should develop and disseminate the documentation. | Summer 1999 |
| 3. The Director of ETS should evaluate the usefulness of the change to determine alternative methods of improving data transference. | Fall 1999 |

FISCAL IMPACT

No additional costs are associated with this recommendation.

FINDING

Within Transportation Services, there is a unit called the Maintenance Management/COMPASS Department. The manager of this department reports to the Director of Transportation Services. The unit has a total of 20 positions which includes 17 data entry operators.

The Maintenance Management/COMPASS Department is a service operation that supports the Comprehensive Online Maintenance Planning and Stores System (COMPASS). COMPASS was acquired in 1986 and has served the district continuously since that time. The system is primarily a work order and stores inventory system that services the District Facility Maintenance Departments, Vehicle Maintenance, and Pupil Transportation Departments. In addition, COMPASS provides on-line employee time collection for these departments and interfaces the information to the district's payroll system.

At the time of the on-site visit, there were 312 users of COMPASS (i.e., Broward County staff that had on-line access to the system). COMPASS has an elaborate security system that includes eight different levels of access. By far, the largest number of users (237) had "read-only" access.

The system tracks maintenance work orders, including preventive maintenance, for transportation (i.e., buses, trucks, etc.), facilities (i.e., carpentry, plumbing, etc.), and maintenance work required at the schools. Earlier in the fall, the district piloted the system in one Innovation Zone. The pilot provided school personnel with the ability to check on the status of work orders on-line. The pilot was completed on November 1, 1998 (as scheduled), and the response from the pilot schools was very positive. The plan now calls for implementing the system throughout the district. Full implementation is scheduled to be completed in Spring 1999. When the system is available to all schools, there will be approximately 700 users.

COMPASS is programmed to automatically generate work orders for preventive maintenance. This capability is not just restricted to buses and trucks, but also is used to determine times for performing other functions such as tree trimming, fertilization, mowing schedules; and the maintenance of refrigeration units, cafeteria equipment, and water heaters. In fact, just about anything that should occur on a periodic basis can be tracked by the system.

The system is used also for inventory. Each work order includes information on stock items required for that job. The number of items required to complete the work order then reduces the number of stock items in inventory. When COMPASS senses that the re-order level for any stock item has been reached, the system generates a list that shows what items need to be ordered.

COMPASS is a mainframe-based system and there are eight staff members in ETS who support the system. Senior staff in the Maintenance Management/COMPASS Department and ETS report that there is a good working relationship between the two units and together they are providing effective services and support to COMPASS users.

COMMENDATION

The Broward County School District is commended for its acquisition, implementation, and ongoing support of the Comprehensive On-line Maintenance Planning and Stores System (COMPASS).

Another indication of the quality of the system is the high number of visitors who come to the Broward County School District to observe the system in operation.

FINDING

The Broward County School District collects and reports student grades in a semi-automated and time intensive manner. Teachers, regardless of the method of tracking grades, must manually code grade sheets each nine weeks for grade reporting. Once collected at the site, the grade sheets must be sent to the processing center where each one is processed through a scanning machine. Data are stored, and after the necessary calculations, report cards are printed. School administrators come to ETS to retrieve report cards and distribute them to students.

RECOMMENDATION

Recommendation 12-11:

Use data capture software in conjunction with an electronic grade book package to minimize the time involved in the report card process.

Automating the grading and report card process decreases administrative time and employs a more efficient method of obtaining critical data. One element of the Technology Plan calls for providing laptops to all teachers in the system. If a standard grade book software package were available, teachers could track and record grades as well as transfer grade data to the school office for aggregation. The aggregated data could be relayed to the central office and stored in the necessary systems. If for security reasons, report cards continue to be printed at a central location, the savings in record keeping and scanning should easily justify the change in procedures.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Technology Advisory Committee should form a subcommittee to determine the best grade book package | May 1999 |
| 2. The Director of ETS, in conjunction with the subcommittee, should purchase the software package. | Summer 1999 |
| 3. The Director of ETS, or his designee, should develop a method in BRIO to link the grade book software data to the TERMS system. | August 1999 |
| 4. The Director of ETS, or his designee, should develop a plan for redundant testing in the 1999-2000 school year. | August 1999 |

- | | |
|--|-----------------------|
| 5. ETS staff, under direction of the Director of ETS, should implement the automated grading system. | 1999-2000 school year |
|--|-----------------------|

FISCAL IMPACT

A variety of packages are available to provide electronic grade keeping and reporting. Depending on the capabilities, the cost for purchasing a site license and installing one of these systems varies from approximately \$100,000 to \$300,000. This cost would include a copy of the software and documentation for each teacher in the district. Additionally, many vendors provide initial training and technical support as part of the package. For estimation purposes, three major vendors were contacted and the average is used for this calculation.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Purchase a Uniform Grade Book Package	(\$200,000)	\$0	\$0	\$0	\$0

FINDING

The Manatee Student Financial System provides school personnel with the ability to track student fees, organizational funds, and money received by the school. The current system handles over \$2 million of activity during a typical school year. However, the version of the software utilized by the district suffers from the following problems:

- fails to be Year 2000 compliant;
- possesses no connectivity features;
- receives no technical support from the TSSC Help Desk; and
- operates on a 16-bit machine only.

Without an upgrade, this program will fail to be useful beginning in the 1999-2000 school year due to its date protocol. Moreover, the limitation of operating on a 16-bit system conflicts with the district's attempt to upgrade all machines to 32-bit. Several schools indicate that older systems are maintained in addition to newer equipment for the sole purpose of running the Manatee software. Given the volume of funds and importance of the system for tracking sport and extracurricular funds, a new package should be chosen and implemented as soon as possible.

RECOMMENDATION

Recommendation 12-12:

Replace the Manatee system with a more flexible, connectable, and up-to-date software package.

Several administrators indicated that using the module that is supported by MSA should be a possible solution given the current use of MSA. Ideally, the package would link with the student record system (TERMS) as well. By connecting to TERMS, the records of students owing the school money would be tied into the database that holds student

academic information. In addition, given the district's commitment to integrating all administrative systems, the package chosen should be easily connectable to the current accounting system.

Recently, the district prepared an RFP for contracting with a vendor for the new software. The RFP is scheduled to be released in March 1999. The timeline below is based on a May 1999 initiation schedule.

IMPLEMENTATION STRATEGIES AND TIMELINE

- 1. The Director of ETS should ask administrative staff to supply their needs for local accounting. May – June 1999
- 2. The Director of ETS, in consultation with administrative staff, should issue an RFP and determine the package and vendor most appropriate based on the needs cited. Summer 1999
- 3. The Director of ETS should purchase the new system. Summer 1999
- 4. ETS should test the new local accounting system. August 1999
- 5. ETS should implement the new local accounting system. Fall 1999

FISCAL IMPACT

A variety of packages could be selected for local accounting. Surveyed vendors estimate that the costs would run between \$40,000 and \$100,000. The price includes a site license to provide a copy of the software and a manual to each administrator responsible for student funds. Some vendors provide technical support and training as part of the price as well. Given the limited time available to the district to change this system and the size of the district, the cost estimate utilizes a higher estimate.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Purchase New Local Accounting Software	(\$80,000)	\$0	\$0	\$0	\$0

12.4 Professional Development

Training in the use of technology is one of the most critical factors that determines whether technology is used effectively. Teachers must be comfortable using technology and they must know much more than merely how to operate the equipment. In fact, they must know how to integrate it effectively into their teaching. Studies indicate that it may take three, four, or even five years for a teacher to acquire the level of expertise desired. Consequently, it should be recognized that mastering this approach is not something that can be achieved quickly. Planning and support for technology-related professional development must take this factor into account.

Training must also be ongoing. Teachers need to continuously have an opportunity to expand their instructional technology skills and they need opportunities to interact with other teachers so that they may share new strategies and techniques. Access to electronic mail has proven to be a very valuable way for teachers to share ideas on classroom uses of technology.

A key to improving student performance is changing the way learning takes place. Teachers can no longer be the “fountain of knowledge,” delivering information to their students. Instead, they must become facilitators, or coaches, who help students learn how to obtain the information they need from various sources. Technology is the “enabler” that makes this possible.

In the last two to three years, many teachers have come to realize that technology can be a very effective teaching and learning tool. Where previously many rejected its use, today most teachers are receptive to learning how to use it. Frequently cited as a problem; however, is the lack of time teachers have to participate in training. Most teachers are engaged in classroom responsibilities so extensively that they find it difficult to attend training that is offered after school or on weekends. Compounding this situation is a growing resentment to the expectation that they participate in training on their own time with little or no compensation.

During some interviews, it was found that opposition is growing to pulling teachers out of their classes to attend training sessions. Such an attitude is understandable since students are almost certainly going to be more productive when their regular teacher is present. However, other factors must be considered. If teachers are able to attend technology-related training, they are going to be more effective in using technology, thereby enhancing the learning opportunities of their students. Because the students will benefit from the training their teacher receives, it is not a sound educational practice to prohibit teachers from attending a reasonable amount of training sessions during school days.

Some argue that teachers should obtain these additional skills on their own time and advocate scheduling teacher training after school, on weekends, or during the summer only. It is certainly true that teachers, like other professionals, have a responsibility to devote some personal time to bettering their professional skills—and most do. Also like other professionals, they should have opportunities during the workday to receive training. In fact, if employers are able to improve the effectiveness of their employees through training, they have an obligation to do so. If for-profit companies follow such practices, educational organizations certainly should do so as well. Thus, in most instances, teachers should be compensated for training sessions they attend outside of normal working hours.

An alternative approach to delivering professional development has emerged in business and is rapidly being adapted to education. This new approach uses the technology as a delivery mechanism for the professional development. Teachers with computers at home, or with computers they check out from school for home use, sign on to the Internet to take courses. These courses are offered by both public and private entities. Some are very primitive, with little more than lecture notes placed on-line. Others, however, are very sophisticated with on-line mentors to help “students,” interactive activities, chat rooms for course participants, and other efforts to build a

sense of community among the participants. Because the courses are on-line, teachers can approach the material whenever it is convenient for them, whether that is on a Sunday afternoon, or early in the morning. If teachers are already comfortable with the technology, this is a low-cost, high impact approach to professional development.

CURRENT SITUATION

Broward County's Information Technology Plan states:

Professional development is essential if teachers are to improve their technology-based knowledge and skills. The progression to greater competency is a process that develops over time, and is measured in years of practice, trial and error, and persistence. Understanding the time element and commitment to improving staff technology competency will facilitate the realization of the technology vision for each school in Broward County.¹

One of 19 technology guidelines specified in the *School and District Technology Usage* policy reads: "Appropriate training and professional development must be provided to teachers, staff, and administrators to ensure timely implementation and effective use." From these statements it is clear that the Broward County School District places a high priority on professional development for all staff.

FINDING

Several steps have been taken to provide professional development to staff, particularly to teachers. For example, there is a professional development coordinator in each Innovation Zone who is charged with coordinating professional development and training for staff in the zone.

The Educational Programs Department has conducted the Pyramid Project which has provided training to teachers during the summer. During the summer of 1997, over 300 teachers participated in two-week sessions that offered instruction on the integration of multimedia applications. The program objective was to help teachers integrate technology into math, science, social studies and language arts. Those who attended were to return to their schools and work with their colleagues on technology integration. During the summer of 1998, about 100 teachers took part in training on the instructional use of the Internet. The reason the attendance was substantially lower was that only teachers who actually had Internet access in their classrooms were eligible.

ETS has recently added six teachers to its staff to provide professional development support to schools. (Note: These are not among the positions recommended for elimination in Section 4.3 in Chapter 4). These new trainers serve staff in the schools that have been wired. The objective is to enable those schools to make more effective use of the technology resources that are now available. Each trainer is assigned to an area and supports the schools in their area. Their job is to ensure that technology is being used for decision making, school improvement, and curriculum integration. Some specific tasks they perform include:

¹ School Board of Broward County Information Technology Plan, prepared by the Center for Educational Leadership and Technology, October 1995, page 59.

- provide advice to the principal and SAC;
- assist with technology planning;
- help to implement the technology plan;
- work with individual teachers on using technology in their teaching;
and
- evaluate technology use at the site.

In spite of these and other efforts to help teachers adapt technology as an integral part of their teaching, interviews with school-based personnel and district staff confirmed that professional development for teachers was not adequate. Although there are many opportunities for basic training in technology applications, the primary complaint was a lack of training in more advanced topics, especially in integrating technology into specific content areas.

MGT technology consultants visited about 20 schools in Broward County. During these on-site visits, over 95 percent of teachers and technology coordinators indicated the need for more training. In addition, two ETS staff members added to the comments made by teachers and staff by indicating that the ETS facility is so overcrowded that the training rooms have been converted into offices.

Based on the fact that a significant need for more advanced professional development exists, and limited time will continue to be a problem for teachers, it is clear that new, more creative strategies for delivering professional development must be implemented.

RECOMMENDATION

Recommendation 12-13:

Review various strategies for delivering professional development and devise new creative approaches to address the significant need for enhanced training for teachers.

The Staff Development Subcommittee of the Technology Advisory Committee should assume the responsibility for studying various approaches to strengthening professional development and provide a plan for improving that function. Some strategies that should be explored include:

- allocating additional release time so that teachers may participate more frequently in traditional professional development workshops;
- expanding upon the training opportunities available through BECON and other distance learning sources;
- developing a comprehensive web-based training program;
- producing videos of highly skilled teachers using technology in their content area to provide teaching models;

- granting more release time to media specialists to allow them to work closely with teachers in their school;
- arranging more on-site instructional support through teachers who can work individually with other teachers on specific teaching strategies;
- seeking ways to increase the availability of personal and on-line mentors;
- increasing the number of teachers who attend educational technology conferences such as the BETS Conference, FETC, and others; and
- exploring the availability of retired educators who could assist with various types of professional development.

Regardless of the professional development strategies adopted, it is critical that emphasis be placed on more advanced training. During interviews, school personnel consistently confirmed MGT's findings by expressing the belief that the lack of advanced training was one of the major shortcomings of the district's current professional development programs.

IMPLEMENTATION STRATEGIES AND TIME LINE

- | | |
|--|-----------------|
| 1. The Staff Development Subcommittee of the Technology Advisory Committee should explore the various strategies for delivering professional development and devise new delivery strategies. | May – July 1999 |
| 2. The Subcommittee should present its recommended strategies to the full Technology Advisory Committee for its review. | July 1999 |
| 3. The Technology Advisory Committee should take the steps necessary to obtain approval to proceed with implementing the proposed strategies for delivering professional development. | August 1999 |
| 4. Broward County teachers and others should participate in training that is provided through the new professional development delivery techniques. | Ongoing |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

12.5 Technical Support

Technical support, like training, significantly influences how effectively technology is used in the classroom. Frequently teachers, even those who have had considerable experience with technology, encounter difficulties that interrupt their planning or classroom activities. Unless they are able to get quick responses to questions like those below and many others, their effectiveness will be diminished.

- Why is one of the computers in my classroom malfunctioning so often?
- Why does my connection to the Internet keep disappearing?
- How do I direct a document to another printer in the building?
- How do I transfer this file to Northeast High School?
- Why can't I import this Excel chart into my Word document?

When solutions to these types of problems are not provided promptly, teachers sometimes abandon the use of technology. After such experiences, persuading them to resume using it is often challenging.

Those schools which are able to supply answers quickly to these and scores of other similar questions will be the schools that most effectively prepare their students. An on-site technology specialist is by far the best way of satisfying the needs described above, as well as many others.

FINDING

With the push to increase the level of resources present within the classroom throughout the district, the demands for technical support are increasing immensely. The responsibility for providing technical support belongs to the ETS Help Desk.

The district is in the process of implementing the Vantive Customer Service Management (Help Desk) software package. The software generates a central database of problems and solutions. Also, the database tracks problem histories for future project planning and technology related decision-making.

The Help Desk software will allow ETS staff to:

- log every call received;
- route calls to the appropriate problem solver;
- monitor problem resolution;
- provide management reports on call traffic, resolution time, etc.;
- provide reports on trends that should be targeted in training;
- create a searchable database of problems and solutions; and
- prioritize tasks depending on the scope of the problem.

The customer service portion of the package is web-enabled and will allow schools and district offices to:

- request services and check request status;
- report problems and check status of open problems; and
- search database for solutions.

When comparing the performance of ETS to other technology departments in MGT's school district database, the administrator, principal, and teacher satisfaction levels in the Broward County School District easily exceed the average. Sixty-six (66) and 76 percent of administrators feel that the district is doing a *good* or *excellent* job at using instructional and administrative technology, respectively. The database average for instructional and administrative technology support in other districts is only 28 and 22 percent.

Principals rate the district's performance in a similar manner. Teachers score closest to the database average by giving a 56 and 54 percent approval rating of the district's use of technology in the instructional and administrative arenas, respectively. Nevertheless, MGT's national teacher database average is 14 and 35 percentage points lower than teacher respondents to the Broward survey.

In contrast, however, interviews with teachers and administrators consistently reveal that the ETS technical support Help Desk fails to:

- satisfy all of the needs of the schools;
- interact with school personnel in a friendly and concerned manner;
- fail to return calls;
- possess the knowledge necessary to answer questions; and
- understand the issues related to technology in the classroom.

With the need to increase the level of resources present within the classroom throughout the district, the demands for technical support are increasing immensely. The responsibility for providing technical support belongs to the ETS Help Desk.

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- create a searchable database of problems and solutions; and
- prioritize tasks depending on the scope of the problem.

The customer service portion of the package is web-enabled and will allow schools and district offices to:

- request services and check request status;
- report problems and check status of open problems; and
- search database for solutions.

Although the Help Desk is a recent addition to ETS, recognizing the failure of the current system to provide sufficient support demonstrates the desire on the part of the leadership of ETS to improve service delivery. However, the Vantive system alone will be insufficient to increase customer service and responsiveness.

Additional training is necessary for the staff utilized at the Help Desk. Some respondents report that the members of the Help Desk answer phones only and provide few, if any, solutions from an initial phone call. The inability to answer simple questions at the point of initial interaction indicates that more training of the Help Desk staff is necessary.

RECOMMENDATION

Recommendation 12-14:

Develop a training program for Help Desk team members dealing with technical and non-technical issues.

The customer satisfaction survey being conducted by ETS will serve as a useful summary of the needs and concerns of the customers they serve. This information should be carefully examined before creating any type of Help Desk training program. In the future, data collected by the Vantive system will provide an invaluable resource for training issues and goals.

While periodic technical training will increase the knowledge base of team members, customer service training should also be a component of the training process. When a teacher or administrator calls with a problem, a sense of genuine interest in that problem should be established. Asking the right questions and knowing when to listen can improve customer approval.

IMPLEMENTATION STRATEGIES AND TIME LINE

- | | |
|---|-----------|
| 1. The Manager of the Customer Service Center should examine the results of the ETS customer survey. | May 1999 |
| 2. The Manager of the Customer Service Center should develop a set of goals and curriculum for training the Help Desk team members. | June 1999 |
| 3. The Manager of the Customer Service Center should present findings to the Technology Advisory Committee and the Director of ETS. | July 1999 |

- | | |
|---|-------------|
| 4. The Manager of the Customer Service Center should begin the training program. | August 1999 |
| 5. Training goals should be reevaluated and new sessions organized every quarter. | Ongoing |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

13.0 TRANSPORTATION

This chapter presents the findings and recommendations for the performance review of the Transportation Services Department of the Broward County School District. The chapter has been organized into the following four sections:

- 13.1 Organization and Management
- 13.2 Routing and Scheduling
- 13.3 Vehicle Maintenance
- 13.4 Bus Fleet Management

BACKGROUND AND OVERVIEW

As part of this performance review, a diagnostic on-site review was first conducted of the Broward County School District. The transportation portion of the diagnostic review included responses from administrators, principals, teachers, and the general public. Overall the diagnostic review indicated a general satisfaction with the Transportation Services Department, and a great improvement in services over the past four years. Some of the key findings showed:

- a reduction in parental complaints on scheduling of buses as a result of the new computerized EDULOG Routing System;
- a reduction in transportation costs as a result of the initiation of depot stops for student riders (transporting students to cluster points, transferring them to other buses to get to their base school);
- increased efficiency using shorter runs to increase the number of riders per bus; and
- satisfaction with the postcard system to advise parents prior to the beginning of the school year of the child's bus and the routing.

The performance review team confirmed the improvements identified in the diagnostic on-site review and additionally found the Transportation Services Department to be performance-oriented and highly focused on making critical improvements in the overall operation. Areas in which critical improvements have been made, or were in the process of being made, in the Transportation Services Department include the following:

- A highly efficient system called COMPASS provides workload tracking information to transportation services management.
- A new maintenance warranty program began in July 1998 at the central maintenance facility.
- A 54-point self-inspection system is performed quarterly in each area terminal facility.
- A depot system is used to get higher utilization of each bus.

Although the Transportation Services Department does not have published staffing standards for the number of mechanics required to support the bus fleet, and other district vehicles, it is in line with other school districts throughout the country.

In other areas where improvements are needed, the review team focused on issues that have the greatest potential for the Broward County School District. A summary of those issues included the following:

- The Broward County School District has a higher cost for transportation services than the average of its peer groups.
- The Broward County School District has a lower ridership rate and a lower ridership per bus than the average of its peer groups.
- Transportation Services expenditures have increased 40 percent over the 1994-97 time period, yet student ridership has only increased seven percent.
- The span of supervisor for transportation terminal supervisors is unbalanced at the five area terminals.
- Route planners are attached to area terminal supervisors rather than functioning as an integrated team with the route planning supervisor.
- Driver absenteeism causes the need for an expensive substitute driver system, referred to in the Transportation Services Department as relief drivers.
- Overtime pay usage is higher than authorized, and higher than other larger school districts previously studied.
- An attrition rate of 350 drivers per year (20 percent) between 1995 and 1998 causes the need for an expensive recruitment and selection system. The norm for comparable school districts is 10-15 percent.

Exhibit 13-1 shows expenditures for the three-year period of 1994-95 to 1996-97. This exhibit also shows comparison statistics for staffing and ridership.

Over the three year period of time from 1994 to 1997, the Transportation Services Department's expenditures increased by 40 percent. Costs, which include the cost of the purchase of buses, have increased from approximately \$42 million to \$59 million. The expenditures for buses has increased over 400 percent from \$1.8 to \$9.7 million. The indicators of workload (e.g. the number of annual miles and the number of daily buses), have risen at a much lower rate of 15 percent and 29 percent, respectively. Of importance to note is the number of mechanics which support the bus fleet has only risen at a rate of 11 percent, while the increase in buses rose at a rate of 29 percent. The rate of student riders, the major customer to the Transportation Department, has only risen by seven percent.

**EXHIBIT 13-1
BROWARD COUNTY TRANSPORTATION SERVICES EXPENDITURES
1994-95 THROUGH 1996-97**

CATEGORY	1994-95	1995-96	1996-97	PERCENTAGE INCREASE
Expenditures	\$42,107,304	\$49,102,783	\$58,917,274	40%
Purchase of Buses	\$5,009,401	\$4,432,688	\$9,675,010	93%
Total Annual Miles	15,050,560	17,231,514	17,328,142	15%
# Student Riders	60,767	65,351	64,911	7%
# Daily Buses	843	975	1,090	29%
# Bus Drivers	844	972	1,072	27%
# Substitutes	126	145	161	28%
# Mechanics	38	45	42	11%
# Total Employees	1,332	1,527	1,737	30%

Source: Quality Link, Florida School District Transportation Profiles, June 1996-1998.

Exhibit 13-2 provides detail of the three-year budget for 1996-97, 1997-98, and 1998-99 for the two major departments of Vehicle Maintenance and Pupil Transportation.

**EXHIBIT 13-2
BROWARD TRANSPORTATION BUDGET BY DEPARTMENT
1996-1997 THROUGH 1997-98**

CATEGORY	1996-97	1997-98	1998-99	PERCENT CHANGE
Vehicle Maintenance				
Positions	118	125	125	+6%
Salaries & Benefits	\$5,760,860	\$6,159,679	\$6,124,772	+6%
Operations	\$5,375,025	\$6,338,963	\$6,338,963	+18%
Overtime	\$49,857	\$49,857	49,857	0%
Total	\$11,185,742	\$12,548,499	\$12,513,592	+12%
Pupil Transportation				
Positions	1,603	1,709	1710	+7%
Salaries & Benefits	\$34,902,764	\$39,224,781	\$39,282,754	+13%
Operations	\$558,722	\$558,722	\$645,072	+15%
Overtime	\$2,008,123	\$2,008,123	\$2,008,123	0%
Total	\$37,469,609	\$41,791,626	\$41,935,949	+12%
Total Both Departments	\$48,655,351	\$54,340,125	\$54,449,541	+12%

Source: Broward County School District, Annual Budget 1996-97 to 1998-99.

The department is growing at a lesser rate during the most recent three-year period of 1996-97 to 1998-99. Growth in the budgets has been at a rate of 12 percent. An item worthy of note is that the Transportation Services Department has budgeted overtime from 1994-95 through 1998-99 consistently for Vehicle Maintenance at \$49,857 and for Pupil Transportation at \$2,008,123. In Pupil Transportation, this amounts to nearly six percent of the salaries and benefits. Later in this chapter, we provided a discussion on

overtime expenditures as compared to other large school districts in the country. The comparison figures for overtime ranges from one to four percent. In 1996-97, the expenditures for transportation were nearly \$59 million. The budget for that year, shown in Exhibit 13-2, was over \$10 million less at \$48.7 million. As discussed with the Director of Transportation, the overspending was attributed to additional overtime, an expanded summer school program, and an expanded training program to meet the needs of the explosive growth of the district.

The peer districts selected for the Broward County School District were Miami-Dade, Palm Beach, Duval, Hillsborough, and Orange County School Districts. The comparative data for this analysis were selected from the *Quality Link-Florida School District Transportation Profiles (Quality Links)* prepared by the Florida Department of Education. The publications are careful to note that the information “should encourage thoughtful, probing questions and more complex data collection to explain many of the variations in costs among districts”. The publications also caution drawing conclusions only after careful “scrutiny and analysis”. The information provided in this chapter is done so with the cautionary advice in mind. When peer district information was not available in *Quality Links*, but where comparative data were helpful in providing guidance to the Broward County School District, MGT used information from the data obtained in other school district reviews. There are three areas that the review team pursued as they related to issues of critical importance that were being investigated for this report. These are:

- comparative cost of operation;
- comparative student ridership and cost per rider; and
- comparative staffing of substitute drivers

Data gathered on all three areas provide strong evidence that the Broward County School District could reduce the cost of its transportation operation significantly with greater utilization of buses in its fleet. Exhibit 13-3 shows the comparison between the average miles driven per bus and the cost per mile for operation of the buses.

**EXHIBIT 13-3
OPERATIONAL COST STATISTICS
BROWARD COUNTY SCHOOL DISTRICT AND PEER SCHOOL DISTRICTS
1996-97 SCHOOL YEAR**

SCHOOL DISTRICT	BUSES DAILY	MILES PER BUS	COST PER MILE	OPERATING EXPENDITURES
Miami-Dade	1,313	18,281	\$2.88	\$70,966,894
Palm Beach	572	22,440	\$1.56	\$21,000,330
Duval	913	20,200	\$1.77	\$35,634,041
Hillsborough	972	21,806	\$1.73	\$40,483,928
Orange	860	17,780	\$2.11	\$34,315,845
Peer Average	926	20,101	\$2.27	\$40,480,208
Broward	1,066	16,600	\$2.73	\$49,242,264

Source: Quality Link, Florida School District Transportation Profiles, Florida Department of Education, June 1998.

As can be seen, the Broward County School District has the lowest mileage per bus, but has a larger average operating budget and a greater cost per mile than the average peer districts. The Transportation Services Department is not getting the utilization per bus that the peer group is experiencing. Thus, the cost per mile for the Broward County School District is \$0.46 per mile higher than the peer group average.

Exhibit 13-4 shows the comparison of student ridership, bus occupancy, and cost per rider with the other peer school district districts. As can be seen, the Broward County School District has nearly 2,776 more student riders than the average of the other peer districts, runs 140 more buses, and has the lowest bus occupancy next to the Miami-Dade School District. Consequently, the cost per rider is \$109 more per student. In summary the statistics provide an indication that Broward County School District's bus operation is not as efficient as the other peer districts.

**EXHIBIT 13-4
RIDERSHIP STATISTICS
BROWARD COUNTY SCHOOL DISTRICT AND PEER SCHOOL DISTRICTS
1996-97 SCHOOL YEAR**

SCHOOL DISTRICT	STUDENT RIDERSHIP	DAILY BUSES	BUS OCCUPANCY	STUDENT RIDERS	COST PER RIDER
Miami-Dade	18.7%	1,313	49	63,743	\$1,113
Palm Beach	42.1%	572	101	57,874	\$363
Duval	43.3%	913	60	54,642	\$652
Hillsborough	51.6%	972	78	76,221	\$531
Orange	45.2%	860	68	58,193	\$590
Peer Average	40.2%	926	71	62,135	\$650
Broward	29.7%	1,066	61	64,911	\$759

Source: Quality Link, Florida School District Transportation Profiles, Florida Department of Education, June 1998.

Exhibit 13-5 provides a comparison of the percentage of substitute drivers which are being used by each peer school district.

**EXHIBIT 13-5
SUBSTITUTE DRIVERS
BROWARD COUNTY SCHOOL DISTRICT AND PEER SCHOOL DISTRICTS
1996-97 SCHOOL YEAR**

SCHOOL DISTRICT	BUS DRIVERS	DRIVER SUBSTITUTES	PERCENTAGE SUBSTITUTES
Miami-Dade	1,310	179	14%
Palm Beach	572	50	9%
Duval	0*	*	*
Hillsborough	890	98	11%
Orange	968	85	9%
Peer Average	935	103	11%
Broward	1,072	161	15%

Source: Quality Link, Florida School District Transportation Profiles, Florida Department of Education, June 1998.

*Duval data are missing and not included in the average.

The peer data on driver substitutes show that Broward County School District is staffing substitutes at 15 percent of the total number of bus drivers, while the peer districts are averaging 11 percent. Attributing an 11 percent staffing of substitutes to bus drivers shows that Broward has, on average, 43 more substitute drivers than the peer districts.

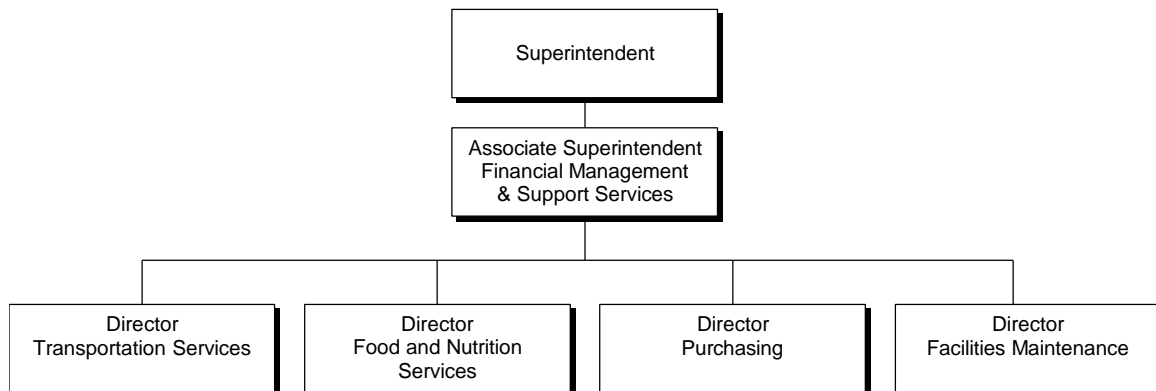
Although the review of the Transportation Services Department showed many exemplary practices, the comparison of operations with peer districts shows a higher cost of operation, a higher cost per rider, and a higher number of substitute drivers. All three of these indicators point toward a potential for the Broward County School District to improve efficiency and lower its cost for transportation.

13.1 Organization and Management

CURRENT SITUATION

The Director of the Transportation Services Department reports to the Associate Superintendent of Financial Management and Support Services. Exhibit 13-6 shows the upper level organizational structure from the Superintendent to the Transportation Services Department.

EXHIBIT 13-6 ORGANIZATIONAL STRUCTURE FOR THE TRANSPORTATION SERVICES DEPARTMENT



Source: Broward County School District, Department of Transportation Services, 1998.

The Transportation Services Department has a total of 1,858 employees in its 1998-99 budget. As shown in Exhibit 13-7, the department has three subsections:

- the Pupil Transportation Department with 1,710 employees;
- the Vehicle Maintenance Department with 125 employees; and
- the Systems and Procedures Department with 20 employees.

The Director's office has two employees assigned, in addition to the Director's position.

The Pupil Transportation Department is responsible for safely transporting students from home-to-school each day. The Vehicle Maintenance Department is responsible for maintaining all of the district vehicles, performing the state required vehicle safety inspections, and maintaining a stockage level of repair parts. The Systems and Procedures Department is responsible for COMPASS (Comprehensive On-Line Maintenance and Stores System). COMPASS provides for the capability of tracking individual work time and project costs.

FINDING

The Transportation Services Department has been struggling with absenteeism issues on the part of school bus drivers for several years. Absenteeism is a negative force on morale, since it places the work burden on the employees who are attempting to comply with the leave rules. It is also costly, since the burden on the compliant employees causes a higher percentage of payroll to be used for overtime pay.

Bus drivers work 190 days per year and spend on an average of 19 days of this time on leave, while authorized a maximum of 10 days per year. In accordance with union contract language, the Transportation Department has been offering monetary awards since 1994 to reduce absenteeism an average of two days for each employee. The union contract reads:

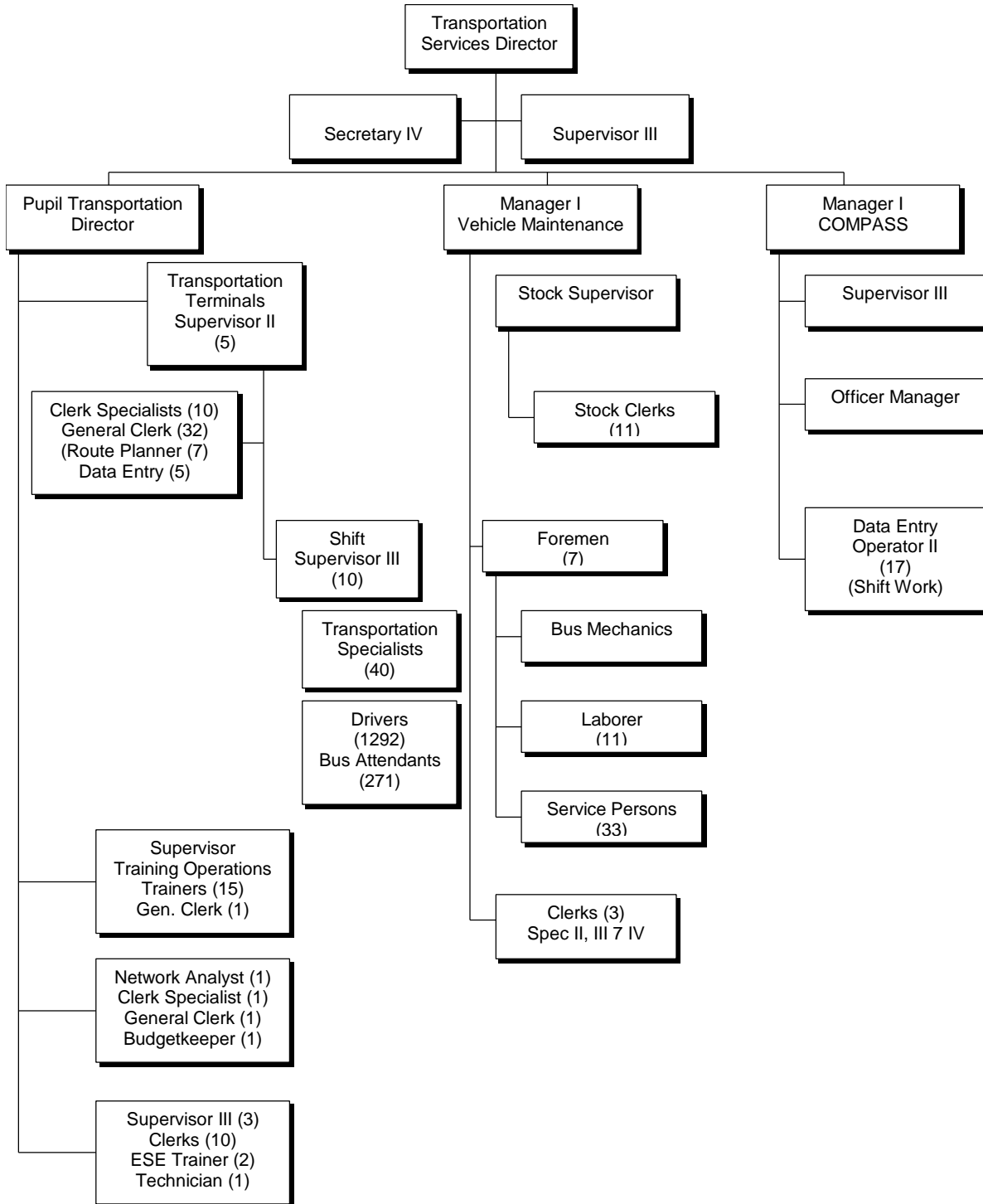
If Transportation employees in an area reduce absenteeism by an average of two days per employee from 1996-97 to 1997-98, the area will be allocated \$10,000 to divide among the employees in the area. However, participating employees cannot use more than five sick days if they wish to receive this award.

The incentive award requires all employees in an area to comply with the reduction, or no one gets the award. Those employees interviewed for the study did not believe that the monetary awards were having an appreciable difference in reducing the absenteeism. In fact, the evidence in Exhibit 13-8 shows that absenteeism has increased by 11 hours per driver per year between 1995-96 and 1997-98. These data support the responses of those interviewed.

According to Exhibit 13-8, the average number of hours of absences per driver for 1997-98 was 115, or 19 days. This equates to nearly two days per month per driver, or nine days per year over the number of days authorized by the district.

The actual focus of attention to correct high usage of leave time may need to be focused on only a few employees. To get a better grasp of high leave users, a random sample of detailed leave usage was gathered on a small number of drivers. There were 47 drivers in the sample, which is four percent of the total number of drivers.

**EXHIBIT 13-7
DEPARTMENT OF TRANSPORTATION SERVICES
ORGANIZATIONAL CHART**



Source: Broward County School District, Department of Transportation Services, 1998.

**EXHIBIT 13-8
DRIVER ABSENTEEISM*
1995-96 THROUGH 1997-98**

SCHOOL YEAR	DRIVERS AUTHORIZED	HOURS ABSENT	HOURS ABSENT/YEAR/DRIVER
1995-96	1,164	120,920	104
1996-97	1,226	122,207	100
1997-98	1,292	148,692	115

Source: Transportation Services Department, 1998.

Note: Records on absenteeism were provided by the Transportation Services Department for the most recent three-year period. The leave records included summary information on "personal leave-unpaid", "sick leave-personal illness", sick leave-other", and sick leave-personal reasons". The hours absent per year per driver were calculated by dividing the number of hours absent, by the drivers authorized.

While this is not necessarily a statistically valid sample, it is an indication that only a small number of drivers, possibly 20 percent or less, are responsible for over 50 percent of the total leave usage for the department.

Exhibit 13-9 shows the detail on the 47 randomly-selected drivers for the three-year period.

**EXHIBIT 13-9
COMPARISON OF HIGH AND LOW LEAVE TIME**

CATEGORY	DRIVERS	PERCENT OF DRIVERS	HOURS USED	PERCENT OF TOTAL
High Level of Absenteeism	9	20%	2,197	51%
Low Level of Absenteeism	38	80%	2,165	49%
Total	47	100%	4,362	100%

Source: Transportation Services Department, 1995-1997.

For comparison purposes with another group of employees in transportation, data were also gathered on absenteeism related to the vehicle mechanics as shown in Exhibit 13-10. The vehicle mechanics work 261 days per year. Absenteeism is not as prevalent for mechanics as it is for bus drivers. Mechanics average almost the same number of hours off per year, but they work an additional 71 days more than the bus drivers.

A detailed analysis of each employee's leave time did not reveal any specific high level of leave use, indicating that high leave usage is not necessarily systemic within the Transportation Services Department, but centers more on bus drivers.

**EXHIBIT 13-10
ABSENTEEISM FOR VEHICLE MECHANICS**

SCHOOL YEAR	MECHANICS AUTHORIZED	ANNUAL HOURS WORKED (Estimated)	HOURS ABSENT	HOURS ABSENT/YEAR PER MECHANIC
1995-96	47	98,136	4,132	88
1996-97	46	96,048	4,132	90
1997-98	46	96,048	5,057	110

Source: Broward County School District, Transportation Services Department, 1998.

The concerns of bus drivers, as related to this matter, were discussed in a focus group interview session. Since all drivers could not attend the session, a random sample of 15 drivers was selected to give everyone an equal chance of participation. As part of the interview session, the drivers suggested that monetary rewards for reducing absenteeism would probably work better if the rewards were part of a larger program that incorporated periodic listening sessions to sort through the issues of concern in each area of the district.

The cost for high usage of leave time can be manifested in excessive overtime costs or by incurring a higher than necessary staff. Overtime costs were found to be excessive for the Transportation Services Department. No cost records for overtime were readily available despite repeated attempts made by MGT to gather costs from both the Transportation Services Department and the Finance Office. The lack of records is an indication that the Transportation Services Director and both the Director of Pupil Transportation and the Director of Vehicle Maintenance do not have the data that are needed to properly manage the overtime account. Since cost information was not readily available, an estimate of cost was made based upon the hours reported for the overtime use report. An estimated hourly rate was established based upon the average cost per person in each department.

Exhibit 13-11 shows the estimated overtime payments for 1995-96 through 1997-98. Although the overtime usage trend is down between 1995-96 and 1997-98, the expenditures are still excessive. The determination of excessive is based upon information from other school districts with similar size transportation departments. Overtime costs were calculated, however, by deriving an estimated cost for overtime hours and then the total hours provided was multiplied by the estimated costs. The Transportation Services Department provided the actual number of hours worked for premium overtime paid at time and a half pay, or the excess of 40 actual hours worked during a pay period (OTP) and straight overtime paid at a non-premium rate, which is the excess of eight actual hours worked in one day. The employee did not actually work more than 40 hours in a pay period (OTS). The calculation for overtime costs in this report is conservative since it only considers straight time and not time and a half.

**EXHIBIT 13-11
OVERTIME COSTS BY DEPARTMENT
1995-1998**

CATEGORY	1995-96	1996-97	1997-98	% CHANGE
Vehicle Maintenance Overtime*	\$256,594	\$120,068	\$117,746	-54%
Pupil Transportation Overtime*	\$2,813,140	\$2,608,650	\$2,579,630	-8%
Total Both Departments	\$3,069,734	\$2,728,729	\$2,697,376	-12%

Source: School Board of Broward County 1995-96 to 1997-98.

*Note: Only overtime hours were provided by the district, but costs were calculated for maintenance based upon \$26/hour and for transportation based upon \$22/hour fully loaded costs derived from budgeted figures. Actual expenditures were not available.

Despite the downward trend for overtime spending, both the Vehicle Maintenance and Pupil Transportation Departments are overspending the budgeted amount on a consistent basis. The Transportation Services Department has budgeted overtime from 1994-95 through 1998-99 consistently for Vehicle Maintenance at \$49,857 and for Pupil Transportation at \$2,008,123 as shown in Exhibit 13-2 earlier in this report. Although the total cost is not as high as Pupil Transportation, the most recent actual usage of overtime for Vehicle Maintenance is nearly two and a half times what the department budgeted. The actual overtime for Pupil Transportation is 25 percent higher than what was budgeted.

In 1997-98, the district budgeted \$27.2 million for bus driver salaries. Overtime costs for that same year are estimated at \$2.6 million, or nearly 9.5 percent of salaries. The amount budgeted for bus driver overtime that year was \$2.0 million, or seven percent of salaries. Information obtained as a result of reviews performed in other school districts showed that one to two percent of the budget was fairly appropriate. Costs exceeding the one to two percent range were an indication that budget was not being properly monitored or that staffing was insufficient to meet the daily needs of the district.

Exhibit 13-12 shows the comparison of the percentage of payroll for overtime between the Broward County School District and three other districts: Fairfax County, Virginia; Montgomery County, Maryland; and Prince George's County, Maryland. As can be seen, overtime in the Broward County School District is significantly higher than districts combined.

**EXHIBIT 13-12
OVERTIME USAGE COMPARISON WITH OTHER SCHOOL DISTRICTS
1997-98**

SCHOOL DISTRICT	FLEET*	OVERTIME USAGE
Prince George's County, MD	1,146	1.0%
Montgomery County, MD	1,025	4.2%
Fairfax County, VA	1,245	0.5%
Broward County, FL	1,409	9.5%

Source: Update of information from previous project review work with school district transportation departments, December 1998.

*Fleet information from School Bus Fleet Magazine, 10/97.

RECOMMENDATIONS

Recommendation 13-1:

Establish a comprehensive achievement program for the Transportation Department that will recognize employees for achievement and meritorious work.

The district should establish a comprehensive achievement program to reward and motivate drivers, attendants, and mechanics. The program, at a minimum, should be comprised of the elements discussed below. Each year the employees should be asked to meet with their supervisors and establish objectives associated with work quality as well as time and attendance. After completing the agreed upon objectives, both the employee and supervisor should sign the written objectives. Some suggested work quality objectives are related to zero incidents (bus and students) and on-time performance for drivers and attendants. Work quality objectives for mechanics could consist of the percent of preventive maintenance completed on time and the percent of bus repairs completed on time.

Those employees who meet their objectives should be given recognition at an assembly of their peers on an annual basis. Those who have greatly exceeded the objectives, or performed extra meritorious work, should be singled out for written correspondence awards, signed by the Transportation Services Director and others, including the Superintendent and Board members. This should assist in team building and enhance morale.

Additionally, the department may want to issue certificates and plaques for the driver, attendant, and mechanic of the month based upon a vote of the peers. Making all employees aware of those who have met their objectives and have performed extra meritorious service can provide a forum for the employees to choose a fellow employee for distinction. The combination of establishing agreed upon objectives and allowing employees to choose counselors for distinction should help develop a more cohesive department and build a team spirit.

Recommendation 13-2:

Reduce overtime usage to a more acceptable three to five percent rate and track overtime use.

The overtime usage is exceedingly high based upon information provided by other comparative school districts. The district should track and report overtime use. A reduction in absenteeism is expected to have a corresponding impact on the reduction in overtime usage.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Transportation Services Director should prepare a comprehensive achievement program, which includes "meet and discuss" listening sessions as well as an awards and rewards component. July 1999
2. The Transportation Services Director should obtain input from the transportation employees, the Human Resource September 1999

Director, and get approval from the Superintendent and the School Board.

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|---|----------------|
| 3. The Transportation Services Director should implement the achievement program. | January 2000 |
| 4. The Transportation Services Director should evaluate the achievement program. | August 2000 |
| 5. The Transportation Services Director should request development of an information system that will provide monthly information on overtime usage. | May 1999 |
| 6. The Transportation Services Director, the Pupil Transportation Director, and the Vehicle Maintenance Manager should implement an overtime usage information systems. | September 1999 |
| 7. The Transportation Services Director should develop procedures for tracking overtime usage and establish review criteria for evaluating high usage of overtime and document the reasons that necessitate overtime usage. | January 2000 |
| 8. The Transportation Services Director should evaluate and publish the changes in absenteeism, turnover, overtime, and the reasons for the change. | August 2000 |

FISCAL IMPACT

Implementation of a comprehensive achievement program is expected to reduce absenteeism and overtime costs. Implementation of the program is expected by January 2000 and an initial evaluation of the program by August 2000. After two years of operation, the benefits of the program are expected to reduce the current overtime costs in half reducing the current overtime percentage of 9.5 percent of salary to approximately five percent of salary by 2001-02.

The current overtime costs for bus drivers are \$2.6 million. Approximately half of the reduction of \$1.3 million is expected by the end of the 2000-01 school year, and the full reduction is expected by the end of the 2001-02 school year and beyond. The five-year savings is shown below.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Reduce Overtime in Half	\$0	\$650,000	\$1,300,000	\$1,300,000	\$1,300,000

FINDING

The Broward County School District's school bus driver turnover rate is high. The Transportation Services Department is experiencing a turnover rate for school bus drivers of approximately 20 percent per year over the most recent four-year period. Turnover rate is not available in Quality Links for the peer school districts, but the districts that have comparable transportation departments to Broward, such as Fairfax

County, Virginia; Prince George's County, Maryland; and Montgomery County, Maryland experience turnover rate in the 10-15 percent range.

Exhibit 13-13 shows both new hires and resignations for the 1995-1999 school years. The actual data are not available for the 1998-99 year, but was estimated based upon data provided for the first few months of the school year. The department hires approximately 341 new bus drivers each year. All indications, based upon early figures for the current school year (1998-1999), are that turnover may be getting worse, and the 1998-99 year will show a rise over the previous year by a few more percentage points.

**EXHIBIT 13-13
TURNOVER RATE* AND NEW HIRES OF BUS DRIVERS**

SCHOOL YEAR	DRIVERS AUTHORIZED	NEW HIRES	PERCENT NEW HIRES	RESIGNATIONS	TURNOVER RATE
1995-96	1,164	338	29%	154	13%
1996-97	1,226	435	35%	279	23%
1997-98	1,292	282	22%	258	20%
1998-99	1,292	310(est.)	24% (est.)	310 (est.)	24% (est.)
Average	1,243	341	27%	250	20%

Source: Broward County School District, Transportation Services Department, 1998

*Turnover rate is calculated based upon resignations divided by drivers authorized.

Exhibit 13-14 shows the increase in authorized positions for 1995 through 1999 which must be included in the positions to be filled through turnover. The School Board of Broward County has not authorized any additional positions in the current year (1998-99).

**EXHIBIT 13-14
CHANGES IN DRIVER POSITIONS AUTHORIZED**

SCHOOL YEAR	DRIVERS AUTHORIZED PREVIOUS YEAR	DRIVERS AUTHORIZED CURRENT YEAR	NEW POSITIONS AUTHORIZED
1995-96	1,033	1,164	131
1996-97	1,164	1,226	62
1997-98	1,226	1,292	66
1998-99	1,292	1,292	0

Source: Broward County School District, Transportation Services Department, 1998.

A comparison of turnover rate in both non-bus operators, in Exhibit 13-15, and the Vehicle Maintenance Department, in Exhibit 13-16, shows that neither category presents any major concern. However, the average turnover rate in non-bus operators is increasing, and deserves some attention to keep it within range of the average of seven percent. The Vehicle Maintenance Department must have high employee satisfaction with a low absentee rate discussed above, and an exceedingly low turnover rate average of less than one-half percent.

**EXHIBIT 13-15
TURNOVER RATE FOR NON-BUS OPERATORS**

SCHOOL YEAR	NON-BUS OPERATORS	RESIGNATIONS	TURNOVER RATE
1995-96	281	11	4%
1996-97	322	23	7%
1997-98	417	44	11%

Source: Broward County School District, Transportation Services Department, 1998.

**EXHIBIT 13-16
TURNOVER RATE IN THE VEHICLE MAINTENANCE DEPARTMENT**

SCHOOL YEAR	MAINTENANCE STAFF	RESIGNATIONS	TURNOVER RATE
1995-96	116	13	1%
1996-97	117	8	0.7%
1997-98	118	5	0.4%

Source: Broward County School District, Transportation Services Department, 1998.

The focus of attention in the department regarding turnover should be on bus drivers. MGT found that turnover is occurring most frequently with bus drivers having less than one year of service. Obtaining the commercial driver license (CDL) through the Broward County School District qualifies bus drivers to also drive commercial vehicles. With a shortage of truck drivers in the nation, there exists some temptation for drivers not yet acclimated to the school district to seek employment elsewhere. As a result of the growth in the district with both new hires and filling the resignations, the Department of Transportation Services must operate a large scale recruitment, selection, and training program. The Pupil Transportation Director indicated that it requires processing over 1800 applicants to qualify 300 drivers for the district. The district found that to perform this task, just to keep up with growth and turnover demands, requires a substantial commitment for both recruitment and training.

The training staff provide safety programs in the schools. Florida State Board rules specify that school principals are responsible for training students on safety issues, including transportation safety. At the present time, driver trainers spend approximately 55 percent of their time training new drivers and 39 percent of their time retraining drivers. The rest of their time is spent performing safety training of students as mandated by the Florida State Board rules which specify that all students using school transportation services will be given classes on transportation safety.

A staff of 20 (including 15 trainers) is dedicated to the tasks of training and recruitment, with a total employee cost of approximately \$677,000. Based upon the turnover and new hires shown in Exhibit 13-11, each of the 15 trainers has had to train, on the average, 24 new drivers each year, as well as provide inservice retraining for 67 drivers. That workload is expected to diminish as the hiring of new drivers becomes more stable and as the authorization for drivers remains constant or is reduced. The detail on training costs is shown in Exhibit 13-17.

**EXHIBIT 13-17
STAFF COSTS FOR TRANSPORTATION EMPLOYEES
DEDICATED TO TRAINING**

EMPLOYEE CLASSIFICATION	NUMBER OF EMPLOYEES	COSTS
Supervisor, Training Operations	1	\$56,310
Trainers-General	15	\$485,681
General Clerk	1	\$23,378
Supervisor III-ESE	1	\$46,753
Trainers – ESE	2	\$64,757
Total	20	\$677,000

Source: Broward County School District, Transportation Services Department, 1998.

Specialized transportation trainers were not part of the Transportation Services Department as a dedicated work force until 1996-97. Prior to that time, there were no dedicated trainers provided for in the budget. No reference is made in the department's job descriptions as to the responsibility for recruitment. Costs for recruitment staff were not made available by the Transportation Services Department; however, input from supervisors, clerks, and transportation specialists were provided.

RECOMMENDATION

Recommendation 13-3:

Reduce the turnover rate to a more acceptable 10-15 percent range and establish an objective to reduce one trainer a year.

The feasibility to reduce up to five trainers is directly related to the district's initiatives to reduce the turnover rate for regular drivers. If driver turnover can be reduced, there exists the probability that corresponding reductions in trainers will be possible. Current incentives initiated by Broward County School District Transportation Services Department to reduce driver turnover should be carefully monitored, and if successful in reducing driver turnover to a more acceptable 10-15 percent range, then it is feasible for the department to reduce up to five trainers.

The department achievement program, as cited in Recommendation 13-1, should have a positive impact on reducing turnover rate as well as reducing absenteeism and overtime. Implementing an incentive program should assist in getting new drivers (who are largely represented in the turnover rate) acclimated to the team and strengthen the veteran team. Research has indicated that goals are more likely to be achieved if they are agreed upon and in writing. By implementing the achievement program, the written and agreed upon goals should have a positive impact on reducing absenteeism. Trainers occupy critical positions in the Transportation Services Department and any reduction in their numbers must be weighed very carefully. This audit recommends reducing up to five trainers (if feasible) in response to driver turnover reductions.

IMPLEMENTATION STRATEGIES AND TIMELINE

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|---|---------------------------------|
| 1. The Transportation Services Director should hold a series of workshops with school bus drivers to review issues causing high turnover rates; sessions could be held in conjunction with achievement program listening sessions | June 1999 |
| 2. The Transportation Services Director should review positive initiatives in the Vehicle Maintenance Department to determine if the initiatives are assisting in that keeping turnover at a lower rate. | May 1999 |
| 3. The Transportation Services Director should implement best practices used by the Vehicle Maintenance Department and input from bus drivers. | July 1999 |
| 4. The Transportation Services Director should include the achievement program as part of the plan to reduce turnover rate. | July 1999 |
| 5. The Transportation Services Director evaluates driver turnover success and reasons for the change. | Annually Commencing August 2000 |
| 6. The Transportation Service Director should reduce the up to five trainers based on the corresponding reduction of turnover rate. | August 2000 |

FISCAL IMPACT

A trainer costs approximately \$32,400 with benefits. Any reduction in trainers, balanced with a corresponding reduction in the need to conduct driver training, would result in cost savings. As stated previously, Broward County School District Transportation Department will have to determine when driver training turnover has been substantially reduced to the level where corresponding reductions may be made in driver trainers. Based on a more acceptable 10-15 percent turnover rate, the department could reasonably reduce one trainer a year.

The following chart illustrates the potential cost savings if one trainer is reduced. Only half of the benefits are expected in the 2000-01 school year (Note: this is because program implementation would take at least one-half of the year making initial savings for 2000-01 \$16,200). Full savings could be expected in subsequent years.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Reduce Turnover Rate and Trainers	\$0	\$16,200	\$32,400	\$32,400	\$32,400

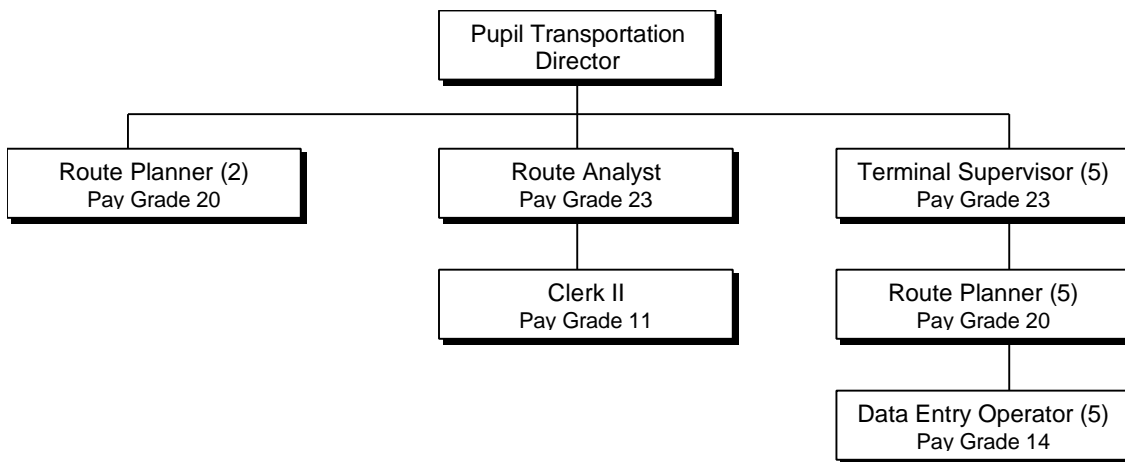
FINDING

The Pupil Transportation Section has a split operation on route planning that requires coordination between a Route Analyst at a Pay Grade 23 reporting directly to the Pupil Transportation Director, and the Route Planners (Pay Grade 20) also reporting to the Director and Supervisors (Pay Grade 23) in the five area terminals.

The Route Analyst is important to the routing and scheduling system for the district. She is assisted by a Clerk II position, and she has some responsibility for giving guidance to the two Route Planners who have a direct reporting relationship to the Pupil Transportation Director. Those two Route Planners have an overall view of the system and help to coordinate districtwide planning with the Route Analyst. The other five Route Planners and their five Data Entry Operators report to separate terminal supervisors. These five route planners have primary responsibility for route planning in the area covered by their terminal.

Exhibit 13-18 shows the reporting relationships for route planning.

**EXHIBIT 13-18
CURRENT ORGANIZATIONAL CHART FOR ROUTE PLANNING
IN THE TRANSPORTATION SERVICES DEPARTMENT**



Source: Broward County School District, Transportation Services Department, 1998.

According to the job description, the Route Analyst, "coordinates the implementation of the computerized routing system EDULOG -- and provides support to the organization." The Route Planners abbreviated position description shows responsibility for the development and maintenance of school bus routes under the direction of the Terminal Supervisor. No single individual has overall responsibility for route planning and scheduling, or overall responsibility for the Route Planners, except at the Pupil Transportation Director's level.

The school district is highly dependent upon the computerized routing and scheduling system for its transportation efficiency. The efficiency could be further enhanced with close coordination and team work that results from a team leader being recognized to give the team direction. The system is not capable of getting maximum efficiency that

would be achievable under a consolidated operation. Although Terminal Supervisors are part of the overall transportation team, their immediate focus of attention is on the geographic area of their responsibility, and not the overall operation of the district. There is no incentive to reduce routes in their geographic area, because reducing routes may reduce their staff. Currently, there is no reward system in place to provide incentives to use technology to the maximum advantage and reduce staffing to the lowest extent practicable. Consolidating the route planning staff under the Director will be a first step in establishing a reward system for the planning staff.

RECOMMENDATION

Recommendation 13-4:

Consolidate the route planner and associated data entry operator positions into one organizational unit and establish reporting to the Route Analyst position.

The positions do not need to change physical location in order to function properly. The critical requirement is for the Route Analyst to have clear authority for route planning and scheduling for the district. Working for one person should help to ensure the planners are working together for a common purpose.

In a previous district review, in Fairfax County Public Schools in Virginia, we found that establishing a fixed responsibility for route planning was one of the single most important improvements to the overall transportation system. Prior to the establishment of a consolidated route planning staff, Fairfax County had route planning responsibilities fixed with the route supervisors. The route supervisors had many other duties that distracted them from the key responsibility of reviewing the routing in an "EDULOG" system as a result of students being added and subtracted from the routes. Establishing a central routing and scheduling planning staff has enabled this district to have focused attention to be placed on maximizing the routes to get greater bus utilization and reduced transportation time between home and school. Fairfax County has indicated a willingness to work with other school districts in setting up central planning units. The Broward County School District may want to also take advantage of this assistance.

IMPLEMENTATION STRATEGIES AND TIMELINE

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| 1. The Director of Pupil Transportation should prepare a request for reorganization of route planning and scheduling services and submit the request to the Director of Transportation Services. | May 1999 |
| 2. The Director of Transportation Services should submit the reorganization request to the Superintendent. | June 1999 |
| 3. The Superintendent should approve the reorganization request. | July 1999 |

4. The Route Analyst should prepare operating procedures or the new Route Planning and Scheduling Office and train all of the employees in its requirements. July 1999

5. The new Route Planning and Scheduling Office should begin operation. August 1999

FISCAL IMPACT

The consolidation is expected to have a direct positive impact on the efficiency of the route planning, and is expected to result in a reduction of routes. The calculation of fiscal impact is shown in the Routing and Scheduling Section of this chapter.

FINDING

The ratio of supervisors to bus drivers and attendants is high for the Transportation Services Department. Transportation specialists serve in the capacity of supervisors although their job description does not specifically give them the responsibility of rating bus drivers. The abbreviated version of the job description states that Transportation Specialists assist the Supervisor II and Shift Supervisor III in daily coordination of bus operators and attendants assigned to a designated terminal.

The Transportation Specialist participates in the annual evaluation of bus drivers and attendants by providing their verbal observations and recommendations to the Terminal Supervisor who actually rates the driver. The district uses a ratio of 30 drivers per field supervisor in the operation.

Exhibit 13-19 shows the ratio of field supervisors to drivers in the current school year (1998-99). As shown in the exhibit, the highest ratio is 27:1 and the lowest ratio is 24:1.

**EXHIBIT 13-19
RATIO OF FIELD SUPERVISORS TO DRIVERS
1998-99**

AREA TERMINALS	DRIVERS	SUPERVISORS	SPECIALISTS	TOTAL FIELD SUPERVISORS	RATIO
South	303	2	9	11	27:1
West	268	2	8	10	27:1
Central	323	2	10	12	27:1
North	218	2	7	9	24:1
Northwest	180	2	5	7	26:1
Total	1,292	10*	39	49	26:1

Source: Broward County School District, Department of Transportation Personnel Roster, 1998-99.

* Second shift supervisors are not considered in the count.

A review of other school districts shows a ratio that is considerably higher than the current ratio experienced by the Broward County School District. Similar data were not available from peer districts in Florida, other than for the Miami-Dade County School District. Exhibit 13-20 provides the group average of ratio of drivers to field supervisors

in seven other school districts to be 50:1. Three of the school districts are similar in size to the Broward County School District (Miami-Dade County, Fairfax County and Prince George's County) and have an average ratio of 51:1. Miami-Dade and Fairfax are closer at an average of 38:1 ratio.

The Broward County School District has set a standard of using 30 drivers per field supervisor. While their current ratio is 26:1, it is still high when considering the ratios of other school districts with similar transportation responsibilities. Both Miami-Dade County and Fairfax County School Districts (when averaged) suggest a ratio that is closer to 38:1. For the purposes of calculating staffing needs for field supervision of bus drivers, a ratio of 38:1 is suggested for Broward to use as a staffing standard. A ratio of 38 bus drivers per supervisor requires that Broward establish a field supervision staff of 34 supervisors. This will require a reduction in the current staff of 15 supervisor positions.

**EXHIBIT 13-20
COMPARISON OF DRIVERS PER FIELD SUPERVISOR
FOR SELECTED DISTRICTS
1997-98**

COMPARATIVE SCHOOL DISTRICTS	NUMBER OF DRIVERS	TOTAL FIELD SUPERVISORS	DRIVERS PER FIELD SUPERVISOR
Northside (San Antonio), TX	400	12	33
Fairfax County, VA	1,048	30	35
Miami-Dade County, FL	1,455	34	42
Richmond, VA	225	4	56
Fort Bend, TX	266	4	67
Prince George's, MD	1,047	14	75
El Paso, TX	239	6	40
Group Average	668	15	50
Broward County, FL	1,292	49*	26

Source: Data provided by school districts, 1998.

* MGT reduced the supervisory number to 49 from 54 because of five shift supervisors that work a second shift and should be considered as an extension of the five supervisors on the first shift.

RECOMMENDATION

Recommendation 13-5:

Eliminate 15 field supervisors as an interim staffing standard plan until the district has conducted an in-depth evaluation and has identified a long-term, feasible staffing plan.

Without a staffing standard, the school bus drivers and attendants get varying levels of support, training, and supervision. Although field supervisors should be expected to assist in training, the training of school bus drivers is primarily covered through the staff of 15 trainers in the training department. The district should use a suggested staffing standard of 38:1 on an interim basis until a staffing standard is developed.

IMPLEMENTATION STRATEGIES AND TIMELINE

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| 1. The Director of Pupil Transportation should conduct further evaluation of the duties and responsibilities of bus driver supervisors and determine if the ratio suggested by this report is adequate to meet the needs of the Transportation Department. An interim standard, as recommended in this report, should be established until a final staffing standard is developed. | August 1999 |
| 2. Based upon the appropriate staffing standard, the Director of Transportation Services should submit the reorganization request to the Superintendent. | September 1999 |
| 3. The Superintendent should approve the reorganization request based upon the staffing standard. | October 1999 |
| 4. The Director of Transportation Services should publish the staffing standard in the Department's Standard Operating Procedures Manual. | November 1999 |
| 5. The Director of Transportation Services should submit the request to eliminate positions to Human Resources. | December 1999 |
| 6. The positions should be eliminated through attrition. | No later than August 2001 |

FISCAL IMPACT

A reduction in staffing should begin in the 2000-01 school year based upon the suggested staffing standard or the standard developed by the school district. If the district elects to adopt the suggested standard a reduction in staffing can follow the schedule suggested in this fiscal impact analysis. The total cost of the field supervision position is \$2,044,229 as shown in Exhibit 13-21.

**EXHIBIT 13-21
FIELD SUPERVISION STAFF COSTS**

EMPLOYEE CLASSIFICATION	NUMBER OF EMPLOYEES	COSTS
Supervisor, Terminals	5	\$281,550
Shift Supervisors	10	\$467,530
Transportation Specialists	40	\$1,295,149
Total	55	\$2,044,229

Source: Broward County School District, Transportation Services Department, 1998.

The individual cost of each position is \$37,168. The total savings that can be realized through the reduction of 15 positions is \$557,520.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Eliminate 15 Field Supervisors	\$0	\$278,760	\$557,520	\$557,520	\$557,520

FINDING

A yearbook and a newsletter have been developed for the Transportation Services Department with the hope of building employee morale and building a bridge between the department and the community. The yearbook project was created in the past year at the request of the bus operators and attendants. A planning committee, preparing the yearbook, realized there was a critical need to be met regarding community relations, employee morale, and other issues of absenteeism and turnover. The committee analyzed the direction the department was taking and how they could best assist the department in reaching its goals. After a complete analysis, they concluded the area that needed to be addressed was community relations. Despite the excellent safety record, the organization lacked community support. Reportedly, the community did not have a clear understanding of the services that the Broward County School District Transportation Services Department provides. There was miscommunication and erroneous concepts about the organization that had to be dispelled. The yearbook committee seized the opportunity to address in the yearbook the problems the organization faced as it relates to the community.

The yearbook is projected to be published and distributed in Spring 1999. The book is projected to be approximately 100 pages, part color, inspirational, educational, and informative. The yearbook will take the reader on a journey through past and present pupil transportation. The cost of the book will be funded by selling advertisements in the book, raffles, and donations from the business community. The committee plans to also establish a scholarship with proceeds from fund raising. The yearbook can also serve as a positive feature of the department and help build team spirit throughout the department.

The Pupil Transportation Section started publishing a quarterly newsletter titled *Transit Express*. The newsletter began publication in 1995 and was an instant success with employees. The newsletter serves as a source of pride for the division and information to the community. The *Transit Express* has articles on current events, safety tips, area news, recognition of birthdays and years of service. Also included in the letter is a column titled *Spotlight*. This column recognizes employees who have been selected by their supervisor as an outstanding employee for a given period of time. Fun articles are also published in the letter such as gossip columns. The *Transit Express* is an excellent source of information and morale booster for employees and another means of staying in touch with the community.

COMMENDATION

The Pupil Transportation Section of the Transportation Services Department is commended for establishing a Broward County School Transportation yearbook

and newsletter, and for building a foundation for team spirit within the Transportation Services Department as well as a bridge to the community.

Although the newsletter is not unusual in a school district's transportation department, the idea of a yearbook is very unusual. The yearbook holds the promise of building a foundation for improving the school bus driver environment and help to reduce absenteeism and turnover which are two of the biggest challenges the district is facing. The introduction of a yearbook has just gotten underway and it is too early to determine its effect on the two major employee problems in the department.

13.2 Routing and Scheduling

CURRENT SITUATION

The Transportation Services Department transports approximately 67,000 students daily. Another 135,000 students either walk or find other forms of transportation to school.

The Transportation Services Department currently conducts all routing and scheduling of home to school buses using an automated routing and scheduling system that was initiated four years ago. The system is called EDULOG, and is provided to the Transportation Department by Education Logistics of Missoula, Montana. Route scheduling software uses geographic information and student residence information to automatically establish pickup points and school bus routing. The key basic foundation of the system is the "map," or the geographic information system, which is a software program to identify all city streets and residences. Once the map is created, it can be matched by address to the student database. The system allows bus drivers to always have current information on which student is at which bus stop, by name, and address.

The Broward County School District currently authorizes 1,292 bus drivers to run approximately 1,051 daily buses and routes. The difference between the authorized number of bus drivers and the number of daily bus runs is approximately 240 extra drivers. The district claims that, as a result of high absenteeism and high turnover, it is necessary to have a large number of drivers in reserve to assure that runs will be made as scheduled. The utilization of these drivers was checked and they are currently conducting runs on a daily basis. The district also uses full-time bus operators, called relief operators, to operate in place of absent drivers. Each relief operator is guaranteed eight hours per day and is expected to have knowledge of all routes in the county. The relief operators are also being used on a daily basis and can be switched to any route in the county.

FINDING

Additional efficiencies can be found in the reduction of routes based upon focused attention of route planners on the problem areas. The school district operation is dynamic, and the planning of routes needs to be dynamic as well. Students are moving in and out of the school district on a daily basis, and the scheduling and routing of school buses must fit into that framework.

In order to plan the routes properly, the seven route planners assigned by the district need to be focused. Currently, they report to six different supervisors and are not focused as well as they should be on district needs and priorities. The consolidation of these positions is addressed above, in the Organization and Management section of this chapter.

Given that the district believes there is more efficiency that can be found based upon a focused level of effort by a coordinated planning staff, a conservative estimate of five percent savings should be found in the school district in the next two school years. This five percent figure is based upon the published experiences of two different school districts as illustrated below.

According to a software support manager with North Carolina's Department of Public Instruction, one school district with a 250-bus fleet was able to put aside 60 of its vehicles after making "radical changes" suggested by the computer, such as staggered school starting times. As a second example, a recent review conducted by the Fairfax County, Virginia school district showed that route scheduling software could provide a five to 10 percent reduction in the number of routes in this district, even after a general analysis was conducted using the computer routing and scheduling system. The additional efficiencies were expected to be obtained by reaching outside the pyramid relationship among elementary, middle and high schools in certain boundary areas, and finding excess space on buses that cross boundaries.

RECOMMENDATION

Recommendation 13-6:

Focus the computer-based route scheduling system on the dynamics of changes in students during the school year and the efficiencies available by finding space on buses which cross boundaries. Reduce the current number of routes by an additional five percent.

With the constant flux of students coming into and going out of the Broward County School District during the year, school bus routing must be constantly monitored to maintain an optimum level of efficiency. With regular attention given to changes in student population; and revising routing accordingly as students are assigned to new bus routes or eliminated from bus routes as a result of changing schools, the Broward County School District should be able to reduce routing and increase bus capacity. A conservative target estimate is five percent which has been achieved by the school districts discussed above. The potential improvements could be made through additional clustering and depots as well as appropriate adjustments to bus schedules.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Transportation Services should purchase upgraded equipment that will create user-friendly screens in a Windows format that will make it easier on the planners and reduce the time it takes to make routing changes (already budgeted).

July 1999

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| 2. The Director of Transportation Services should give the necessary direction to all staff for the route planners to get maximum cooperation. | August 1999 |
| 3. The route planners should take a districtwide comprehensive examination at achieving maximum efficiency for target schools as well as for neighborhood schools. | August 1999 |
| 4. The new route planning schedule for 1999-2000 should be prepared and implemented before the new school begins. | August 1999 |
| 5. The Route Planning Office should evaluate the efficiency of the new schedule. | April 2000 |

FISCAL IMPACT

Reducing the current number of routes by five percent is expected to reduce the buses need and drivers needed by 50. The cost of a driver, including benefits, is \$21,000. The current salvage value of a bus is approximately \$2,500 x 50 buses = \$125,000. The replacement schedule for buses can be reduced four buses over 10 years old. A conservative estimate of four buses @ \$40,000 per bus is used for calculations below. The savings is not expected to be fully realized until the 2000-2001 school year. The five-year savings is shown below.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Reduce 50 buses	\$0	\$125,000	\$0	\$0	\$0
Reduce 50 drivers (through attrition)	\$0	\$1,050,000	\$1,050,000	\$1,050,000	\$1,050,000
Reduce Replacement Need of Four Buses	\$0	\$160,000	\$160,000	\$160,000	\$160,000
Total	\$0	\$1,335,000	\$1,210,000	\$1,210,000	\$1,210,000

13.3 Vehicle Maintenance

CURRENT SITUATION

The Vehicle Maintenance Department maintains a fleet of 1,766 vehicles, 1,200 of which are school buses and 566 general fleet vehicles. The department is organized into five operating areas: Central, West Central, South, North, and Northwest. The Northwest site is unmanned, has no garage facilities, but serves as a secured storage site for buses. All other areas have garage facilities. Buses assigned to the Northwest area are maintained at the North area facility, which is approximately one mile away.

The areas with maintenance facilities also maintain the general service fleet for the school district. Specialized truck and body shops are located with the Central operating area. All buses use diesel fuel.

Exhibit 13-22 shows the bus mix assigned to each facility. Each facility has secure parking areas for assigned buses.

Assignment of the general services fleet for vehicular maintenance is shown in Exhibit 13-23.

**EXHIBIT 13-22
MAINTENANCE OR STORAGE OF BUSES BY AREA**

AREA	REGULAR BUSES	SPECIAL EDUCATION BUSES	SPARE BUSES	TOTAL
Central	173	95	44	312
Central West	194	12	26	232
North	137	58	31	226
North West	109	33	4	146
South	173	79	32	284
Total	786	277	137	1200

Source: Broward County School District, Transportation Bus Assignments, August 1998.

**EXHIBIT 13-23
VEHICULAR MAINTENANCE OF GENERAL SERVICES FLEET
BY AREA**

AREA	CENTRAL	SOUTH	NORTH	WEST CENTRAL	TOTAL
General Services Fleet	438	65	61	2	566

Source: Broward County School District, Vehicle Maintenance Department, August 1998.

The West Central area maintenance structure is temporary, but this facility houses only two of the general services fleet which are emergency service vehicles. The Truck Maintenance Shop and the Body Shop are located in the Central Area. Area responsibilities for bus and general service fleet maintenance are shown at Exhibit 13-24.

**EXHIBIT 13-24
FLEET MAINTENANCE RESPONSIBILITIES BY AREA**

FLEET	CENTRAL	SOUTH	NORTH	WEST CENTRAL	TOTAL
Buses	312	284	372	232	1,200
General Fleet	438	65	61	2	566
Total	750	349	433	234	1,766

Source: Broward County School District, Vehicle Maintenance Department, August 1998.

The maintenance facilities at North, Central, and South are adequate. The West Central garage facility is a temporary structure, with open sides, exposing equipment and personnel to weather elements. Plans for a permanent structure have been prepared and has been funded.

The Preventive Maintenance Program includes a Monthly Safety Inspection performed on each operating bus, as required by Section 234, Florida Statutes. Preventive Maintenance Inspection II is performed every 90 days. Oil and filter change intervals are mileage driven (4,000 to 6,000 depending on the engine), while the Preventive Maintenance Inspection III is conducted annually and provides for the inspection and adjustment of heavier chassis components. A Supplemental Air Conditioning Preventive Maintenance Plan inspects each bus monthly and insures optimum cooling and efficiency.

Staff in the maintenance shops are shown in Exhibit 13-25. This exhibits shows the authorized staffing of the maintenance shop according to the annual budget.

**EXHIBIT 13-25
STAFF POSITIONS IN MAINTENANCE SHOPS
1998-99**

POSITION TITLE	NUMBER OF POSITIONS
Manager	1
Supervisor II	1
Garage Serviceperson	7
Auto Truck Mechanic	54
Leadman- Maintenance	3
Paint and Body Mechanic	5
Foreman Area Vehicle Maintenance	3
Foreman Vehicle Maintenance	3
Tire Repairperson	4
Foreman-Maintenance	1
Foreman-Paint	1
Upholstery	3
Paint and Body	3
Tire Repair	2
Stockroom	11
Facilities	4
Laborer	11
Secretary	2
Clerk	6
Total	125

Source: Broward County School District, Annual Budget, 1998-99.

FINDING

All current bus mechanics are certified as Automotive Service Excellence (ASE) bus inspectors based on the Florida Department of Education guidelines for school bus inspectors.

The Vehicle Maintenance Department, as a condition of employment, requires that mechanics be "Automotive Service Excellence" (ASE) certified. If not certified before being employed by the Broward County School District, newly employed mechanics have one year to attain ASE Brake Certification or face job termination. Subsequently, mechanics must become fully certified under the medium/heavy truck classification.

The achievement of ASE certification requires several steps. The candidate initially registers and takes one or more of the 33 ASE exams. After passing at least one exam and providing proof of two years of relevant work experience, the mechanic becomes an ASE-certified technician. Tests are conducted twice a year. Certified mechanics must be retested every five years or risk losing their certification.

The enhanced training and qualifications of the district's bus mechanics have been acknowledged by the bus manufacturers and component suppliers. Effective in July 1998, warranty work will be done by mechanics in their own shops rather than a dealer's facility. Warranty reimbursement will be made by the manufacturer to the school district. This selection of the Maintenance Department to do warranty work is indicative of the cost conscious staff and maintenance facilities. Not many school districts receive this kind of acknowledgment. The warranty work that will be done by the Maintenance Department is also expected to result in a cost savings. The cost of transporting the buses to and from the dealership can be eliminated. Also, scheduling a bus for the dealership may take the bus out of service longer than if done in the shop, and could result in an increased cost related to the need for more spare buses (maintenance and replacement).

COMMENDATION

The Vehicle Maintenance Department is commended for its actions to develop fully qualified vehicle technicians which allow warranty work to be undertaken by mechanics in the Broward County School District.

FINDING

As shown in Exhibit 13-26, the Broward County School District's fleet of buses and general services vehicles is maintained by 59 mechanical maintenance staff persons. The ratio of vehicles to mechanics is 30:1 to one.

**EXHIBIT 13-26
FLEET MECHANICAL MAINTENANCE STAFF
1998-99**

POSITION TITLE	NUMBER OF POSITIONS	COSTS
Auto Truck Mechanic	54	\$3,037,527
Paint and Body Mechanic	5	\$445,994
Total	59	\$3,483,521

Source: Broward County School District, Annual Budget, 1998-99.

The transportation industry, as well as many school districts, use as a common practice, a ratio of 20 to 30 vehicles per mechanic depending upon the age of the fleet, the expertise of the mechanics, and the level of maintenance equipment available. The Broward County School District, with its 30:1 ratio, falls into a highly acceptable range for vehicles per mechanic, but has not established an official policy on staffing standards based upon the age of the fleet, the expertise of staff, the maintenance equipment available, and the record keeping system that can track costs. To assist the district in establishing a target staffing standard, the ratio of buses to mechanical staff of several school districts that have been reviewed by MGT are shown in Exhibit 13-27.

**EXHIBIT 13-27
COMPARATIVE MECHANIC ASSIGNMENTS TO FLEET SIZE**

SCHOOL DISTRICT	MECHANICS	EQUIPMENT	EQUIPMENT PER MECHANIC
Fairfax County, VA	64	1,285	20.1
Prince William County, VA	23	525	22.8
Socorro ISD, TX	9	224	24.9
Ysleta ISD, TX	14	359	25.6
Hillsborough	48	1,002	20.8
Prince George's, MD	65*	1,655	24.5
Houston	60	1,422	23.7
Average	40	924	23.2
Broward	59	1,766	29.9

Source: Quality Link, Florida School District Transportation Profiles, June 1998, Florida Department of Education, Houston ISD, 1996, Prince George's County Transportation Department Budget and Operations Report, 1997-98, Telephone survey with Fairfax and Prince William counties, and Socorro and Ysleta performance review reports, 1998.
*as recommended by MGT.

The average of the school districts reviewed is 23.2 buses per mechanic, or approximately seven pieces of equipment less per mechanic than in the Broward County School District. Several school districts, like Prince George's (MD) and Houston (TX), that have been studied with large fleets like Broward, are targeting closer to a 25:1 ratio between mechanics and school buses. Other school districts recently studied in Texas, such as Socorro and Ysleta Independent School Districts, use a 25:1 ratio. The heavy vehicle industry, such as Ryder Truck Lines, also use a target staffing ratio of 25:1 mechanics per heavy vehicle unit.

COMMENDATION

The Vehicle Maintenance Department is commended for establishing a staffing ratio that exceeds the expectations of other school districts as well as an industry leader, Ryder Truck Lines.

The Broward County School District needs to formalize its staffing standard in the district's Standard Operating Procedures Manual. Adopting a minimum policy of 25:1 mechanics to heavy equipment units, along with the highly effective mechanic training and ASE certification program, and a recommended change from a 10-year to a 12-year bus replacement policy, should permit the district to effectively meet its equipment maintenance needs.

13.4 Bus Fleet Management

FINDING

Buses in the regular home-to-school daily bus fleet are being replaced every 10 years based upon directives from the Florida Department of Education. Until 1984, the state of Florida provided bus replacement funds at 10 percent per year of the daily bus need. In 1994, the law specifying school bus replacement funding for school districts was repealed. Currently, it is up to the local school district to provide replacement funding, but the Broward County School District has adhered to the 10-year replacement cycle. The Broward fleet currently has 48 buses, (of the 1,060 daily buses needed), that are over 10 years old. Most of those 48 buses are special education buses that have not been high mileage buses. Most of them are expected to be replaced in the 1999-2000 school year.

The Broward daily bus fleet inventory by age is shown in Exhibit 13-28. Over 95 percent of the fleet used in daily service is under 10 years old.

**EXHIBIT 13-28
BROWARD DAILY BUS FLEET INVENTORY BY AGE**

Year	Total
1984	12
1986	12
1987	18
1988	6
1990	65
1991	67
1992	83
1993	102
1994	19
1995	232
1996	136
1997	168
1998	140
Total Fleet	1,060

Source: Broward County School District, Transportation Services Department, 1998.

Replacing daily need buses on a 10 percent basis per year requires approximately 106 buses to be replaced per year. The cost at \$40,000 per bus, is approximately \$4.2 million per year. The actual cost of replacing the school bus fleet in the Broward County School District, between 1994 and 1997, is shown in Exhibit 13-29. The average cost over the three-year period has been about \$6.4 million.

**EXHIBIT 13-29
BUS REPLACEMENT COSTS
1994-95 THROUGH 1996-97**

1994-95	1995-96	1996-97
\$5,009,401	\$4,432,688	\$9,675,010

Source: Quality Link, Florida School District Transportation Profiles, 1994-97.

The Quality Link Report produced by the Florida Department of Education, states that school bus pool purchases in 1997 were averaging about \$40,000 per bus and the costs are escalating around three percent per year. The escalation costs amount to an increase of \$156,000 per year.

The Broward County Transportation Services Department, by changing from a 10-year to a 12-year replacement schedule, could reduce the number of buses to be replaced per year, and lower escalation costs. For a 10-year schedule replacing 10 percent of the 1,060 bus fleet each year, amounts to 106 buses per year. Over a ten-year period, the number of buses replaced equates to 1,060. On the other hand, a 12-year replacement schedule replacing 8.3 percent of the 1,060 buses each year, amounts to 87.9 (rounded off) to 90 buses replaced each year. Over a 12-year period, this equates to 1,080 buses versus 1,060 for a 10-year period. Replacing 106 buses each year costs \$4,240,000 whereas, replacing 90 buses on a yearly basis using the 12-year cycle would cost \$3,380,000 which is an annual cost savings of \$760,000 (the difference by subtracting \$3,480,000 from \$4,240,000). In addition, the number of buses purchased on a yearly basis using the 12-year cycle is 90 as opposed to the 10-year cycle yearly purchase of 106.

Since Broward County Transportation Services has a well-trained maintenance staff with more than adequate maintenance equipment and record-keeping systems, there should be a preference to have a 12-year replacement cycle as opposed to a ten-year cycle. Such a decision would not have any adverse effect on the transportation delivery objectives of the department. Supporting this is the fact that the Director of Transportation Services is purchasing more 84 passenger buses in order to increase ridership per bus and plans to keep them in the daily bus fleet for 15 years. The majority of the current fleet are 65-passenger diesel buses.

Many school districts throughout the country use a 12-year replacement schedule for school buses. Some comparable districts to Broward County are Fairfax County, Virginia; Prince George's County Maryland; Richmond, Virginia; Port Arthur, Texas; Houston, Texas; and Dallas, Texas.

In addition, the states of North Carolina and Virginia recommend a 12-year replacement cycle for buses. Both regular and special education buses are treated the same in these replacement schedules mentioned, both at the individual school district level as well as at the state level.

RECOMMENDATION

Recommendation 13-7:

Establish a school bus replacement policy of 12 years.

The Broward County School District should increase the use of school buses from 10 years to 12 years, and reduce the annual replacement funding from 10 percent of the daily bus fleet need to 8.3 percent. This action will reduce the annual replacement of buses by 16.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Director of Transportation Services should prepare a bus replacement policy changing from 10 years to 12 years. | May 1999 |
| 2. The Superintendent and the School Board approve the policy on replacement schedule. | June 1999 |
| 3. The replacement policy should be implemented. | August 1999 |

FISCAL IMPACT

With a 10-year replacement cycle, and the average bus cost of \$40,000, the bus replacement costs for 106 buses in 1999-2000 are expected to be \$4.2 million plus \$127,000 in escalation costs. Using a 12-year replacement cycle, the cost is expected to be \$3.6 million for replacement and \$127,000 in escalation costs. The overall difference in cost is \$1,360,000. In essence, the 12-year cycle replaces 90 vehicle per year, whereas the 10-year cycle replaces 106 vehicle per year. The difference is 16 vehicles for which there are cost savings. Initially, for the 12-year cycle 16 vehicles x \$40,000 = \$640,000 which could be realized in year 2000-01. Cost savings for subsequent years would add the three percent escalation costs. The five-year cost savings are shown below.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Change School Bus Replacement from 10 Years to 12 Years	\$0	\$640,000	\$659,000	\$678,776	\$699,112

FINDING

The Quality Inspection Program has been in place for four years. Quality control people are stationed in each terminal to help maintain excellent quality. According to the Maintenance Director the quality of the inspections has improved since the program was initiated. No terminal has ever fallen below the “Good” criteria. If it did, the Transportation Department would send out a team to monitor and do follow-up work to get the Terminal back in good shape.

According to the Director of Pupil Transportation, during the course of the school year, each terminal will be inspected from top to bottom by a quality inspection team. This team is comprised of five transportation specialists and headed by the Supervisor for Transportation Operation. The inspection is unannounced and the terminals are randomly selected. The inspection team inspects the complete daily operation of the terminal. The team arrives before the terminal opens, and observes and inspects the operation until the terminal closes at the end of the day. The inspection team utilizes a detailed inspection log that evaluates records, physical appearance of the plant, and job performance at the terminal. A random number of routes will have observers riding to evaluate the efficiency of the route, the performance of the bus driver, and whether

the route is safe. Bus departures are checked against schedules to evaluate timeliness of buses.

At the conclusion of the inspection, a debriefing is conducted with the terminal supervisor and staff. The debriefing covers areas needing improvement as well as the terminal strengths. A complete written report with supporting documentation is provided to the Director of Pupil Transportation. The grading scale for the inspection is shown in Exhibit 13-30.

**EXHIBIT 13-30
QUALITY INSPECTION CRITERIA**

GRADING SCALE	CONDITION
125	Excellent
90	Good
45	Poor
0	Unsatisfactory

Source: Broward County School District, Pupil Transportation Section, 1998.

14.0 FOOD SERVICE

This chapter addresses the Broward County School District programs and activities designed to manage the district's food service program. This chapter contains the following seven major sections:

- 14.1 Program Scope and Operating Efficiency
- 14.2 Student Lunch and Breakfast Participation
- 14.3 Organization and Staffing
- 14.4 Part-time Employee Benefits
- 14.5 Cash Control and Cafeteria Office Security
- 14.6 Food Choices and Costs
- 14.7 Marketing and Catering

14.1 Program Scope and Operating Efficiency

CURRENT SITUATION

The mission of the Broward County School District Food and Nutrition Services is as follows:

The mission of Food and Nutrition Services is to provide high quality, nutritious meals and nutrition education to students and staff, through programs that are efficient and effective.

The program, with annual revenues of approximately \$54 million, offers lunch and breakfast meals to students and adults at all the district's schools, centers, and annexes.

The Broward County Food and Nutrition Services Department serves students at all district schools and annexes. For the purpose of calculating free and reduced price meal eligibility, this equates to 212 food service facilities. This total is comprised of 130 elementary schools, 27 middle schools, 36 high schools and 19 centers. Of these, 22 are satellite facilities that have food prepared at one school and brought to the satellite facility. The department, on the average, served approximately 113,000 lunch meals daily to students during the 1997-98 school year and approximately 4,000 to adults. For breakfast, approximately 36,000 meals were served to students and 600 to adults on a daily basis during the 1997-98 school year. This equates to 54 percent lunch participation and 17 percent breakfast participation.

The district participates in the National School Lunch Program (NSLP) and National Breakfast Program (NBP), which are regulated by the United States Department of Agriculture (USDA). In Florida, the NSLP and NBP programs are administered by the Florida Department of Education, Food and Nutrition Management Section, and the Florida Department of Agriculture, Division of Agriculture and Consumer Services. The district renews its agreements with these state agencies each year to operate the

program at the local level. The local responsibility for program administration is shared by the district's board, school principals, and the program.

As of October 31, 1998, approximately 38 percent of the district's 229,000 students were approved to receive free or reduced meal benefits through the NSLP and NBP. As a participant in these programs, the district receives federal and state reimbursement income for free, reduced, and paid breakfast and lunch meals served. In addition to federal meal income reimbursements, the district also receives USDA food commodities. These food commodities are stored at a private facility and delivered to the individual kitchens by the storage company.

From a profit and loss perspective, the Broward County Food and Nutrition Services Department is a financially sound program. Net profit increased as a percentage of revenue to 4.8 percent from 2.2 percent for the 1997-98 school year. Operating profit increased as well from one percent to 3.6 percent for 1997-98. The percentage of expenses attributed to purchased food decreased while the percentage devoted to salaries, wages, and benefits increased.

As illustrated in Exhibit 14-1, the program reported a net operating profit of \$2.6 million in the 1997-98 school year with operating revenue of \$53.3 million and operating expenses of \$51.3 million.

Food Service in the Broward County School District is an efficient, self-supporting program that has established and maintained a strong financial position. The program's financial stability has been maintained even without raising meal prices in several years. Prices have remained constant at the elementary level since 1985-86, at the middle schools since 1989-90, and at the high schools since 1991-92.

As evidenced by Exhibit 14-2 the program's financial position has improved over the last two years. The balance sheets for the program indicate that assets and total fund balances have increased from 1996 to 1998 while liabilities have decreased.

To maintain the financial position of the program, the Director of Food and Nutrition Services has initiated several procedures. The Director has implemented competitive bidding practices, detailed site-based profit/loss statements, and site-based budgets and cost reports to maintain a strong cost control system. To control departmental labor costs, the Director has implemented staffing guidelines at each district kitchen. The allocation of labor hours is based on historical and projected average daily meals served. The use of satellite kitchens has further enhanced employee productivity at cafeteria operations. In addition, an automated point-of-sale system that reduces paperwork and improves accuracy has been installed and is operational at all district locations.

The Director, with the assistance of the Supervisor of Nutrition Education and Training, has implemented an extensive training program that has been successful in training employees in all areas of food service. All food service assistants must satisfactorily complete three 60-hour school food service training courses. In addition, all food and nutrition service personnel must maintain a current health sanitation certificate by attending a county food sanitation course once every three years and attending a four hour CPR class once every three years.

EXHIBIT 14-1
PROFIT AND LOSS STATEMENTS FOR THE BROWARD
COUNTY SCHOOL DISTRICT
FOOD AND NUTRITION SERVICES
1995-96 THROUGH 1997-98 SCHOOL YEARS

REVENUES AND EXPENDITURES	1995-96		1996-97		1997-98		PERCENT CHANGE 1995-98
	DOLLARS	PERCENT OF OPERATING REVENUE	DOLLARS	PERCENT OF OPERATING REVENUE	DOLLARS	PERCENT OF OPERATING REVENUE	
OPERATING REVENUE							
Local Sources							
Student Food Sales	\$14,997,457	30.9%	\$15,283,689	29.9%	\$16,030,832	30.1%	6.9%
Adult Food Sales	1,331,397	2.7%	1,450,446	2.8%	1,481,203	2.8%	11.3%
Other	81,735	0.2%	76,391	0.1%	154,589	0.3%	89.1%
Total Local Revenue	\$16,410,589	33.8%	\$16,810,527	32.9%	\$17,666,624	33.1%	7.7%
State Sources							
Breakfast Supplement	\$690,221	1.4%	\$565,575	1.1%	\$654,248	1.2%	-5.2%
School Lunch Supplement	722,588	1.5%	732,466	1.4%	750,637	1.4%	3.9%
Total State Revenue	\$1,412,809	2.9%	\$1,298,041	2.5%	\$1,404,885	2.6%	-0.6%
Federal Sources							
Federal Reimb. - Lunch	\$20,214,664	41.6%	\$22,237,626	43.6%	\$23,484,773	44.0%	16.2%
Federal Reimb. - Breakfast	6,029,969	12.4%	6,136,805	12.0%	6,372,805	12.0%	5.7%
Federal Reimb. - Summer Feeding	1,238,020	2.5%	1,254,741	2.5%	1,332,378	2.5%	7.6%
Federal Reimb. - Summer Nutrition	157,923	0.3%	101,797	0.2%	120,991	0.2%	-23.4%
Cash-In-Lieu of Commodities	13,890	0.0%	42,710	0.1%	-	0.0%	-100.0%
Commodities	3,073,828	6.3%	3,157,045	6.2%	2,930,232	5.5%	-4.7%
Other	9,783	0.0%	8,893	0.0%	9,779	0.0%	0.0%
Total Federal Revenue	\$30,738,077	63.3%	\$32,939,618	64.5%	\$34,250,958	64.2%	11.4%
Total Operating Revenues	\$48,561,475	100.0%	\$51,048,186	100.0%	\$53,322,467	100.0%	9.8%
EXPENSES							
Purchased Food	\$17,522,654	36.1%	\$18,924,370	37.1%	\$18,795,108	35.2%	7.3%
Salaries and Wages	13,882,681	28.6%	14,499,133	28.4%	15,573,936	29.2%	12.2%
Fringe Benefits	6,329,714	13.0%	6,290,347	12.3%	6,780,325	12.7%	7.1%
Supplies	3,505,583	7.2%	3,863,140	7.6%	3,754,244	7.0%	7.1%
Purchased Services	813,533	1.7%	1,130,859	2.2%	1,093,043	2.0%	34.4%
Value of Commodities Used	3,081,786	6.3%	3,146,429	6.2%	2,920,666	5.5%	-5.2%
Equipment	199,763	0.4%	650,000	1.3%	266,885	0.5%	33.6%
Indirect Cost	913,081	1.9%	1,976,539	3.9%	2,151,164	4.0%	135.6%
Other	45,079	0.1%	43,253	0.1%	59,207	0.1%	31.3%
Total Expenditures	\$46,293,875	95.3%	\$50,524,071	99.0%	\$51,394,578	96.4%	11.0%
OPERATING PROFIT	\$2,267,600	4.7%	\$524,115	1.0%	\$1,927,889	3.6%	-15.0%
SPECIAL REVENUES AND EXPENDITURES							
SPECIAL REVENUE							
Food	\$171,807	15.4%	\$94,990	8.0%	\$86,364	6.2%	-49.7%
Interest	561,799	50.3%	641,143	54.2%	726,008	52.2%	29.2%
Contributions/Transfers	382,536	34.3%	446,798	37.8%	577,439	41.5%	51.0%
Total Special Revenue	\$1,116,142	100.0%	\$1,182,932	100.0%	\$1,389,811	100.0%	24.5%
SPECIAL EXPENSES							
Food	\$123,173	11.0%	\$75,808	6.4%	\$67,794	4.9%	-45.0%
Supplies	3,481	0.3%	3,782	0.3%	3,671	0.3%	5.5%
Salaries/Wages	30,615	2.7%	10,548	0.9%	10,205	0.7%	-66.7%
Fringe Benefits	14,389	1.3%	4,852	0.4%	4,694	0.3%	-67.4%
Equipment	382,536	34.3%	446,798	37.8%	577,439	41.5%	51.0%
Other	150	0.0%	-	0.0%	-	0.0%	-100.0%
Total Special Expenses	\$554,343	49.7%	\$541,789	45.8%	\$663,803	47.8%	19.7%
OTHER PROFIT (LOSS)	\$561,799	50.3%	\$641,143	54.2%	\$726,008	52.2%	29.2%
FOOD LOSS							
Plate Food	\$15,104	1.4%	\$16,096	1.4%	\$20,090	1.4%	33.0%
Commodities	5,931	0.5%	11,931	1.0%	9,566	0.7%	61.3%
TOTAL FOOD LOSS	\$21,036	1.9%	\$28,027	2.4%	\$29,657	2.1%	41.0%
NET PROFIT (LOSS)	\$2,808,362	5.7%	\$1,137,231	2.2%	\$2,624,241	4.8%	-6.6%

Source: Broward County School District, Food Service Accounting, 1998.

EXHIBIT 14-2
BROWARD COUNTY SCHOOL DISTRICT FOOD SERVICES BALANCE SHEET
1996-1998

CATEGORY	June 30, 1996	June 30, 1997	June 30, 1998
Assets			
Cash	\$11,612,254	\$10,566,381	\$12,925,043
Accounts Receivable	1,823,093	15,753	70,521
Interest Receivable	24,583	23,313	107,712
Due from Other Agencies		1,936,067	2,044,940
Prepaid Expenses			101,882
Inventory	2,170,115	1,814,759	2,078,713
Total Assets	\$15,630,045	\$14,356,272	\$17,328,810
Liabilities			
Accounts Payable	\$253,560	\$159,434	\$352,248
Due to Budgetary Funds	1,938,732		-
Due to Other Agencies	974,474		
Liability for Compensated Absence	174,296	196,713	144,089
Deferred Revenue	1,503,422	1,102,860	1,310,967
Total Liabilities	\$4,844,484	\$1,459,006	\$1,807,304
Fund Balances			
Reserved for Encumbrances	\$39,419	\$179,691	\$77,092
Reserved for Inventory	666,693	736,852	829,455
Unreserved	10,079,449	11,980,723	14,614,959
Total Fund Balances	10,785,561	12,897,266	15,521,507
Total Liabilities and Fund Balances	\$15,630,045	\$14,356,272	\$17,328,810

Source: Broward County School District, Food Service Accounting, 1998.

An Intern Training Program has been implemented to prepare future food service manager candidates. This is an intensive course of 22 classes that covers topics ranging from the policies and procedures of processing free and reduced applications, to interviewing skills. The interns are eligible to become managers after successful completion of the program. Interns usually serve as interim managers until a full-time position becomes available.

Recent per meal statistics such as higher meals per labor hour and lower per meal costs indicate the program's operating efficiency relative to other food service programs in its region. Based on the *Florida Department of Education's Annual 1995-96 Cost Report*, the program had the lowest total cost per meal for both breakfast and lunch of the seven food service programs in Florida's Region 5 (South Region). The regions are geographically defined and Region 5 is comprised of the nearby school districts of Broward, Collier, Miami-Dade, Hendry, Martin, Monroe, and Palm Beach. Total meal costs as shown on Exhibit 14-3 include salaries, benefits, purchased services, energy services, supplies, purchased foods, other materials and expenses, and indirect costs. When comparing direct costs and the three largest components that comprise the direct costs (salaries, benefits, and purchased food), the Broward County School District also fared well in the South Region as seen on Exhibit 14-4.

EXHIBIT 14-3
ANNUAL REPORT OF FLORIDA CHILD NUTRITION PROGRAMS
TOTAL COST PER MEAL ANALYSIS
1995-96

REGION 5 SCHOOL DISTRICTS	TOTAL COST PER BREAKFAST MEAL	TOTAL COST PER LUNCH MEAL SERVED	COMBINED BREAKFAST AND LUNCH COST PER MEAL SERVED
Broward	\$1.191	\$1.585	\$2.776
Martin	1.262	1.679	2.941
Miami-Dade*	1.403	1.867	3.270
Palm Beach*	1.449	1.928	3.377
Hendry	1.462	1.945	3.407
Collier	1.508	2.006	3.514
Monroe	1.596	2.123	3.719
Region 5 Total	\$1.354	\$1.805	\$3.286
State Total	\$1.297	\$1.747	\$3.044
SIX LARGEST SCHOOL DISTRICTS			
Duval	\$1.115	\$1.484	\$2.599
Broward	1.191	1.585	2.776
Orange	1.203	1.601	2.804
Hillsborough	1.290	1.716	3.006
Miami-Dade*	1.403	1.867	3.270
Palm Beach*	1.449	1.928	3.377
Average	\$1.275	\$1.697	\$2.972

Source: *Annual Report of Child Nutrition Programs*, National School Lunch & Breakfast Programs Cost Report 1995-96, Food and Nutrition Management, Florida Department of Education, 1998.

*Miami-Dade and Palm Beach County School Districts are listed twice as they are part of Region 5 and are also two of the six largest school districts in Florida.

EXHIBIT 14-4
ANNUAL REPORT OF FLORIDA CHILD NUTRITION PROGRAMS
DIRECT COST PER MEAL RANKINGS (LUNCH)
1995-96

REGION 5 SCHOOL DISTRICTS	MAJOR COMPONENTS			TOTAL DIRECT COST PER MEAL (LUNCH)*
	SALARIES PER MEAL (LUNCH)	BENEFITS COST PER MEAL (LUNCH)	PURCHASED FOOD COST PER MEAL (LUNCH)	
Broward	\$0.511	\$0.233	\$0.648	\$1.585
Martin	0.516	0.329	0.711	1.679
Hendry	0.700	0.321	0.697	1.862
*Miami-Dade	0.571	0.184	0.727	1.867
*Palm Beach	0.516	0.322	0.798	1.919
Collier	0.751	0.334	0.683	2.006
Monroe	0.771	0.292	0.758	2.048
Average	\$0.594	\$0.287	\$0.711	\$1.820
SIX LARGEST SCHOOL DISTRICTS				
Duval	\$0.518	\$0.217	\$0.502	\$1.431
Orange	0.501	0.237	0.706	1.569
Broward	0.511	0.233	0.648	1.585
Hillsborough	0.619	0.260	0.657	1.670
*Miami-Dade	0.571	0.184	0.727	1.867
*Palm Beach	0.516	0.322	0.798	1.919
Average	\$0.539	\$0.242	\$0.673	\$1.673

Source: *Annual Report of Child Nutrition Programs*, National School Lunch & Breakfast Programs Cost Report 1995-96, Food and Nutrition Management, Florida Department of Education.

Columns do not add up to the total; they represent the three major components that comprise the total direct cost.

*Miami-Dade and Palm Beach County School Districts are listed twice as they are part of Region 5 and are also two of the six largest school districts in Florida.

When compared to the other five largest school districts in terms of student population in Florida, only the Duval County School District has lower combined breakfast and lunch total per meal costs. When comparing direct costs, Duval and Orange County School Districts fare better than the Broward County School District. However, statewide, besides Duval and Orange, Broward trails only Clay, Lake, and Citrus County School Districts in the lowest direct costs per lunch served.

FINDING

A new food service management and accountability system – Prepaid Card System (PCS) has been implemented in all 212 school cafeteria operations. The system has been in place since the 1995-96 school year. The PCS point-of-service feature has improved the efficiency and accuracy of breakfast and lunch program records and reports. An inventory module of the PCS system has been introduced at all 27 of the high schools and 30 of the 36 middle schools and 87 of the 130 elementary schools.

This module enables cafeteria managers to perform inventory functions such as receiving, ordering, and counting electronically as opposed to a paper-based manual process.

As part of the PCS system, four full-time members of the Food and Nutrition Services staff are dedicated to operating a help desk at the Food and Nutrition Services central office. The members of the help desk staff are managed by the Supervisor of Special Programs, a position unique to Food and Nutrition Services. The staff takes incoming phone calls from cafeteria managers and assists with problems related to the software. Staff also provide on-site training and assist with installation. According to the Food and Nutrition Services Director, the staff positions are district funded, permanent, and the workload is steady and will remain that way as new modules of the system are put into place.

There is no evidence of a systematic method for tracking incoming calls made to the help desk. By tracking the calls, analysis could be performed to determine which schools are having the most trouble and which problems are encountered most frequently. This tracking would assist in determining which managers need additional training, and the type of training should be covered.

RECOMMENDATION

Recommendation 14-1:

Track incoming calls to the computer help desk to isolate problem areas.

All incoming and outgoing calls should be logged with a notation of the type of problem encountered. The number of calls and types of problems should be analyzed to note where problem areas are occurring and to determine if additional training is necessary.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-------------|
| 1. The Supervisor of Special Programs should create an automated log using a spreadsheet or database program. The caller, date, time, school, type of problem, and date and time of disposition should be noted. | August 1999 |
| 2. Food and Nutrition Services clerical staff should, on a daily basis, compile information from the spreadsheets or database and produce reports for the Supervisor of Special Programs. | Ongoing |
| 3. The Supervisor of Special Programs should analyze data periodically to determine which types of problems are encountered most frequently and respond accordingly by developing remedial training programs or contacting the software company for additional assistance. | Ongoing |

FISCAL IMPACT

The logging of incoming and outgoing calls should not have a positive or negative fiscal impact as the logging of calls and the entering of the information into a database can be accomplished using existing Food and Nutrition Services clerical support staff. In the long run, if problem areas are identified earlier, more efficient operations should result.

14.2 Student Lunch and Breakfast Participation

CURRENT SITUATION

An average of the number of students served daily for the 1997-98 school year is provided in Exhibit 14-5. As can be seen, the percentage of eligible free and reduced students is greater than the meal participation percentage, which is defined as the percentage of students that were in attendance that were served a meal. While almost 79 percent of all of the students were eligible to receive free or reduced breakfast, only 17 percent of all students ate breakfast on a daily basis. However, more students participated in the lunch program, as the participation percentage almost equals the free and reduced percentage. This indicates that not all students eligible to take part in the programs are participating in the National School Lunch Program and National Breakfast Programs.

**EXHIBIT 14-5
STUDENT BREAKFAST AND LUNCH PARTICIPATION AND
FREE AND REDUCED PERCENTAGE IN THE
BROWARD COUNTY SCHOOL DISTRICT
1997-98**

CATEGORY	BREAKFAST	LUNCH
Average Daily Attendance	210,434	210,434
Average Number of Students Served Daily	36,266	113,477
Meal Participation Percentage	17.23%	53.93%
Free and Reduced Percentage	78.97%	58.70%

Source: Broward County School District, Food Service Accounting, 1998.

Exhibit 14-6 shows that when the totals are broken down into the types of schools, participation is greater than the free and reduced percentages for lunch at the elementary schools, and almost equal at the middle schools. At the high schools and centers, the free and reduced percentages are greater than the meal participation percentages. Centers are defined as schools that serve special needs students such as special education or alternative schools. Lower participation at high schools is typical of most food service programs especially for those programs that have open campuses. Broward County has eight high schools with open campuses that allow students to leave the campus at lunch.

EXHIBIT 14-6
STUDENT BREAKFAST AND LUNCH PARTICIPATION BY TYPE OF SCHOOL
IN THE BROWARD COUNTY SCHOOL DISTRICT
1997-98

SCHOOL LEVEL	BREAKFAST		LUNCH	
	MEAL PARTICIPATION	FREE AND REDUCED %	MEAL PARTICIPATION	FREE AND REDUCED %
Elementary	23.16	68.47	70.76	52.66
Middle	14.19	71.00	53.85	54.96
High Schools	8.22	61.08	20.13	55.91
Centers	45.71	81.44	61.89	81.36
Overall	17.23	78.97	53.93	58.70

Source: Broward County School District, Food Service Accounting, 1998.

Exhibit 14-7 shows the percentage of lunch meals that were served to each category of students in Region 5 and the six largest school districts in terms of enrollment during the 1995-96 school year, the latest year that statewide data was available. When compared to districts in Region 5, Broward had the second lowest percentage of meals served to free and reduced students, and served the lowest percentage of meals to free and reduced students than the five other largest school districts in Florida.

EXHIBIT 14-7
FLORIDA CHILD NUTRITION PROGRAMS
CUMULATIVE LUNCH PARTICIPATION PERCENTAGES
1995-96 SCHOOL YEAR

SCHOOL DISTRICT	REGION 5 (SOUTH)		
	CUMULATIVE PARTICIPATION IN SCHOOL LUNCH PROGRAMS		
	PAID	FREE	REDUCED
Broward	44%	49%	6%
Collier	42%	51%	7%
Miami-Dade*	17%	76%	7%
Hendry	24%	70%	6%
Martin	44%	49%	7%
Monroe	46%	45%	9%
Palm Beach*	32%	62%	6%
Region	29%	64%	7%
SIX LARGEST FLORIDA SCHOOL DISTRICTS			
Broward	44%	49%	6%
Miami-Dade*	17%	76%	7%
Duval	31%	59%	9%
Hillsborough	29%	63%	8%
Orange	30%	61%	8%
Palm Beach*	32%	62%	6%
State	32%	59%	8%

Source: Annual Report of Child Nutrition Programs 1995-96, Participation and Earnings, Florida Department of Education, 1998.

*Miami-Dade and Palm Beach County School Districts are listed twice as they are part of Region 5 and are also two of the six largest school districts in Florida.

FINDING

Based on the latest available statewide figures, the Broward County School District serves a lower percentage of free and reduced eligible students than districts of comparable size and in its region. As illustrated in Exhibit 14-7, the percentage of free and reduced meals served in the Broward County School District represented only 55 percent of the total meals served, compared with a region total of 71 percent and a statewide total of 67 percent.

High school student participation is typically much lower than participation among elementary and middle school students. Lower high school participation is affected by open campuses at eight of the 27 high schools. The decision to keep a campus closed at lunch or allow students to leave is a site-based management decision that is left to the discretion of the principal at each high school. Principals claim that overcrowding and outdated facilities are the major reasons contributing to the decision to allow student to leave campus. However, according to the Food and Nutrition Services Director, only one high school will receive a total kitchen replacement and four are scheduled to receive expansion or remodeling of their cafeterias in a five-year construction plan approved by the School Board.

To attract students back to campus and to make the best use of existing facilities, several high schools have incorporated food courts in an effort to encourage more students to stay on campus. At one high school, the cafeteria was remodeled using students from various departments such as shop and art to assist with the construction and decorating in an effort to save funds. The cafeteria was converted from two serving lines to four with each line having a different theme such as international and country kitchen. All four serving lines serve reimbursable meals and according to the Area Supervisor assigned to the school the number of meals served per day increased by over 200.

Based on observations during on-site visits to 13 campuses, kitchen operations appeared neat and well organized, and food service staff were friendly to students. School principals at these locations expressed a high degree of satisfaction with their food service program and with the dedication of food service staff. The interviews held with 15 principals and assistant principals, three central office administrators and seven members of the community during the diagnostic portion of the project revealed that few complaints are received in the central office or in schools from parents who are dissatisfied with the school food service program.

In the survey sent by MGT to administrators, principals, and teachers throughout the district, all expressed satisfaction concerning food service. Compared to other school districts in which MGT has conducted surveys, fewer Broward County teachers (33 percent) and administrators (22 percent) indicate that food services needed improvement than teachers (39 percent) and administrators (32 percent) in other school districts. When comparing the three groups of respondents within the Broward County School District, the administrators expressed the highest levels of satisfaction with the food service operation in their district (63 percent *adequate* or *outstanding*), compared to principals (58 percent *adequate* or *outstanding*) and teachers (51 percent *adequate* or *outstanding*).

COMMENDATION

The Director of Food and Nutrition Services, cafeteria managers, and food service staff are commended for their efforts in achieving a high level of student breakfast and lunch participation.

The Broward County Food and Nutrition Services Program has many obstacles such as overcrowded facilities, open lunch at some high school campuses, and low percentages of free and reduced students that could potentially cause a large program such as Broward County's to have low participation rates. The program has overcome these obstacles and managed to be among the most efficient and well managed programs that MGT has reviewed in the state of Florida.

14.3 Organization and Staffing

CURRENT SITUATION

The Director of Food and Nutrition Services is responsible for the activities of the program and reports to the Associate Superintendent of Financial Management and Support Services. As illustrated in the department's organizational structure in Exhibit 14-8, the program's central office positions include the Director, a Supervisor of Field Services, a Supervisor of Nutrition Education and Training, a Purchasing Agent, and a Supervisor II in charge of Special Programs. In addition, there are seven Area Supervisors, and a Clerk Specialist IV in charge of verification of free and reduced applications. The Supervisor of Field Services serves as the director in the director's absence. The Supervisor of Special Programs serves as an Area Supervisor of 10 schools in addition to supervising a computer help desk staff with one supervisor and two employees.

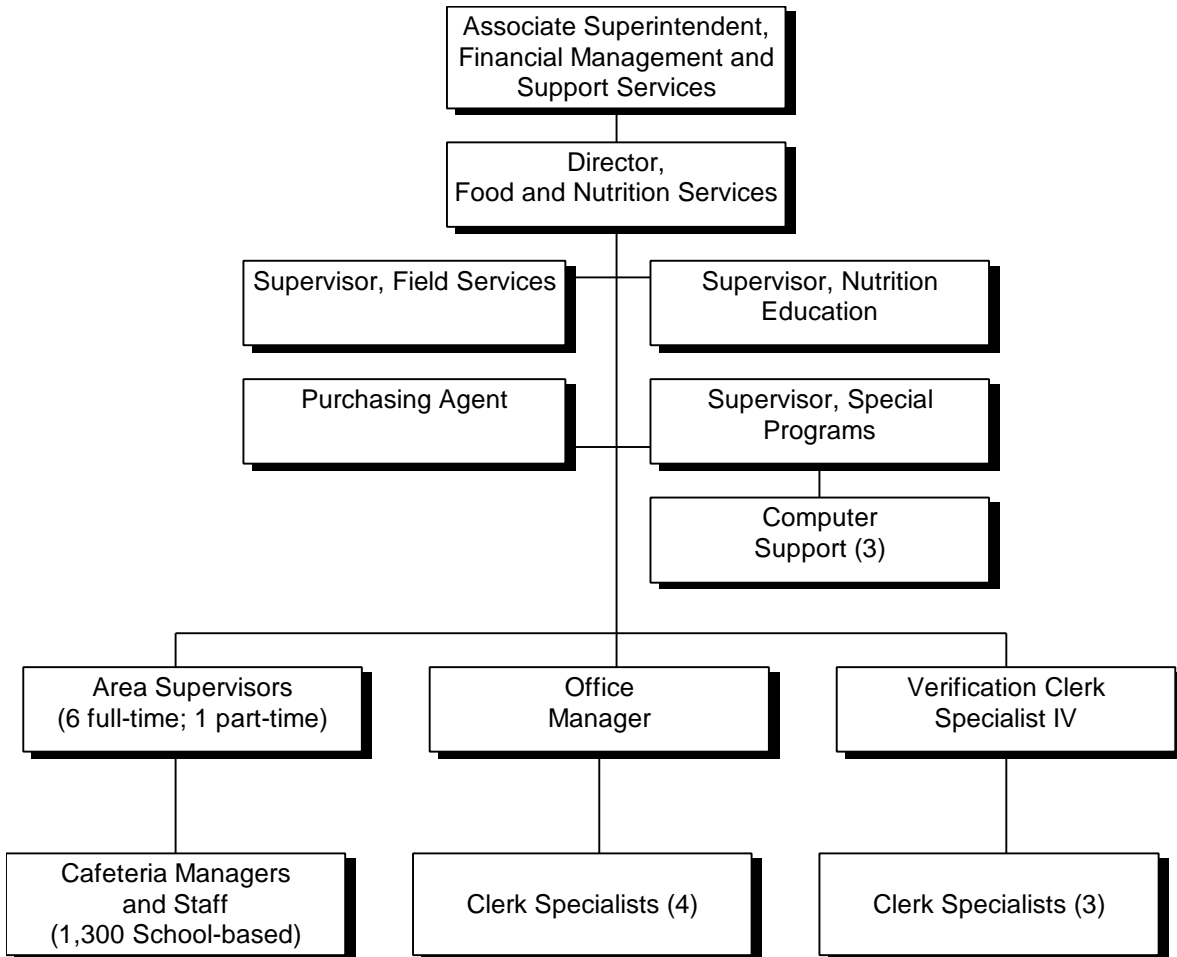
There are other personnel that are part of the Food and Nutrition Services budget but do not report directly to the Food and Nutrition Services Director. These positions include a Supervisor of Food Service Accounting with a staff of six, three accounts payable clerks devoted to processing food service related invoices, and two warehouse personnel who deliver goods and equipment to the cafeterias.

At the beginning of the school year, there were approximately 1,300 food services employees at the 189 kitchens. This includes:

- 170 managers;
- 30 assistant managers;
- 189 bakers;
- 189 cooks;
- 36 assistant bakers;
- 36 assistant cooks;
- 35 salad preparation attendants; and
- 625 assistants.

Twenty-two (22) of the managers are dual managers responsible for two cafeterias.

**EXHIBIT 14-8
FOOD AND NUTRITION SERVICES
IN THE BROWARD COUNTY SCHOOL DISTRICT
CURRENT ORGANIZATIONAL STRUCTURE**



Source: Broward County School District, Food and Nutrition Services, 1998.

FINDING

The Director of Food and Nutrition Services has established a dual manager program in response to budget cuts that the district faced in the early 1980s. Currently, there are 22 dual managers serving at 44 schools. The managers split their time between two schools in close proximity. A designated “key person” is left in charge to handle any emergencies in the absence of the manager.

There are six levels of managers and the level is determined by the number of meals served daily. Within each level, there are four steps which are based on longevity. The higher the level and step, the higher the pay of the manager. Managers who take on this additional responsibility are rewarded by two forms of additional pay:

- A manager's level and paygrade is based on the level of participation, the higher the participation at a school, the higher the level and pay. Dual manager levels are calculated by combining the participation of the two schools managed.
- Various stipends are paid to dual managers. The amount is determined by the collective bargaining agreement between the Federation of Public Employees and the School Board.

The benefit to the district is realized by only having to pay the fringe benefits and salary for one employee while getting the performance of two. Based on an average 10 month salary of \$25,000, MGT estimates that the district saves approximately \$733,150 by not paying the additional salaries and benefits to the additional 22 managers. However, the stipends that the dual managers receive increase the dual manager's salaries by an average of about \$5,000 each, which brings the total estimated savings to \$623,150. The \$25,000 average was determined by taking the midpoint of the lowest step (\$19,860) of the lowest manager level and the highest level and highest step (\$30,010) according to the Food Service Managers 1998-99 Salary Schedule. Actual salary data were not available. The results are shown on Exhibit 14-9.

**EXHIBIT 14-9
ESTIMATED DUAL MANAGER PROGRAM
SAVINGS CALCULATION**

	10-MONTH SALARY	BENEFIT RATE	NUMBER OF MANAGERS	SAVINGS	INCREASED MANAGER PAY	TOTAL SAVINGS
AVERAGE MANAGER'S SALARY	\$25,000	33%	22	\$733,150	\$110,000	\$623,150

Source: Created by MGT based on district salary schedules, 1998.

COMMENDATION

The Food and Nutrition Services Director is commended for initiating the Dual Manager Program.

Not only has the program saved money, but it has rewarded productive employees by augmenting their potential for increased earnings and providing incentives for managers to continue working for the Broward County School District.

RECOMMENDATION

Recommendation 14-2:

Increase the number of managers participating in the Dual Manager Program.

As shown above, the district has realized extensive savings through the Dual Manager Program. This effort should continue with increased participation in the program. Efforts should be made to encourage high performing managers to take on dual manager roles when existing managers retire or new schools open.

Currently, dual managers exist at schools with average daily meals served from 324 meals per day to 1,195 per day so the program is not limited to only small schools. However, dual management is more feasible at the smaller schools, especially the newer schools where participation is low. Some new elementary schools have participation rates as low as 50 percent and as few as 600 students. The criteria for choosing schools that would benefit from having dual managers is multi-faceted. According to the Food and Nutrition Services Director, the following should be considered before dual management is considered:

- schools must be located within five miles of each other;
- participation at the two schools should be low enough that it would be manageable for the two schools to be managed by a single manager; and
- the manager should be both willing to take on the additional responsibilities and considered capable by the director to take on the duties.

In discussions with the Director, an attainable goal of two new dual managers per year was agreed upon as an achievable target. The proposed increase in dual managers should be accomplished through natural attrition and as a result of new schools opening and not through a reduction in staff. It is important to note that two new dual managers annually may not be feasible if there is low turnover or enrollment levels fall or remain constant. Many factors such as turnover, close proximity of schools, and willing participants are involved with successful implementation of this recommendation. No district that MGT has studied in the past has a similar program. Thus, MGT does not have any benchmarks to analyze the success of such programs.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Food and Nutrition Services should identify at least two sets of schools in close proximity that would be suitable for dual management and at least two existing managers that would be suitable. May 1999
2. When vacancies at the manager level occur, the identified managers should be encouraged to participate and be presented with facts concerning the increased pay and responsibilities that go along with dual management. The Director of Food and Nutrition Services should attempt to fill the vacancies with dual managers. June 1999 through
May 2000
3. If successful during the 1999-2000 school year, efforts should be made to add two more dual managers each year thereafter. Successful implementation also depends on enough schools in close proximity to become available and enough managers leaving through natural attrition. June 2000

FISCAL IMPACT

The fiscal impact was calculated using the average salary and benefits that have been saved as shown in Exhibit 14-9. Using the estimated figure of \$623,150 per year saved, this relates to an average of \$28,780 salary and benefits per manager saved. If a goal of two new dual managers is achieved for 1999-2000, the result will be an approximate savings of \$57,560 for the first year with two new dual managers to \$287,800 in the fifth year with 10 new dual managers.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Increase Participation in Dual Manager Program	\$57,560	\$115,120	\$172,680	\$230,240	\$287,800

FINDING

The Food and Nutrition Services Program has eight supervisors. However, one is responsible for special programs and is currently assigned to supervising the computer help desk in addition to supervising 10 schools. Another supervisor is in a part-time position and is responsible for the supervision of new manager interns. This leaves approximately 200 kitchens and satellite operations for the remaining six supervisors to provide support and oversight to, which is roughly 33 programs per supervisor.

In discussions with supervisors, cafeteria managers, and central office personnel a common problem identified is the workload for which each supervisor is responsible. In addition to the supervision of schools, each has ancillary duties such as teaching courses in the intern management program, overseeing the 16 vans assigned to the food services program, and acting as a manager in emergency situations. With about 33 schools each and about 20 school days per month, some schools are visited only once a month by the supervisors. Supervisors report that they do not spend enough time visiting all of their assigned schools and have to spend more time than they feel is necessary assisting new managers or managers having difficulties.

The Area Supervisors are responsible for insuring that quality standards of performance are being met in all areas of the food service programs at each of their assigned schools. They must act as a liaison between the managers and principals when problems occur and are responsible for the yearly evaluation of each of the managers. It is difficult to make scheduled visits as the supervisors are frequently paged (each is assigned a pager) by either the central office, cafeteria managers, or principals. Most supervisors report that they receive about a dozen pages a day. During discussions with each individual supervisor, we noted that each supervisor was paged at least once.

Despite the previously discussed accomplishments of the Broward County School District Food Service Program, interviews, observations, and survey data revealed concerns with respect to the cafeteria dining environment, food quality, type/variety of menu choices, and behavior of staff toward children. The overcrowding and poor appearance of some cafeteria dining facilities is a situation that requires immediate attention from district facility planners and is out of the direct control of the Food

Service Program. However, food quality and employee concerns may be partially attributed to the program's lack of regular, ongoing oversight and support of the district's day-to-day cafeteria operations. Most visits by the area supervisors to Broward County School District campuses appear to be based on the requests of managers to resolve problems rather than routine on-site visits.

RECOMMENDATION

Recommendation 14-3:

Enhance the effectiveness and efficiency of Area Supervisors by creating two additional Area Supervisor positions.

By increasing the number of Area Supervisors from six to eight, the number of schools assigned to each supervisor would decrease to about 25. This would allow for more contact with each manager at the supervisor's assigned schools. By increasing the number of area supervisors, the problems addressed above concerning food quality, menu choices, and behavior of staff toward children can be addressed more effectively. The Food Service Supervisor should continue to maintain an open communication channel with school administrators. Efforts should be made to continue to improve the quality of products and services offered at each cafeteria.

IMPLEMENTATION STRATEGIES AND TIMELINE

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|--|-------------|
| 1. The Director of Food and Nutrition Services should create a division of responsibilities and activities for the two additional Area Supervisor positions. | May 1999 |
| 2. The Personnel Office should advertise the two positions. | May 1999 |
| 3. The Director should screen applicants and select the most qualified applicants for interviews. | June 1999 |
| 4. The Director and Supervisor of Field Services should interview selected applicants. | July 1999 |
| 5. The new Area Supervisors should begin employment. | August 1999 |

FISCAL IMPACT

Based on the existing pay grade of Area Supervisors, it is assumed that the district can hire two qualified individuals at an annual salary of \$39,500 each --- the starting salary for Pay Grade 23. Annual benefit expenses for this salary are estimated to be approximately \$13,026 (\$39,474 x .333), resulting in an annual cost of approximately \$105,000 for the salaries and benefits associated with the new positions.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Add Two Area Supervisor Positions	(\$105,000)	(\$105,000)	(\$105,000)	(\$105,000)	(\$105,000)

FINDING

As shown previously on the organizational chart (see Exhibit 14-8), there are four staff members, one is a six-month temporary position, responsible for verifying applications for free and reduced lunches and breakfasts. The temporary person works during the intensive periods of the verification process. The supervisor of the verification staff (Verification Clerk Specialist IV) reports directly to the Director. Federal legislation requires that schools participating in school nutrition programs keep an accurate number of the approved free and reduced price meal applications on file as outlined in the district's focused verification process. The staff averages about 6,000 verifications a year out of nearly 90,000 applications. To accomplish this, Broward County utilizes the "Alternate System of Verification". This entails performing two types of verifications: random, and focused. Verification involves confirming an applicant's information through written evidence, collateral contacts, outside agency records, school conferences, parent conferences, and other sources as appropriate.

The district has a choice of two processes for verifying the eligibility for the free and reduced meal program --- random sampling or focused verification. Focus verification allows the district to concentrate on applications where the family's (applying for the program) stated income falls within 100 on the government guidelines charts. Broward uses the focused verification process.

In reviewing the procedures used to accomplish the verification tasks, many manual procedures are used. For example, addresses of parents are typed onto letters as opposed to using the district's student database to generate the letters. A separate database program whereby information relating to families that have had their free and reduced eligibility status verified is maintained. No linkage exists between this database and the district's mainframe, and duplicate information is maintained in each.

In reviewing the PCS Revenue System, it was noted that it contains a module devoted to free and reduced verification. During MGT's on-site visit, a PCS representative was in the Food and Nutrition Services Department and explained the procedures. The module has the capability of accepting downloaded information from the student databases and other agencies (e.g., Department of Children and Family Services) necessary to perform the verification procedures automatically.

RECOMMENDATION

Recommendation 14-4:

Enhance the effectiveness and efficiency of the free and reduced verification process by automating the process using an existing module contained in the PCS Revenue Control System.

The verification process is a manual time-consuming effort that could be simplified by automation. Sufficient resources exist within Food and Nutrition Services and Education Technology Services to assist in the conversion from a manual process to an automated one. One full-time and one temporary position devoted to the verification process could be eliminated due to the reduction of time-consuming, manual procedures. Responsibility for supervising the verification staff should shift from the Director to the Office Manager as the director's span of control, especially with the increase of two Area Supervisors, will be rather broad. During concentrated verification efforts, existing clerk specialists who report to the Office Manager could assist.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Food and Nutrition Services and the Supervisor of Special Programs should study the PCS verification module and develop an action plan to implement it fully by the beginning of the 1999-2000 school year. The existing support contract with PCS should be utilized fully to assist with the implementation. May 1999

2. The Supervisor of Special Programs and the Verification Clerk Specialist IV should meet with a representative from Education Technology Services to develop a process for feeding the necessary information from the student database into the PCS system. According to ETS staff, conversion of the mainframe data to PC based systems is accomplished routinely and would not be a difficult or time consuming process. June 1999

3. The half-time temporary clerk specialist and a full-time clerk specialist position should be eliminated and supervision of the verification staff should shift to the office manager from the Director. July 1999

4. The district has an agreement with PCS to provide on-site training. Training should begin for the verification staff and other clerk specialists. August 1999

FISCAL IMPACT

Based on the existing pay grade of clerk specialists, the elimination of two positions will result in annual savings of approximately \$38,454. The fiscal impact that would be

realized from the elimination of two Clerk Specialist III positions was derived by multiplying the minimum Pay Grade 14 salary (\$21,013) for those positions by 1.5 and then multiplying the 33 percent benefit rate by just one of the positions as the other position is a six-month temporary position without benefits.

The following equation was used to calculate \$38,454:

$$\begin{aligned}
 & \$21,013 \times 1.5 = \$31,520 \\
 & \$21,013 \times .33 = \$6,934 \\
 & \$31,520 + \$6,934 = \$38,454
 \end{aligned}$$

Recommendation	1999-2000	2000-2001	2001-02	2002-03	2003-04
Eliminate One Clerk Specialist and a Temporary Clerk Specialist	\$38,450	\$38,450	\$38,450	\$38,450	\$38,450

FINDING

There are four clerk specialists that report to the Office Manager. Three of the clerk specialists perform duties for a single administrator. The fourth clerk specialist performs general duties for the remaining central office staff of 12.

RECOMMENDATION

Recommendation 14-5:

Reorganize the clerk specialists and balance the workload among all four positions.

The clerk specialists who currently perform duties for a particular administrator should continue to have the administrator as their primary point of contact for assignment of tasks; however, their duties should expand to assist the Area Supervisors with office paperwork such as typing and filing the supervisor’s site visit reports so the supervisors can spend more time at schools. In addition, the clerical staff should take on the additional responsibilities of assisting with verifications and updating the computer desk’s call tracking database.

IMPLEMENTATION STRATEGIES AND TIMELINE

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| 1. The Director of Food and Nutrition Services should develop revised responsibilities for each of the clerk specialists to assist the Area Supervisors and initialize the reorganization of the clerical staff. | May 1999 |
| 2. The revised organizational structure should be implemented. | June 1999 |

FISCAL IMPACT

There is no fiscal impact as the reorganization of the clerical staff and added responsibilities can be accomplished with existing resources.

14.4 Part-time Employee Benefits

CURRENT SITUATION

All food service personnel, regardless of the number of hours worked, receive some type of insurance. According to the most recent *Collective Bargaining Agreement Between the Federation of Public Employees and the School Board of Broward County*, those food service employees that work at least three hours per day receive HMO health insurance coverage. Those employees that work at least four hours per day, in addition, receive dental insurance, term life insurance, disability income protection insurance, and optical insurance. Of the approximately 1,300 cafeteria staff, only 109 or approximately eight percent, worked less than four hours per day.

Food service personnel in the private sector rarely receive company benefits unless they are classified as full-time positions. Since most school district positions are classified as full-time, it has been a common practice in school districts across the country to provide a universal benefit package for all district personnel. However, a food service program is unique from most other district programs and activities in that most food service positions are classified as part-time rather than full-time status.

FINDING

Benefit costs represent a much higher percentage of personnel costs in Food and Nutrition Services than the rest of the district because of the high percentage of part-time personnel whose benefit costs represent a larger portion of their personnel cost than do full-time employees. In the 1997-98 school year, the food service employee benefit expenses of \$6.8 million represented 43.5 percent of the program's \$15.5 million in salary costs. For the 1998-99 school year, this percentage will increase to 46.3 percent with \$7.3 million in benefits and \$15.9 million on salaries. District employee benefit costs are estimated to average approximately 33 percent of salaries for the 1998-99 school year. This difference between the district's 33 percent benefit cost rate and Food and Nutrition Services benefit cost rate of 46 percent is largely attributed to the high percentage of part-time positions in food service relative to the overall district's percentage of part-time positions.

Since part-time positions work less hours than full-time positions and all district positions receive similar benefits, the benefit costs associated with part-time positions will represent a higher percentage of salaries than the benefit costs of full-time positions. For example, if the food service program's benefit costs corresponded with the district level of 33 percent of salaries, the program would have reported \$5.3 million in employee benefit costs in the 1997-98 school year. This is approximately \$1.5 million less than the program's reported benefit costs of \$6.8 million.

RECOMMENDATION

Recommendation 14-6:

Hire new employees below four hours per day, or increase the hours of existing employees, to reduce benefit cost.

In an effort to reduce the high percentage of costs attributed to employee benefits, new employees should be hired when appropriate below the four-hour level, whereby only HMO coverage is offered to the employee. When additional hours are required, the district should make every attempt to increase the hours of existing employees as opposed to hiring new employees. This practice will permit the district to avoid paying for additional benefits.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Food and Nutrition Services Director should instruct all those who make hiring decisions at the individual schools that all new hires should be below the four-hour level wherever feasible and the current production levels can be maintained. May 1999
2. The Food and Nutrition Services Director should incorporate the new three-hour positions when completing the staffing forms for the 1999-2000 school year. June 1999
3. When new hiring decisions are made throughout the year, all new hires should be three-hour, 3.25, 3.5, or 3.75 hours per day employees whenever feasible and the current production levels can be maintained. 1999-2000 school year

FISCAL IMPACT

Hiring only three-hour employees should result in a continued reduction in food service payroll benefit costs beginning in the 1999-2000 school year. However, it is unlikely that the department could achieve the districtwide benefit of the salary percentage of 33 percent for several reasons.

- First, the disproportionate number of part-time food service workers (less than 30 hours per week) results in higher cost percentages, especially when compared to the standard full-time (40 hours a week) positions of most other departments.
- Second, since the pay grade of food service assistants is among the lowest in the district, benefits will remain relatively higher as a percentage of salaries.
- Third, the low annual turnover of food service personnel will provide an opportunity for only incremental reductions, as positions

receiving full benefits are vacated and filled with new employees receiving only HMO benefits.

Food service insurance benefit costs are estimated to be \$218.46 per month for a food service employee. This figure is based on monthly costs of:

- health insurance costs of \$200;
- dental insurance costs of \$10.80;
- life insurance costs of \$1.14 which is \$0.19 per \$1,000 of salary (based on \$6,000 part-time salary);
- disability costs of \$2.76 which is \$0.46 per \$1,000 of salary (based on \$6,000 part-time salary); and
- optical insurance costs of \$3.76 per month.

According to the Director, there is about a 10 percent annual turnover rate. Hiring 130 new employees with only HMO benefits costing \$148 per month would cost \$192,400 in benefits for the 10-month school year. Hiring these employees as four-hour or above employees would cost \$283,998 in insurance benefits. If the district chooses to implement the recommendation of hiring new employees below four hours, an estimated cost savings of \$91,598 will be realized.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Hire New Food Services Staff as Three-Hour Employees	\$91,600	\$91,600	\$91,600	\$91,600	\$91,600

FINDING

All employees, both substitutes and permanent employees, must pay \$50 for a fingerprint background check. This is a financial burden to those in need of a job and can act as a deterrent to seeking employment with the district.

RECOMMENDATION

Recommendation 14-7:

Deduct the background check fee for new food service employees from the employee's first paycheck.

By deducting the fee from the substitute employee's first paycheck, the district reduces the risk of losing potential employees while also ensuring payment for the fingerprint background check is retained.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Food and Nutrition Services Director should make the necessary arrangements with the Payroll Department to deduct the fee from the employee's first paycheck. May 1999
2. The Food and Nutrition Services Director should implement the change. August 1999

FISCAL IMPACT

This recommendation can be implemented with existing resources.

14.5 Cash Control and Cafeteria Office Security

CURRENT SITUATION

All cafeterias have electronic cash registers connected to the PCS Revenue Control System and cash is kept in locked offices. Money is counted on a daily basis and taken to the front office where it is picked up daily by a security courier service.

FINDING

In discussions with managers, observations at the school cafeteria offices and documentation provided by the district it appears that there are adequate cash handling procedures in place. The *School Food Service Procedure Manual* has detailed procedures to follow for making deposits, maintaining and accounting for petty cash, and establishing a change fund. For the 1997-98 school year, there was a total cash overage of \$3,613.87 for all 212 food service facilities combined which is less than one-tenth of one percent (.0067 percent) of the total revenues received. Overall, this is a very small percentage of revenues. However, but upon further examination the range was from an overage of \$5,836.35 to a shortage of \$4,072.72.

In six of the older cafeterias visited, it was observed that employee purses and personal belongings were stored in the dry storage area. Employees expressed concern as vendors and other employees have access to the storage areas and they felt it would be easy for thefts to occur, although no employee indicated any thefts had occurred. Newer cafeterias had employee lounges with lockers for storage.

RECOMMENDATION

Recommendation 14-8:

Strengthen the controls to ensure accurate cash counts and provide safe places for employees to store personal belongings.

With an automated point-of-sale system in place, there should not be extreme fluctuations in cash overages and shortages that are being experienced. For the 1997-

98 school year, 33 of the 212 food service facilities had cash shortages or overages of more than \$400. Schools that have extreme shortages and overages should be identified for additional training and monitoring, and be checked on a monthly basis for improvement.

A survey of all kitchens should be taken by the Area Supervisors on their regular visits to assess the storage situations for employees. According to the Food and Nutrition Services Director, it is estimated that one-fourth of the existing 212 food service facilities cafeterias do not have lockers for the employees.

IMPLEMENTATION STRATEGIES AND TIMELINE

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|---|--------------------|
| <p>1. The Food and Nutrition Services Director and Area Supervisors should review and revise, if necessary, cash handling documentation in the School Food Service Procedures Manual. Area Supervisors should note upon their routine visits the storage situation at each of their schools and determine if there is ample space to place lockers in the storage or lounge area.</p> | <p>June 1999</p> |
| <p>2. The Facilities Department should be contacted to determine if there are locker rooms being renovated and if there are any suitable lockers that could be salvaged. The Purchasing Agent should order the appropriate number of lockers needed for the cafeterias.</p> | <p>July 1999</p> |
| <p>3. At the annual orientation meeting, the Food and Nutrition Services Director should have a training session on cash management and should develop performance improvement plans for those schools that have excessive overages and shortages.</p> | <p>August 1999</p> |
| <p>4. Lockers should be installed before the next school year starts.</p> | <p>August 1999</p> |

FISCAL IMPACT

The enhanced emphasis on cash controls can be implemented with existing resources. If salvaged lockers are not available and need to be purchased, they can be purchased for approximately \$300 per school apiece. This estimate is based on three single tier lockers each consisting of three small lockers found in an industrial supply catalog found on the Internet from a company that sells lockers. It is estimated that about 50 lockers will need to be purchased, unless lockers can be salvaged from renovations.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Purchase 50 Lockers for Employees	(\$15,000)	\$0	\$0	\$0	\$0

14.6 Food Choices and Costs

CURRENT SITUATION

Food purchases have remained fairly constant as a percentage of total expenditures. Combined purchased food and the value of commodities represents 42 percent of expenditures for the last two years, down from 45 percent in 1996-97. Purchased food costs represented 36 percent of revenue which is lower than the latest available statewide average of 39 percent in 1996.

Menu planning is the responsibility of the Supervisor of Field Services. Menus are planned in advance for all schools and are uniform for each school. There is a single menu for elementary schools and two for middle and high schools. Menus are planned to incorporate as many commodities as possible to reduce costs and keep inventory in check.

Surveys are frequently administered to all levels of students by the Supervisor of Nutrition Education and Training. These surveys are used to test new foods, to gauge satisfaction in current menu choices, and to modify the menu for particular schools. The foods served will not change at a particular school based on the surveys, but the way the food is prepared may change to make it spicier, saltier or whatever the children indicate as their taste preference.

FINDING

Complaints from the district administrators, principals, school personnel, parents and community leaders interviewed during the diagnostic portion of the review regarding the Food Services Program, centered around the lack of choices available to students. While the daily menus may be consistent across all schools, children do have a choice of entrees at all schools. There are usually two main entrees available to elementary students. The choices served seem to be food that children enjoy such as cheese pizza, tacos, hamburgers, and chicken nuggets. However, there is some validity to the lack of choice complaints as some of the same food choices are repeated and served often. Analysis of menus for the elementary students for the 36 school days between October 26 and December 18 found hamburgers being served four times, and cheese pizza, chicken nuggets, chicken patties and tacos being served three times each as the main entrée. However, children seem to enjoy these types of foods based on the department's survey results and the high participation rates.

However, a la carte selections are very limited at elementary and middle schools. The a la carte choices are limited to ice cream one day a week, and students may buy extra items already found on the menu. At high schools, students have a wide array of choices for a la carte items such as bottled water, fruit drinks, vendor pizza, and chips.

RECOMMENDATION

Recommendation 14-9:

Perform analysis to consider if revenues will increase as a result of an increase in the sale of a la carte items.

The danger of expanding the a la carte choices to elementary and middle school children is that productivity may decrease as a result of having to prepare or stock additional items. In addition, a la carte items are not reimbursable, so if a student chooses not to buy a reimbursable meal and just purchases a la carte items, the only revenue received is the profit of those items. Any expansion of a la carte items should be done incrementally at a few test schools. The items chosen should be those that a student will buy in addition to a reimbursable meal instead of as a replacement to a reimbursable meal. Quarterly analysis should be performed to determine if the participation and financial performance have increased. In addition, productivity should be monitored to ensure that it has not declined as a result of increased a la carte choices.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Food and Nutrition Services and Supervisor of Field Services should choose a six elementary and middle schools to use as pilot programs to determine the effect the serving of additional a la carte items will have on participation and revenue. July 1999
2. The Supervisor of Field Services should choose which types of a la carte items to serve on a trial basis as the selected elementary and middle schools. The items chosen should be available from existing vendors. July 1999
3. The school year should begin with increased a la carte choices at a select number of elementary and middle schools. August 1999
4. The Supervisor of Field Services should perform analysis to determine what effects an increase in the serving of a la carte items had on revenue, meals per labor hour and participation. If successful, similar items should be introduced at all elementary and middle schools. November 1999

FISCAL IMPACT

The fiscal impact of expanding the serving of a la carte items is difficult to predict. The analysis of the impact of the experimentation can be done with existing resources. But if successful, and it is found that by increasing the sale of a la carte items revenue and level of participation increases, then the impact of implementing the changes will definitely have an effect.

FINDING

As mentioned previously, despite a continued rise in the market price of food products, the district's lunch meal prices have not been increased in over a decade for elementary schools, six years for high schools, and eight years for middle schools. Lunch menu prices in the Broward County School District are among the lowest compared to similar sized districts in the state.

Exhibit 14-10 presents a comparison of Broward County student breakfast and lunch menu prices and the prices of the five other largest school districts in Florida. Broward and Hillsborough County have the lowest breakfast prices and the lowest lunch prices except for high schools where Duval County was lower.

**EXHIBIT 14-10
BREAKFAST AND LUNCH PRICES IN THE
BROWARD COUNTY SCHOOL DISTRICT AND COMPARISON SCHOOL DISTRICTS
1998-99**

SCHOOL DISTRICT	BREAKFAST		
	ELEMENTARY FULL PRICE	MIDDLE FULL PRICE	HIGH FULL PRICE
Broward	\$0.50	\$0.60	\$0.60
Miami-Dade	0.60	0.70	0.70
Duval	0.75	0.75	0.75
Hillsborough	0.50	0.60	0.60
Orange	0.70	N/A	N/A
Palm Beach	0.90	0.90	0.90
Average	\$0.66	\$0.71	\$0.71
SCHOOL DISTRICT	LUNCH		
	ELEMENTARY FULL PRICE	MIDDLE FULL PRICE	HIGH FULL PRICE
Broward	\$1.00	\$1.35	\$1.50
Miami-Dade	1.25	1.50	1.50
Duval	1.30	1.45	1.45
Hillsborough	1.25	1.55	1.55
Orange	1.40	1.50	1.60
Palm Beach	1.25	1.50	1.50
Average	\$1.24	\$1.48	\$1.52

Source: MGT telephone calls to individual Food Service Programs, December 1998.

RECOMMENDATION

Recommendation 14-10:

Perform an analysis to consider if it will be cost-effective to raise menu prices.

Meal prices must be reviewed on an annual basis and adjustments should be made, where appropriate, to keep pace with increasing costs of administration, training, food,

labor, and other operating expenses. Pricing strategies may include incremental annual price increases (i.e., five cents) that will minimally cover the annual increases in departmental operating costs.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Food and Nutrition Services should perform analysis after the final financial figures have been posted to determine the feasibility of an increase in prices. This analysis should include calls to neighboring school districts to determine the effect of increasing prices on revenue. July 1999
2. If found appropriate to raise prices based on analysis, the Food and Nutrition Services Director should propose to the Board an increase in prices for the 1999-2000 school year. August 1999

FISCAL IMPACT

The fiscal impact of analyzing the increasing of menu prices is difficult to predict. The analysis of the increasing of menu prices can be done with existing resources, but the impact of implementing any menu price changes will definitely have an effect. As the Broward County School District has a higher than state average percentage of students that pay full price for lunch, it may not be advisable to raise meal prices as the current financial status of the program is good. However, analysis should be performed to determine if current meal prices are appropriate.

14.7 Marketing and Catering

CURRENT SITUATION

The Broward County Food and Nutrition Services Department markets their food services in the same manner as a business. Marketing concepts such as radio and television announcements of menus, menus on the Internet, and product promotions are all used to increase program participation.

Catering programs by school food service departments can be a profitable enterprise. Opportunities exist for the department to bring in additional funds by catering school sponsored events such as banquets, PTA meetings, and dances. Staff and Board meetings, retreats, and conferences present additional opportunities to secure revenue. While there is some ongoing catering activity in the Broward County School District, it is not aggressively pursued.

Opportunities also exist to serve organizations outside of the school district as well. There are numerous non-profit organizations such as day-care centers and elder care groups that could benefit from school food service programs.

Efforts to promote the Food and Nutrition Services Program are numerous. The Supervisor of Nutrition Education has incorporated many events into the schools. For example, contests during National School Lunch Week, Employee of the Month/Year programs, and student surveys about food choices and quality have been utilized. Players from local professional sports teams have also been involved in school lunch promotions. Communication to the employees is enhanced through a newsletter published several times a year by the Supervisor of Nutrition Education and distributed to all food service employees. In addition, the Supervisor of Nutrition Education works as a teacher in the classroom by teaching units on food and nutrition.

FINDING

Currently, the school lunch menus are announced daily by local radio and television stations, printed in the local newspaper, and placed on the Broward County School District internet web page. The menus are distributed to the students on a monthly basis as well as in a monthly calendar format.

RECOMMENDATION

Recommendation 14-11:

Increase awareness of the Child Nutrition Services Program by printing more colorful menus.

The Food and Nutrition Services Program should have menus printed by an outside company such as School Marketing Partners. This company prints the menus in a colorful booklet that includes coupons for children-oriented products, games, and surveys. There is no cost to the district as the company derives its benefits from the coupons that are placed in the booklets.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Child Nutrition Director should contact several menu printing services such as the School Marketing Partners and determine which is best suited to meet the needs of the Broward County School District. May 1999
2. The Child Nutrition Director should begin the distribution of menus through school homerooms when a suitable partner is located. August 1999

FISCAL IMPACT

This recommendation will not cause the district to incur additional expenditures. By increasing the awareness of the program, participation should increase.

FINDING

There are several programs in place that cater to citizens of the community such as Foster Grandparents, YMCA, and several day care centers. A new program with the Broward County Parks and Recreation Department is expected to raise about \$25,000 in revenue. During the 1997-98 school year, service to these programs raised approximately \$125,000 in revenue. However, there is no concentrated effort to have a formalized catering program to serve the needs of internal clients such as the Board, staff meetings and after-school functions.

RECOMMENDATION

Recommendation 14-12:

Initiate and publicize a formal catering program.

A brochure should be created outlining the types of catering services that can be provided for different functions by the Broward County School District Food and Nutrition Services Department. This brochure should contain descriptions of different types of platters or combinations of items that can be served and the corresponding prices. Examples of items to include are pastries, fruit, coffee, sandwiches, finger foods, sodas, and bottled water. The additional administrative functions related to the catering duties should be supervised by the Nutrition Education and Training Supervisor with assistance from the Food and Nutrition Services clerical staff.

When kitchen employees are used for catering purposes, the Food and Nutrition Services Department must be reimbursed for the amount of staff labor that was utilized. This is above and beyond the price of the food served. For instance, if a cafeteria employee caters a Board meeting and stays for the meeting to assist in serving, Child Nutrition Services will bill the cost center responsible for the event and the employee will be reimbursed accordingly if hours are spent above the normal working hours.

FISCAL IMPACT

A successful catering program has the potential to bring in hundreds of thousands of dollars of revenue depending on the aggressiveness of the marketing efforts. As evidenced, last year \$125,000 of revenue was realized through just eight external programs. An effort should be made to increase this amount by 50 percent the first year and 25 percent each subsequent year by offering service to internal clients and gaining additional outside clients with existing staff.

However, with increased catering, the need for additional central office staff may arise. Analysis should continue to be performed to ensure that the workload involved with an increase in catering functions does facilitate the need for additional staff increase in the central office. At the point where it would not be possible to increase catering any further without hiring additional central office staff, then additional efforts at increasing level of catering should be curtailed. The following scenario is dependent on the ability to increase catering without adding central office staff.

Recommendation	1999-2000	2000-01	2001-2002	2001-02	2002-03
Expand Catering Services	\$62,500	\$78,125	\$97,650	\$122,100	\$152,600

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Food and Nutrition Services Director and the Supervisor of Nutrition Education and Training should create a plan for expanded catering services. June 1999
2. The Supervisor of Nutrition Education and Training should develop a brochure and price list of catering services. July 1999
3. The Supervisor of Nutrition Education and Training should meet with principals, administrators, and leaders of external groups who may be potential customers, and market the catering program. August 1999
4. The new school year should begin with an expanded catering program in place. August 1999

15.0 SAFETY AND SECURITY

This chapter addresses the safety and security functions of the Broward County School District in the following sections:

- 15.1 Safety
- 15.2 Security
- 15.3 School Security Issues
- 15.4 School Violence Prevention Programs

BACKGROUND AND OVERVIEW

Two separate units perform safety and security functions in Broward County School Districts. School safety services, including fire, sanitation, and casualty (loss, liability, and risk reduction) inspection, are provided by the Safety and Benefits Section of the Department of Risk Management, Safety, and Benefits. School security services in the Broward County School District are provided by the Special Investigative Unit (SIU) which provides investigative personnel to serve the security needs of district high schools, middle schools, elementary schools, and vocational schools/alternative centers. SIU also provides building security personnel at many of the district's central administrative offices.

The Broward County School District is following national patterns in moving from a traditional system where teachers and principals are solely responsible for maintaining school discipline to a modern technological approach addressing the needs of a rapidly changing society in an urban metropolitan area. School principals work with sworn law enforcement officers assigned to each school called school resource officer (SROs) and with a full-time security specialist assigned to high schools and middle schools to control incidents of violence and other threats to school security.

Broward County School District's own experience reflects the growing national perception that, despite ongoing national attention to the problem, not all public school systems are safe places of learning. The seventh goal of the National Education Goals states that, by the year 2000,

...all schools in America will be free of drugs and violence and the unauthorized presence of firearms and alcohol, and will offer a disciplined environment that is conducive to learning.

In response to this goal, the United States Congress passed the Safe and Drug-Free Schools and Communities Act of 1994, which provides for support of drug and violence prevention programs. As part of this legislation, the National Center for Education Statistics (NCES) is required to collect data to determine the "frequency, seriousness, and incidence of violence in elementary and secondary schools."

NCES responded to this survey by commissioning the 1996-97 Principal/School Disciplinarian Survey on School Violence. The school violence survey was conducted with a nationally representative sample of 1,234 regular public elementary, middle, and secondary schools in 50 states and the District of Columbia. The survey requested information on four main topics:

- the incidence of crime and violence that occurred in public schools during the 1996-97 academic year;
- principal (or school disciplinarians) perceptions about the seriousness of a variety of discipline issues in their schools;
- the types of disciplinary actions schools took against students for serious offenses; and
- the kinds of security measures and violence prevention programs that were in place in public schools.

The type of criminal incidents that schools were asked to report included murder, suicide, rape, or other type of sexual battery, assault or fight with a weapon, robbery, assault or fight with a weapon, theft/larceny and vandalism. Physical attacks or fights without a weapon led the list of reported crimes in public schools with approximately 188,000 such attacks reported nationwide in 1996-97. In the same year, there were approximately 115,500 cases of theft/larceny, 98,400 cases of vandalism, 11,000 incidents of physical attacks or fights in which weapons were used, 7,150 cases of robbery, and 4,200 cases of rape/sexual battery reported.

Forty-three (43) percent of public schools surveyed nationally reported no incidents of crime in 1996-97, while 47 percent of the schools reported no violent crime, but at least one serious or nonviolent crime. Ten percent of schools surveyed reported at least one serious violent crime during the 1996-97 school year. Serious violent crime means that any one of the following crimes occurred at the school: murder, rape or other type of sexual battery, suicide, physical attack or fight with a weapon, or robbery. Less serious or nonviolent crimes include physical attack or fight without a weapon, theft/larceny, and vandalism.

Principals were also asked to report on the number of serious disciplinary problems in their schools, including:

- the possession or use of a firearm;
- the possession or use of a weapon other than a firearm;
- the possession, distribution, or use of alcohol or drugs, including tobacco; and
- physical attacks or fights.

Sixteen (16) percent of public school principals considered at least one of these discipline problems to be a serious issue in their schools in 1996-97 --- 43 percent reported that they had minor or no discipline problems and 41 percent reported a moderate, but no serious problem on at least one of these issues. The three other discipline issues most often cited by school principals as problems were student tardiness (40 percent), student class cutting (25 percent), and physical conflicts among students (21 percent). Physical conflicts among students were more likely to be reported as serious or moderate discipline problems in city schools than in rural schools (25 percent versus 14 percent).

Fifty-one (51) percent of elementary school principals in the NCES study reported that all or almost all of their teachers and staff were involved in violence prevention programs, compared to 40 percent of staff in middle schools and 26 percent of staff in high schools. Approximately 90 percent of schools reported having zero tolerance policies for firearms (91 percent), 88 percent had policies of zero tolerance for alcohol and drugs, 69 percent had a zero tolerance policy for violence, and 79 percent had a zero tolerance policy for tobacco.

The NCES national survey also asked school districts to report on the types of security measures used to ensure safety in school buildings. Ninety-six (96) percent of public schools reported that visitors were required to sign in before entering the school buildings. Eighty (80) percent closed campus for most students during lunch. Fifty-three (53) percent controlled access to the school buildings, and 24 percent controlled access to the school grounds. Nineteen (19) percent of school districts conducted random drug sweeps.

Finally, NCES rated school districts responding to the survey on the level of security in their school facilities. Two percent of schools had stringent security, defined as a guard present on a full-time daily basis, students passing through metal detectors daily, and/or being subject to random checks with metal detectors. Eleven (11) percent of schools had moderate security, which is defined as either a full-time or part-time guard and no metal detectors, but with controlled access to the school building. Eighty-four (84) percent of public schools included in the national survey were considered to have low security, which means no guards, no metal detectors, and minimal or no attempts on the part of the staff to control access to school buildings.

In 1996-97, the United States Department of Education released *Violence and Discipline Problems in U.S. Public Schools* --- a report examining five-year trends in public schools. The Department of Education found encouraging signs in the nation's poorest schools (those where 75 percent or more of the student population is living in poverty). Between 1990-91 and 1996-97, fewer principals reported problems in the following safety and discipline areas:

- physical conflicts among students (the percentage of students who cited this as a problem declined from 40 percent in 1990-91 to 29 percent in 1996-97);
- alcohol use among students (declined from 12 percent in 1990-91 to three percent in 1996-97);
- drug use among students (from 13 percent in 1990-91 to five percent in 1996-97);
- physical abuse of teachers (from six percent in 1990-91 to five percent in 1996-97); and
- verbal abuse of teachers (from 24 percent in 1990-91 to 13 percent in 1996-97).

As these areas improved, teachers apparently became more willing to show up for work. During the same five-year period, the percentage of principals who believed teacher

absenteeism was a problem in their schools fell from 33 percent in 1990-91 to 15 percent in 1996-97. Although problems in the nation's wealthiest schools (defined by the report as those with 20 percent or fewer of their students living in poverty) are minor in comparison to those in the poorest schools, school officials in wealthier communities still have reason for concern. The report shows growing percentages of principals in affluent schools indicate student tardiness and absenteeism, drug use, tobacco use, and verbal use of teachers are a problem.

The *Violence and Discipline Problems* report also found that principals in schools with minority populations of 50 percent or more reported improvements in several areas, including:

- student absenteeism (the percentage of principals who reported this as a problem dropped from 39 percent in 1990-91 to 35 percent in 1996-97);
- physical conflicts among student (dropped from 40 percent in 1990-91 to 31 percent in 1996-97);
- robbery or theft (dropped from nine percent in 1990-91 to seven percent in 1996-97);
- vandalism (dropped from 21 percent in 1990-91 to 16 percent in 1996-97);
- alcohol use (dropped from 11 percent in 1990-91 to three percent in 1996-97);
- trespassing (dropped from 12 percent in 1990-91 to seven percent in 1996-97); and
- physical abuse of teachers (dropped from three percent in 1990-91 to one percent in 1996-97).

The U.S. Department of Education's report brings encouraging news for the nation's urban schools, especially those schools in poor and high minority neighborhoods. Modest signs of progress are particularly evident because urban schools have focused intensely for several years on improving safety and discipline. Some urban school districts have developed programs to teach kids how to resolve conflicts, and others have installed high-tech security systems and hired experienced police officers to patrol the halls. Still other school districts have taken a zero-tolerance stance on school violence, expelling students for up to a year for violating weapons policies.

The Director of the Safe and Drug Free Schools Program at the U.S. Department of Education reports that it is often difficult to accurately gauge overall national improvement in school district crime and safety issues because the improvement is not evenly distributed throughout the country. Some school districts significantly improved, while others did not. The director adds that, over the years, schools have tried a number of strategies to improve discipline and make classrooms safer. In most cases, though, these strategies have been used in isolation, rather than joined and combined into one comprehensive effort. The challenge now, he states, is for schools to combine

prevention efforts, early intervention programs, law enforcement partnerships, and punishment programs into one full-scale initiative.

The *Violence and Discipline Problems* report also found a direct link between school size and discipline problems. Principals in schools of 1,000 or more students were more likely to site problems with students in areas such as physical conflicts, drug abuse, and verbal abuse of teachers, for example, than were principals of mid-size schools with student enrollments between 300 and 999. Between 1990-91 and 1996-97, the percentage of principals at large schools who identified these problems actually increased for several of the problem areas. Among principals of mid-size schools; however, the percentage citing these student problem areas decreased over five years in all categories except tardiness, drug use, and tobacco use. Another alarming trend for large schools is that the number of students who reported the presence of street gangs at schools has also increased over the same five-year period from 15 percent in 1990-91 to 28 percent in 1996-97.

Often, the best approach to reducing school safety and security problems is often a combination of strategies. In addition to developing crisis management plans, these strategies should include conflict resolution training, programs to build up and promote student self esteem, and stricter discipline measures. Stricter discipline measures include regular security patrols, camera surveillance systems, and uniform enforcement of the student code of conduct consistently throughout the school system.

Several questions on MGT's survey of Broward County School District administrators, principals, and teachers addressed safety and security issues.

- The first question presented the statement, "*Broward County Schools are safe and secure from crime.*" In response, 56 percent of administrators, 90 percent of principals, and 46 percent of teachers *agree or strongly agree*.
- In responding to the second statement "*Our schools do not effectively handle misbehavior problems,*" teachers differed most significantly from the opinions expressed by administrators. While 44 percent of central office administrators and 79 percent of principals *disagree or strongly disagree* with the statement, 52 percent of teachers *agree or strongly agree* that Broward County Schools do not effectively handle misbehavior problems.
- The third question presented the statement, "*There is administrative support for controlling student behavior in our schools.*" In response, 61 percent of administrators, 90 percent of principals, and 57 percent of teachers *agree or strongly agree*.
- In replying to the fourth question, "*In general, parents do not take responsibility for their children's behavior in our schools,*" 36 percent of administrators and 28 percent of principals *agree or strongly agree*, while 50 percent of teachers *agree or strongly agree* with the statement. The responses to MGT's survey suggest that the effectiveness of existing school discipline policies is an area of significant concern for many Broward County classroom teachers.

- When asked to evaluate the effectiveness of safety and security in the Broward County School District, 51 percent of administrators, 65 percent of principals, and 43 percent of teachers state the function is *adequate or outstanding*. This compares to 32 percent of administrators, 32 percent of principals, and 42 percent of teachers who state that the program *needs some improvement or major improvement*.

When these responses are compared with MGT's benchmark database of surveys completed in other school systems around the country, safety and security in Broward County rates about average.

- Fifty-eight (58) percent of administrators (polled separately in Broward County as principals and central office administrators, but combined for national comparisons) reported that the safety and security function in their district was *adequate or outstanding*, while 57 percent of Broward County administrators *agree*.
- Thirty-eight (38) percent of teachers nationally indicated that the safety and security function in their school district was *adequate or outstanding*, while 42 percent of Broward County teachers *agree*.
- Similarly, 67 percent of administrators in other school districts around the country *agreed or strongly agreed* with the statement that "*District schools are safe and secure from crime*," while 70 percent of Broward County administrators *agree*. Forty (40) percent of teachers around the country also *agreed or strongly agreed* with the statement, while 46 percent of Broward County teachers *agree*.

Broward County administrators and teachers consistently reflect the national pattern of opinions concerning school discipline expressed by their counterparts in school districts around the country.

- Sixty-seven (67) percent of administrators from across the country *disagreed or strongly disagreed* with the statement, "*Our schools do not effectively handle misbehavior problems*," while 59 percent of Broward County administrators *disagree or strongly disagree*.
- Fifty-three (53) percent of school teachers in MGT's national benchmark comparison database *agreed or strongly agreed* that their schools do not effectively handle misbehavior problems, while 52 percent of Broward County teachers *agree*.
- Eighty-four (84) percent of administrators in school districts around the country *agreed or strongly agreed* with the statement, "*There is administrative support for controlling student behavior in our schools*," while 73 percent of Broward County administrators *agree*. Forty-nine (49) percent of teachers around the country also *agreed or strongly agreed* with the statement, while 57 percent of Broward County teachers *agree*.

- Broward County survey responses reflect national trends in replying to the statement, “*In general, parents do not take responsibility for their children’s behavior in our schools.*” Fifty-two (52) percent of administrators across the country *disagreed or strongly disagreed* with the statement, while 43 percent of Broward County administrators *agree*.
- Fifty-nine (59) percent of teachers across the county *agreed or strongly agreed* that parents do not take responsibility for their children’s behavior in school, while 56 percent of Broward County teachers feel the same.

The survey data also suggest that effective school discipline policies are a major concern of Broward County classroom teachers.

15.1 Safety

The Safety Section of the Broward County Risk Management, Safety, and Benefits Department provides overall safety inspection and loss control services for the Broward County School District. This section consists of nine employees, including the safety manager, three safety specialists who function as facility inspectors, one playground inspector, and four clerical personnel. The safety manager reports to the Director of the Risk Management, Safety, and Benefits.

CURRENT SITUATION

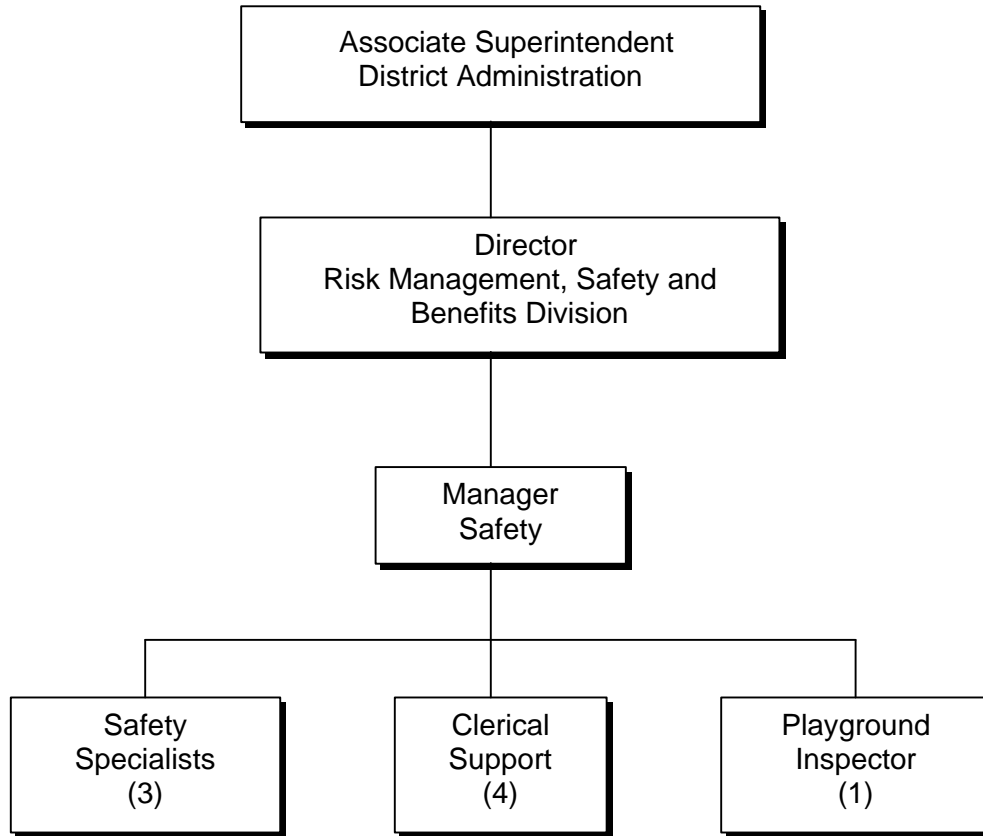
The Broward County Safety Manager “recommends and establishes measures to reduce or eliminate employee and student accidents, fire incidents, and health hazards in compliance with all local, state, and federal requirements for occupational and health safety.” This position is responsible for meeting local, state, and federal requirements for fire prevention. The safety manager must be certified as a fire inspector by the state of Florida and must maintain Florida Department of Education certificates in sanitation and casualty inspections. Requirements for the position include a bachelor’s degree in health and safety, safety engineering, or a related field, and eight years of progressive experience in safety and/or fire inspection.

Exhibit 15-1 shows the current organizational structure for the Broward County School Safety Department.

The job duties of the safety manager include the following:

- inspects or tours school district facilities to detect existing or potential accident and health hazards, and recommends corrective or preventive measures where indicated in accordance with State Department of Education regulations, Chapter 6A-176;
- formulates and recommends general safety policies and measures to be followed by students and employees;

**EXHIBIT 15-1
RISK MANAGEMENT, SAFETY,
AND BENEFITS DEPARTMENT
SAFETY SECTION
ORGANIZATIONAL CHART**



Source: Broward County School District, Risk Management, Safety, and Benefits Department, 1998.

- consults with all departments and programs on design and use of equipment, shops, fire prevention, and safety programs;
- identifies hazardous locations enroute to and from school or school bus stop;
- periodically inspects all vehicles and equipment operated by School Board employees to evaluate their condition and recommend the correction or any unsafe conditions identified;
- maintains a record regarding the incident and severity rate for accidents and health hazards and provides a report monthly, quarterly, and annually;
- investigates all accidents, fire incidents, bomb threats, accident claims, accidental injuries, and/or health hazards involving students,

employees, and/or equipment to determine cause; cooperate in the preparation of material and evidence for school district use in hearings, law suits, and insurance investigations;

- prepares the annual Health/Safety/Sanitation reports for transmission to the State Department of Education and to the Director, Facilities, for inclusion in the project priority list for capital outlay funding;
- devises, supervises, and coordinates training programs or media which will increase proficiency in safe practices and promote safety consciousness and fire prevention;
- represents the school district in community safety groups, county organizations, and programs;
- liaisons with Broward County Emergency Services in providing mass care shelters in school buildings and in opening school facilities as emergency shelters in the event of major disasters, such as hurricanes and floods; and
- responds to emergencies and disasters listed above and coordinates school shelter operations with the County and the American Red Cross.

Exhibits 15-2 provide budget information for the Broward County Safety Section operations for the 1996-97 through 1998-99 school years. The Safety Section's annual operating budget is a small percentage of the total annual operating budget of the entire Risk Management, Safety, and Benefits Department. As discussed earlier in Chapter 4.0, the proposed organizational chart of the Broward County School District, shows that the Safety Section be relocated as part of the Risk Management and Safety Department under the new Deputy Superintendent of Operations.

**EXHIBIT 15-2
SAFETY DEPARTMENT
OPERATING BUDGET
1996-97, 1997-98, AND 1998-99**

BUDGETED ITEMS	1996-97	1997-98	1998-99
Salaries	\$275,000	\$290,000	\$300,000
Fringe Benefits	77,000	81,200	84,000
Repairs and Maintenance	10,000	11,000	12,000
Equipment Rental	8,500	10,000	11,000
Printing	3,000	4,000	4,500
Supplies	3,500	4,500	5,000
Furniture, Fixtures, and Equipment [more than \$750]	12,000	13,000	14,000
Professional Dues and Registration	550	675	700
TOTAL	\$389,550	\$414,375	\$426,200

Source: Broward County School District, Risk Management, Safety, and Benefits Department, 1998.

FINDING

One of the most important responsibilities of the Broward County Safety Section is to complete an annual fire, sanitation, and casualty (loss, liability, and risk reduction and control) inspection of all school district facilities and administrative offices in the county. The Florida Department of Education's State Requirements for Educational Facilities (Section 6A-2.0111, Chapter 4, Section 4.4) has the following requirements pertaining to school safety inspections:

- **Fire Safety Inspectors** Fire safety inspectors must be certified by the state of Florida, Department of Insurance, Division of the State Fire Marshal. The School Board must ensure that every building on each site within its jurisdiction, whether owned, leased, or leased-purchased, receives an annual comprehensive fire safety inspection, and that reports are kept on file in school district offices;

- **Sanitation and Casualty Safety Inspectors (SCSI)** Each school district must secure the services of a SCSI to provide annual sanitation and casualty safety inspections of existing facilities to determine compliance with the Uniform Building Code (UBC). The board shall insure that every building on each site within its jurisdiction, whether owned, leased, or lease purchased, receives an annual comprehensive, sanitation, and casualty safety inspection conducted by an inspector, and that reports are kept on file in Board offices. Duties, as assigned by the Board, include, but not be limited to the following:
 - **Annual Inspection** Annually inspect the Board's facilities for compliance with the UBC for existing facilities.

 - **Maintain Records** Keep a file in the administrator's office of inspection reports for each facility.

 - **Non-Compliance Notification** Notify the immediate supervisor, in writing, if a condition or procedure is observed to be incompatible with the UBC.

 - **Facility Operation** Participate in the instruction of all concerned facility staff on the operation of all life-safety facilities of the facility.

- **Other Inspections as Required By Code or Law** Provide periodic inspections by certified inspectors of fire alarms, fire sprinklers, fire extinguishers, bleachers, and other equipment, as required by law, rule, or code.

The Safety Unit has three safety specialists, who are cross trained and certified by the state of Florida in fire, sanitation, and casualty inspections. The goal of staff is to complete a minimum of one inspection at each school district facility in Broward County School District annually. As the staff is cross trained in a variety of inspection

procedures, fire, sanitation and casualty inspections are completed at one time during a single visit to each school facility.

The Broward County Schools Safety Section is recognized as a statewide technological leader in the field of school inspections because the staff has developed an easy-to-use barcoded inspection form which greatly simplifies the inspection process. The standard inspection form contains an individual bar code for each type deficiency requiring corrective action that may need to be addressed in an inspection report. Examples of the types of inspection deficiencies on the inspection report form that have their own specific bar code entry include:

- repair torn carpet
- repair light fixtures
- repair loose glass
- repair ventilation system
- install device to prevent door slamming
- remove exit obstructions
- install illuminated exist sign
- replace exit sign
- install directional exit sign
- repair ceiling
- repair stairs
- remove/replace key deadbolts
- install smoke detectors/ smoke doors
- replace discharged fire extinguisher
- install fish numbers (room identification code numbers)
- remove door stops
- install light covers
- post capacity sign
- label containers
- install battery lighting
- remove improperly stored chemicals
- provide metal can for rag storage

Safety specialists complete an inspection by using a bar code wand that is attached to a small portable handheld computer. As each facility's safety inspection begins, the safety specialist enters an individual code number for the facility into the computer and the date of the inspection. The safety specialist enters each room in the school. As a deficiency is spotted, the specialist enters the individual code assigned to the school room visible into the computer, and then runs the bar code wand reader along the bar code entry that refers to the inspection deficiency on the general inspection form. The computer automatically lists this inspection deficiency as an item to be addressed in the complete inspection report.

Once the safety specialist returns to the office, he or she is able to quickly generate a complete inspection report for the entire school facility that includes at minimum a detailed list of:

- deficiency description and corrective action required;

- the estimated cost of correcting the deficiency (based on a set schedule of estimates furnished by maintenance staff from the Broward County Schools Facilities Division);
- type of deficiency and appropriate personnel to make repairs or corrections (Safety specialists use a coding system with three alternatives: M=facility maintenance staff; O=occupant, such as principals and school janitorial staff; C=capital improvements allocation required);
- number of times the deficiency has been cited previously; and
- a scheduled date for correction.

When it was originally implemented approximately five years ago, the Safety Unit's bar code inspection reporting system was the first to be used by a school district or any other public entity in the state of Florida. The bar code inspection system continually attracts the attention of other school districts, counties, and municipalities throughout the state of Florida and from across the country. The Safety Manager receives frequent calls from other public entities requesting information on the system, but to his knowledge, the bar code inspection system is not in general use in any other school district. The bar code system has significantly reduced the amount of paperwork and the length of time required for security specialists to complete inspections, and has made annual safety inspections an achievable and realistic goal.

The most common type of information request that Broward receives from other public entities regarding the bar code inspection system comes from other Florida county school districts with a significantly smaller total student enrollment than Broward County. Such districts have a smaller number of total school facilities that would require annual safety inspections. School districts that call the safety manager to request information are often curious about the various types of new technology that other school districts in Florida are implementing, but there is no indication that they are planning to immediately implement a new system.

COMMENDATION

The Broward County School District Safety Section is commended for developing and implementing a technologically innovative bar code inspection reporting system that has reduced the amount of paperwork and time required for school safety inspections, and has made the process very efficient and effective.

In the course of a walk through school safety inspection, the hand held bar code program scanner serves as a useful tool for the safety specialist in recording the various safety code deficiencies that are discovered in each part of the school facility. In conducting this visual safety assessment, the specialist also closely looks for any type of life threatening or unusual safety problem and reports imminent threats to be addressed immediately.

FINDING

The Risk Management, Safety, and Benefits Department's Safety Procedures Manual includes several inspection program procedures. The Safety Section must establish an annual calendar for scheduling all inspections prior to the month of May of each school year. The Safety Section uses the following procedures:

- safety specialist (inspector) meets with the Principal/Department Head to discuss the inspection process and proceeds with the inspection;
- when the inspection is completed, the safety specialist (inspector) meets with the principal/department head to discuss any violations or concerns that were noted during the inspection;
- the inspection report is printed and returned with an instruction sheet to the school to obtain the signature of the principal/department head; and
- a report of new violations is sent to the Comprehensive On Line Maintenance Purchasing and Stores System (COMPASS) in the Facilities Maintenance Department. This automated software system generates numbers and assigns work orders to maintenance staff to correct the deficiencies found at the facility.

When the inspections have been completed and accepted by the school board the documents are assembled and distributed to the:

- State Fire Marshall's Office;
- Facilities and Management Department; and
- District Maintenance Department.

In a memorandum sent to area superintendents and principals that was issued in May 1998, the Broward County Superintendent clarified accountability and reporting relationships for the school safety inspection process. The previous memorandum had been issued eight years ago and the implementation of the COMPASS system had made the previous directive outdated. In issuing this memo, the Superintendent also made respective area directors and school principals aware that they are expected to be committed and involved in annual school safety inspections.

Please advise each of the principals in your area of the following procedural change in addressing the corrections and violations in their annual comprehensive safety inspection report:

Effective July 1, 1998, the Risk Management, Safety, and Benefits Department will deliver to the school principal a copy of their annual comprehensive safety inspection report. A copy will also be provided to the area director. Upon receiving the inspection report, the principal must initiate the following actions:

1. *Sign and date the last page attesting to their receipt of the inspection report.*
2. *Review with their staff the violations listed on the inspection report with an "O" under the column titled "Type of Deficiency." These violations must be corrected by the school staff.*
3. *Initiate COMPASS work orders (within one week of receiving the inspection report) for all violations that are coded for maintenance and safety to life issues.*
4. *Monitor the completion of staff repairs and work orders.*
5. *Advise the respective area director of the status of the corrections.*

While Broward County School District safety specialists state that this recent memorandum from the Superintendent has increased focus on correcting safety deficiencies, the existing level of attention given to correcting school safety deficiencies remains inconsistent throughout the district and varies from school facility to school facility. Reportedly, specialists continue to be concerned about the level of attention given to correcting school safety deficiencies highlighted in the annual safety inspection report. This often varies significantly from school principal to school principal.

Broward County principals and central office administrators take immediate action to correct urgent life threatening safety problems in their schools. In Broward County school facilities; however, it is common for safety specialists to report less serious safety deficiencies over and over again each year and have principals take little corrective action. Safety specialists maintain detailed safety inspection records for all schools in Broward County. The records show that it is common for the same type of less serious safety deficiencies to be included in a school's safety inspection report for up to five years before it is corrected.

Safety specialists report that certain types of safety violations or deficiencies often go uncorrected and are repeatedly noted in safety inspections year after year. These are often minor types of school safety problems that can be easily corrected by the school's janitorial staff or district maintenance personnel.

The level of attention devoted to addressing school safety problems often varies from school to school in Broward County. Apollo Middle School is one example of a school where the same safety deficiency was repeatedly identified in safety inspections over a five-year period. At Apollo Middle School, the 1998 annual safety inspection recommends that district maintenance staff install smoke detectors in a certain section of the school. The report shows that this deficiency has been identified six times in safety inspections from 1992 through 1998, and has yet to be corrected. It is each school principal's responsibility to ensure that safety deficiencies are corrected, although no type of penalty exists if a principal fails to correct the identified problems.

MGT consultants reviewed a representative sample of annual safety inspection reports from 10 Broward County high schools, 12 Broward County middle schools, and 15 Broward County middle schools. MGT found that at each school, on average, the

following safety deficiencies were reported somewhere in the school facility during at least two previous safety inspections, and had not been corrected:

- replace exit signs;
- install smoke detectors;
- install fume/dust ventilation;
- repair ceilings;
- repair walls;
- install sign for emergency escape;

MGT found that the need to install smoke detectors in at least one area of the school facility is an item that was routinely included in each school facility safety inspection report that we examined. At Boyd Anderson High School, for example, the 1998 annual safety inspection report shows that installing smoke detectors in a certain location at the school was reported in five previous safety inspection reports. And, at Atlantic West Middle School, the 1998 annual safety inspection report that the need to install smoke detectors in one area of the school was reported in four previous inspection reports.

It should be noted that Broward County Schools safety specialists function in a risk management advisory capacity only to fulfill the state of Florida's requirements that each school facility be inspected annually. They have no authority to require school administrators to correct the safety problems identified in the inspections.

RECOMMENDATION

Recommendation 15-1:

Enforce the district policies and procedures and correct all deficiencies highlighted in each school facility's annual safety inspection report within a reasonable time frame uniformly throughout the Broward County School District.

Safety deficiencies should be corrected promptly to reduce the school district's potential risk of liability for employee and student injuries and accidents. Area directors must hold principals accountable for correcting deficiencies which are cited through the annual evaluation process.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should issue a follow-up memorandum emphasizing the importance of annual school facility safety inspections and enforcing the district's existing procedure for principals and area directors issued in May 1998. The memorandum should instruct principals to correct safety deficiencies as soon as they are identified and reported by safety specialists. May 1999

2. The Superintendent and area directors should incorporate the correction of annual safety inspection deficiencies as a component of each school principal's annual job evaluation. July 1999

FISCAL IMPACT

There is no additional cost associated with this recommendation beyond the cost of repairing deficiencies using available funds. This has been an ongoing responsibility of school principals for many years, although no effort has been made in the past to hold principals accountable for correcting safety deficiencies throughout the school district.

FINDING

During site visits to various Broward County school facilities, MGT consultants observed that there is an overall lack of coordination in the process of generating work orders from school facility safety inspection reports. Although it takes a relatively short time for a safety specialist to complete a school facility's safety inspection and produce a printed inspection report, the specialist often waits until a large group of school safety inspections are completed before repair work orders are produced. The safety specialist sends completed school inspection reports to the Facility Maintenance Department's Comprehensive On-Line Maintenance Purchasing and Stores System (COMPASS) to generate numbered inspection work orders to repair safety deficiencies. The work orders are issued to facilities maintenance staff, who complete the repairs as soon as possible with existing resources.

Facilities maintenance staff indicate that some specialists submit inspection reports together in bulk once or twice a year to be converted into numbered work orders. This delay often creates pressure for maintenance staff to complete a large volume of safety repairs within a short time frame, making their workload and schedules less manageable. The Safety Manager and the Supervisor of Workload and Systems Maintenance report that the process of generating facility improvement work orders through the COMPASS system is an ongoing coordination challenge for both departments. Records maintained by the Safety Manager and the Maintenance Department show that there have been at least two instances within the last five years when COMPASS system work orders have been delayed because safety inspectors failed to submit individual school safety reports on time.

During site visits to the Safety Department, MGT consultants found evidence that school safety inspection reports submitted weekly by inspectors are stored in stacks of 50-100 reports for up to a month at a time before they are processed by the COMPASS system as facilities work orders. Documentation maintained by the Safety Department shows that Facilities Maintenance staff has no system in place for routinely tracking work orders once they are generated to assure the work is completed. Facilities Maintenance also has no system in place to assure that work orders accurately match the safety deficiencies highlighted in inspection reports.

The Supervisor of Workload and Systems Maintenance has become more actively involved in the quality control process for the COMPASS system. Maintenance Department records show that in the past it has been an ongoing problem for maintenance staff to accurately track work orders once they are issued and assure that corrective maintenance tasks are completed within a reasonable time frame. The Safety Manager and the Supervisor of Workload and Systems Maintenance reported that continued attention to quality control and submitting school safety reports promptly is essential for the continued success of the COMPASS system.

RECOMMENDATION

Recommendation 15-2:

Submit school safety inspection reports as soon as they are completed to the COMPASS system throughout the year to quickly generate numbered work orders for facilities maintenance staff.

It is much easier for maintenance staff to manage their schedules and to make repairs if safety specialists submit school safety inspection reports to the COMPASS system to convert into work orders as soon as the inspections are completed. The operational performance of the COMPASS system should be annually evaluated in order to ensure that the system is producing work orders for facilities maintenance staff in a timely manner. A tracking and monitoring system should be developed to ensure that work orders accurately match the safety deficiencies highlighted in school inspection reports so that school safety deficiencies are more readily corrected. In addition, an annual evaluation and assessment of the COMPASS system's efficiency should be conducted.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-----------|
| 1. The Safety Manager should issue a memorandum to safety specialists directing them to submit school safety inspection reports to the COMPASS system immediately after they are completed. | May 1999 |
| 2. The Safety Manager and officials from Facilities Maintenance should develop a cooperative tracking and monitoring system to ensure that a work order is promptly generated to accurately match each safety deficiency highlighted in school safety inspection reports. The monitoring system should also verify that the work order is completed to correct each safety deficiency in a reasonable time frame. | June 1999 |
| 3. The Safety Manager and officials from Facilities Maintenance should initiate an annual evaluation and assessment of the COMPASS software system in order to ensure that it is performing at peak efficiency. | July 1999 |

FISCAL IMPACT

There is no cost associated with this recommendation. The focus of the recommendation is to improve the efficiency and effectiveness of the annual school safety inspection process.

FINDING

Through its Safety Section, the Risk Management, Safety, and Benefits Department has developed a number of types of extensive and very detailed Risk Management and Safety manuals to serve as safety benchmarks and standard procedures for all Broward County School District facilities. The Safety Section has produced four main types of safety manuals:

- *Play It Safe: Risk Management, Safety, and Benefits*
- *Risk Management/Safety Procedures Manual*
- *Broward County Schools Playground Handbook*
- *Risk Management and Safety Emergency Preparedness Program*

The *Play It Safe Manual* is a standard workplace safety guide and accident prevention policy handbook for the Broward County School District. The manual includes the following sections:

- Management Commitment and Involvement (policy statement, goals and objectives, responsibilities)
- Safety Committees (meetings, functions and responsibilities)
- Safety and Health Training (safety orientation, job specific training, checklist)
- First Aid Policy (first aid facility, procedures in medical emergencies, first aid training)
- Accident Investigations (accident investigation procedures, accident investigation report, instructions for completing accident reports)
- Record Keeping Procedures (procedures, access to records)

The *Risk Management, Safety, and Benefits Procedures Manual* primarily includes a detailed description of standard procedures to follow in dealing with chemicals and hazardous materials, and in assessing safety issues. This manual includes detailed emergency procedures, which address the following situations:

- bio-hazardous waste
- check procedures
- disposal of chemicals
- drug and alcohol testing
- emergency preparedness
- environmental compliance
- hazardous communication
- hazardous walking
- indoor air quality
- inspections program
- licensures/permits
- motor vehicle records
- student accident
- vehicle accident
- workers' compensation
- notice of intent
- summons/complaints

The *Broward County Schools Playground Handbook* establishes standards for school staff to use in the construction, use, supervision, maintenance, and inspections of outdoor playground facilities. The handbook includes the following sections:

- Introduction

- Equipment (general requirements, specific pieces of equipment, unapproved equipment, state requirements for educational facilities, accessibility to the disabled)
- Installation Requirements (location, anchorage, surfacing, playground border, orientation, installation requirements, installation procedures)
- Playground Rules
- Playground Supervision-General Requirements
- General Requirements for Playground Maintenance
- Playground Inspection By School Personnel
- Maintenance Procedures

The Safety Section has also developed an *Emergency Preparedness Program Manual* which provides an extensive list of the proper procedures to follow in the event of emergencies and other natural disasters. The manual addresses the following topics:

- Emergency Procedures (after hours emergency notification, bomb threat emergency evacuation, chemical/spill emergencies, computer emergencies, fire emergencies, gas leak emergencies, major utility failures, medical emergencies, and tornado emergencies);
- Hurricane Procedures (shelters, maintenance, facilities, education technology services, transportation procedures);
- Emergency Center Information (north area shelters, central area shelters, south area shelters, special care shelters); and
- Damage Assessment Procedures (post storm procedures, post storm-district administration procedures).

These manuals provide very extensive, thorough, and detailed written policy information for Broward County school administrators and school staff to follow in the event of emergencies or major disasters, and for safety and accident prevention. The Safety Section has created very detailed reference sources for the benefit of all school personnel.

Safety department staff know that the manuals are being used as a working resource because they frequently receive questions from school employees throughout the county regarding the proper procedures and steps outlined in the manuals for safety and accident prevention. In addition, during a school's annual safety inspection, safety specialists are required to verify that all safety manuals are displayed in a convenient reference location for school employees. Specialists also interview a cross section of school employees to verify that the employees have received training in proper safety and accident prevention procedures as outlined in the manual.

COMMENDATION

The Safety Section is commended for developing thorough, extensive, and detailed manuals for Broward County School District personnel to use in the event of emergencies and natural disasters, and for safety and accident prevention.

FINDING

The Broward County School District's *Play It Safe Risk Management, Safety, and Benefits Manual* includes the district's policy on establishing Site Safety Committees, based on Florida State Statutes 440 and 442. Site safety committees:

- promote safety awareness and co-worker participation through continuous improvement's to the organization's safety program;
- review and update workplace safety rules based on accident investigation findings, self-inspection audits, and reports by employees of unsafe conditions or work practices;
- monitor safety and education training programs for all employees;
- evaluate recordkeeping procedures to ensure that accident and injury records are controlled and properly maintained, are reviewed for trends and patterns and that corrective action is implemented successfully;
- assist in the practice of emergency drills and actual emergency evacuations;
- make at least one safety inspection every six months of plant facilities and grounds for new health and safety problems;
- provide safety orientations to all new employees and orientation to the "Worker's Right to Know Program";
- make formal safety presentations to all employees twice a year;
- maintain a site safety bulletin board;
- maintain a formal safety file at the site for review by visiting staff members and safety inspectors; and
- take or recommend actions to have unsafe conditions and acts either removed or brought under control.

One exception to the above policy is that at select locations (such as Kathleen C. Wright Administrative Building, Sailboat Bend Complex, and Educational Technology Services), the site administrator must coordinate the safety activities of the site safety committee with all departments at that location.

The policy also specifies a recommended composition for site safety committees:

- School Site (Elementary and Secondary – Middle and High)
 - Site Safety Chairperson
 - Teacher Representative
 - Physical Education Representative
 - Food Service Representative
 - Custodial Representative
 - Science Department Representative (Secondary Schools only)
 - Vocational Industrial Educational Representative (Secondary Schools only)
 - Community School Representative (when applicable)
 - Exceptional Student Representative (when applicable)
 - Representative from one of the following:
PTA, PTO, PTSA, Parent Advisory, or School Improvement Team

- School Sites (Vocational, Technical Centers, and Skills Centers)
 - Site Safety Chairperson
 - Custodial Representative
 - One person representing each department
 - Teacher Representative
 - Minimum of Four --- Maximum of Eight Members
 - Representatives from one of the following:
PTA, PTO, PTSA, Parent Advisory, or School Improvement Team

- Administrative and Support Service Sites
 - Site Safety Chairperson

 - Minimum of two Safety Committee members, including the Site Safety Chairperson, at the discretion of the Site Administrator

 - For sites with large groups, for example, Transportation Department, Maintenance Department, a minimum of eight Safety Committee members is recommended.

Each Broward County school has a functioning school safety committee that meets on a monthly basis. Safety department staff report that the committees greatly assist their work by bringing urgent safety concerns to the attention of school officials. Parent representatives on the committees are often very successful in highlighting safety problems for school principals to take corrective action.

COMMENDATION

The Broward County School District is commended for establishing effective site safety committees for each worksite.

FINDING

One of the Safety Manager's most important job responsibilities is to evaluate each elementary and secondary school site for traffic problems and safety hazards in bus loading and unloading zones. This task is accomplished in a variety of ways. The manager makes regular visits to elementary and secondary schools and remains in close contact with school principals and school safety committees to alert him to any problems. The Safety Manager instructs safety specialists to assess patterns of traffic flow and potential safety problems in bus loading and unloading zones at each school as a part of their annual safety inspection visits. The manager spends a great deal of time visiting schools and meeting with principals and parents who are concerned about safety problems in bus loading and unloading zones. Safety Department staff also participate in instructional workshops for school crossing guards prior to the start of each school year, and alert crossing guards to various safety issues at each school during the course of the year.

Another important mechanism used by the Safety Manager to maintain awareness of upcoming traffic developments related to the school district is the Parent Safety Committee. The Parent Safety Committee was created approximately 20 years ago by the Broward County School Board and meets monthly. The membership of the committee includes:

- a representative of the Florida Department of Traffic;
- two representatives from Broward County Government Traffic Engineering;
- three school parent representatives, geographically distributed from throughout the Broward County School District (one from the central area, one from the north area, and one from the south area of the district);
- a representative from the district PTA; and
- two school safety representatives (including the safety manager).

The Parent Safety Committee performs a number of tasks during its regular meetings. The Broward County Government's Traffic Engineering Department is required to review all school building plans as they are submitted and to provide comments on how the building projects would affect traffic flow patterns in school areas, particularly near bus loading and unloading zones. Traffic engineering representatives bring all plans that may have an impact on school facilities to the attention of the Parent Safety Committee and incorporate the committee's views into their own findings and recommendations. In addition, traffic engineering representatives from Broward County and the state of Florida provide regular updates for the committee on highway construction and improvement projects that may have an impact on school facilities.

The Parent Safety Committee reviews the various complaints related to traffic and parking that have been received from elementary and secondary school principals, school staff, and the general public. The committee assists school district safety staff in addressing how problems can be solved efficiently. The committee also listens to the

general concerns of parent representatives and the district PTA representative on the committee related to school traffic safety.

COMMENDATIONS

The Safety Department is commended for establishing and maintaining the Parent Safety Committee as an effective mechanism for safety staff to keep informed of ongoing building construction and road improvements that affect school traffic flow.

The Safety Department is also commended for using the Parent Safety Committee as a forum to solicit community involvement in solving school safety problems.

FINDING

Another major area of responsibility for the Safety Manager is accident investigation. The *Play It Safe: Risk Management, Safety, and Benefits Manual* describes the detailed accident investigation procedure:

Accident investigations will be performed by the immediate supervisor to identify casual factors contributing to the accident and to initiate measures to prevent similar incidents from recurring. The supervisor will routinely investigate all work related accidents and injuries and file an accident investigation report specifying the corrective action or interim measure taken. The report will include:

- *the date and time of the accident, the nature of the injury or damage, and the name of the employee or student involved in the accident; and*
- *a brief detail of the accident including what work was being performed, what materials or equipment were involved, and what conditions such as housekeeping, weather, etc., which may have been contributing factors.*

All work-related accidents and injuries requiring minor first aid treatment must be reported to the Safety Program Coordinator within 24 hours of the accident. Employee and student accidents resulting in medical treatment or possible work days lost, shall be reported. Employee accidents resulting in serious injury or death must be reported immediately to the Safety Program Coordinator and to the immediate supervisor.

Accident investigation reports shall be completed by the supervisor according to the accident investigation procedures and returned to the Safety Program Coordinator. The accident report will be reviewed at the next safety committee meeting.

An accident investigation is not designed to find fault or place blame but is an analysis of the accident to determine cause. For student or employee accidents, the form asks for information concerning:

- *what, where, when, how, and why the accident happened;*
- *nature of the injury;*
- *part of the body affected;*
- *treatment administered; and*
- *all conditions or acts which contributed to the accident, including unsafe physical conditions, unsafe work practices, and casual factors, such as events leading up to and including the accident.*

The on-site investigator shall determine if any additional safety measures and workplace safety training should be implemented to prevent this particular type of accident in the future. Management shall insure that corrective actions are taken and that control measures are implemented.

The Safety Manager's role in the accident investigation process is primarily concerned with student accidents. The Safety Department receives all student accident reports as they occur, while employee accident reports are sent to workers' compensation personnel in another unit of the Risk Management, Safety, and Benefits Department. The Safety Manager does not routinely become involved in employee accident investigations unless he receives a request from workers' compensation personnel to investigate a particular case.

In the event of a student accident, the Broward County School District's standard policy is to rely on the judgement of the on-site school administrator. The Safety Manager conducts an investigation of the accident. The Safety Section receives monthly student accident reports from all school facilities in the Broward County School District, and maintains files of student accident reports for at least three years for Occupational Safety and Health Administration (OSHA). The Safety Section recently created an AS/400 computer program to allow all elementary and secondary schools to electronically file and transmit school accident reports to the Safety Section. The computer program goes on-line at all schools for regular use in January 1999.

COMMENDATION

The Safety Department is commended on implementing a computer software program that allows for the efficient and effective reporting of student and employees accidents in the workplace. The department is also commended for providing effective training in accident reporting procedures for school administrators.

The Safety Section meets all state reporting requirements for accident and injury prevention and participates in periodic audits conducted by the Occupational Safety and Health Administration (OSHA).

FINDING

The Florida Department of Education's State Requirements for Educational Facilities (Section 6A-2.0111, Chapter 5, Section 5.2) includes the following uniform life safety code requirements:

All new construction and existing buildings owned by a board, being remodeled or renovated, shall comply with the National Fire Protection Association (NFPA) 101 Life Safety Code, other building codes and standards identified in state and federal laws and rules, and these state requirements for educational facilities:

- **Means of Egress.** *Every occupied space shall be arranged, constructed, equipped, maintained, and operated so as to permit prompt egress in case of fire or other emergency.*

- **Means of Egress/Remodeling or Renovations.** *Remodeling or renovations in existing facilities shall not reduce the means of egress below the requirements for new buildings; new construction (additions) shall not block or reduce safe means of egress from existing structures. Renovations shall not reduce the fire resistance of existing exit corridors, and the exit path shall be marked with exit signs as appropriate. When renovating or remodeling existing buildings, safe means of egress from a student occupied space may be accomplished by one of the following:*
 1. *Provide doors leading from student occupied spaces directly to the exterior;*
 2. *Provide complete automatic sprinkler protection of the entire building;*
 3. *In renovations, provide minimum one-half (1/2) hour fire-resistance rated corridors leading to approved exits, and provide emergency rescue windows from each student-occupied space; and*
 4. *In remodeling, provide minimum one (1) hour fire resistance rated corridors leading to approved exists and provide emergency rescue windows from each student-occupied space.*

In the course of interviews and site visits, MGT consultants found that Broward County School District Safety staff frequently do not have an adequate period of time to fully comment on site plans for proposed school facilities and renovations early in the review process. Safety staff need to have an opportunity for comment much earlier in the process.

One major concern of the safety staff is that they frequently submit comments after the major architectural design and blueprint documents have been completed. At this point, it is often too late to correct major safety concerns at the design stage. As a result, the

school district must address these concerns later in the construction process, when they are much more expensive to correct.

The concerns of safety staff need to be incorporated as a standard component of the architectural specifications of all building design contracts. This approach would ensure that the safety department's major areas of concern are addressed early in the design process by architects before the final architectural blueprints are completed.

RECOMMENDATION

Recommendation 15-3:

Incorporate the Safety staff's recommended list of minimum school facility safety standards as a required component of architectural design specifications for all new and renovation construction projects prior to the bidding and award of any contracts.

Safety Section personnel should be included as participants early in the facility design process prior to the development of final design blueprints and specifications. Facilities management capital projects staff should incorporate the Safety Section's major list of school facility safety concerns as a standard component of all capital construction project design specifications for school facilities.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|--------------------------------------|
| 1. The Safety Manager should work with officials in the Facility Management Department to incorporate the standard list of school safety facility issues as a component of all project design specifications. | May 1999 |
| 2. The Safety Manager should be included as a member of the facility design and project review team so that safety staff input can be provided early in the process before architectural design contracts are bid and awarded. | Commencing in Summer 1999
Ongoing |

FISCAL IMPACT

There is no cost associated with the recommendation. The tasks in the recommendation can be accomplished using existing personnel and resources within a reasonable time frame.

15.2 Security

The Broward County School District, like many large school districts throughout the nation, has significantly increased its number of programs dealing with prevention, intervention, and enforcement as a result of the increasing concern over public safety and violence in the schools. Generally, prevention programs implemented by schools or communities are established to prevent or reduce crimes and discipline problems on or near school campuses. Discipline management policies and alternative programs are the focus of many intervention programs.

15.2.1 Office of Professional Standards

The Broward County School District relies on its Office of Professional Standards and the Special Investigative Unit (SIU) as its official law enforcement/investigative section for the school district. Exhibit 15-3 contains an organizational chart of the Office of Professional Standards and the Special Investigative Unit (SIU). The Office of Professional Standards and SIU function as two distinct and separate units, although the Chief of SIU reports directly to the Director of the Office of Professional Standards. On a routine administrative basis, the director is primarily concerned with professional standards investigations and activities, while the Chief of SIU oversees the security functions provided by his staff. (Note: As discussed earlier in Chapter 4.0 in the District Management Section, the Office of Professional Standards and SIU should be transferred to the Deputy Superintendent for Operations.)

The Office of Professional Standards coordinates evaluations and internal investigations of teachers and other district personnel as appropriate when these personnel are alleged to have committed actions in violation of the professional practices of the state of Florida Department of Education. SIU provides direct assistance to schools and facilities to improve student/staff safety and security through law enforcement services, and crime, delinquency prevention, and intervention programs designed to reduce criminal activity and violence in the schools and communities.

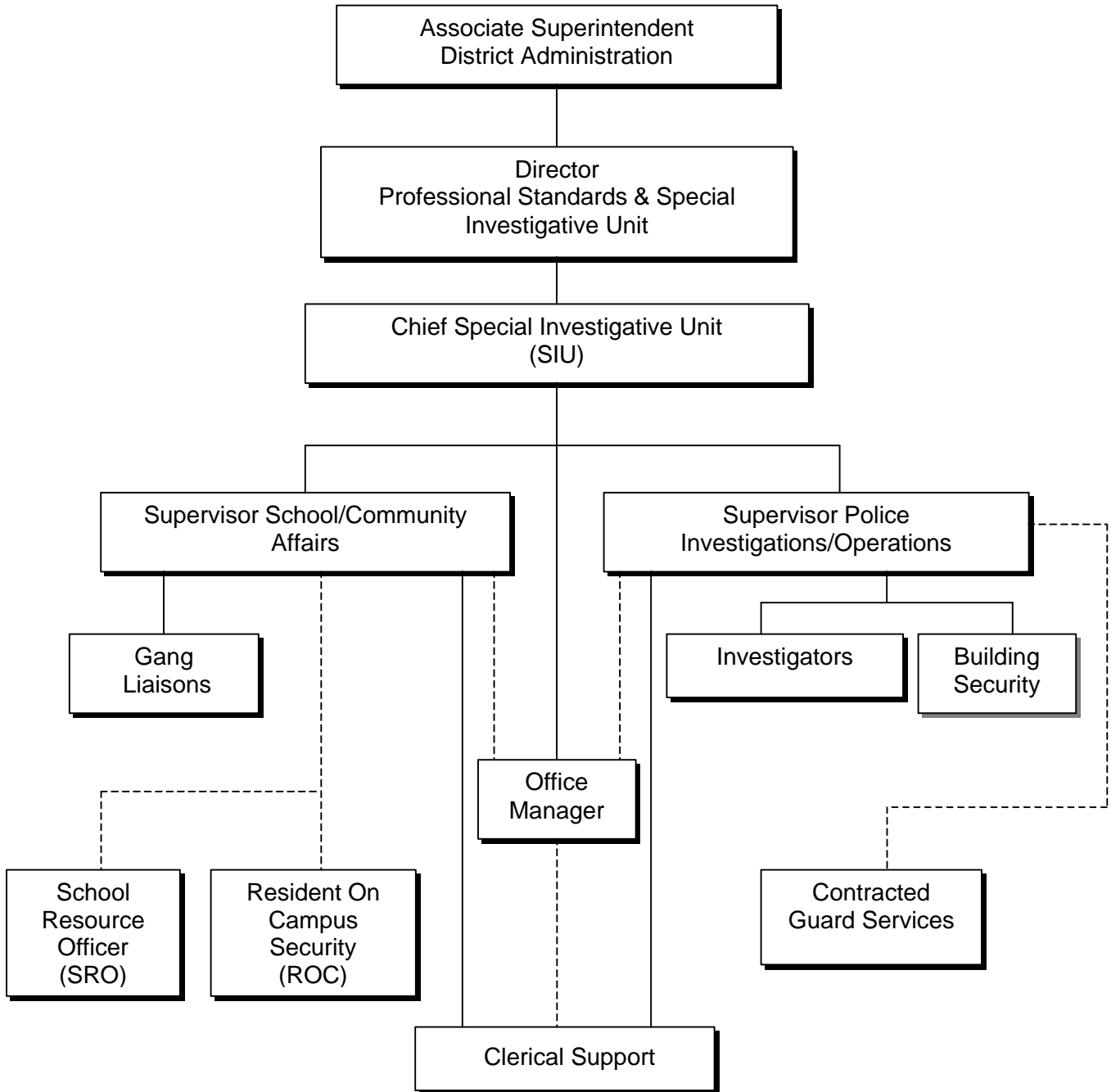
The Office of Professional Standards includes the director, his administrative assistant, and three investigators who are assigned to conduct personnel investigations under the director's supervision, as authorized by the Superintendent. The Office of Professional Standards is housed in the Kathleen C. Wright Administrative Building.

CURRENT SITUATION

The primary responsibilities of the Director of the Office of Professional Standards include the following:

- assist the associate superintendent and district administration in the evaluation of teachers, personnel investigations, school safety and security, employee disciplinary action, and in acting as liaison with the State Department of Education Professional Practices Services, Education Practices Commission, and law enforcement agencies;
- provide assistance and direction to school district personnel on matters requiring investigation of employees;
- assure compliance with rules, regulations, and statutes related to teacher assessment procedures, discipline, and termination procedures of employees;
- represent the district in all matters related to employee discipline and termination before the Division of Administrative Hearings; and
- coordinate the formulation of policy and procedures related to the safety and security of all students and employees in the school district.

**EXHIBIT 15-3
OFFICE OF PROFESSIONAL STANDARDS AND
SPECIAL INVESTIGATIVE UNIT (SIU)
ORGANIZATIONAL CHART**



Source: Broward County School District, Special Investigative Unit, 1998.

The Office of Professional Standards publishes a reference guide of statutes, rules, and policies for all Broward County school administrators and personnel entitled *Taking Action: Resolving Employee Performance Problems*. The reference guide's introduction states:

*From time to time, an employee's performance may fall below a level recognized as effective. This can occur for many reasons including skill deficiencies, resource deficiencies, changes in the employee's attitude, changes in performance incentives, or as a result of the employee's personal life events. It is the responsibility of the administrator to make skillful interventions when performance problems occur. These interventions must be timely, appropriate, and proactive. A persistent performance problem with one employee can impact students, parents, co-workers, and administrators. Clearly, when the performance of one individual is less than effective, the activities of others are influenced. Broward's administrators are required to **Take Action** to resolve performance problems.*

The **Taking Action** reference guide includes procedures and guidelines to be followed by principals and administrators in resolving allegations of serious employee misconduct. The Broward County School District defines serious employee misconduct to include the following types of incidents:

- assault/battery
- burglary/theft
- child abuse
- corporal punishment
- falsification of records
- profanity
- sexual harassment
- sexual misconduct
- substance abuse (alcohol/drugs).

According to the guide, when an incident of serious employee misconduct is reported involving a school board employee, the principal and/or the administrator should take the following steps:

1. *Contact the Office of Professional Standards to report the allegation(s) of serious employee misconduct;*
2. *Submit a completed personnel investigation request form to the Director of the Office of Professional Standards (form includes date, time, and location of incident, name of complainant, nature of allegation, position of accused, etc.);*
3. *Contact the appropriate deputy superintendent, associate superintendent, or area superintendent, and advise him or her of the incident and facts known to date;*

4. *Provide employee with written notice of investigation, when the investigation is authorized by the school superintendent, identifying the nature of the allegation;*
5. *Be advised of the SIU Personnel Investigator assigned by the Director of Professional Standards to conduct the personnel investigation;*
6. *Keep the Office of Professional Standards advised of any new information which surfaces regarding the allegation;*
7. *Refer the press/media to the Director of Professional Standards or the Director of Community Relations; and*
8. *Remember that, according to F.S. 231.291, Personnel Files, require confidentiality of any complaint and any material relating to the investigation of a complaint against an employee until the conclusion of the preliminary investigation.*

Upon receipt of a request to conduct an investigation for alleged employee misconduct, the Director of Professional Standards confers with the appropriate principal or administrator to learn the circumstances of the case. At this point, the director requests approval from the Superintendent to initiate an investigation. Once approval is received from the Superintendent, an investigator is assigned to the case. The principal or administrator notifies the employee of the investigation, and directs him or her not to attempt to engage the complainant in any conversation regarding the matter under investigation. A violation of this directive can result in disciplinary action for insubordination.

The investigator uses the following standard operating procedure in conducting preliminary on-site investigations:

- interviews the complainant or victim, always using an administrator as a witness who serves as note taker;
- takes written and oral statements from the complainant or victim;
- interviews and takes statements from any witnesses. Has the witness show where he or she was at the time the alleged incident took place;
- identifies if the witness is friends with the complainant. Finds some witnesses who are not friends with the complainant and has no dislike either way regarding the employee;
- gathers documentary evidence relating to the case;
- photographs any marks on the victim and the location of the incident;
- if an injury occurred, documents if medical treatment was required;

- obtains a copy of the police report, as appropriate if a law enforcement agency responded; and
- locates any past complaints regarding the employee and his or her disposition.

On average, the district authorizes the Office of Professional Standards investigators to initiate one new personnel investigation about every two weeks. Approximately 75 percent of the cases are incidents that require only a few weeks of time for investigators to review and make a determination. Twenty-five (25) of the incidents the Office of Professional Standards investigates become more high profile cases involving such serious crimes as child abuse, sexual harassment or misconduct, theft, arrest, etc., that lead to criminal charges and gain media attention. This type of case, which is approximately 25 percent of those reported to the office, generally consumes in excess of 50 percent of an investigator's time from up to six months to two years for one case alone.

The Broward County School District has a Professional Standards Committee composed of senior school officials that meets monthly and receives the results of all investigations conducted by the Office of Professional Standards. The committee includes the following members:

- Deputy Superintendent for School Operations
- Associate Superintendent for District Administration
- Associate Superintendent and School Board Liaison
- Associate Superintendent for Accountability
- South Area Director (representing area directors)
- Director of Risk Management, Safety and Benefits
- Director of Institutional Staffing
- Chief of SIU

The committee reviews the results of investigations and makes a recommendation to the Superintendent for action in each case. The action can range from dismissal of the allegations to a letter of reprimand to suspension and/or termination of the employee, depending on the results of the investigation and the nature of the allegations. The Professional Standards Committee only has the authority to recommend a course of action in a case to the Superintendent and the School Board, but in over 95 percent of the cases, the Superintendent has concurred with recommended action. The committee closely follows and must comply with the statutes and guidelines of the Florida Department of Education, the Educational Practices Commission, and collective bargaining agreements.

In most instances, teachers and other district employees have the right to have a representative of their union present and involved in any disciplinary hearings. The employee and the union representative have the right to appear before the Professional Standards Committee and present additional evidence when allegations warrant.

When the Superintendent receives the Professional Standards Committee's recommendation, he takes appropriate action with the Board, which may include a letter of reprimand, suspension, and/or dismissal.

FINDING

The Office of Professional Standards publishes a very detailed and comprehensive reference guide of statutes, rules, and policies for school administrators entitled *Taking Action: Resolving Employee Performance Problems*. The guide includes the following mission statement:

It is the mission of the administrator to provide assistance to personnel needing improvement in the performance of their professional responsibilities. This assistance will be provided in a manner that respects the individual's professionalism, dignity, and worth, while insuring the delivery of effective instructional services to students.

These principles should guide the administrator in initiating, facilitating, and managing a process to resolve a performance problem:

- *the process must consider the welfare of students, individually and collectively, as the highest priority;*
- *the process must take a supportive, positive approach toward improving performance;*
- *administrators using the process must be trained;*
- *the process must meet legal requirements;*
- *administrators using this process must expect the performance of employees to improve to appropriate and prescribed levels of competency within a designated period of time and correct misconduct;*
- *administrators must follow established district procedures;*
- *the process must provide a comprehensive documentary record to support personnel decisions; and*
- *when termination is a possible outcome, the process must provide due process for the individual and the district.*

The *Taking Action: Resolving Employee Performance Problems* includes the following sections:

- **Assessing the Situation** (beginning the staff discipline process; overview of the discipline process; is the performance a problem and incident or pattern behavior; due process)
- **Teacher Performance** (information to emphasize at faculty meetings; writing the performance development plan; professional development form)

- The Investigation (procedures and guidelines for administrators to follow; event/incident process flow chart; guidelines for at the site investigations)
- Documentation (key components of documentation; developing documentation to support your decisions; how to write letters of reprimand-sample letters; record of written warning)
- School Board of Broward County Policies (inspection and examination of public records; assessing teacher competency; grievance procedures; personnel records; assaulting personnel; insulting personnel)
- State Board of Education Rules (code of ethics, principles of professional conduct; criteria for dismissal procedures; criteria for suspension and dismissal; standards of competent professional performance; educational practices commission)
- Florida School Laws (personnel of school system; public records; administrative procedures act)
- Collective Bargaining Provisions (teachers, paraprofessionals, facilities servicepersons/maintenance, security specialists, and transportation, secretarial/clerical, food service)

COMMENDATION

The Office of Professional Standards is commended for developing the *Take Action: Resolving Employee Personnel Problems* guide as a comprehensive and detailed human resource manual to assist school principals and administrators in addressing and solving school employee personnel problems.

The *Take Action: Resolving Employee Personnel Problems* Human Resources Manual is consulted frequently by district administrators. School principals and central office administrators must follow the detailed steps specifically outlined in the manual in order to submit a formal request to the Office of Professional Standards to conduct an investigation of an incident involving a school district employee. The Director of the Office of Professional Standards reported that he receives questions daily from other school personnel concerning information contained in the manual.

15.2.2 Special Investigative Unit (SIU)

CURRENT SITUATION

The Special Investigative Unit (SIU) is the official law enforcement/investigative section for the school district. This unit provides direct assistance to schools and facilities to improve student/staff safety and security through law enforcement services and crime prevention and intervention programs. SIU strives to meet the needs of the school community by providing these services:

- investigating misdemeanor and felony crimes as necessary;
- assisting victims of crime;
- monitoring alarms for intrusion and fire on a 24-hour basis;
- maintaining police/SIU investigation records;
- contacting and referring individuals to community human services agencies;
- assisting and cooperating with all local, county, and state emergency services agencies;
- planning and managing special events;
- handling special security requests;
- offering security consultations and surveys;
- administering the youth gang liaison and youth crime watch programs;
- providing prevention/ education programs;
- coordinating the school resource office (SRO) and D.A.R.E. program;
- coordinating the training for school resource officers and other school security personnel;
- administering the Resident on Campus Security (R.O.C.S.) Program;
- coordinating security for the school district; and
- coordinating the installation of surveillance cameras.

Exhibit 15-3 (shown previously) provides the organizational structure of the Special Investigative Unit, and Exhibit 15-4 provides budgetary information for SIU operations. The Chief of the Special Investigative Unit oversees SIU operations on a daily basis, assisted by a Supervisor of Police Investigations/Operations and a Supervisor of School/Community Affairs. The department also includes 13 investigators, three gang liaisons, seven clerical support personnel, and three building security guards.

The Chief of SIU oversees the daily operations. This position has a dual reporting relationship, primarily to the Director of Professional Standards and SIU, but also to the Superintendent on issues that involve a direct threat of criminal activity to school property and personnel. The primary job duties of the chief include:

- formulate policies and procedures related to security for all operations in the school district;

**EXHIBIT 15-4
SPECIAL INVESTIGATIVE UNIT (SIU)
OPERATING BUDGET**

BUDGET ITEM	1996-97	1997-98	1998-99
Salaries	\$1,456,156	\$1,612,128	\$1,603,198
Employee Benefits	493,451	547,993	545,493
Contracted Security Services	338,000	350,000	350,000
Travel In-County	33,334	50,000	50,000
Travel Out-of-County	2,244	5,000	5,000
Repairs and Maintenance	2,855	-	-
Equipment Rental	9,101	8,248	8,248
Professional Dues and Registration	3,017	2,040	2,040
Other/Misc. Capital	100,079	558,390	104,195
TOTAL	\$2,438,237	\$3,133,799	\$2,668,174

Source: Broward County School District, Special Investigative Unit, 1998.

- direct and oversee operations throughout the school district as related to security;
- serve as the primary representative of SIU on various school system committees and community task forces relating to school security and crime prevention;
- prepare the annual SIU operating budget;
- oversee investigations, reviews reports, and makes results available to appropriate school officials and outside agencies, as appropriate, in matters relating to schools;
- maintain liaison with law enforcement agencies; and
- review current developments in literature and initiates innovative and preventative programs.

FINDING

The chief is SIU's primary representative on various school system and community task forces related to school security and crime prevention. The Chief was an active participant in the Broward County School District's 1997 Customer Survey. The survey addressed 12 key areas, including:

- supervision of students
- school safety to and from school
- safety at school
- weapons, gangs, drugs, and alcohol at school
- physical harm and threats at school
- neighborhood safety

A cross-demographic mix of parents throughout Broward County were surveyed randomly by mail (10,587 returned surveys; 13 percent return). Additionally, all teachers were offered the opportunity to respond (9,262 returned surveys; 96 percent return). Finally, students from grades three through twelve were surveyed (135,270 returned surveys; 86 percent return). In comparing the 1996-97 community survey to the 1994-95 survey, a significantly higher percent of teachers and students stated they felt safer at school, while more parents felt that their child was safe at school. Key responses to survey statements on this Broward survey include:

- *teachers stop fights, disagreements, and/or arguments between students (68 percent of students in 95-96 agree; 68 percent of students in 1996-97 agree);*
- *the staff takes steps to ensure that students do not bring drugs or alcohol to my child's school (64 percent of parents in 95-96 agreed; 71 percent of students in 1996-97 agreed; an increase of seven percent);*
- *students threaten or fight with each other when they are at my school (42 percent of students in 1994-95 agreed; 37 percent of students in 1996-97 agreed; a decline of six percent);*
- *I feel safe from crime at school. (56 percent of students in 1994-95 agreed; 60 percent of students in 1996-97 agreed; an increase of four percent);*
- *my child is safe at his/her school. (75 percent of parents in 1994-95 agreed; 81 percent of students in 1996-97 agreed; an increase of six percent);*
- *thirteen (13) percent of students surveyed in 1994-95 reported that they felt students carried weapons at their school; a decline to nine percent in 1996-97; and*
- *twenty (20) percent of students reported gang membership at their schools in 1994-95 and 18 percent in 1996-97; a decline of two percent.*

The public summary of the 1996-97 community survey attributes much of the improvements in public perceptions of crime and security issues to the Board and Superintendent making school security a major system priority. In 1994, the Board approved the following additional security measures for the Broward County School District that have been implemented:

- increase the number of SIU investigators;
- add two new Gang Liaison positions (for a total of three);
- require the job description and training requirements for school security specialist to meet districtwide standards;

- conduct an annual survey of stakeholders to determine if they feel safe and secure in district schools;
- direct schools to develop and implement improvements in school safety and security, including hand held metal detectors, surveillance cameras, youth crime watch, youth motivators, internal suspension, behavior management, and conflict mediation;
- develop a coordinated campaign to inform the public regarding policies affecting safety and security-zero tolerance for weapons; and
- revise policy and the student code of conduct to include distribution of drugs, alcohol, and mood altering substances, assault against school personnel; and threats of violence directed against staff as expellable offenses.

COMMENDATION

The Broward County School Board and the Superintendent are commended for initiating and implementing additional security measures and initiatives that have significantly improved parent and student perceptions of the Broward County School District as a safe learning environment.

FINDING

The SIU Chief has prepared a *Standard Operations Manual* for SIU personnel. Portions of the *SIU Standard Operations Manual* function as an employee personnel manual. Other sections of the manual include detailed, administrative procedures addressing all types of emergency situations that law enforcement offices routinely face. The manual has been tailored to specifically address emergency situations in a school setting. Administrative procedures covered in the *Standard Operating Procedures Manual* include:

- work hours
- transportation
- off-duty employment
- personal appearance and dress code
- radio communication
- public relations and relations with the news media
- in-county and out-of-county travel
- courtroom conduct
- in-service training
- incident reports
- personnel investigation
- child abuse cases
- evidence and property collection procedures
- firearms-authorized possession and use of force
- handcuffs
- bomb threats
- civil disturbance

COMMENDATION

The Special Investigative Unit is commended for developing a detailed *Standard Operations Manual* that serves as an effective and detailed resource for SIU investigators and personnel in the field.

SIU Investigators report that the Standard Operations Manual is one of their most frequently consulted reference documents. Investigators use the manual as a daily reference guide for proper procedures in completing incident reports, collecting evidence, and in such sensitive cases as child abuse and completing personnel investigations.

FINDING

While the SIU chief is involved in long-range budgetary planning, and spends a great deal of his time representing SIU on various school and community task forces, other personnel supervise department activities on a daily basis. The Supervisor of Police Investigations and Operations oversees and directs investigatory services to schools and facilities, provides security coverage for Board meetings and other school events, and authorizes emergency call-out services that encompass the entire student and employee population. Investigators perform investigations of crimes and incidents occurring on school campuses, facilities, and district sites, and serious complaints against employees for the purposes of identification, apprehension, and prosecution of violators. The goals and objectives are carried out by investigators, security guards, supervisory, and support personnel as outlined below:

- Thirteen investigators are assigned geographically in the North, Central, and South areas of the school district. An investigator is assigned approximately 14 to 24 schools each depending on his or her geographic location. Three investigators are assigned to the Office of Professional Standards, as described in the previous section.
- Three uniformed (unarmed) building security personnel are also employed. Two are assigned to the district's main administrative building and one at the Technical Support Center on W. Oakland Park Boulevard where the SIU offices are located.

The Supervisor of School/Community Affairs provides crime prevention and intervention services to schools, facilities, and communities. The primary job duties of this position include:

- supervises Gang Liaisons, clerical staff, and other employees as assigned. A Gang Liaison has been assigned to work in each of the three geographical areas of the district to serve as a resource officer, educator, and facilitator for gang prevention efforts;
- coordinates and develops crime prevention and intervention programs for gang awareness, gun safety, substance abuse prevention, and violence-free lifestyles. These programs include youth crime watch, mandated in all Broward County secondary

schools. This student led program has made a significant contribution toward the reduction of crime on school campuses;

- serves as crime prevention liaison to parent groups, school and district staffs, community organizations, law enforcement agencies, juvenile justice agencies, and municipal and county governmental agencies;
- provides administrative oversight for the School Resource Officer (SRO) program. SROs are specially trained police officers assigned to all middle and high schools, one vocational school, one adult community school, three alternative schools, and three exceptional schools for a total of 65 officers. There are presently 55 SROs also serving in elementary schools. SROs reenforce the Board's initiative to prevent violence and gang activity on campus, and conduct violence and substance abuse education and prevention;
- provides administrative oversight for the Resident On Campus Security (ROCS) Program. ROCS is a school-based security initiative administered by SIU to reduce thefts, trespassing, and vandalism on school campuses after regular school hours, weekends, and holidays. ROCS participants include law enforcement officers and school board employees who are approved by the board for installation of mobile homes on school property as a deterrent against criminal activity. All sign lease agreements to perform security duties to protect district property in the 43 participant schools; and
- plans, organizes, and facilitates inservice training workshops and programs for security specialists, campus monitors, school resource offices, investigators, school and district staff, community organizations, and parent groups.

SIU investigators are required to be sworn law enforcement officers with a minimum of four years of experience. Exhibit 15-5 describes the geographic distribution of the investigators throughout the Broward County School District. Column one in the exhibit shows the investigator's identification number and the total number of schools assigned to each investigator. The data show that, on average, an investigator is assigned a geographic territory of approximately 15-18 schools. Although investigators stop by the SIU central office on West Oakland Park Boulevard on a daily or weekly basis as needed, each investigator is assigned office space at a school facility in his or her assigned geographic area of the district. Most investigators have a desk with a filing cabinet and office supplies, but not a personal computer.

As each high school and middle school throughout the district also has one or two security specialists and a school resource officer (SRO) assigned to their facilities, the investigator usually spends a majority of the time at the elementary schools and centers in the geographic area. The security specialist and/or SRO at a high school or middle school will usually detect a violation and apprehend and/or arrest the students or

**EXHIBIT 15-5
SPECIAL INVESTIGATIVE UNIT
INVESTIGATOR ASSIGNMENTS
1997-98**

INVESTIGATOR NUMBER (# OF SCHOOLS)	HIGH SCHOOLS	MIDDLE SCHOOLS	ELEMENTARY SCHOOLS		CENTERS
#109 (18)	Coconut Creek Ely	Pompano Beach	Coconut Creek Cypress Drew Charles McNab Markham	Palmview Pompano Beach Sanders Park Winston Park	Atlantic Vocational Cross Creek Cypress Run Alt/Except. Stud. Drew Charles Resource Cntr. Pompano Multi- Purpose Center
#118 (14)	Coral Springs Stoneman- Douglas	Coral Springs Forest Glen Sawgrass Springs	Coral Park Coral Springs Country Hills Eagle Ridge Forest Hills	Hunt Park Springs Riverglades Westchester	<u>Community Schools:</u> Coral Springs
#113 (14)	Taravella	Margate Ramblewood Silver Woods	Atlantic West Broadview Maplewood Margate Morrow N. Lauderdale	Pinewood Ramblewood Riverside Tamarac	<u>Community Schools:</u> Margate Taravella
#114 (15)	Deerfield Beach	Crystal Lake Deerfield Beach	Cresthaven Deerfield Beach Deerfield Park Floranada Norcrest	North Andrews Gardens Park Ridge Quiet Waters Tedder Tradewinds	Bright Horizons <u>Community Schools</u> Crystal Lake Deerfield Beach Adult & Community Cntr.
#104 (16)	Dillard Ft. Lauderdale	Wm. Dandy Sunrise	Bayview Bennett Dillard Larkdale Lauderdale Manors	Thurgood Marshall Northside Rock Island Sunland Park Wilton Manors	Wingate Oaks <u>Community Schools</u> Crystal Lake Deerfield Beach Adult & Community Cntr.

**EXHIBIT 15-5 (Continued)
SPECIAL INVESTIGATIVE UNIT
INVESTIGATOR ASSIGNMENTS
1997-98**

INVESTIGATOR NUMBER (# OF SCHOOLS)	HIGH SCHOOLS	MIDDLE SCHOOLS	ELEMENTARY SCHOOLS		CENTERS
#117 (15)	Anderson, Boyd Northeast	Lauderhill Lauderdale Lakes Rickards	Castle Hill Castle Hill Annex Lauderhill P.T. Lloyd Estates	Oakland Park Oriole Royal Palm	<u>Community Schools</u> Lauderhill Northeast Adult & Vocational Center
#110 (17)	Nova S. Plantation	Indian Ridge Nova Seminole	Davie Meadowbrook Nova Blanche Forman	Nova Eisenhower Plantation Park Tropical	McFatter Vocational Pine Ridge Alt. <u>Community Schools</u> Nova Community
#107 (16)	Piper Plantation	Blair Plantation Westpine	Banyan Central Park Horizon Mirror Lake Nob Hill	Peters Sandpiper Sawgrass Village Welleby	<u>Community Schools</u> Blair Piper Plantation Community
#112 (17)	Stranahan	New River Parkway	Broward Estates Croissant Park Stephen Foster Harbordale Martin Luther King North Fork	Riverland Walker Westwood Heights Virginia S. Young	Seagull Sunset Whiddon-Rogers Ed. Center Whiddon-Rogers Ed. Annex <u>Community Schools</u> Parkway Community Walker
#105 (22)	Cooper City Western Western Annex	Pioneer Silver Trail Tequesta Trace Tequesta Trace Annex	Chapel Trail Cooper City Country Isles Country Isles Annex Eagle Point Eagle Point Annex Embassy Creek	Flamingo Griffin Hawkes Bluff Indian Trace Panther Run Silver Ridge Silver Palms	<u>Community Schools</u> Cooper City

**EXHIBIT 15-5 (Continued)
SPECIAL INVESTIGATIVE UNIT
INVESTIGATOR ASSIGNMENTS
1997-98**

INVESTIGATOR NUMBER (# OF SCHOOLS)	HIGH SCHOOLS	MIDDLE SCHOOLS	ELEMENTARY SCHOOLS		CENTERS
# 103 (17)	Hollywood Hills McArthur	Apollo Driftwood	Boulevard Hgts. Driftwood Hollywood Hills Hollywood Park Orange Brook	Pembroke Pines Sheridan Hills Sheridan Park Stirling West Hollywood	Quest, The Sheridan Vocational <u>Community Schools</u> Hollywood Hills Adult & Community Cntr.
#119 (17)	Flanagan Flanagan Annex Miramar	Perry Pines Walter C. Young	Fairway Miramar Palm Cove Pasadena Lakes Pembroke Lakes	Perry, A.C. Pine Lakes Sea Castle Sunshine	Whispering Pines <u>Community Schools</u> Miramar Walter Young
#116 (16)	Hallandale South Broward	Attucks McNicol	Bethune Colbert Collins Dania Hallandale	Hollywood Central Lake Forest Oakridge Watkins	Hallandale Adult & Community Cntr. <u>Community Schools</u> South Broward

Source: Broward County School District, Special Investigative Unit, 1998.

employees involved in the incident. The investigator must complete a formal investigation of the incident and work with students, parents, and/or employees to correct problems and ensure that the incident does not reoccur.

A number of investigators interviewed by MGT consultants reported that they spend a great deal of their time counseling students and their families to improve problems of school violence, discipline, and drug abuse. The primary job duties of investigators include:

- conduct investigations of incidents in the schools and/or facilities assigned to him/her including incidents involving school transportation;
- document the results of the investigation(s) in report(s) to the Supervisor, Special Investigative Unit;
- inform the principal or department supervisor of the results of any investigations at his/her school/department, and keep him/her informed of activity at his/her school department;
- immediately report to the local law enforcement agency and Supervisor/Chief, SIU incidents involving a criminal violation of the law;
- assist local law enforcement agencies in school-related investigations;
- make arrests in necessary and emergency situations;
- upon request, conduct safety and security survey;
- review survey results with Supervisor/Chief of SIU;
- present survey results with recommendations to principal or department supervisor;
- assist principal or department supervisor in developing security plan;
- upon request of Supervisor/Chief, SIU, provide status reports to area superintendent/director with regard to incidents at assigned schools; and
- testify in administrative and criminal procedures.

SIU investigators are assigned to cases in their own geographic areas of the district by their supervisor through immediate notification incident report forms. These forms are faxed from the security specialist at a high school or middle school or from an assistant principal at an elementary school to the Special Investigative Unit (SIU) central office on West Oakland Park Boulevard. The immediate notification form asks the security specialist or principal to provide the following information:

- school site;
- name and type of complainant (student, employee, parent, other);
- details of incident (including victim(s) and suspect(s) names);
- description of incident/injuries;
- description of property loss/damage; and
- if police or paramedics are notified.

The security specialist or administrator must take action first to use the immediate notification form to alert an SIU investigator to respond and investigate the incident. The SIU investigator follows standard procedure, interviewing victims, suspects, collecting evidence, and documenting property damage. The investigator completes the required paperwork to provide sufficient documentary evidence for school principals and administrators to take action and discipline, suspend, or expel students, as required. For each case they are assigned, SIU investigators are required to complete written reports and process written and tape recorded statements from victims, suspects, and witnesses. Most of this work has to be completed by SIU's clerical support staff located in the West Oakland Park Boulevard facility, as investigators do not have personal computers.

COMMENDATION

The Broward County School District Special Investigative Unit (SIU) is commended for effectively distributing SIU investigator assignments to ensure that all schools in each geographic area of the district receive adequate support from professional security personnel.

The staffing pattern for SIU investigators is effective because the Broward County School District's Special Investigative Unit has been able to distribute its personnel across a wide geographic area using limited resources. School principals and administrators are generally satisfied with the security department's organizational structure, and reported that SIU investigators rapidly respond to their requests. Administrators also indicated that they are pleased that one SIU investigator is always stationed in their immediate geographic area to address the needs of their schools. The Special Investigative Unit has been able to assign each investigator to approximately the same number of schools in his or her territory. Each investigator has approximately two high schools, two or three middle schools, 10 elementary schools, and three to five centers.

FINDING

The SIU Office on West Oakland Park Boulevard has a total of seven clerical support staff that perform a number of administrative support duties for SIU staff. Some of the clerical staff act as receptionists, answering the telephone and greeting visitors to the facility. Other clerical staff coordinate radio communication with investigators in the field. Most clerical staff serve as word processors and data entry personnel, preparing the numerous case reports and tape recorded transcript summaries required by SIU investigators on a daily basis.

During site visits, MGT consultants found that most SIU clerical staff spend in excess of 60 percent of their time performing word processing functions to prepare case reports

and tape recorded transcripts required by investigators. The workload is so excessive that SIU plans to hire three additional data entry operators to perform word processing functions and preparing investigator case reports as required.

A majority of SIU investigators interviewed by MGT consultants reported that they would prefer to have a personal laptop computer assigned so that they could complete their own case reports. At present, investigators have to wait from three weeks up to a month from the time they submit a case report to word processors to receive the draft version of the report. This period also delays the processing of student disciplinary actions, suspensions, or expulsions that may result from the case findings.

SIU investigators report that it is common for modern metropolitan law enforcement agencies to assign laptop computers to their officers for use in the field. The laptop computer is more compatible with the roving work demands of a modern police investigator's job. A significant number of SIU investigators have a long history of work experience with large metropolitan police agencies. They believe that it would be in the long-term best interest of Broward County's SIU to be more compatible with modern technology now used by metropolitan police departments. The laptop computers would enable investigators to complete their casework and reports more rapidly, and also eliminate the need for additional clerical personnel in the Special Investigative Unit.

RECOMMENDATION

Recommendation 15-4:

Purchase individual laptop computers and provide the necessary training for SIU field personnel and eliminate three new data entry operator positions and one existing data entry operator position in the SIU Administrative Services Unit.

The Broward County School District should provide laptop computers for SIU personnel so investigators can complete reports and other casework rapidly in the field. This action should significantly reduce the amount of time it takes to produce a case report and increase the efficiency and effectiveness of investigators in the field. SIU should be able to eliminate three new data entry operator positions and one existing data entry operator position that will no longer be required.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Chief of SIU should purchase laptop computers for 13 SIU investigators, three gang liaison positions, two supervisors, and the SIU Chief. May 1999
2. The Chief of SIU should initiate the process of eliminating three new and one existing data entry operator position by the start of the 1999-2000 school year. July 1999

FISCAL IMPACT

Based on current estimates, it would cost approximately \$47,500 to purchase laptop computers for SIU personnel (\$2,500 per laptop x 19 laptops = \$47,500). The 19 laptops include computers for 13 investigators, three gang liaisons, two supervisors and

one chief. The \$2,500 per computer is based on market estimates and information provided by technology support staff. Eliminating the three new data entry operator positions and one existing data entry operator position will save the district approximately \$113,092 per year. (\$21,258 annual salary x 33 percent fringe of 7,015 = \$28,273 x 4 positions = \$113,092)

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Purchase 19 Laptop Computers for SIU Personnel	(\$47,500)	\$0	\$0	\$0	\$0
Eliminate Four Data Entry Operator Positions	\$113,100	\$113,100	\$113,100	\$113,100	\$113,100

FINDING

The transmission of data from the Office of Professional Standards in the K.C. Wright Administration Building to the SIU offices on West Oakland Park Boulevard is often a cumbersome process. Instead of e-mailing files electronically from one site to the other, the documents are transported manually by an SIU staff member. When the document reaches K.C. Wright or SIU, it must often be reentered into the computer because each location uses a different database and word processing software.

Security specialists, principals, and administrators can not transfer the immediate notification incident report form and the personnel request form to an electronic format so that the form can be e-mailed electronically. At present, these forms have to be typed and physically faxed. E-mailing the forms would be much more efficient.

RECOMMENDATION

Recommendation 15-5:

Standardize computer software databases for the Office of Professional Standards in K.C. Wright Administration Building and the Special Investigative Unit (SIU) offices on West Oakland Park Boulevard to enable SIU personnel to utilize the same casefile database and exchange files electronically.

Security specialists, principals, and administrators should be able to submit immediate notification incident report forms and personnel investigation request forms electronically via e-mail. Both offices are part of the same department and should standardize word processing and other computer software packages to share the same casefile database. Staff should e-mail files electronically from one location to the other instead of having to manually transport documents. Also, the director should be able to transmit the monthly agenda for the Professional Standards Committee meeting electronically to committee members, instead of having to hand carry or mail agenda materials.

Using standardized software will also save staff time through allowing staff to transmit documents and reports via e-mail and avoiding the use of couriers. Word processing staff will no longer be required to enter the same information into separate database at each facility.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Director of Professional Standards and other SIU staff should work with technology support staff to create a centralized common database for all Professional Standards and SIU personnel using standardized computer software systems. May 1999

2. The Director of Professional Standards and appropriate technology personnel should create a computer software version of the immediate notification incident report form and the personnel investigation request form. Summer 1999

3. Security specialists, principals, and administrators should begin submitting the form electronically via e-mail. Fall 1999

FISCAL IMPACT

There is no cost associated with this recommendation. This recommendation does not require the Office of Professional Standards and SIU staff to create or develop a new and unique software program for their own use. The department should use the same standardized existing software package, such as Microsoft Office, for example, and take advantage of electronic data transfers to share the same case database, whenever possible. The data can easily be e-mailed from one location to the other after computer software is standardized at each location. The tasks included in this recommendation can be accomplished using existing personnel and resources.

15.2.3 Security Specialists and School Resource Officers

CURRENT SITUATION

Broward County high schools and middle schools use a variety of on-site personnel to provide security services, including security specialists, school resource officers (SROs), and Resident On Campus Security (ROCS). Only high schools and middle schools have full-time security specialists assigned to them for the 10-month school year. Each high school and middle school has an average of two security specialists.

The primary job duties of the security specialist include:

- investigate all incidents of negative conduct occurring on school property and coordinate investigative and prevention efforts with the Special Investigative Unit (SIU), school resource officer (SRO), law enforcement departments, city police departments, and other agencies as appropriate, to maximize prevention and cessation of illegal and destructive activities;

- gather information from various sources concerning possible illegal or undesirable activities. Inform the principal of all information gathered from various sources concerning possible illegal or undesirable activities occurring on school campus;

- advise the principal of all hazardous conditions, unsafe procedures, and all security matters, and suggest methods of elimination;
- document and report all incident through the principal to the Special Investigative Unit (SIU);
- tour the school's perimeter and interior periodically to provide maximum visibility, to reduce potential physical conflicts among the students, and to provide an atmosphere conducive to the learning process;
- develop rapport with students by exercising prudent judgment upon contact, and using more potent warnings and reasonable force only when warranted; and
- request identification from adults and students who appear to be out-of-place for the circumstances and assist them, as necessary, when on legitimate school business.

Security specialists are required to have four years of professional experience as a certified police officer, civilian or military, or as an investigator/ case worker for a social service agency. Two to four years of experience in working with juveniles is preferred.

School Resource Officers (SROs) are specially trained police officers serving in all middle and high schools, one vocational school, one adult community school, three alternative schools, and three exceptional schools for a total of 65 officers. SROs are full-time employees of either the city police department serving the region where the school is located or employees of the Broward County Sheriff's Department. The officer is assigned to the school on a full-time basis when school is in session. When school is closed during the summer months, the SRO takes vacation time and/or performs standard police duties for his or her police department employer or for the county sheriff's office. The SRO program was originally approved by the Broward County School Board in 1987-88 as a delinquency prevention program. In 1996-97, the SRO program was expanded to place an additional 27 officers in schools for a current total of 55 officers serving in 86 elementary schools.

Exhibit 15-6 shows the distribution of SROs in the Broward County School District based on the police agency employers.

School Resource Officers (SROs) perform the following job functions:

- strengthen relations between students and the police through positive and ongoing interaction;
- provide crime, violence, and substance abuse education and prevention;
- aid students in building character, self-esteem, and good citizenship;
- provide law enforcement support and a police presence to avert assaults, violence, and other major incidents; and

**EXHIBIT 15-6
SCHOOL RESOURCE OFFICER (SRO) ASSIGNMENTS
IN THE BROWARD COUNTY SCHOOL DISTRICT
BY POLICE AGENCY**

AGENCY	MIDDLE AND HIGH SCHOOLS		ELEMENTARY SCHOOLS	
Broward Sheriff's Office	Boyd Anderson High Creek Crystal Lake Community Cypress Run Alternative Dandy, William Middle Deerfield Beach High Beach Middle Ely High Lauderdale Lakes Middle Lauderhill Middle McFatter Vocational New River Middle	Cross Nova Center- Upper Level Nova Center- Middle Level Olsen Middle Parkway Middle Pine Ridge Alternative Pompano Beach Middle Seagull School South Area Alternative Sunset School Tequesta Trace Middle	Broadview Broward Estates Castle Hill Collins Country Isles Cresthaven Dania Deerfield Beach Deerfield Park Eagle Point Foster, Stephen Indian Trace King, Martin L. Lake Forest	Larkdale Lauderhill, P.T. Meadowbrook Norcrest North Andrews Gardens Oriole Palmview Park Ridge Quiet Waters Royal Palm Tamarac Tedder Watkins
Coconut Creek Public Safety Department	Coconut Creek High		Coconut Creek Tradewinds	Winston Park
Cooper City Police Department	Cooper City High and	Pioneer Middle	Cooper City	Embassy Creek Griffin
Coral Springs Police Department	Coral Springs High Coral Springs Middle Forest Glen Middle	Ramblewood Middle Sawgrass Springs Middle Taravella High	Coral Park Coral Springs Country Hills Eagle Ridge Forest Hills Hunt	Maplewood Park Springs Ramblewood Riverside Westchester
Davie Police Department	Indian Ridge Middle	Western High	Davie Flamingo Hawkes Bluff Blanche Forman	Nova Eisenhower, Dwight D. Silver Ridge

**EXHIBIT 15-6 (Continued)
SCHOOL RESOURCE OFFICER (SRO) ASSIGNMENTS
IN THE BROWARD COUNTY SCHOOL DISTRICT
BY POLICE AGENCY**

AGENCY	MIDDLE AND HIGH SCHOOLS		ELEMENTARY SCHOOLS	
Fort Lauderdale Police Department	Dillard High, Fort Lauderdale High,	Stranahan High Sunrise Middle	N/A	
Hallandale Police Department	Hallandale High	Hallandale Adult and Community Center	N/A	
Hollywood Police Department	Apollo Middle Attucks Middle Hollywood Hills High McArthur High	McNicol Middle Driftwood Middle South Broward	N/A	
Margate Public Safety Department	Margate Middle		Atlantic West	Margate
Miramar Police Department	Miramar High	Perry Middle	N/A	
North Lauderdale Public Safety	Silver Lakes Middle		Morrow North Lauderdale	Pinewood
Oakland Park Public Safety	Northeast High and	Rickards Middle	Lloyd Estates Oakland Park	Rock Island
Parkland Public Safety	Stoneman Douglas High			Sherman Douglas
Pembroke Pines Police Department	Flanagan High, Flanagan 9 th Grade Center Pines Middle	Silver Trail Middle Walter C. Young Middle	Chapel Trail Palm Cove Pasadena Lakes Pembroke Lakes	Pembroke Pines Pine Lakes Silver Palms
Plantation Police Department	Plantation High Plantation Middle	Seminole Middle South Plantation High	Central Park	Mirror Lake
Pompano Beach Police Department		N/A	Cypress Charles Drew Markham	McNab, Pompano, Sanders Park
Sunrise Police Department	Bair Middle Piper High	Westpine Middle		Village
Wilton Manors Police Department	Bair Middle Piper High	Westpine Middle		Wilton Manors

Source: Broward County School District, Special Investigative Unit, 1998

- reenforce the school board's initiative to prevent gang activity and substance abuse training through the Gang Resistance Education and Training (GREAT) and Drug Abuse Resistance Education (DARE) programs.

SROs serve on a contract basis with the Broward County School District as part of an agreement with their police agency employer. The contract is typically in the amount of \$12,000 per SRO which does not contribute to the officer's salary. Each SRO contract is an agreement signed between Broward County School District and the participating area police department. Broward County pays \$12,000 for each high school and middle school SRO in monthly installments directly to the area police department. These funds are used entirely at the discretion of each police department. Some departments use the monies for related personnel expenditures, while other departments place the monies directly into their general funds for all types of law enforcement operating expenses. Only high schools and middle schools are required to sign contracts involving the \$12,000 amount for the SROs services. Police agencies furnish SROs to elementary schools at no cost as a community service.

Resident On Campus Security (ROCS) is a security initiative approved by the Broward County School Board in 1982, to reduce vandalism, theft, and trespassing on school campuses after regular hours and on weekends and holidays when school is not in session. ROCS participants include law enforcement officers and some district employees. All sign lease agreements with the Board and agree to perform security duties to protect district property in exchange for rent free installation of the mobile home. This initiative provides an additional security option to schools. ROCS participants include some 43 schools. Exhibit 15-7 shows ROCS schools in the Broward County School District.

Exhibit 15-7 includes information on the Resident On Campus Security Program (ROCS) participant schools as well as ROCS resident participating employers and the resident's occupation. The exhibit shows that a variety of state, county, and municipal law enforcement agencies participate in the Resident On Campus (ROCS) program. The Florida Highway Patrol has six employees serving as Residents On Campus, the Broward County Sheriff's Office has contributed three ROCS employees, and 25 participants in the ROCS program are employees of local municipal law enforcement agencies in Broward County. The information in Exhibit 15-7 shows that ROCS has very diverse and extensive support from many different public sector agencies. While most residents are law enforcement officers, residents also include a painter, firefighter, and facilities person.

FINDING

The major difference between the School Resource Officers (SROs) responsibilities and the responsibilities of the school security specialists is that SROs spend the majority of their time involved in violence and substance abuse education and prevention efforts in the classroom. Due to existing federal and state law enforcement agency statutes and restrictions, SROs are legally unable to initiate searches on their own of school areas that may contain a student's personal property. The security specialist must perform this

**EXHIBIT 15-7
SCHOOLS PARTICIPATING IN THE
RESIDENT ON CAMPUS (ROCS) PROGRAM**

SCHOOL	PARTICIPATING EMPLOYER	ROCS OCCUPATION
Atlantic Vocational	School Board	Painter (Journeyman)
Attucks Middle	Hollywood Police Dept.	Law Enforcement Officer
Bethune Elementary	Florida Highway Patrol	Law Enforcement Officer
Colbert Elementary	Florida Highway Patrol	Law Enforcement Officer
Cooper City High	Florida Highway Patrol	Law Enforcement Officer
Cross Creek High	School Board	Security Specialist
Cypress Run	Florida Marine Patrol	Law Enforcement Officer
Driftwood Middle	Hollywood Police Dept.	Law Enforcement Officer
Fort Lauderdale High	Fort Lauderdale Police Dept.	Law Enforcement Officer
Griffin Elementary	Cooper City Police Dept.	Law Enforcement Officer
Hawkes Bluff Elementary	Fire Department	Fire Fighter
Hollywood Hills Elem.	Hollywood Police Dept.	Law Enforcement Officer
Hollywood Hills High	Hollywood Police Dept.	Law Enforcement Officer
Margate Middle	Margate Police Dept.	Law Enforcement Officer
McFatter Vocational	Broward Sheriff's Office	Law Enforcement Officer
Miramar High	Miramar Police Dept.	Law Enforcement Officer
Mirror Lake Elementary	Plantation Police Dept.	Law Enforcement Officer
Nob Hill Elementary	Sunrise Police Dept.	Law Enforcement Officer
Norcrest Elementary	School Board	Head Facilities Person
Northeast High	Broward Sheriff's Office	Deputy (Sergeant)
Nova Eisen. Elementary	State of Florida	Law Enforcement Officer
Nova High	Fl. Game/Fish Commission	Law Enforcement Officer
Olsen Middle	Metro Miami-Dade Police Dept.	Law Enforcement Officer
Park Springs Elem.	Coral Springs Police Dept.	Law Enforcement Officer
Pasadena Lakes Elem.	Pembroke Pines Police Dept.	Law Enforcement Officer
Pembroke Pines Elem.	Pembroke Pines Police Dept.	Law Enforcement Officer
Perry Elementary	Florida Highway Patrol	Law Enforcement Officer
Pines Middle	Pembroke Pines Police Dept.	Law Enforcement Officer
Pompano Beach Elem.	Pompano Police Dept.	Law Enforcement Officer
Portable Site #3461	Broward Sheriff's Office	Law Enforcement Officer
Riverglades Elementary	School Board	Supervisor
Riverside Elementary	Florida Marine Patrol	Law Enforcement Officer
Seagull School	Florida Highway Patrol	Law Enforcement Officer
Sheridan Hills Elem.	Hollywood Police Dept.	Law Enforcement Officer
Silver Lakes Middle	School Board	S.I.U. Investigator
Silver Ridge Elem.	Davie Police Dept.	Law Enforcement Officer
South Plantation High	School Board	Head Facilities Person
Stoneman Douglas High	Coral Springs Police Dept.	Law Enforcement Officer
Westchester Elem.	Coral Springs Police Dept.	Law Enforcement Officer
Western High	Florida Highway Patrol	Law Enforcement Officer
Whispering Pines	Miramar Police Dept.	Law Enforcement Officer
Winston Park Elem.	Coconut Creek Police Dept.	Law Enforcement Officer
Young Middle	Pembroke Pines Police Dept.	Law Enforcement Officer

Source: Broward County School District, Special Investigative Unit, 1998.

function. SROs may respond to assist the security specialists to break up fights and help resolve student conflicts, but the majority of their time is spent on classroom education activities and serving as a uniformed presence at the request of the school principal.

School Resource Officers (SROs) and school security specialists often perform entirely separate job duties and have limited opportunities to closely coordinate their regular activities to improve security on campus. Security specialists spend most of their time patrolling halls and searching for illegal student activity. SROs are involved primarily in educational prevention activities in the classroom, and assist the specialist as requested. In requesting assistance to conduct an investigation for a student suspension or expulsion, the security specialist contacts an assigned area SIU investigator first. In reviewing records of in-service training activities, MGT consultants found that school security specialists had no opportunities to participate in joint in-service training activities with SIU investigators, other SIU staff, and with SROs.

The Broward County School District has been successful in negotiating contracts with local law enforcement agencies to provide SRO services to high schools and middle schools for a subsidy of \$12,000 per SRO. Broward County police agencies, including the Sheriff's Office and local police departments, indicate these reimbursements go directly into county or city general funds, and are used for a variety of purposes as needed within and outside of the police agency.

The Broward County Sheriff's Office Grants Management Section reports that the Sheriff's Office elementary school SRO program was started in 1995 through a federal law enforcement program grant. Once the grant funds were spent, the cost of the elementary SRO positions have continued to be funded by the Sheriff's Office. Other police departments in Broward County who also provide SROs to elementary schools in their geographic area have followed the example set by the Sheriff's Office and now fund the total cost of their department's own elementary school SRO positions.

In order to fully understand the Broward County School District Special Investigative Unit's (SIU) relationship to other law enforcement agencies in the area, it is necessary to review the unique operating structure of Broward County SIU in greater depth. While it employs sworn law enforcement officers, the Broward County Schools Special Investigative Unit (SIU) does not function as a national or state accredited law enforcement agency, in the same way that the Broward County Sheriff's Office and area police departments operate. In researching comparison school districts, we found that only Miami-Dade County Schools, with a total enrollment of approximately 346,000 students, and Hillsborough County, with a total enrollment of over 153,000 students, operate fully accredited school police agencies which are comparable to the Broward County Sheriff's Office. The major distinction among these school districts and the Broward County School District is that in Miami-Dade and Hillsborough County Schools, the School Resource Officers (SROs) are employees of the school district and not local law enforcement agencies.

The Broward County School District follows a pattern that is more common among school districts nationally. The school district operates a security department that is composed of sworn law enforcement officers, but the department itself is not a nationally or state-accredited law enforcement agency. The Broward County School District works with area police departments to provide SROs to high schools and middle schools

through a cooperative arrangement. Duval County Schools, with an average enrollment of about 127,000, and Orange County Schools, with an average enrollment of about 134,000, uses the same pattern of cooperating with area law enforcement agencies to provide personnel at various high schools and middle schools.

Following our analysis of security operations in the Broward County School District and comparison school districts, including the Miami-Dade, Duval, Hillsborough County School Districts, MGT concluded that the SIU needs to continue with its present operational structure and not become a fully accredited law enforcement agency. Under its existing operational structure, the SIU has been able to develop a cooperative agreement among all area law enforcement agencies to reduce crime in the public schools. The Broward County School District SIU has been able to keep its personnel costs significantly lower through working with local law enforcement agencies to furnish SRO personnel for high schools and middle schools. Through having an established working arrangement with area law enforcement agencies, the SIU in the Broward County School District is able to take advantage of these the additional manpower and enhanced technology provided by these agencies.

In the course of our analysis of the Broward County School District, MGT determined that security specialists are responsible for a significant portion of the day-to-day investigative work at the high school and middle school level. This is primarily because SROs spend a great deal of their time conducting classroom education activities, and are restricted from initiating searches by statute as sworn police officers. Security specialists are called on to do the bulk of investigative work, but have few opportunities to receive annual inservice training in such areas as investigation, working with student discipline problems, etc. After reviewing inservice training records supplied by the Broward County SIU staff, we found that security specialists have no opportunity to participate in ongoing, law enforcement-based inservice training program during the school year. Security specialists would substantially benefit from quality inservice training activities that provide them with the opportunity to strengthen and enhance their investigative skills, and closely interact with investigators and other SIU personnel.

RECOMMENDATION

Recommendation 15-6:

Provide effective inservice training for security specialists, SIU investigators, and SROs.

An annual budget for staff development should be allocated (about two percent of the amount of the contracts). Security specialists perform day-to-day search and investigative work at area high schools and middle schools, yet receive no inservice training throughout the school year. In the course of our analysis, we found that the need for increased, quality inservice training for security specialists and other investigative personnel is one of the most critical issues facing the SIU. Effective, ongoing inservice training makes a significant difference in retaining quality personnel and reducing crime and security incidents in public schools.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|------------------|
| <p>1. The Superintendent and SIU administrative staff should set an amount of dollars equal to about two percent of its existing SRO contract funds with area police agencies to provide inservice training at the start of the 1999-2000 school year.</p> | <p>May 1999</p> |
| <p>2. The SIU Supervisor for School/Community Affairs should develop annual joint in-service training programs for investigators, school security specialists, and SROs in allowing them to more effectively coordinate their activities in working with students. Inservice training should particularly provide additional education for security specialists in such areas as investigative procedure, changes in federal and state law, and for working with student discipline problems.</p> | <p>July 1999</p> |

FISCAL IMPACT

Based on \$12,000 per school resource officer (SRO) at each Broward County high school and middle school, the Broward County School District currently allocates approximately \$672,000 for contracts with area police agencies, including the Broward County Sheriff's Office, to provide SROs for district high schools and middle schools (\$12,000 per SRO contract x 23 high schools and 33 middle schools = \$672,000).

We recommend that an amount equivalent to approximately two percent of these funds, or \$13,500, should be set aside annually to provide effective inservice training programs. These dollars should be provided out of the district staff development funds. The \$13,500 estimate is derived through discussions with Broward County SIU staff regarding the estimated need for additional funds required to provide coordinated inservice training activities for all school security personnel. A review of SIU inservice training records found that there have been very few coordinated inservice training activities for school personnel involved in campus security, particularly security specialists, within the last five years.

Recommendation	1999-2000	2000-01	2001-02	2002-03	2003-04
Provide Inservice Training	(\$13,500)	(\$13,500)	(\$13,500)	(\$13,500)	(\$13,500)

15.3 School Security Issues

A number of districtwide security issues were identified by the MGT team. These issues include:

- visitor procedures and security badges;
- school camera systems;
- enforcement of the Code of Student Conduct;
- incident reporting; and

- campus security threat assessments.

Each concern will be addressed below.

15.3.1 Visitor Procedures and Security Badges

CURRENT SITUATION

The K.C. Wright Administration Building, district offices on West Oakland Park Boulevard, and other administrative office facilities have established visitors procedures requiring all employees to wear an identification badge, which includes a photograph, during regular working hours. The established visitors procedure also includes a requirement for visitors to sign in and use a color-coded visitors badge, which must be returned to the front desk upon leaving the facility. The security guard uses a different color of badge each day, so that all visitors are required to check in at the security desk every day. This process discourages unauthorized visitors from trying to enter using a colored badge from a previous day.

FINDING

When the MGT safety and security consultant visited a school or school office to sign in, visitor passes were easily obtained at the front desk. The visitor's badge can be easily duplicated. In a number of cases, a visitor's badge consisted of a slip of paper signed "visitor" with a magic marker. The consultant was not asked for identification, nor was he supervised while taking a visitor's pass. It would have been a simple matter at most schools for the consultant to obtain several passes at once. Moreover, there was no procedures in place at the school to verify that visitor badges were returned.

In addition, at the K.C. Wright Administration Building, procedures call for color-coded visitors badges to be changed daily. MGT consultants observed on more than one occasion that security guards at the K.C. Wright security counter issued badges in more than one color to different visitors on the same day. Security guard personnel at K.C. Wright also made no effort to assign numbered and coded badges to individual visitors.

RECOMMENDATION

Recommendation 15-7:

Establish visitor procedures and badges that promote greater security.

The Broward County School District should create visitor badges that are sequentially numbered and cannot be easily duplicated in order to increase security effectiveness and deter unauthorized visitors at both individual schools and the central office. Visitor procedures should be established that promote greater security in order to create a safe and healthy environment.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|---|-------------------------------------|
| 1. The Superintendent should instruct the administrative staff to work with SIU in developing guidelines regarding visitor badges for the schools to follow. | May 1999 |
| 2. All schools and central offices should submit a sample of their proposed revised visitor badge to SIU for approval. | June 1999 |
| 3. The Special Investigative Unit (SIU) should distribute new guidelines regarding campus visitors to all schools and school office facilities. These guidelines should stress the importance of identifying visitors for security reasons. | August 1999 |
| 4. SIU investigators should make periodic checks to ensure that schools and the central office are using the new badges and following appropriate visitors procedures. SIU investigators should also verify that security guard personnel at the K.C. Wright Administration Building and other central office facilities are issuing different color coded badges to visitors on separate work days, as required in central office security procedures. | 1999-2000
School Year
Ongoing |

FISCAL IMPACT

There is no fiscal impact associated with this recommendation. Badges can be created using office supply materials.

15.3.2 School Cameras

CURRENT SITUATION

The Broward County School District identifies one of its most significant school security accomplishments within the last three years as the placing of security cameras in all Broward County high schools and middle schools, in most elementary schools, in centers, and in administrative sites.

Exhibit 15-8 shows the Broward County schools which have surveillance cameras. The exhibit shows the names of the schools with cameras and the right column in the exhibit shows the average number of cameras for middle schools, high schools, elementary schools, centers, and administrative sites. The exhibit's right column also lists the names of schools whose total number of cameras are less than or exceed the average.

The data demonstrate that middle schools and high schools have an average of 16 security cameras per school, while elementary schools have 10 surveillance cameras on average. Centers and administrative sites typically have from ten to 20 surveillance cameras.

Exhibit 15-8 shows which 88 of the district's 201 schools have cameras. The exhibit also shows the average number of cameras that are needed to provide adequate security coverage for very large and complex school facilities.

Surveillance cameras are placed at strategic locations throughout the school, such as common areas where students congregate, and locations which might be potential areas for fights and other disturbances. The cameras make 24-hour recordings of all activities within their range, and a camera monitor room is a locked and secured area somewhere in the school facility.

School security cameras are an effective security tool for a variety of reasons. One main advantage of the camera system is that it allows security staff to immediately determine and even to predict in advance where security threats and other types of violations occur. The security specialist can use the camera monitor as a mechanism to respond where he/she is needed. The camera system also allows security staff to conduct 24-hour surveillance on a potential problem area in the school without being present. Finally, the camera system provides filmed, legal records of security incidents that occur in the school over a 24-hour period. Such filmed records are useful in court cases when students or school employees may be charged or brought to trial for incidents that occurred on campus.

School security specialists value the camera as a resource. They believe, however, that the effectiveness of these cameras can be greatly enhanced by positioning the cameras at the request of school officials according to their needs and requirements, and not just as a service contractor has determined. Also, cameras would be more effective with a zooming capacity that could allow staff to clearly identify the face of a particular student who may be involved in a recorded security incident. At present, existing camera systems do not have sufficient capacity to provide this service.

Security specialists keep videotape records of camera recordings for up to a year. The camera monitor room is usually staffed during the school day by one of the school's security specialists or a teacher or teaching assistant that may be restricted to light duties as a result of workers' compensation injuries. One of the security specialists usually patrols the school building during the day, while the other security specialist monitors the camera room and responds to incidents that the camera detects.

FINDING

Three main problems were evident with the existing camera system:

- First, the cameras are often placed at the discretion of the camera surveillance company that has the districtwide contract for the school district. Security specialists shared that, at some schools, the cameras are useless in detecting student incidents because of where they were placed. At times, the camera maintenance contractor ignored the suggestions of security specialists and placed the camera in a shade that obstructs the camera lens at certain times of the day. In spite of repeated requests for the cameras to be repositioned, the camera maintenance contractor did not respond.

**EXHIBIT 15-8
BROWARD COUNTY SCHOOLS
WITH SURVEILLANCE CAMERAS**

TYPE OF SCHOOL	NAMES OF SCHOOLS WITH CAMERAS			AVERAGE NUMBER OF CAMERAS PER SCHOOL
Middle	Apollo Attucks Blair Coral Springs Crystal Lake Dandy Williams Deerfield Beach Forest Glen Indian Ridge Lauderdale Lakes Lauderhill	Margate McNicol New River Nova Olsen Parkway Perry Pines Pioneer Plantation Pompano Beach	Ramblewood Rickards Sawgrass Springs Seminole Silver Lakes Silver Trails Sunrise Tequesta Trace West Pine Walter C. Young	Average number of cameras per middle school = 16 Middle schools with number of cameras greater than 16: McNicol-32 Parkway-30 Attucks-26 New River-26 Silver Trails-26
High	Anderson Boyd Coconut Creek Cooper City Coral Springs Deerfield Beach Dillard Ely Flanagan Flanagan Annex	Ft. Lauderdale Hallandale Hollywood Hills McArthur Miramar Northeast Nova	Piper Plantation South Broward South Plantation Stoneman-Douglas Starnahan J.P. Taravella Western	Average number of cameras per high school = 16 High schools with number of cameras greater or less than 16: Dillard Ely Flanagan-32 Anderson Boyd-22 Flanagan Annex-4

**EXHIBIT 15-8 (Continued)
BROWARD COUNTY SCHOOLS
WITH SURVEILLANCE CAMERAS**

TYPE OF SCHOOL	NAMES OF SCHOOLS WITH CAMERAS			AVERAGE NUMBER OF CAMERAS PER SCHOOL
Elementary	Bayview Bethune Castle Hill Colbert Collins Deerfield Park Dillard Eagle Ridge	Fox Trail Hallandale Hunt Martin Luther King Lauderdale Manors Lauderdale P.T. Lloyd Estates	North Fork Oriole Panther Run Parkridge Rock Island Royal Palm Sanders Park	Average number of cameras per elementary school = 10 Elementary schools with number of cameras greater or less than 10" Fox Trail-16 Panther Run-16 Silver Lakes-16 Sunland Park-13 Village-8 Hunt-4
Centers	Cypress Run Hallandale Adult Pine Ridge	Pompano Multi S. Area Alternative Sunset School	Whiddon-Rogers Wingate Oaks	Average number of cameras per center = 10 Centers with number of cameras greater than 10: Whiddon-Rogers-20 Hallandale Adult-16 Pine Ridge -16 Pompano Multi-16; Cypress Run-10 S. Area Alternative-10 Sunset School-10 Wingate Oaks-10
Admin. Sites	Central Area Office	Kathleen C. Wright	Tech. & Support Serv. Building	Kathleen C. Wright-46 Tech. & Support Serv. Building-30 Central Area Office-10

Source: Broward County School District, Special Investigative Unit ,1998.

- Second, the quality of the cameras installed is often poor. A number of cameras will not allow monitors to focus enough to view student faces.
- Third, maintenance is slow. One security specialist reported that he had filed a maintenance request to repair two cameras that were not working in August, and he had yet to receive service from the maintenance contractor in November.

RECOMMENDATION

Recommendation 15-8:

Renegotiate the maintenance contract for school security cameras to include timely response to maintenance requests, prompt repair of equipment, and a requirement that school surveillance cameras be repositioned at the request of the school principal and security specialists to better serve security needs.

The Broward County School District should renegotiate its contract with the camera maintenance contractor in order for schools to receive timely maintenance and repair of camera equipment. School principals and security specialists should be able to reposition cameras in order to effectively address security concerns within their schools.

The existing contract with the surveillance camera maintenance contractor needs to be renegotiated to require the contractor to repair and/or replace equipment promptly and to reposition cameras at the request of the principal and security specialists to meet their security needs requirements.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should direct each school principal to submit a list of surveillance cameras and equipment that are in poor working order, in need of repair or not placed properly. The Superintendent should also direct principals to compile a list of repair requests for surveillance cameras that have not been serviced by the contractor during the last school year. May 1999
2. The Superintendent, appropriate associate superintendents, and district staff should renegotiate the surveillance camera maintenance contract to allow prompt repair of camera equipment and permit cameras to be repositioned at the request of the school principal. July 1999
3. The Superintendent should direct Broward County principals to periodically evaluate the effectiveness of the repair service provided by the camera maintenance contractor on a regular basis. August 1999
and Ongoing

FISCAL IMPACT

There is no fiscal impact associated with this recommendation. The tasks included in this recommendation can be accomplished within an acceptable timeframe using existing resources.

15.3.3 Enforcement of the Student Code of Conduct

CURRENT SITUATION

Inconsistent implementation of the discipline measures outlined in the Code of Student Conduct is prevalent throughout the Broward County School District. SIU investigators report that the level of attention given to the enforcement of the student code of conduct and discipline problems varies greatly from school to school and from one school principal to another. Investigators report that some school principals address discipline problems very quickly, while other principals are slow to respond and enforce the provisions of the code of conduct.

Exhibits 15-9, 15-10, 15-11, and 15-12 show the number of external suspensions, internal suspensions, and expulsions reported for Broward County high schools, middle schools, elementary schools, and vocational/alternative schools and centers. In Exhibit 5-9, the data show that there is no consistent average of external suspension incidents reported for Broward County high schools. Cooper City High School, for example reported only 222 external suspensions in 1997-98, while Deerfield Beach High School reported 1,336. Such variation suggests that enforcement of the student code of conduct is not consistent throughout the district. Further, the MGT survey reported that 52 percent of teachers *agree or strongly agree* with the statement *our schools do not effectively handle misbehavior problems*.

The foreword to the Broward County School District Secondary Code of Student Conduct includes a message to students from the Superintendent which states:

Your success this year will be determined by a number of things over which you have control. You need to come to school every day, pay attention in class, complete your homework, treat school staff and other students with respect, and obey classroom and school rules.

The Code of Student Conduct is all about how you are expected to act in school. It describes what you should and should not do in school and what happens if you do not follow the rules. We believe that a safe and secure environment is a requisite for teaching and learning. One of our major system priorities is ensuring student and employee safety and security. The Code book also address the zero tolerance policy on violent crimes adopted by the State Board of Education and our school board.

The Code of Student Conduct also explains the rights and responsibilities that you and your parents have in school. Please discuss this Code of Student Conduct with your parents. Your signature and that of your parents on the form on the next page indicate that you have received the Code and are aware of the rules.

**EXHIBIT 15-9
NUMBER OF EXTERNAL SUSPENSIONS,
INTERNAL SUSPENSIONS, AND EXPULSIONS
REPORTED FOR BROWARD COUNTY HIGH SCHOOLS**

HIGH SCHOOL	1995-96			1996-97			1997-98		
	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION
Anderson, Boyd	733	449	7	788	377	2	837	377	3
Coconut Creek	518	-	2	656	614	2	552	1182	4
Cooper City	403	137	1	173	693	1	222	125	1
Coral Springs	513	114	-	311	79	1	413	135	4
Deerfield Beach	751	516	1	893	453	-	1336	396	-
Dillard	573	695	-	444	445	3	585	357	1
Ely	513	258	3	728	-	3	506	-	-
Flanagan, Charles W.	-	-	-	433	631	7	480	1193	8
Fort Lauderdale	285	-	3	263	447	-	521	584	1
Hallandale	222	1181	3	353	584	1	500	1013	-
Hollywood Hills	541	2554	2	579	2458	2	709	119	1
McArthur	420	860	3	568	775	2	496	555	4
Miramar	754	461	1	558	553	3	608	647	3
Northeast	528	122	-	420	-	-	432	-	-
Nova	372	602	1	291	1254	-	273	1152	1
Piper	805	1827	1	269	376	-	241	93	-
Plantation	386	1403	3	383	1870	2	423	2653	5
South Broward	337	144	-	388	474	-	435	755	1
South Plantation	423	1078	1	559	1464	-	494	1267	-
Stoneman Douglas	1122	212	3	780	316	4	673	322	3
Stranahan	451	1626	2	811	2148	2	711	2316	1
Taravella, J.P.	316	558	3	397	676	1	397	649	1
Western	473	845	-	213	117	1	520	344	2
TOTAL	11,439	15,642	67	11,258	16,804	66	12,364	16,234	65

Source: Broward County School District, Special Investigative Unit, 1998.

**EXHIBIT 15-10
NUMBER OF EXTERNAL SUSPENSIONS,
INTERNAL SUSPENSIONS, AND EXPULSIONS
REPORTED FOR BROWARD COUNTY MIDDLE SCHOOLS**

MIDDLE SCHOOL	1995-96			1996-97			1997-98		
	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION
Apollo	564	327	-	491	467	-	552	716	1
Attucks	305	-	2	678	-	1	454	1	1
Bair	368	595	1	215	1042	-	272	1122	-
Coral Springs	513	489	3	311	525	4	413	510	3
Crystal Lake Community	1729	969	1	976	1773	2	1024	1	-
Dandy, William	942	401	3	1423	1048	-	1014	1191	1
Deerfield Beach	565	1111	2	425	480	-	872	-	2
Driftwood	285	-	7	257	31	1	283	-	1
Forest Glen	230	1382	7	12	329	-	584	734	5
Indian Ridge	25	335	-	146	741	2	159	1073	5
Lauderdale Lakes	860	561	1	537	582	1	518	417	-
Lauderhill	871	744	3	948	363	-	1140	28	-
Margate	837	775	6	473	875	6	356	227	3
McNicol	624	-	2	720	129	2	475	358	-
New River	297	891	1	827	706	2	920	614	8
Nova	193	4	-	279	128	3	112	193	-
Olsen	557	13	-	666	-	2	445	-	11
Parkway	272	-	-	378	124	-	398	447	3
Perry, Henry D.	479	365	-	801	252	4	529	1	1
Pines	383	367	1	307	506	-	300	832	-
Pioneer	337	8	1	284	-	1	251	1014	6
Plantation	100	90	9	183	149	-	100	99	-
Pompano Beach	332	1434	3	140	347	1	217	673	2
Ramblewood	183	-	-	245	-	-	220	-	-
Rickards	536	402	1	318	416	-	456	435	1
Rogers	384	862	-	-	-	-	-	-	-
Sawgrass	-	-	-	121	-	6	74	-	3
Seminole	410	659	-	446	588	3	425	701	1
Silver Lakes	425	477	1	373	530	-	278	618	4
Silver Trail	43	-	-	204	-	-	79	41	1
Sunrise	571	877	-	611	64	1	698	-	-
Tequesta Trace	266	-	-	59	342	-	104	561	2
Westpine	352	414	-	534	514	2	408	747	2
Young, Walter C. Resource Center	339	125	-	172	1	-	142	-	1
TOTAL	15,477	14,677	55	14,560	13,052	44	14,272	13,354	68

Source: Broward County School District, Special Investigative Unit, 1998.

**EXHIBIT 15-11
NUMBER OF EXTERNAL SUSPENSIONS,
INTERNAL SUSPENSIONS, AND EXPULSIONS
REPORTED FOR BROWARD COUNTY ELEMENTARY SCHOOLS**

ELEMENTARY SCHOOL	1995-96			1996-97			1997-98		
	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION
Atlantic West	-	-	-	-	-	-	1	1	-
Banyan	2	-	-	4	-	-	8	2	-
Bayview	8	-	-	7	1	-	-	-	-
Bennett	6	-	-	23	-	-	28	-	-
Bethune	27	-	-	-	-	-	26	-	-
Boulevard	3	-	-	-	-	-	-	-	-
Broadview	3	-	-	13	-	-	4	-	-
Broward Estates	-	-	-	-	-	-	-	-	-
Castle Hill	54	-	-	49	-	-	90	-	-
Castle Hill Annex	-	-	-	28	-	-	20	-	-
Central Park	-	-	-	1	1	-	-	2	-
Chapel Trail	1	-	-	1	-	-	-	-	-
Coconut Creek	1	-	-	9	2	-	2	-	-
Colbert	5	2	-	3	-	-	2	-	-
Collins	-	-	-	1	-	-	11	3	-
Cooper City	-	-	-	-	-	-	1	-	-
Coral Park	-	-	-	1	-	-	-	-	-
Coral Springs	9	-	-	8	-	-	3	-	-
Country Hills	-	-	-	-	-	-	-	-	-
Country Isles	1	-	-	5	-	-	4	-	-
Cresthaven	19	-	-	31	6	-	19	1	-
Croissant Park	1	-	-	4	-	-	15	8	-
Cypress	1	-	-	20	-	-	9	2	-
Dania	6	-	-	10	-	-	18	-	-
Davie	2	7	-	4	6	-	10	5	-
Deerfield Beach	15	5	-	3	2	-	-	-	-
Deerfield Park	-	-	-	9	6	-	11	3	-
Dillard	5	2	-	88	-	-	53	-	-
Drew, Charles	33	50	-	16	3	-	74	389	-
Driftwood	2	-	-	6	-	-	2	-	-
Eagle Point	-	-	-	-	-	-	-	-	-
Eagle Ridge	6	-	-	5	1	-	9	-	-
Edgewood	25	-	-	-	-	-	-	-	-

**EXHIBIT 15-11 (Continued)
NUMBER OF EXTERNAL SUSPENSIONS,
INTERNAL SUSPENSIONS, AND EXPULSIONS
REPORTED FOR BROWARD COUNTY ELEMENTARY SCHOOLS**

ELEMENTARY SCHOOL	1995-96			1996-97			1997-98		
	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION
Embassy Creek	1	-	-	-	-	-	-	-	-
Fairway	17	-	-	22	-	-	34	-	-
Flamingo	10	6	-	4	43	-	9	13	-
Floranada	4	-	-	15	16	-	15	-	-
Forest Hills	1	-	-	1	3	-	8	-	-
Foster, Stephen	1	2	-	-	1	-	-	-	-
Griffin	-	-	-	-	-	-	-	2	-
Hallandale	-	-	-	1	-	-	6	-	-
Harbordale	-	-	-	7	4	-	8	-	-
Hawkes Bluff	-	-	-	-	-	-	-	-	-
Hollywood Central	8	-	-	4	-	-	21	-	-
Hollywood Hills	6	-	-	3	-	-	7	-	-
Hollywood Park	-	1	-	-	-	-	-	-	-
Horizon	7	1	-	20	1	-	13	7	-
Hunt, James S.	5	-	-	3	-	-	5	-	-
Indian Trace	-	-	-	1	-	-	-	-	-
King, Martin Luther	5	-	-	15	-	-	35	1	-
Lake Forest	2	-	-	8	-	-	9	2	-
Larkdale	112	88	-	80	-	-	25	-	-
Lauderdale Manors	22	-	-	28	-	-	42	-	-
Lauderhill, P.T.	54	1	-	33	49	-	64	60	-
Lloyd Estates	4	9	-	26	9	-	-	1	-
Maplewood	-	-	-	-	-	-	-	-	-
Margate	43	28	-	6	63	-	2	-	-
Markham, Robert C	9	-	-	2	-	-	1	1	-
Marshall, Thurgood	38	-	-	49	1	-	45	-	-
McNab	1	-	-	2	2	-	5	-	-
Meadowbrook	10	24	-	17	30	-	6	8	-
Miramar	10	1	-	61	1	-	55	1	-
Mirror Lake	13	-	-	4	-	-	11	-	-
Morrow	4	-	-	15	1	-	9	1	-
Nob Hill	-	1	-	-	3	-	-	2	-
Norcrest	-	-	-	-	1	-	-	-	-

**EXHIBIT 15-11 (Continued)
NUMBER OF EXTERNAL SUSPENSIONS,
INTERNAL SUSPENSIONS, AND EXPULSIONS
REPORTED FOR BROWARD COUNTY ELEMENTARY SCHOOLS**

ELEMENTARY SCHOOL	1995-96			1996-97			1997-98		
	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION
N. Andrews Grd.	-	-	-	-	-	-	-	-	-
North Fork	40	-	-	43	-	-	14	-	-
N. Lauderdale	27	-	-	80	33	-	46	10	-
North Side	16	-	-	14	-	-	11	-	-
Nova Eisenhower	1	-	-	11	-	-	17	-	-
Nova Forman	6	5	-	11	1	-	17	2	-
Oakland Park	-	1	-	11	-	-	4	1	-
Oakridge	11	-	-	5	-	-	6	-	-
Orange Brook	10	-	-	11	-	-	6	-	-
Oriole	37	-	-	15	1	-	27	-	-
Palm Cove	-	-	-	-	1	-	-	-	-
Palmview	20	-	-	36	1	-	25	-	-
Park Ridge	30	-	-	31	-	-	12	-	-
Park Springs	3	-	-	-	-	-	2	-	-
Pasadena Lakes	3	-	-	6	18	-	16	20	-
Pembroke Lakes	-	-	-	-	-	-	-	-	-
Pembroke Pines	-	4	-	3	-	-	5	-	-
Perry, Annabel C	2	4	-	11	-	-	2	-	-
Peters	16	14	-	15	12	-	6	10	-
Pine Lakes	6	9	-	5	5	-	2	-	-
Pinewood	25	-	-	30	-	-	29	-	-
Plantation	35	20	-	32	127	-	28	77	-
Plantation Park	4	1	-	5	-	-	-	-	-
Pompano Beach	1	-	-	4	-	-	3	-	-
Quiet Waters	9	-	-	5	-	-	-	-	-
Ramble Wood	-	-	-	1	3	-	-	-	-
River Glades	-	-	-	-	-	-	-	-	-
Riverland	6	1	-	32	-	-	20	2	-
Riverside	-	-	-	1	-	-	-	1	-
Rock Island	6	-	-	51	127	-	35	7	-
Royal Palm	37	32	-	23	10	-	25	1	-
Sanders Park	17	2	-	4	-	-	13	-	-
Sandpiper	-	13	-	2	11	-	1	10	-

**EXHIBIT 15-11 (Continued)
NUMBER OF EXTERNAL SUSPENSIONS,
INTERNAL SUSPENSIONS, AND EXPULSIONS
REPORTED FOR BROWARD COUNTY ELEMENTARY SCHOOLS**

ELEMENTARY SCHOOL	1995-96			1996-97			1997-98		
	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION
Sawgrass	6	-	-	3	-	-	3	1	-
Sea Castle	2	-	-	19	-	-	14	-	-
Sheridan Hills	6	-	-	10	-	-	4	-	-
Sheridan Park	1	-	-	2	-	-	-	-	-
Silver Palms	-	-	-	1	-	-	3	-	-
Silver Ridge	12	1	-	-	-	-	3	3	-
Stirling	2	-	-	11	-	-	20	-	-
Sunland	3	-	-	46	-	-	44	-	-
Sunshine	-	1	-	4	-	-	5	-	-
Tamarac	5	-	-	3	-	-	4	-	-
Tedder	52	11	-	8	-	-	17	-	-
Tradewinds	-	-	-	3	-	-	4	-	-
Tropical	6	-	-	9	-	-	3	-	-
Village	24	6	-	8	3	-	8	2	-
Walker	37	7	-	74	95	-	30	1	-
Watkins	3	1	-	-	-	-	-	-	-
Welleby	9	-	-	4	-	-	12	-	-
West Hollywood	21	137	-	46	157	-	9	133	-
Westchester	-	-	-	2	-	-	-	1	-
Westwood Heights	36	72	-	18	254	-	49	47	-
Wilton Manors	3	1	-	13	3	-	10	109	-
Winston Park	8	1	-	8	1	-	3	-	-
Young, Virginia	5	2	-	17	1	-	2	-	-
TOTALS	1,564	574	-	1,682	1,129	-	1,474	953	-

Source: Broward County School District, Special Investigative Unit, 1998.

**EXHIBIT 15-12
NUMBER OF EXTERNAL SUSPENSIONS,
INTERNAL SUSPENSIONS, AND EXPULSIONS
REPORTED FOR BROWARD COUNTY
VOCATIONAL/ALTERNATIVE SCHOOLS AND CENTERS**

SCHOOLS / CENTERS	1995-96			1996-97			1997-98		
	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION	EXTERNAL SUSPENSION	INTERNAL SUSPENSION	EXTERNAL EXPULSION
Bright Horizons Center	1	-	-	2	-	-	2	-	-
Wingate Oaks Center	-	-	-	-	-	-	5	-	-
Cypress Run Alt.	119	-	1	206	6	2	195	-	1
Pine Ridge Alt.	88	-	0	50	4	1	98	-	1
South Area Alt.	157	176	-	29	-	-	180	6	1
Atlantic Voc.	3	-	-	3	-	-	1	-	-
McFatter, William T.	2	-	-	-	-	-	-	-	-
Sheridan Voc.	4	-	-	20	-	-	11	-	-
Hallandale Adult	170	-	3	200	-	2	240	-	-
Pompano Multi-Purpose	120	-	-	74	-	-	111	-	7
Whiddon-Rogers Education	-	-	1	288	-	-	190	-	1
Cross Creek	37	6	-	44	1	-	70	-	-
Sunset School	-	-	-	-	-	-	-	-	-
Whispering Pines	4	4	-	-	-	-	-	-	-
The Quest Center	-	-	-	-	-	-	-	-	-
TOTALS	1,075	186	5	916	11	5	1,103	6	11

Source: Broward County School District, Special Investigative Unit, 1998.

The Secondary Code of Student Conduct includes a form which is a joint parent/student acknowledgement of the provisions of the code of conduct. It requires the signature of both the parent/guardian and the student and states:

*Parents need to become involved in the education of their children and have the responsibility to provide the school with a current emergency contact person and/or telephone numbers. They also have the responsibility to notify the school of anything (such as medical information) which may affect their child's ability to learn, attend school regularly, or to take part in school activities. Parent(s) should take special notice of the **Attendance** and **Tardy** sections of this Code as well as the **Suspension and Expulsion** provisions which are in accordance with School Board Policy.*

The Secondary Code of Student Conduct includes the following provisions:

Students are not allowed to conduct, recruit, or participate on campus in a formal or informal ongoing organization, association, or group of three or more persons who are gang related; have members or associates who individually or collectively engage in or have engaged in a pattern of youth and street gang activity; and have a common name or common identifying clothing, jewelry, buttons, colors, signs, symbols, or markings with the intent to threaten and/or present a danger to public safety.

The Elementary and Secondary Code of Student Conduct also includes provisions for action that must be taken if there are serious problems involving weapons, drugs (including alcohol), or mood altering substances, steroids, and criminal acts. Certain actions are to be taken as a result of these violations as stated in Board Policy 5006. All violations involve the following steps:

- principal involvement;
- immediate parent contact;
- suspension from school grounds, all classes, and all school activities; and
- referral to Special Investigative Unit and police.

Further, School Board Policy 5006 states the following:

Students found to have committed the following offenses on school property, school-sponsored transportation, or during a school-sponsored activity shall receive the most severe consequences provided for by School Board policy, mandatory expulsion:

- *homicide or attempted homicide (murder, manslaughter);*
- *sexual battery or attempted sexual battery;*
- *armed robbery or attempted armed robbery;*

- *robbery or attempted robbery;*
- *aggravated battery;*
- *battery or aggravated battery on a teacher or other school personnel;*
- *kidnapping or abduction;*
- *extortion;*
- *arson or attempted arson;*
- *possession, use, or sale of any firearm; or*
- *possession, use, or sale of any explosive device*

Suspension and expulsion in elementary and secondary schools are when a student:

- *uses any weapon, such as a knife, razor blades, brass knuckles, ice picks, dirks, or other pointed or sharp instruments;*
- *distributes or transmits drugs (including alcohol), mood-altering substances, or steroids, whether or not there is an exchange of money;*
- *commits a second or third offense for the use, possession, or being under the influence of drugs/ alcohol or other mood-altering substances. If he or she enters and completes a state-certified drug/alcohol rehabilitation program, the expulsion may be held in abeyance;*
- *is found to be in possession of any drugs or controlled substances which constitutes a felony under Florida statutes;*
- *commits or attempts to commit sexual battery, i.e. rape; and*
- *starts a fire or attempts to commit arson (willful and malicious burning or attempt to burn).*

Under the Elementary and Secondary Code of Student Conduct, suspension is mandatory with possible expulsion, when a student:

- *possesses, displays, transmits, or handles a weapon other than a firearm, such as a knife, razor blades, ice picks, brass knuckles, stars, other sharp and pointed instruments, and toys that resemble weapons, including water guns, dart guns, etc.;*
- *possesses, uses, or is under the influence of drugs, including alcohol and other mood-altering substances, for the **first** time. In this case, a 10 day suspension is **mandatory**; however, up to seven of the ten*

days may be waived if the student agrees to attend a counseling program authorized by the principal;

- *uses any article or substance as a weapon, including, but not limited to, rock, pen, pencil, or chemicals;*
- *uses any substance to attempt to harm or burn another person;*
- *abuses any staff member, including but not limited to, verbal abuse, threatened or actual physical harm or destruction of personal property. Students shall be suspended when they threaten or direct profanity at any staff member in such a manner as to substantially disrupt the educational process consistent with School Board Policy 5006 III;*
- *consistently commits serious breaches of conduct; and*
- *is charged by a proper prosecuting attorney with a felony, or with a delinquent act which would be a felony if committed by an adult, if that incident is shown in an administrative hearing to have an adverse impact on the educational program, discipline, or welfare in the school in which the student is enrolled, shall be suspended from the regular school program and placed in a disciplinary program or expelled.*

All students recommended for expulsion are assigned to a disciplinary program without student or parent consent for a period of time commencing with the end of the ten (10) day suspension and concluding with the Board's final decision on the recommendation to expel the student.

FINDING

The Broward County School District has produced an Elementary and Secondary Code of Student Conduct that provides extensive and detailed information for parents regarding school attendance, suspension and expulsion policies, and other requirements. The Code of Conduct also requires parents and students to jointly sign an agreement stating that the student will abide by the provisions of the code.

The Code of Conduct requires parents and students to jointly sign an agreement certifying that they have read and understand the rules and provisions of the Code of Student Conduct. The parent/student acknowledgement form states that by signing the agreement, parents and students certify that they have received the Code, have read and know the rules, and agree to be responsible for their child's actions if the rules are broken.

COMMENDATION

The Broward County School District is commended for producing a comprehensive Code of Student Conduct that presents detailed information for parents on student attendance, discipline, suspension, and expulsion policies in a clear, concise, and useful manner.

FINDING

Exhibits 15-9, 15-10, 15-11, and 15-12 present information on the number of external and internal suspensions and expulsions in Broward County high schools, middle schools, elementary schools, and vocational/alternative schools and centers for 1995-96, 1996-97, and 1997-98. The data show that, particularly at the high school and middle school level, the use of internal suspension as an alternative form of punishment has steadily increased. The exhibit shows that at the middle school level, internal suspension is used almost as often as external suspension as a form of punishment.

External suspension is defined as students being physically removed and sent home from school for the entire length of a suspension period, which averages ten days. Internal suspension is where students remain in school during the suspension period, but are isolated at a location on school property or at a nearby community center or other facility, which has been designated for this purpose. The student is supervised by a teacher or a staff member and must keep up with his or her regular class work assignments.

The school district has a very active internal suspension program which operates through a number of designated sites which are strategically located geographically throughout the county. The internal suspension program has a number of advantages over the traditional external suspension program. With internal suspension, parents may continue to stay at work knowing their children will be supervised at school. Students learn that suspension does not mean just a vacation away from school. They learn that violating rules means spending time isolated from their friends with extra work to complete. Internal suspension frequently offers a more effective long-term lesson for the student on the consequences of his or her actions.

COMMENDATION

The Broward County School District is commended for implementing internal suspension as an effective alternative discipline program.

FINDING

The Special Investigative Unit (SIU) investigators report that enforcement of the Code of Student Conduct varies significantly from principal to principal across the district. Inconsistent enforcement of a Code of Student of Conduct as found in the Broward County School District, is a problem facing many school districts nationally across the United States.

In Broward, schools have strong communication and good working relationships among principals, School Resource Officers, and security specialists where the code of conduct is consistently enforced. Strengthening student code of conduct enforcement is an issue that was consistently highlighted by SIU personnel, security specialists, SROs, and principals across Broward County. Some school principals strictly enforce the provisions of the Code, while other principals ignore certain types of offenses. Investigators believe that the district has a strong and effective Code of Student Conduct, and that if the code is enforced uniformly throughout the school district, it would serve as an effective deterrent for many different types of student offenses and significantly reduce the problems security specialists, SROs, and investigators frequently face in maintaining order in the schools.

Given the high priority the Broward County School Board places on fostering an atmosphere of order and discipline necessary for effective learning, it is important for school administrators to consistently enforce the Code of Student Conduct throughout the district. The absence of effective and consistent discipline in the school district creates an atmosphere which can lower student achievement, teacher morale, and productivity.

RECOMMENDATION

Recommendation 15-9:

Enforce the disciplinary measures of the Code of Student Conduct consistently and uniformly throughout the Broward County School District.

Broward County school principals should vigorously and consistently enforce the provisions of the Code of Student Conduct throughout the school district, particularly the offenses that require automatic and immediate suspension and expulsion. Such a practice will be effective in assisting security specialists and investigators to reduce incidents of violence and assaults in schools.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|-----------|
| 1. The Superintendent should issue a directive to all associate superintendents, area directors, and school principals requiring full and consistent implementation of the Code of Student Conduct throughout the school district. | May 1999 |
| 2. The Superintendent and area directors should initiate inservice training and seminars for area directors and principals on the proper means of enforcing the Code of Student Conduct. | July 1999 |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

15.3.4 Incident Reporting

CURRENT SITUATION

Under existing district procedures, security specialists and/or principals and assistant principals at Broward County high schools, middle schools, and elementary schools are required to report violations of the Student Code of Conduct (defined as incidents) to the Special Investigative Unit as soon as they occur. The investigator assigned to the geographic area will then file the necessary paperwork to initiate student disciplinary action such as suspension or expulsion. In taking statements from the various parties involved in the case, the investigator must frequently counsel students and their families and work with the student to prevent the problem from reoccurring.

Exhibit 15-13 shows the number of incidents reported for Broward County high schools. The exhibit shows that at the high school level, the most common types of incidents reported are:

- arson
- assault
- battery
- disrupting school functions
- fighting
- theft
- vandalism
- weapons

Exhibit 15-14 presents the number of incidents reported for Broward County middle schools. The exhibit shows that at the middle school level, the most common type of incidents reported are:

- arson
- assault
- battery
- disrupting school functions
- theft

Exhibit 15-15 presents the number of incidents reported for Broward County elementary schools. The most common types of incidents reported in elementary schools are:

- assault
- battery
- burglary
- disrupting school functions
- fighting
- theft

Exhibit 15-16 shows the number of incidents reported for Broward County transportation. As can be seen, while 113 incidents were reported in 1995-96, only 21 were reported in 1997-98. The data suggest that incident reporting for school transportation is not consistent and that a number of incidents are unreported.

Exhibit 15-17 presents the number of incidents reported for Broward County school centers. The greatest number of incidents reported were assault, battery, burglary, and theft. Exhibit 15-18 shows the number of incidents reported for Broward County school district offices. Burglary and theft show the highest number of reported incidents at the district offices.

FINDING

Exhibit 15-19 summarizes the total number of critical incidents reports for Broward County high schools, middle schools, elementary schools, and vocational schools/alternative centers. A critical incident is defined as an incident that is reported to another level of law enforcement beyond the security specialist, such as an SIU investigator, an SRO, or a local law enforcement agency.

**EXHIBIT 15-13
NUMBER OF INCIDENTS REPORTED
FOR BROWARD COUNTY HIGH SCHOOLS**

TYPE OF INCIDENT REPORTED	1995-96	1996-97	1997-98
Alcohol	6	18	7
Distribution	1	-	-
Possession	3	8	4
Use	2	10	3
Arson	19	6	1
Assault	32	29	40
Against School Personnel (aggravated)	1	3	2
Against School Personnel (simple)	17	14	27
Against Student (aggravated)	4	9	2
Against Student (simple)	10	3	9
Battery	173	165	128
Against School Personnel (aggravated)	-	4	4
Against School Personnel (simple)	33	36	31
Against Student (aggravated)	20	26	22
Against Student (simple)	120	99	71
Bomb	26	43	23
Device Found	1	2	2
Threat	25	41	21
Burglary	52	59	52
Actual	25	31	32
Attempt	3	2	-
Vehicle	24	26	20
Death	N/A	1	1
Employee	N/A	1	1
Disrupting School Function	62	59	48
Disorderly	39	26	41
Fighting	10	20	5
Other	13	13	2
Drugs	140	118	139
Distribution	N/A	1	3
Possession	107	92	116
Sale	1	3	1
Use	32	22	19
Fighting	84	56	44
Student on Student	84	56	44
Fire	5	5	3
Harassment	8	15	6
Against Personnel	-	3	1
Against Student	8	12	4
Other	-	-	1
Kidnapping	1	3	N/A
Against Student	1	3	4

**EXHIBIT 15-13 (Continued)
NUMBER OF INCIDENTS REPORTED
FOR BROWARD COUNTY HIGH SCHOOLS**

TYPE OF INCIDENT REPORTED	1995-96	1996-97	1997-98
Other Serious Incidents	N/A	N/A	32
Robbery	30	21	12
Armed	1	21	2
Strong Arm	1	-	10
Sex Offense	8	8	10
Student		7	9
Other	8	1	1
Sexual Battery	6	2	N/A
Personnel	1	-	N/A
Student	5	2	N/A
Theft	221	225	186
Private Property	128	101	92
School Property	93	1	94
Tobacco	N/A	N/A	1
Trespass	62	55	34
Former Student	10	37	3
Student from other school	11	13	8
Suspended student	14	13	8
Other	27	5	15
Vandalism	124	100	90
Private Property	6	5	1
School Bus	7	5	9
School Property	111	90	80
Vehicle	98	82	95
Accident	1	24	15
Theft of Accessories	28	1	1
Theft from	13	5	2
Theft of	11	14	17
Vandalism	45	37	60
Weapons	76	45	60
Gun	15	14	7
Knife	43	18	41
Mace	6	1	2
Razor Blade	1	9	2
Toy Gun	4	-	4
Other	7	3	4
TOTAL	1,233	1,125	1,012

Source: Broward County School District, Special Investigative Unit, 1998.

**EXHIBIT 15-14
NUMBER OF INCIDENTS REPORTED
FOR BROWARD COUNTY MIDDLE SCHOOLS**

TYPE OF INCIDENT REPORTED	1995-96	1996-97	1997-98
Alcohol	11	3	7
Distribution	1	-	-
Possession	8	3	7
Use	2	-	-
Arson	12	3	10
Assault	33	36	40
Against School Personnel (aggravated)	18	4	4
Against School Personnel (simple)	8	23	22
Against Student (aggravated)	6	3	7
Against Student (simple)	1	6	7
Battery	197	179	143
Against School Personnel (aggravated)	7	6	N/A
Against School Personnel (simple)	49	50	56
Against Student (aggravated)	29	26	15
Against Student (simple)	112	97	72
Bomb	11	14	13
Device Found	2	14	2
Threat	9	-	11
Burglary	18	31	32
Actual	15	21	26
Attempt	1	1	3
Vehicle	2	9	3
Death	N/A	1	N/A
Employee	N/A	-	N/A
Student	N/A	1	
Disrupting School Function	103	80	76
Disorderly	86	63	70
Fighting	4	10	4
Other	13	7	2
Drugs	86	73	51
Distribution	-	1	4
Possession	60	64	39
Sale	6	3	2
Use	19	5	6
Fighting	61	18	14
Student on Student	61	18	14
Fire	15	4	5
Harassment	10	15	10
Against Personnel	6	3	2
Against Student	4	12	8
Other	-	-	-
Kidnapping	2	2	N/A
Against Student	2	2	N/A

**EXHIBIT 15-14 (Continued)
NUMBER OF INCIDENTS REPORTED
FOR BROWARD COUNTY MIDDLE SCHOOLS**

TYPE OF INCIDENT REPORTED	1995-96	1996-97	1997-98
Other Serious Incidents	N/A	23	44
Against Student	2	2	N/A
Robbery	18	17	14
Armed	18	2	-
Strong Arm	-	15	14
Sex Offense	22	11	8
Other	3	1	-
Student	19	10	8
Sexual Battery	9	2	2
Personnel	9	-	-
Student	-	2	2
Theft	73	132	107
Private Property	44	78	50
School Property	29	54	57
Tobacco	N/A	N/A	N/A
Trespass	34	44	43
Former Student	5	3	1
Other	12	9	9
Student from other school	12	17	11
Suspended student	5	15	22
Vandalism	45	61	42
Private Property	-	2	-
School Bus	9	5	9
School Property	36	54	33
Vehicle	35	42	37
Accident	3	6	7
Theft of Accessories	-	1	-
Theft from	4	-	3
Theft of	8	5	5
Vandalism	20	30	22
Weapons	129	86	94
Gun	25	14	7
Knife	65	49	59
Mace	6	4	1
Other	21	5	11
Razor Blade	11	8	13
Toy Gun	-	6	3
TOTAL	924	877	792

Source: Broward County School District, Special Investigative Unit, 1998.

**EXHIBIT 15-15
NUMBER OF INCIDENTS REPORTED
FOR BROWARD COUNTY ELEMENTARY SCHOOLS**

TYPE OF INCIDENT REPORTED	1995-96	1996-97	1997-98
Alcohol	N/A	N/A	1
Distribution	N/A	N/A	-
Possession	N/A	N/A	-
Use	N/A	N/A	1
Arson	8	4	9
Assault	61	40	48
Against School Personnel (aggravated)	3	1	3
Against School Personnel (simple)	31	25	17
Against Student (aggravated)	4	6	7
Against Student (simple)	22	8	21
Other	1	-	-
Battery	150	95	92
Against School Personnel (aggravated)	1	-	2
Against School Personnel (simple)	54	31	36
Against Student (aggravated)	8	6	6
Against Student (simple)	87	58	48
Bomb	3	3	7
Device Found	1	1	-
Threat	2	2	7
Burglary	115	105	117
Actual	80	72	90
Attempt	13	6	21
Vehicle	21	27	6
School Property	1	-	-
Demonstration	1	N/A	N/A
Sit-In	1	N/A	N/A
Death	N/A	N/A	N/A
Employee	N/A	N/A	N/A
Student	N/A	N/A	N/A
Disrupting School Function	165	72	75
Disorderly	93	53	68
Fighting	3	1	1
Other	69	18	6
Drugs	7	5	3
Distribution	-	-	-
Possession	7	2	3
Sale	-	-	-
Use	-	-	-
Other		3	-
Fighting	55	20	18
Student on Student	55	20	18
Fire	5	2	3

**EXHIBIT 15-15 (Continued)
NUMBER OF INCIDENTS REPORTED
FOR BROWARD COUNTY ELEMENTARY SCHOOLS**

TYPE OF INCIDENT REPORTED	1995-96	1996-97	1997-98
Harassment	12	14	11
Against Personnel	6	3	1
Against Student	6	9	8
Other	-	2	2
Kidnapping	7	4	1
Against Student	7	4	1
Other Serious Incidents	N/A	35	56
Robbery	3	3	1
Armed	-	-	-
Strong Arm	3	2	1
Attempt	-	1	-
Sex Offense	28	23	17
Other	-	4	1
Student	28	19	16
Sexual Battery	3	3	2
Personnel	-	-	1
Student	3	3	1
Theft	195	149	151
Private Property	119	90	1
School Property	76	59	90
Tobacco	N/A	N/A	60
Trespass	37	34	26
Former Student	-	-	-
Other	29	27	25
Student from other school	7	7	1
Suspended student	1	-	-
Vandalism	192	165	125
Private Property	7	2	2
School Bus	4	1	-
School Property	181	162	123
Vehicle	67	98	79
Accident	19	26	25
Theft of Accessories	1	-	-
Theft from	13	3	4
Theft of	7	22	16
Vandalism	27	47	34
Weapons	76	51	48
Gun	12	2	2
Knife	45	33	28
Mace	-	2	-
Other	14	9	9
Razor Blade	5	3	3
Toy Gun	-	2	6
TOTAL	1190	925	890

Source: Broward County School District, Special Investigative Unit, 1998.

**EXHIBIT 15-16
NUMBER OF INCIDENTS REPORTED FOR
BROWARD COUNTY SCHOOLS TRANSPORTATION**

TYPE OF INCIDENT REPORTED	1995-96	1996-97	1997-98
Assault	8	N/A	1
Against School Personnel (simple)	8	-	1
Battery	14	2	4
Against School Personnel (simple)	6	1	2
Against Student (aggravated)	2	-	1
Against Student (simple)	6	1	1
Disrupting School Function	34	N/A	3
Disorderly	31	-	3
Fighting	1	-	-
Other	2	-	-
Bomb	N/A	1	1
Device Found	N/A	1	-
Threat	N/A	-	1
Burglary	N/A	N/A	N/A
Actual	N/A	-	-
Vehicle	N/A	-	-
Drugs	3	N/A	N/A
Use	3	-	-
Other	-	-	-
Fighting	9	N/A	N/A
Student on Student	9	-	-
Fire	1	N/A	N/A
Harassment	3	N/A	2
Against Personnel	2	-	1
Against Student	1	-	1
Kidnapping	1	N/A	N/A
Against Student	1	-	-
Robbery	1	N/A	N/A
Strong Arm	1	-	-
Sex Offense	4	N/A	N/A
Other	2	-	-
Student	2	-	-
Other Serious Incidents		N/A	3
Theft	3	N/A	2
Private Property	2	-	1
School Property	1	-	1
Vandalism	28	N/A	1
Private Property	1	-	1
School Property	27	-	-
Vehicle	2	N/A	4
Accident	1	-	-
Vandalism	1	-	4
Weapons	2	N/A	N/A
Knife	1	-	-
Other	1	-	-
TOTAL	113	3	21

Source: Broward County School District, Special Investigative Unit, 1998.

**EXHIBIT 15-17
NUMBER OF INCIDENTS REPORTED
FOR BROWARD COUNTY SCHOOL CENTERS**

TYPE OF INCIDENT REPORTED	1995-96	1996-97	1997-98
Alcohol	3	3	2
Possession	1	1	2
Use	2	2	-
Arson	1	-	-
Assault	19	18	27
Against School Personnel (aggravated)	3	2	5
Against School Personnel (simple)	9	9	18
Against Student (aggravated)	3	2	3
Against Student (simple)	4	5	1
Other	-	-	-
Battery	50	71	73
Against School Personnel (aggravated)	1	4	4
Against School Personnel (simple)	23	26	32
Against Student (aggravated)	3	8	4
Against Student (simple)	23	33	33
Bomb	2	1	5
Device Found	-	-	-
Threat	2	1	5
Burglary	14	27	16
Actual	5	13	7
Attempt	1	1	2
Vehicle	8	12	7
School Bus	-	1	-
Death	N/A	1	1
Employee	N/A	-	-
Student	N/A	1	1
Disrupting School Function	60	55	70
Disorderly	48	43	62
Fighting	8	2	5
Other	4	10	3
Drugs	27	39	30
Possession	18	30	22
Sale	2	1	-
Use	6	6	8
Other	1	2	-
Fighting	11	18	6
Student on Student	11	18	6
Fire	1	1	2
Gang Activity	N/A	1	N/A
Disturbance	N/A	1	N/A
Harassment	4	4	N/A
Against Personnel	2	1	N/A
Against Student	2	2	N/A
Other	-	1	N/A
Kidnapping	1	N/A	N/A
Against Student	1	N/A	N/A
Other Serious Incidents			17

**EXHIBIT 15-17 (Continued)
NUMBER OF INCIDENTS REPORTED
FOR BROWARD COUNTY SCHOOL CENTERS**

TYPE OF INCIDENT REPORTED	1995-96	1996-97	1997-98
Robbery	7	1	N/A
Armed	-	-	N/A
Strong Arm	7	1	N/A
Attempt	-	-	N/A
Sex Offense	3	4	2
Other	-	2	1
Student	3	2	1
Sexual Battery	N/A	1	2
Personnel	N/A	-	1
Student	N/A	1	1
Theft	57	75	59
Private Property	24	37	16
School Property	33	37	43
School Bus	-	1	-
Tobacco	N/A	N/A	3
Trespass	13	18	13
Former Student	1	2	1
Other	6	10	8
Student from other school	6	3	4
Suspended student	-	3	-
Vandalism	23	13	25
Private Property	2	-	-
School Bus	4	2	2
School Property	17	11	23
Vehicle	31	54	44
Accident	7	14	15
Theft of Accessories	1	1	-
Theft from	3	11	-
Theft of	19	13	14
Fire	-	-	1
Vandalism	11	15	13
Weapons	24	20	16
Gun	3	2	1
Knife	12	5	13
Mace	5	3	-
Other	1	2	1
Razor Blade	3	6	1
Toy Gun	-	3	-
TOTAL	351	430	413

Source: Broward County School District, Special Investigative Unit, 1998.

**EXHIBIT 15-18
NUMBER OF INCIDENTS REPORTED
FOR BROWARD COUNTY SCHOOL DISTRICT OFFICES**

TYPE OF INCIDENT REPORTED	1995-96	1996-97	1997-98
Assault	N/A	N/A	1
Against School Personnel (simple)			1
Bomb	N/A	1	N/A
Device Found	N/A	-	N/A
Threat	N/A	1	N/A
Burglary	3	19	8
Actual	-	14	1
Vehicle	3	5	7
Drugs	1	N/A	N/A
Other	1	N/A	N/A
Harassment	N/A	2	N/A
Against Personnel	N/A	2	N/A
Other Serious Incidents	N/A	1	1
Theft	22	16	21
Private Property	6	1	3
School Property	16	15	18
Trespass	N/A	1	N/A
Other	N/A	1	N/A
Vandalism	5	10	3
Private Property	2	1	-
School Property	3	9	3
Vehicle	3	5	17
Accident	-	1	5
Theft from	-	1	1
Theft of	-	1	5
Vandalism	3	2	6
TOTAL	34	54	51

Source: Broward County School District, Special Investigative Unit, 1998.

**EXHIBIT 15-19
TOTAL NUMBER OF CRITICAL INCIDENTS REPORTED
FOR BROWARD COUNTY SCHOOLS**

SCHOOL	1995-96	1996-97	1997-98
High Schools (23 high schools)	876	1,151	972
Middle Schools (34 middle schools)	621	1,039	835
Elementary Schools (122 elementary schools)	782	965	921
Vocational Schools and Alternative Centers (16 centers)	368	417	464

Source: Broward County School District, Special Investigative Unit, 1998.

The data show that, in most cases, Broward County high schools reported a greater number of total incidents than district elementary schools. SIU investigators and other school law enforcement personnel consider elementary schools to be entirely separate environments with different types of security risks than high schools and middle schools. While all high schools and middle schools in Broward County have certain types of security problems in common, all elementary schools in the district face similar types of security concerns. For example, at the high school and middle school level, the primary security focus is on controlling student behavior through preventing assaults, violence, and eliminating weapons and drug abuse on campus. At the elementary school level, the security focus is primarily on protecting the school campus from unwanted intruders and early education efforts to deter children from joining gangs or becoming involved in drugs.

All Broward County schools are required to follow the same incident reporting procedure. According to procedure, the security specialist is required to file a report with the SIU once an incident occurs on campus, and the SRO logs the incident in the monthly campus activity report form that is sent to the police department. Once the incident information is received at the SIU office, the SIU automatically forward the incident data to the principal's area administrator. The security specialist reports directly to the school principal, and must obtain the principal's signature on the incident report form before the report can be transmitted to SIU. In smaller elementary schools, which have no security specialists, the principal or an assistant principal files the incident report form directly. As the senior administrator on campus, the principal makes the final decision on whether to file an incident report for various occurrences with SIU. The principal has the available flexibility to avoid reporting an incident if he or she chooses to do so.

SIU investigators, SROs, and security specialists report that Broward County school principals do not consistently and uniformly report all incidents that occur on school campuses. MGT consultants reviewed SIU critical incident report data for each Broward County school and found that there were inconsistencies in the number of incidents reported for each school. Some middle schools, for example, had an excessively high

number of incidents reported, and other schools reported very few. SIU has no method of analysis in place for explaining or determining variations or discrepancies in the number of incidents reported at each school from year to year. Based on the differences in the number of incidents reported at schools from year to year, it is reasonable to assume that some principals or administrators may not be reporting the total number of incidents that occur in the course of the school year.

Some Broward County school campuses show differences in the number of incidents that are reported by security specialists and the number of incidents reported by SROs. MGT found that one of the major areas of difference between SIU incident reports and SRO incidents logs is that SROs report all types of fighting that occur on campus, including minor skirmishes, such as pushing and shoving, while SIU reports usually involve only cases of severe fighting defined as assault and battery. In addition, SRO logs sometimes include incidents that happened in the neighborhood surrounding the school campus.

Over the last three years, the Superintendent and SIU staff determined that there are a number of significant differences in the way schools and local law enforcement agencies report critical incidents. Law enforcement agency reports, for example, include incidents which occur on campus or in areas surrounding the school after school hours when buildings are empty and students are not involved. As a result, the Superintendent has asked principals and staff to work collaboratively with law enforcement officers to arrive at a mutually agreeable system of logging incidents.

In 1997, the Superintendent issued a memorandum to area directors and area superintendents requiring principals to work more closely with SROs at their schools to ensure that the number of SIU incident reports at the school are consistent with those submitted by SROs to area police departments. Nonetheless, SIU investigators report that it is still common for principals and administrators throughout the district not to report all incidents that occur on school grounds. In such cases, the principal will ask the school security specialist or SRO to handle the incident, but not to file a report with SIU. The major reason for this practice is that some principals believe reporting a large number of incidents occurring at their schools will reflect poorly on their leadership and adversely affect opportunities for advancement and promotion. In other examples, some principals simply do not want all incidents reported because it would create negative comments and reactions from some parents.

MGT visited school facilities throughout Broward County, conducted surveys, and interviews with Broward County SIU investigators, SROs, security specialists, principals, and administrators, and used information and statistical survey data supplied by SIU staff and SROs. We found that SIU investigators, SROs, security specialists, and school administrators are very concerned over the potential dangers and risks that may emerge when a number of serious incidents go unreported over a long period. If major problems of assault and battery, weapons, and drug possession go unreported or undetected over a long time, there is very serious risk that an unexpected threat to life and property may emerge in a school facility. The compilation of accurate data on security violations is an important part of identifying areas of potential security concern to protect life and property.

RECOMMENDATION

Recommendation 15-10:

Require the reporting of all incidents (through the immediate notification incident report form) to SIU as soon as they occur and establish a method of analysis to evaluate the number of critical incidents reported to SIU annually at each school to ensure that they are consistent with incident reports filed by SROs with area police departments.

The Superintendent should work with area directors to require principals to provide immediate notification to SIU of all incidents at their schools. This practice is essential for SIU to accurately determine the type and patterns of certain types of security problems across the school district. The SIU should develop a method of analysis to explain discrepancies and variations in the number of incidents reported at each school from year to year. School principals should be held accountable during their annual evaluations for ensuring that the number of incidents reported at each school are consistent with those filed with area police departments. Area directors should hold principals accountable.

IMPLEMENTATION STRATEGIES AND TIMELINE

1. The Superintendent should issue a memorandum to all area directors and principals which underscores the importance of the policy requiring all incidents or violations of the Student Code of Conduct to be reported to SIU as soon as they occur. May 1999

2. SIU personnel should work with SROs to develop a method of analysis to evaluate the number of critical incidents reported annually at each school. The method of analysis should ensure that the number of incidents reported to SIU is consistent with SRO incident reports to area police departments. The analysis should also explain any discrepancies or differences in reporting at each school from year to year. June 1999

3. The Superintendent should incorporate the accurate reporting of incidents as a component of each school principal's annual job evaluation. July 1999

FISCAL IMPACT

There is no cost associated with this recommendation. This recommendation can be implemented with existing resources.

15.3.5 Campus Security Threat Assessments

CURRENT SITUATION

Traditionally, most school safety actions in the southeastern United States have involved installing metal detectors, surrounding schools with fences to create safe zones and creating alternative education programs for the violent or disruptive students. Recent actions, such as those in Kentucky and North Carolina, call for a more comprehensive approach that involves awareness, prevention, and intervention, and recognizes school violence as part of a community problem requiring community involvement.

The Southern Regional Education Board (SREB) publication *FOCUS on School Safety and Violence Prevention* indicates there is no simple answer. According to most experts in the field, the best action plan is to implement comprehensive policies that make safety a priority and that are well-organized, predictable, and ongoing. Experts also suggest some common elements schools should consider in developing comprehensive school safety policies. These elements include:

- eliminate the philosophy that “it can’t happen here.” A focus on safety and orderly behavior is appropriate in all schools and at all levels;
- develop clear rules and high expectations for behavior and school performance. These rules should be enforced consistently by all staff in the school;
- adopt clear statements of student and staff responsibilities;
- provide professional development for teachers, staff, and volunteers in all aspects of safety, supervision, classroom management, and crisis intervention;
- adopt procedures for identifying and responding to the needs of at-risk and disruptive students; and
- ensure adequate presence and adult supervision.

The Special Investigative Unit in the Broward County School District presently utilizes a program entitled Crime Prevention Through Environmental Design (CPTED) to conduct security threat assessments of the district schools upon request. Three SIU investigators have been trained at national law enforcement institutes to use the program methodology. Only one investigator works with the program on an ongoing basis at present, because SIU receives very few requests to conduct security threat assessments of school property.

The basic concept of CPTED is that, with proper design and effective use of the physical environment, schools can produce behavior changes that can reduce incidents and fear of crime to improve the quality of life and the learning environment in schools. CPTED utilizes the following principles:

- **Natural surveillance.** The placement of physical features, activities, and people should be made in such a manner to maximize visibility in the lighting of public spaces and walkways at night.
- **Natural access control.** This practice provides physical guidance for people coming and going from a space by the judicious placement of entrances, exits, fencing, landscaping, and lighting.
- **Territorial enforcement.** The use of physical attributes, such as fences, pavement, and landscaping to control access are important.
- **Maintenance.** This process allows for the continued use of a space for its intended purpose, and provides for additional visibility through controlled landscaping.

Effective implementation of the CPTED program offers a number of advantages for school facilities:

- **Property protection.** Increases surveillance of school grounds, equipment areas, student lockers, and other areas. Surveillance devices, such as audio burglar alarms are used during non-school hours, and some parts of the building are limited because of high crime risks. Lockers are kept locked except at the beginning and end of each period and some parking lots are locked throughout the entire school day. Vulnerable areas, such as bicycle compounds, are located in easily observed areas.
- **Improve personal safety.** Increases natural surveillance by putting windows in corridors and classroom doors, promoting self-policing programs, reducing or eliminating causes of congestion in crowded areas, controlling access to various areas, and trying to foster a sense of belonging for the school environment.
- **Education policy.** Involves promoting a sense of responsibility in teachers, students, and administrators, primarily with respect to security problems but with respect to identifying and helping students who may have problems adapting to the school environment. School security staff members are also used to prevent, report, and investigate behavior problems. Students and teachers provide active surveillance on school property. Scheduling activities in otherwise little used areas increases natural surveillance, thereby lessening the fear of using those areas.
- **Restore confidence.** Encourages activities that attract public involvement, promote public awareness of school, faculty, and student achievements. The program encourages social interaction by all segments of the student population, and allows for informal social activities away from unsafe and unsupervised areas.

The CPTED program uses a standard school security survey form that allows an investigator to visually inspect school premises, and note the type and location of any

weakness which should be corrected. The following are examples of the questions included on the CPTED security survey:

- Are the school's outside entrances secure?
- Are all inside doors secure?
- Are broken windows replaced?
- Is the responsibility of the lock and key control assigned to one person?
- Are all keys maintained and issued with strict supervision?
- Is the fencing high enough?
- Are there written regulations regarding access and control of visitors to the school?
- Are visitors required to sign in and issued identification badges?
- Is proper identification required of vendors, repairmen, and salespersons?
- Are students restricted from loitering in corridors, hallways, and restrooms?
- Is an up-to-date inventory of school equipment maintained?

FINDING

The SIU Investigator working with the CPTED program uses the standard school security survey form and completes a report which is reviewed with the school principal. An individual school's CPTED security assessment report is very comprehensive and detailed. CPTED can provide an effective resource for assisting school principals in identifying threats to school security and improving student and faculty safety.

COMMENDATION

The Special Investigative Unit (SIU) is commended for offering Crime Prevention Through Environmental Design (CPTED) as an effective resource for completing security threat assessments for school facilities in the Broward County School District.

FINDING

CPTED school security surveys provide a mechanism to identify threats to school facility safety and security; however, technical assistance available through the program is only offered on a voluntary basis at the request of the school principal. To date, approximately 25 surveys have been completed of school facilities in the CPTED program's five-year history in the school district. SIU staff stressed the lack of interest

on the part of many school principals to participate in the process. SIU actively promotes the CPTED process each school year, but school principals throughout the district have been slow to take advantage of this volunteer resource. SIU staff report that it is often difficult to convince principals of the value of a walk-through campus security assessment and crime prevention activities.

Inadequate provisions have been made at many Broward County school facilities to deter unauthorized visitors. As previously stated, during site visits, MGT consultants were able to walk around freely without being challenged by anyone for extended periods of time. In general, consultants found visitor access and building security to be more effectively controlled at elementary schools than at high schools and middle schools. At several high schools and middle schools, it was relatively easy to enter through an unlocked side door and walk through the school facility without being challenged.

On school campuses and at school offices and resource centers, outside doors were consistently unlocked on all sides of the building. While attending a meeting after 5 p.m. one evening at the K.C. Wright Administration Building, it was extremely easy for an MGT consultant to enter from the parking garage while not wearing a name tag, and proceed through the building lobby to enter an elevator to the 13th floor without ever encountering a security person or being questioned for identification.

School district employees, in general, seem relatively unconcerned or disinterested in security issues. SIU investigators reported that they frequently spend a great deal of their time responding to minor security problems which principals could easily correct using their own initiative. An example of something principals can do to increase security is using a tool to make identification sketch marks on each piece of school equipment. This is a step that very few school principals take. Making identifying marks on a piece of property, such as a VCR or a computer screen, makes it much more likely that an SIU investigator will recover the piece of property if it is stolen. Investigators will be able to easily identify the property in this case if a thief tries to pawn the stolen items in an area pawn shop. Education in property identification procedures is included as a part of SIU's school CPTED security assessment.

RECOMMENDATION

Recommendation 15-11:

Require each facility in the Broward County School District to complete an annual security threat assessment using the CPTED survey process, and initiate implementation plans to correct security problems.

Each principal should work with SIU investigators assigned to the CPTED program to complete an annual security threat assessment of his or her campus. The CPTED program is an effective resource that will assist administrators in eliminating a number of serious campus security problems before they occur.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | |
|--|---|
| 1. The Superintendent should direct each area director and principal to complete an annual security threat assessment of their school facilities using the CPTED program as a resource. | Commencing in the 1999-2000 school year |
| 2. The SIU should make periodic, random inspections of schools after the CPTED survey is completed to ensure that the school is taking steps to correct the threats identified. | Commencing in January 2000 |
| 3. The Superintendent and district staff should incorporate school security as a component of the principal's annual job evaluation. The evaluation should include an assessment of how effectively the principal has addressed the various security threats identified in the CPTED assessment. | August 2000 |

FISCAL IMPACT

There is no cost associated with this recommendation. The recommendation can be implemented using existing resources.

15.4 School Violence Prevention Programs

CURRENT SITUATION

The Broward County School District provides gang awareness, education, and prevention training to school, parents, and communities, as part of each school's menu of safety options. The SIU has three gang liaisons positions, and one is assigned to each geographic area of the school district as a resource. The gang liaison conducts gang awareness education presentations to students, teachers, district and area school staffs, parents, and community-based organizations and agencies.

Students receive information on gangs and gang activity through structured and interactive approaches to learning, alternatives to gangs, and self-esteem. Additionally, School Resource Officers (SROs) teach the GREAT (Gang Resistance Education and Training) program to seventh graders. The program reinforces the district's initiative to prevent gang activity and violence. Teachers and staff are provided with information on topics tailored to the specific needs of a school, including:

- types of gangs
- gang awareness in the classroom
- attire and what to look for
- why students join gangs
- dress code enforcement
- what schools can do to curtail gang activity

FINDING

Gang liaisons are critical links between schools, students, parents, law enforcement, social service agencies, and the community. Gang liaisons provided gang awareness to over 25,000 participants in the 1997-98 school year. The gang education program is particularly popular with school principals and parents because of the program's efforts to inform students about the dangerous reality of gang membership and criminal activity. SIU administrative staff receive weekly comments from parents, school counselors, and administrators regarding how the program has helped students discuss their fears of gang membership with family and school counselors. Principals and administrators strongly support the program because it strongly discourages a gang presence in their schools.

COMMENDATION

The Broward County School District is commended for providing an effective program of gang education and prevention through gang liaisons.

FINDING

The Broward County School District has established a Youth Crime Watch Program as a school-based initiative designed to involve students in overall efforts to reduce crime and violence in schools and communities. Each secondary school is expected to have a youth crime watch program. SIU gang liaisons are responsible for the overall coordination of the program in their assigned geographic areas of the school district. Each liaison coordinates the program to include advisor training, implementation procedures, program development, fundraising information, and identifying community support.

During interviews, school principals, central office administrators, and Broward County parents stated that the Youth Crime Watch Program is effective because it directly involves students in crime prevention activities, discourages vandalism, and helps to make school campuses more secure. Throughout the school year, the SIU Supervisor of School/Community Affairs attends Youth Crime Watch meetings and related school-community parent advisory committee meetings at least twice a month. She receives positive feedback and appreciative comments from approximately 25-50 parents per month about Youth Crime Watch, SIU education, and prevention efforts in the schools.

More than 50 percent of the principals in Broward County are strong vocal supporters of the Youth Crime Watch Program and actively promote it as a regular activity for students. SIU administrators assist Youth Crime Watch Program advisors in producing a monthly newsletter that highlights the activities of the program at each school. Parents and school principals stated that the program gives young people a positive role model and makes them alert to criminal activities at and around their school areas.

COMMENDATION

The Broward County School District is commended for implementing the Youth Crime Watch Program.

FINDING

The Board has adopted a zero tolerance policy for weapons on school property. The policy includes frequent press releases, bumper stickers and posters which state:

Broward County School Board Zero Tolerance..No Weapons. Bring a weapon...get arrested/ expelled.

The bumper stickers and posters also include a phone number to call and report a weapon on campus.

COMMENDATION

The Broward County School Board is commended for adopting a zero tolerance weapons policy for school district facilities.

16.0 SUMMARY OF POTENTIAL COSTS AND SAVINGS

Based on analyses of data obtained from interviews, surveys, community input, state and local documents, and first-hand observations in the Broward County School District, the MGT team developed several hundred recommendations for this report. About 60 recommendations have fiscal implications and are summarized in this chapter. **It is important to keep in mind that the identified cost savings are incremental and cumulative.**

MGT identified total gross savings of about \$104.5 million that could be realized by the Broward County School District over the next five years (school years 1999-2000 to 2003-04) if the recommendations are implemented. The recommendations include investment opportunities of \$499,525 in 1999-2000 and total investment opportunities of \$5.6 million over the next five years.

As shown below in Exhibit 16-1, and in detail in Exhibit 16-2, full implementation of the recommendations in this report could produce net savings of nearly \$5.1 million in the next year. The Broward County School District could achieve total net savings of over \$98.5 million by the 2003-04 school year if all recommendations are implemented. It should be noted that some savings (e.g., Recommendation 8-8) represent capital revenues.

EXHIBIT 16-1 SUMMARY OF NET SAVINGS

Year Savings Begin		Total
1999-2000	Initial Annual Net Savings	\$5,101,430
2000-2001	Annual Net Savings	\$22,594,929
2001-2002	Annual Net Savings	\$24,922,949
2002-2003	Annual Net Savings	\$23,230,910
2003-2004	Annual Net Savings	\$23,035,881
	One-Time (Cost) Savings	(\$337,500)
TOTAL NET SAVINGS PROJECTED FOR 1999-2004		\$98,548,599

It is important to keep in mind that only recommendations with fiscal impact are identified in this chapter. Many additional recommendations to improve the efficiency and effectiveness of the district are contained in Chapters 4 through 15.

Implementation strategies, timelines, and fiscal impacts follow each recommendation in this report. The implementation section associated with each recommendation identifies specific actions to be taken. Some recommendations should be implemented immediately, some over the next year or two, and others over several years.

MGT recommends that the School Board ask Broward County administrators to give each of these recommendations their most serious consideration, develop a plan to proceed with their implementation, and a system to monitor subsequent progress.

Summary of Potential Costs and Savings

**EXHIBIT 16-2
SUMMARY OF POTENTIAL SAVINGS AND COSTS IN THE BROWARD COUNTY SCHOOL DISTRICT**

CHAPTER REFERENCE	Annual (Costs) or Savings/Revenue					Total Five-Year (Costs) or Savings	One-Time (Costs) or Savings
	1999-2000	2000-01	2001-02	2002-03	2003-04		
CHAPTER 4: DISTRICT ORGANIZATION AND MANAGEMENT							
4-4	Combine School Board Office Positions (p. 4-16)	\$326,900	\$326,900	\$326,900	\$326,900	\$326,900	\$1,634,500
4-11	Eliminate Four Area Superintendents (p. 4-3)	\$0	\$756,600	\$756,600	\$756,600	\$756,600	\$3,026,400
4-11	Create Area Executive Directors (p. 4-40)	\$0	(\$522,500)	(\$522,500)	(\$522,500)	(\$522,500)	(\$2,090,000)
4-12	Eliminate Associate Superintendent for District Administration (p. 4-41)	\$0	\$198,000	\$198,000	\$198,000	\$198,000	\$792,000
4-13	Eliminate Director of District Administration (p. 4-4)	\$0	\$153,250	\$153,250	\$153,250	\$153,250	\$613,000
4-19	Reduce Teachers on Assignment (p. 4-5)	\$0	\$2,704,000	\$2,704,000	\$2,704,000	\$2,704,000	\$10,816,000
4-26	Convert TSAs to Coordinators (p. 4-8)	(\$70,400)	(\$70,400)	(\$70,400)	(\$70,400)	(\$70,400)	(\$352,000)
4-30	Eliminate Assistant Principals (p. 4-9)	\$0	\$889,000	\$889,000	\$889,000	\$889,000	\$3,556,000
CHAPTER 5: EDUCATIONAL SERVICE DELIVERY							
5-7	Respond to Curriculum Needs (p. 5-3)	\$0	\$1,430,000	\$1,430,000	\$1,430,000	\$1,430,000	\$5,720,000
5-9	Eliminate School-to-Work Director (p. 5-41)	\$52,250	\$104,500	\$104,500	\$104,500	\$104,500	\$470,250
5-12	Eliminate Coordinator of Diversity/Cultural Outreach (p. 5-51)	\$46,200	\$69,300	\$69,300	\$69,300	\$69,300	\$323,400
5-19	Accelerated Medicaid Reporting (p. 5-8)	\$96,000	\$192,000	\$192,000	\$192,000	\$192,000	\$864,000
5-20	Hire an Evaluation Specialist (p. 5-9)	(\$54,000)	(\$54,000)	(\$54,000)	(\$54,000)	(\$54,000)	(\$270,000)
5-22	Reduce Purchases of Tests (p. 5-10)	\$131,250	\$131,250	\$131,250	\$131,250	\$131,250	\$656,250
5-23	Improve Accountability for Grants (p. 5-11)	\$330,000	\$330,000	\$330,000	\$330,000	\$330,000	\$1,650,000
5-24	Hire Four Social Worker Assistants Annually (p. 5-12)	(\$87,525)	(\$175,050)	(\$262,575)	(\$351,100)	(\$437,625)	(\$1,313,875)
5-33	Eliminate NESS Program (p. 5-13)	\$0	\$1,433,000	\$1,433,000	\$1,433,000	\$1,433,000	\$5,732,000
5-34	Redclassify Nova Schools (p. 5-13)	\$0	\$1,473,964	\$1,473,964	\$1,473,964	\$1,473,964	\$5,895,856
CHAPTER 6: PERSONNEL MANAGEMENT							
6-1	Eliminate Six Clerical Positions (p. 6-7)	\$133,200	\$133,200	\$133,200	\$133,200	\$133,200	\$666,000
6-3	Redclassify Director as an Executive Director (p. 6-)	(\$6,500)	(\$6,500)	(\$6,500)	(\$6,500)	(\$6,500)	(\$32,500)
6-15	Eliminate Five Clerical Positions (p. 6-4)	\$0	\$0	\$112,300	\$112,300	\$112,300	\$336,900

Summary of Potential Costs and Savings

**EXHIBIT 16-2 (Continued)
SUMMARY OF POTENTIAL SAVINGS AND COSTS IN THE BROWARD COUNTY DISTRICT**

CHAPTER REFERENCE	Annual (Costs) or Savings/Revenue					Total Five-Year (Costs) or Savings	One-Time (Costs) or Savings
	1999-2000	2000-01	2001-02	2002-03	2003-04		
CHAPTER 7: COMMUNITY INVOLVEMENT							
7-6	Change Graphic Arts Funding (p. 7-23)	\$0	\$10,000	\$20,000	\$20,000	\$20,000	\$70,000
7-17	Fund Education Foundation Internally (p. 7-73)	\$0	\$0	\$146,300	\$146,300	\$146,300	\$438,900
7-23	Eliminate Intergovernmental Relations Staff (p. 7-9)	\$0	\$33,250	\$33,250	\$33,250	\$33,250	\$133,000
CHAPTER 8: FACILITIES USE AND MANAGEMENT							
8-7	Implement Multi-Track, Year-Round Calendar (p. 8-2)	\$0	\$5,830,000	\$5,987,800	\$4,460,700	\$3,884,000	\$20,162,500
8-8	Implement Construction Cost Savings Measures (p. 8-3)	\$1,801,500	\$1,850,300	\$1,378,400	\$1,200,200	\$1,560,000	\$7,790,400
8-9	Establish Satellite Offices (p. 8-45)	\$83,000	\$83,000	\$83,000	\$83,000	\$83,000	\$415,000
8-11	Implement Performance Standards (p. 8-4)	\$500,000	\$1,000,000	\$1,500,000	\$1,500,000	\$1,500,000	\$6,000,000
8-15	Implement Passive Order System and Standards (p. 8-6)	\$900,000	\$900,000	\$900,000	\$900,000	\$900,000	\$4,500,000
CHAPTER 9: FINANCIAL MANAGEMENT							
9-9	Reduce Payroll Checks (p. 9-3)	\$31,065	\$62,130	\$62,130	\$62,130	\$62,130	\$279,585
9-10	Implement Mandatory Direct Deposit (p. 9-3)	\$285,000	\$570,000	\$570,000	\$570,000	\$570,000	\$2,565,000
CHAPTER 10: ASSET AND RISK MANAGEMENT							
10-4	Eliminate Two Technicians (p. 10-17)	\$0	\$58,700	\$58,700	\$58,700	\$58,700	\$234,800
10-7	Privatize UBC Inspections (p. 10-29)	\$63,600	\$63,600	\$63,600	\$63,600	\$63,600	\$318,000
10-8	Contract for Actuary Services (p. 10-34)	(\$15,000)	(\$15,000)	(\$15,000)	(\$15,000)	(\$15,000)	(\$75,000)
CHAPTER 11: PURCHASING AND WAREHOUSING							
11-1	Eliminate Clerk Specialists (p. 11-9)	\$161,000	\$161,000	\$161,000	\$161,000	\$161,000	\$805,000
11-5	Fully Implement Procurement Card (p. 11-24)	\$34,000	\$68,000	\$68,000	\$68,000	\$68,000	\$306,000
11-6	Reduce Inventory Levels (p. 11-31)	\$85,000	\$85,000	\$85,000	\$85,000	\$85,000	\$425,000
11-7	Reduce Warehouse Positions (p. 11-33)	\$160,000	\$320,000	\$320,000	\$320,000	\$320,000	\$1,440,000
11-8	Reduce Vehicles (p. 11-34)	\$17,780	\$17,780	\$17,780	\$17,780	\$17,780	\$88,900
							\$5,000

Summary of Potential Costs and Savings

**EXHIBIT 16-2 (Continued)
SUMMARY OF POTENTIAL SAVINGS AND COSTS IN THE BROWARD COUNTY SCHOOL DISTRICT**

CHAPTER REFERENCE	Annual (Costs) or Savings/Revenue					Total Five-Year (Costs) or Savings	One-Time (Costs) or Savings
	1999-2000	2000-01	2001-02	2002-03	2003-04		
CHAPTER 12: ADMINISTRATIVE AND INSTRUCTIONAL TECHNOLOGY							
12-1	Create CIO Position (p. 12-13)	(\$12,800)	(\$12,800)	(\$12,800)	(\$12,800)	(\$12,800)	(\$64,000)
12-4	Create Instructional Coordinator Position (p. 12-20)	(\$55,000)	(\$73,000)	(\$73,000)	(\$73,000)	(\$73,000)	(\$347,000)
12-5	Create Instruction Technology Support Position (p. 12-2)	(\$79,800)	(\$106,400)	(\$106,400)	(\$106,400)	(\$106,400)	(\$505,400)
12-11	Purchase Uniform Grade Book Package (p.12-37)						\$0 (\$200,000)
12-12	Replace Mentee System (p. 12-38)						\$0 (\$80,000)
CHAPTER 13: TRANSPORTATION							
13-2	Reduce Overtime in Half (p. 13-13)	\$0	\$650,000	\$1,300,000	\$1,300,000	\$1,300,000	\$4,550,000
13-3	Reduce Trainers (p. 13-17)	\$0	\$16,200	\$32,400	\$32,400	\$32,400	\$113,400
13-5	Eliminate 15 Field Supervisors (p. 13-23)	\$0	\$278,760	\$557,520	\$557,520	\$557,520	\$1,951,320
13-6	Reduce Bus Routes (p. 13-26)	\$0	\$1,335,000	\$1,210,000	\$1,210,000	\$1,210,000	\$4,965,000
13-7	Change Bus Replacement Policy (p. 13-33)	\$0	\$640,000	\$659,000	\$678,776	\$699,112	\$2,676,888
CHAPTER 14: FOOD SERVICE							
14-2	Increase Participation in Dual Manager Program (p. 14-1)	\$57,560	\$115,120	\$172,680	\$230,240	\$287,800	\$863,400
14-3	Add Two Supervisors (p. 14-17)	(\$105,000)	(\$105,000)	(\$105,000)	(\$105,000)	(\$105,000)	(\$525,000)
14-4	Eliminate Clerk Specialists (p. 14-19)	\$38,450	\$38,450	\$38,450	\$38,450	\$38,450	\$192,250
14-6	Hire Food Service Staff as Part-time Employees (p. 14-2)	\$91,600	\$91,600	\$91,600	\$91,600	\$91,600	\$458,000
14-8	Purchase Lockers (p. 14-24)						\$0 (\$15,000)
14-12	Expand Catering Services (p. 14-31)	\$62,500	\$78,125	\$97,650	\$122,100	\$152,600	\$512,975

Summary of Potential Costs and Savings

**EXHIBIT 16-2 (Continued)
SUMMARY OF POTENTIAL SAVINGS AND COSTS IN THE BROWARD COUNTY SCHOOL DISTRICT**

CHAPTER REFERENCE	Annual (Costs) or Savings/Revenue					Total Five-Year (Costs) or Savings	One-Time (Costs) or Savings
	1999-2000	2000-01	2001-02	2002-03	2003-04		
CHAPTER 15: SAFETY AND SECURITY							
154	Purchase Laptops Computers (p. 15-46)					\$0	(\$47,500)
154	Eliminate Four Data Entry Positions (p. 15-46)	\$113,100	\$113,100	\$113,100	\$113,100	\$113,100	\$665,500
156	Provide SRO Training (p. 15-55)	(\$13,500)	(\$13,500)	(\$13,500)	(\$13,500)	(\$13,500)	(\$67,500)
TOTAL SAVINGS		\$5,600,955	\$23,749,079	\$26,164,624	\$24,561,110	\$24,452,606	\$104,528,374
TOTAL (COSTS)		(\$499,525)	(\$1,154,150)	(\$1,241,675)	(\$1,330,200)	(\$1,416,725)	(\$337,500)
TOTAL NET SAVINGS		\$5,101,430	\$22,594,929	\$24,922,949	\$23,230,910	\$23,035,881	\$98,886,099

Total Five-Year Net Savings Minus One-Time Costs		=	\$98,548,599
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APPENDIX A:
SURVEY INSTRUMENTS

**PERFORMANCE REVIEW OF THE
BROWARD COUNTY SCHOOL DISTRICT**

DISTRICT ADMINISTRATOR SURVEY

No attempt will be made to identify individual district administrators in this survey. Please mail your completed survey directly to MGT of America by November 2, 1998 as directed on page 7.

PART A:

DIRECTIONS: For items 1-8, please place a check (✓) on the blank line that completes the statement or answers the question. For items 9 and 10, please write in the numbers.

- | | |
|--|---|
| <p>1. I think the overall quality of public education in the Broward County School District is:</p> <p>_____ Excellent
_____ Good
_____ Fair
_____ Poor
_____ Don't Know</p> | <p>2. I think the overall quality of education in the Broward County School District is:</p> <p>_____ Improving
_____ Staying the Same
_____ Getting Worse
_____ Don't Know</p> |
|--|---|

Students are often given the grades A, B, C, D and F to denote the quality of their work. Suppose teachers and administrators were graded the same way.

3. In general, what grade would you give the teachers in the Broward County School District? _____ Years
- _____ A
_____ B
_____ C
_____ D
_____ F
_____ Don't Know

5. In general, what grade would you give the district-level administrators in the Broward County School District?
- _____ A
_____ B
_____ C
_____ D
_____ F
_____ Don't Know

7. I am a:
_____ Female _____ Male

8. What is your race/ethnic group?
- _____ White _____ Black
_____ Hispanic _____ Asian
_____ Other

- 9a. How long have you been in your current position in the Broward County School District?

4. In general, what grade would you give the school-level administrators in the Broward County School District?

- _____ A
- _____ B
- _____ C
- _____ D
- _____ F
- _____ Don't Know

6. In what area of the district office do you work this year?

- _____ School Operations
- _____ Educational Programs, Student Support, and Human Resource Development
- _____ Accountability, Technology, Strategic Planning, and School Improvement
- _____ Financial Management and Support Services
- _____ District Administration
- _____ Facilities Management and Construction Management/Facility Audits
- _____ Office of the Comptroller
- _____ Area Office
- _____ Other (Please categorize)

9b. How long have you been in a similar position in the Broward County School District?

_____ Years

10. How long have you worked in the Broward County School District?

_____ Years

PART B:

DIRECTIONS: Please indicate whether you strongly agree (SA), agree (A), neither agree or disagree (N), disagree (D), or strongly disagree (SD) with each statement. Please circle the appropriate response (SA, A, N, D, SD) located to the right of each item. If you feel you do not have enough information to give an opinion, circle the don't know (DK) response.

- | | | | | | | |
|---|----|---|---|---|----|----|
| 1. The emphasis on learning in Broward County School District has increased in recent years. | SA | A | N | D | SD | DK |
| 2. Broward County schools are safe and secure from crime. | SA | A | N | D | SD | DK |
| 3. Our schools do not effectively handle misbehavior problems. | SA | A | N | D | SD | DK |
| 4. Our schools have sufficient space and facilities to support the instructional programs. | SA | A | N | D | SD | DK |
| 5. Our schools do not have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics. | SA | A | N | D | SD | DK |
| 6. Our schools can be described as "good places to learn." | SA | A | N | D | SD | DK |
| 7. There is administrative support for controlling student behavior in our schools. | SA | A | N | D | SD | DK |
| 8. Most students in our schools are motivated to learn. | SA | A | N | D | SD | DK |
| 9. Lessons are organized to meet students' needs. | SA | A | N | D | SD | DK |
| 10. The curriculum is broad and challenging for most students. | SA | A | N | D | SD | DK |
| 11. There is little a teacher can do to overcome education problems due to a student's home life. | SA | A | N | D | SD | DK |
| 12. Teachers in our schools know the material they teach. | SA | A | N | D | SD | DK |
| 13. Teachers in our schools care about students' needs. | SA | A | N | D | SD | DK |
| 14. Teachers expect students to do their very best. | SA | A | N | D | SD | DK |
| 15. Principals and assistant principals in our schools care about students' needs. | SA | A | N | D | SD | DK |
| 16. In general, parents do not take responsibility for their children's behavior in our schools. | SA | A | N | D | SD | DK |
| 17. Parents in this district are satisfied with the education their children are receiving. | SA | A | N | D | SD | DK |
| 18. Most parents really don't seem to know what goes on in our schools. | SA | A | N | D | SD | DK |
| 19. Parents play an active role in decision-making in my school. | SA | A | N | D | SD | DK |
| 20. This community really cares about its children's education. | SA | A | N | D | SD | DK |
| 21. Taxpayer dollars are being used wisely to support public education in the Broward County School District. | SA | A | N | D | SD | DK |
| 22. Sufficient student services are provided in the Broward County School District (e.g., counseling, speech therapy, health). | SA | A | N | D | SD | DK |
| 23. Site-based management has been implemented effectively in the Broward County School District. | SA | A | N | D | SD | DK |

PART C:

DIRECTIONS: For each item, please indicate whether you feel the Broward County School District situation is excellent (E), good (G), fair (F), or poor (P). Please circle the appropriate response (E, G, F, P) located to the right of each item. If you feel you do not have enough information to give an opinion, circle the don't know (DK) response.

- | | | | | | |
|--|---|---|---|---|----|
| 1. School board members' knowledge of the educational needs of students in the Broward County School District. | E | G | F | P | DK |
| 2. School board members' knowledge of operations in the Broward County School District. | E | G | F | P | DK |
| 3. School board members' work at setting or revising policies for the Broward County School District. | E | G | F | P | DK |
| 4. The district school superintendents' work as the educational leader of the Broward County School District. | E | G | F | P | DK |
| 5. The district school superintendents' work as the chief administrator (manager) of the Broward County School District. | E | G | F | P | DK |
| 6. Principals' work as the instructional leaders of their schools. | E | G | F | P | DK |
| 7. Principals' work as the managers of the staff and teachers. | E | G | F | P | DK |
| 8. Teachers' work in meeting students' individual learning needs. | E | G | F | P | DK |
| 9. Teachers' work in communicating with parents. | E | G | F | P | DK |
| 10. Teachers' attitudes about their jobs. | E | G | F | P | DK |
| 11. Students' ability to learn. | E | G | F | P | DK |
| 12. The amount of time students spend on task learning in the classroom. | E | G | F | P | DK |
| 13. Parents' efforts in helping their children to do better in school. | E | G | F | P | DK |
| 14. Parents' participation in school activities and organizations. | E | G | F | P | DK |
| 15. How well students' test results are explained to parents. | E | G | F | P | DK |
| 16. The condition in which the Broward County School District schools are kept. | E | G | F | P | DK |
| 17. How well relations are maintained with various groups in the community. | E | G | F | P | DK |
| 18. The opportunities provided by the district to improve the skills of teachers. | E | G | F | P | DK |
| 19. The opportunity provided by the district to improve the skills of school administrators. | E | G | F | P | DK |
| 20. The district's job of providing adequate instructional technology. | E | G | F | P | DK |
| 21. The district's use of technology for administrative purposes. | E | G | F | P | DK |

PART D: Work Environment. Please indicate your level of agreement or disagreement with each statement by placing an "X" in the appropriate column. (Definitions of Columns: SA = Strongly Agree; A = Agree; N = Neutral; D = Disagree; SD = Strongly Disagree; DK = Don't Know).

STATEMENT	SA	A	N	D	SD	DK
1. I find the Broward County School District to be an exciting, challenging place to work.						
2. The work standards and expectations in the Broward County School District are equal to or above those of most other school districts.						
3. the Broward County School District officials enforce high work standards.						
4. Most the Broward County School District teachers enforce high student learning standards.						
5. the Broward County School District teachers and administrators have excellent working relationships.						
6. <u>Teachers</u> who do not meet expected work standards are disciplined.						
7. <u>Staff</u> who do not meet expected work standards are disciplined.						
8. <u>Teacher</u> promotions and pay increases are based upon individual performance.						
9. <u>Staff</u> promotions and pay increases are based upon individual productivity.						
10. I feel that I have the authority to adequately perform my job responsibilities.						
11. I have adequate facilities in which to conduct my work.						
12. I have adequate equipment and computer support to conduct my work.						
13. The workloads are equitably distributed among teachers and among staff members.						
14. No one knows or cares about the amount or quality of work that I perform.						
15. Workload is evenly distributed.						
16. The failure of the Broward County School District officials to enforce high work standards results in poor quality work.						
17. I often observe other teachers and/or staff socializing rather than working while on the job.						

PART E: Job Satisfaction. Please indicate your level of agreement or disagreement with each statement by placing an "X" in the appropriate column. (Definitions of Columns: SA = Strongly Agree; A = Agree; N = Neutral; D = Disagree; SD = Strongly Disagree; DK = Don't Know).

STATEMENT	SA	A	N	D	SD	DK
1. I am very satisfied with my job in the Broward County School District.						
2. I plan to make a career in the Broward County School District.						
3. I am actively looking for a job outside of the Broward County School District.						
4. Salary levels in the Broward County School District are competitive.						
5. I feel that my work is appreciated by my supervisor(s).						
6. I feel that I am an integral part of the Broward County School District team.						
7. I feel that there is no future for me in the Broward County School District.						
8. My salary level is adequate for my level of work and experience.						
9. I enjoy working in a culturally diverse environment.						

PART F: Administrative Structure and Practices. Please indicate your level of agreement or disagreement with each statement by placing an "X" in the appropriate column. (Definitions of Columns: SA = Strongly Agree; A = Agree; N = Neutral; D = Disagree; SD = Strongly Disagree; DK = Don't Know).

STATEMENT	SA	A	N	D	SD	DK
1. Most administrative practices in the Broward County School District are highly effective and efficient.						
2. Administrative decisions are made quickly and decisively.						
3. the Broward County School District administrators are easily accessible and open to input.						
4. Authority for administrative decisions is delegated to the lowest possible level.						
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.						
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.						
7. The extensive committee structure in the Broward County School District ensures adequate input from teachers and staff on most important decisions.						
8. the Broward County School District has too many committees.						
9. the Broward County School District has too many layers of administrators.						
10. Most the Broward County School District administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.						
11. Central Office Administrators are responsive to school needs.						
12. Central Office Administrators provide quality service to schools.						

PART G: the Broward County School District Operations. Please indicate your opinion of the operations of each of the following district functions by placing an "X" in the appropriate column for each function.

District/Program Function	Should Be Eliminated	Needs Major Improvement	Needs Some Improvement	Adequate	Outstanding	Don't Know
a. Budgeting						
b. Strategic planning						
c. Curriculum planning						
d. Financial management and accounting						
e. Community relations						
f. Program evaluation, research, and assessment						
g. Instructional technology						
h. Pupil accounting						
i. Instructional coordination/supervision						
j. Instructional support						
k. Federal Program (e.g., Chapter I, Special Education) coordination						
l. Personnel recruitment						
m. Personnel selection						
n. Personnel evaluation						
o. Staff development						
p. Data processing						
q. Purchasing						
r. Law enforcement/security						
s. Plant maintenance						
t. Facilities planning						
u. Pupil transportation						
v. Food service						
w. Custodial services						
x. Risk management						
y. Administrative technology						

PART H: General Questions

DIRECTIONS: Please respond to each item as indicated. Please print your comments.

1. The overall operation of the Broward County School District is (Check [✓] one).

- Highly efficient
- Above average in efficiency
- Less efficient than most other school districts
- Don't know

2. The operational efficiency of the Broward County School District could be improved by (Check [✓] as many as apply):

- Offering fewer programs
- Increasing some class sizes
- Increasing teacher workload
- Reducing the number of administrators
- Reducing the number of support staff
- Privatizing some support services
- Reducing the number of facilities operated by the district
- Other (please specify) _____

3. Do you have suggestions to improve the overall efficiency and effectiveness of the management and performance of the Broward County School District? Please attach an additional page or write on back with comments, if needed.

PLEASE RETURN YOUR COMPLETED SURVEY BY NOVEMBER 2, 1998 IN THE ATTACHED POSTAGE-PAID ENVELOPE TO:

**MGT of America, Inc.
Post Office Box 38430
Tallahassee, Florida 32315-9958**

THANK YOU FOR YOUR COOPERATION!

PERFORMANCE REVIEW OF THE BROWARD COUNTY SCHOOL DISTRICT

PRINCIPAL SURVEY

No attempt will be made to identify individual principals in this survey. Please mail your completed survey directly to MGT of America by November 2, 1998 as directed on page 7.

PART A:

DIRECTIONS: For items 1-8, please place a check (✓) on the blank line that completes the statement or answers the question. For items 9 and 10, please write in the numbers.

- | | |
|--|---|
| <p>1. I think the overall quality of public education in the Broward County School District is:</p> <p>_____ Excellent
_____ Good
_____ Fair
_____ Poor
_____ Don't Know</p> | <p>2. I think the overall quality of education in the Broward County School District is:</p> <p>_____ Improving
_____ Staying the Same
_____ Getting Worse
_____ Don't Know</p> |
|--|---|

Students are often given the grades A, B, C, D and F to denote the quality of their work. Suppose teachers and administrators were graded the same way.

- | | |
|--|--|
| <p>3. In general, what grade would you give the teachers in the Broward County School District?</p> <p>_____ A
_____ B
_____ C
_____ D
_____ F
_____ Don't Know</p> | <p>4. In general, what grade would you give the school-level administrators in the Broward County School District?</p> <p>_____ A
_____ B
_____ C
_____ D
_____ F
_____ Don't Know</p> |
| <p>5. In general, what grade would you give the district-level administrators in the Broward County School District?</p> <p>_____ A
_____ B
_____ C
_____ D
_____ F
_____ Don't Know</p> | <p>6. In what type of school do you work this year?</p> <p>_____ Elementary School
_____ Junior High/Middle School
_____ High School
_____ District Office
_____ Other (Please categorize) _____</p> |
| <p>7. I am a:</p> <p>_____ Female _____ Male</p> | <p>8. What is your race/ethnic group?</p> <p>_____ White
_____ Hispanic
_____ Other
_____ Black
_____ Asian</p> |
| <p>9a. How long have you been in your current position in the Broward County School District?</p> <p>_____ Years</p> | <p>10. How long have you worked in the Broward County School District?</p> <p>_____ Years</p> |
| <p>9b. How long have you been in a similar position in the Broward County School District?</p> <p>_____ Years</p> | |

PART B:

DIRECTIONS: Please indicate whether you strongly agree (SA), agree (A), neither agree or disagree (N), disagree (D), or strongly disagree (SD) with each statement. Please circle the appropriate response (SA, A, N, D, SD) located to the right of each item. If you feel you do not have enough information to give an opinion, circle the don't know (DK) response.

1. The emphasis on learning in Broward County School District has increased in recent years.	SA	A	N	D	SD	DK
2. Broward County schools are safe and secure from crime.	SA	A	N	D	SD	DK
3. Our schools do not effectively handle misbehavior problems.	SA	A	N	D	SD	DK
4. Our schools have sufficient space and facilities to support the instructional programs.	SA	A	N	D	SD	DK
5. Our schools do not have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	SA	A	N	D	SD	DK
6. Our schools can be described as "good places to learn."	SA	A	N	D	SD	DK
7. There is administrative support for controlling student behavior in our schools.	SA	A	N	D	SD	DK
8. Most students in our schools are motivated to learn.	SA	A	N	D	SD	DK
9. Lessons are organized to meet students' needs.	SA	A	N	D	SD	DK
10. The curriculum is broad and challenging for most students.	SA	A	N	D	SD	DK
11. There is little a teacher can do to overcome education problems due to a student's home life.	SA	A	N	D	SD	DK
12. Teachers in our schools know the material they teach.	SA	A	N	D	SD	DK
13. Teachers in our schools care about students' needs.	SA	A	N	D	SD	DK
14. Teachers expect students to do their very best.	SA	A	N	D	SD	DK
15. Principals and assistant principals in our schools care about students' needs.	SA	A	N	D	SD	DK
16. In general, parents do not take responsibility for their children's behavior in our schools.	SA	A	N	D	SD	DK
17. Parents in this district are satisfied with the education their children are receiving.	SA	A	N	D	SD	DK
18. Most parents really don't seem to know what goes on in our schools.	SA	A	N	D	SD	DK
19. Parents play an active role in decision-making in my school.	SA	A	N	D	SD	DK
20. This community really cares about its children's education.	SA	A	N	D	SD	DK
21. Taxpayer dollars are being used wisely to support public education in the Broward County School District.	SA	A	N	D	SD	DK
22. Sufficient student services are provided in the Broward County School District (e.g., counseling, speech therapy, health).	SA	A	N	D	SD	DK
23. Site-based management has been implemented effectively in the Broward County School District.	SA	A	N	D	SD	DK

PART C:

DIRECTIONS: For each item, please indicate whether you feel the Broward County School District situation is excellent (E), good (G), fair (F), or poor (P). Please circle the appropriate response (E, G, F, P) located to the right of each item. If you feel you do not have enough information to give an opinion, circle the don't know (DK) response.

- | | | | | | |
|--|---|---|---|---|----|
| 1. School board members' knowledge of the educational needs of students in the Broward County School District. | E | G | F | P | DK |
| 2. School board members' knowledge of operations in the Broward County School District. | E | G | F | P | DK |
| 3. School board members' work at setting or revising policies for the Broward County School District. | E | G | F | P | DK |
| 4. The district school superintendents' work as the educational leader of the Broward County School District. | E | G | F | P | DK |
| 5. The district school superintendents' work as the chief administrator (manager) of the Broward County School District. | E | G | F | P | DK |
| 6. Principals' work as the instructional leaders of their schools. | E | G | F | P | DK |
| 7. Principals' work as the managers of the staff and teachers. | E | G | F | P | DK |
| 8. Teachers' work in meeting students' individual learning needs. | E | G | F | P | DK |
| 9. Teachers' work in communicating with parents. | E | G | F | P | DK |
| 10. Teachers' attitudes about their jobs. | E | G | F | P | DK |
| 11. Students' ability to learn. | E | G | F | P | DK |
| 12. The amount of time students spend on task learning in the classroom. | E | G | F | P | DK |
| 13. Parents' efforts in helping their children to do better in school. | E | G | F | P | DK |
| 14. Parents' participation in school activities and organizations. | E | G | F | P | DK |
| 15. How well students' test results are explained to parents. | E | G | F | P | DK |
| 16. The condition in which the Broward County School District schools are kept. | E | G | F | P | DK |
| 17. How well relations are maintained with various groups in the community. | E | G | F | P | DK |
| 18. The opportunities provided by the district to improve the skills of teachers. | E | G | F | P | DK |
| 19. The opportunity provided by the district to improve the skills of school administrators. | E | G | F | P | DK |
| 20. The district's job of providing adequate instructional technology. | E | G | F | P | DK |
| 21. The district's use of technology for administrative purposes. | E | G | F | P | DK |

PART D: Work Environment. Please indicate your level of agreement or disagreement with each statement by placing an "X" in the appropriate column. (Definitions of Columns: SA = Strongly Agree; A = Agree; N = Neutral; D = Disagree; SD = Strongly Disagree; DK = Don't Know).

STATEMENT	SA	A	N	D	SD	DK
1. I find the Broward County School District to be an exciting, challenging place to work.						
2. The work standards and expectations in the Broward County School District are equal to or above those of most other school districts.						
3. the Broward County School District officials enforce high work standards.						
4. Most the Broward County School District teachers enforce high student learning standards.						
5. the Broward County School District teachers and administrators have excellent working relationships.						
6. <u>Teachers</u> who do not meet expected work standards are disciplined.						
7. <u>Staff</u> who do not meet expected work standards are disciplined.						
8. <u>Teacher</u> promotions and pay increases are based upon individual performance.						
9. <u>Staff</u> promotions and pay increases are based upon individual productivity.						
10. I feel that I have the authority to adequately perform my job responsibilities.						
11. I have adequate facilities in which to conduct my work.						
12. I have adequate equipment and computer support to conduct my work.						
13. The workloads are equitably distributed among teachers and among staff members.						
14. No one knows or cares about the amount or quality of work that I perform.						
15. Workload is evenly distributed.						
16. The failure of the Broward County School District officials to enforce high work standards results in poor quality work.						
17. I often observe other teachers and/or staff socializing rather than working while on the job.						

PART E: Job Satisfaction. Please indicate your level of agreement or disagreement with each statement by placing an "X" in the appropriate column. (Definitions of Columns: SA = Strongly Agree; A = Agree; N = Neutral; D = Disagree; SD = Strongly Disagree; DK = Don't Know).

STATEMENT	SA	A	N	D	SD	DK
1. I am very satisfied with my job in the Broward County School District.						
2. I plan to make a career in the Broward County School District.						
3. I am actively looking for a job outside of the Broward County School District.						
4. Salary levels in the Broward County School District are competitive.						
5. I feel that my work is appreciated by my supervisor(s).						
6. I feel that I am an integral part of the Broward County School District team.						
7. I feel that there is no future for me in the Broward County School District.						
8. My salary level is adequate for my level of work and experience.						
9. I enjoy working in a culturally diverse environment.						

PART F: Administrative Structure and Practices. Please indicate your level of agreement or disagreement with each statement by placing an "X" in the appropriate column. (Definitions of Columns: SA = Strongly Agree; A = Agree; N = Neutral; D = Disagree; SD = Strongly Disagree; DK = Don't Know).

STATEMENT	SA	A	N	D	SD	DK
1. Most administrative practices in the Broward County School District are highly effective and efficient.						
2. Administrative decisions are made quickly and decisively.						
3. the Broward County School District administrators are easily accessible and open to input.						
4. Authority for administrative decisions is delegated to the lowest possible level.						
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.						
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.						
7. The extensive committee structure in the Broward County School District ensures adequate input from teachers and staff on most important decisions.						
8. the Broward County School District has too many committees.						
9. the Broward County School District has too many layers of administrators.						
10. Most the Broward County School District administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.						
11. Central Office Administrators are responsive to school needs.						
12. Central Office Administrators provide quality service to schools.						

PART G: the Broward County School District Operations. Please indicate your opinion of the operations of each of the following district functions by placing an "X" in the appropriate column for each function.

District/Program Function	Should Be Eliminated	Needs Major Improvement	Needs Some Improvement	Adequate	Outstanding	Don't Know
a. Budgeting						
b. Strategic planning						
c. Curriculum planning						
d. Financial management and accounting						
e. Community relations						
f. Program evaluation, research, and assessment						
g. Instructional technology						
h. Pupil accounting						
i. Instructional coordination/supervision						
j. Instructional support						
k. Federal Program (e.g., Chapter I, Special Education) coordination						
l. Personnel recruitment						
m. Personnel selection						
n. Personnel evaluation						
o. Staff development						
p. Data processing						
q. Purchasing						
r. Law enforcement/security						
s. Plant maintenance						
t. Facilities planning						
u. Transportation						
v. Food service						
w. Custodial services						
x. Risk management						
y. Administrative Technology						

PART H: General Questions

DIRECTIONS: Please respond to each item as indicated. Please print your comments.

1. The overall operation of the Broward County School District is (Check [✓] one).

- Highly efficient
- Above average in efficiency
- Less efficient than most other school districts
- Don't know

2. The operational efficiency of the Broward County School District could be improved by (Check [✓] as many as apply):

- Offering fewer programs
- Increasing some class sizes
- Increasing teacher workload
- Reducing the number of administrators
- Reducing the number of support staff
- Privatizing some support services
- Reducing the number of facilities operated by the district
- Other (please specify) _____

3. Do you have suggestions to improve the overall efficiency and effectiveness of the management and performance of the Broward County School District? Please attach an additional page with comments or write on back, if needed.

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MGT of America, Inc.
Post Office Box 38430
Tallahassee, Florida 32315-9958

THANK YOU FOR YOUR COOPERATION!

**PERFORMANCE REVIEW OF THE
BROWARD COUNTY SCHOOL DISTRICT**

TEACHER SURVEY

No attempt will be made to identify individual teachers in this survey. Please mail your completed survey directly to MGT of America by November 2, 1998 as directed on page 7.

PART A:

DIRECTIONS:For items 1-9, please place a check (✓) on the blank line that completes the statement or answers the question. For item 10, please write in the number.

1. I think the overall quality of public education in the Broward County School District is:
- _____ Excellent
_____ Good
_____ Fair
_____ Poor
_____ Don't Know
2. I think the overall quality of education in the Broward County School District is:
- _____ Improving
_____ Staying the Same
_____ Getting Worse
_____ Don't Know

Students are often given the grades A, B, C, D and F to denote the quality of their work. Suppose teachers and administrators were graded the same way.

3. In general, what grade would you give the teachers in the Broward County School District?
- _____ A
_____ B
_____ C
_____ D
_____ F
_____ Don't Know
4. In general, what grade would you give the school-level administrators in the Broward County School District?
- _____ A
_____ B
_____ C
_____ D
_____ F
_____ Don't Know
5. In general, what grade would you give the district-level administrators in the Broward County School District?
- _____ A
_____ B
_____ C
_____ D
_____ F
_____ Don't Know
6. In what type of school do you teach this year?
- _____ Elementary School
_____ Junior High/Middle School
_____ High School
_____ District Office
_____ Other (Please categorize)

7. I am a:
- _____ Female
_____ Male
8. What is your race/ethnic group?
- _____ White
_____ Hispanic
_____ Other
_____ Black
_____ Asian
9. What grade or grades are you teaching this year?
- _____ Pre-K _____ 7
_____ K _____ 8
_____ 1 _____ 9
_____ 2 _____ 10
_____ 3 _____ 11
_____ 4 _____ 12
_____ 5 _____ Adult
_____ 6
10. How long have you taught in the Broward County School District?
- _____ Years

PART B:

DIRECTIONS: Please indicate whether you strongly agree (SA), agree (A), neither agree or disagree (N), disagree (D), or strongly disagree (SD) with each statement. Please circle the appropriate response (SA, A, N, D, SD) located to the right of each item. If you feel you do not have enough information to give an opinion, circle the don't know (DK) response.

- | | | | | | | |
|---|----|---|---|---|----|----|
| 1. The emphasis on learning in Broward County School District has increased in recent years. | SA | A | N | D | SD | DK |
| 2. Broward County schools are safe and secure from crime. | SA | A | N | D | SD | DK |
| 3. Our schools do not effectively handle misbehavior problems. | SA | A | N | D | SD | DK |
| 4. Our schools have sufficient space and facilities to support the instructional programs. | SA | A | N | D | SD | DK |
| 5. Our schools do not have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics. | SA | A | N | D | SD | DK |
| 6. Our schools can be described as "good places to learn." | SA | A | N | D | SD | DK |
| 7. There is administrative support for controlling student behavior in our schools. | SA | A | N | D | SD | DK |
| 8. Most students in our schools are motivated to learn. | SA | A | N | D | SD | DK |
| 9. Lessons are organized to meet students' needs. | SA | A | N | D | SD | DK |
| 10. The curriculum is broad and challenging for most students. | SA | A | N | D | SD | DK |
| 11. There is little a teacher can do to overcome education problems due to a student's home life. | SA | A | N | D | SD | DK |
| 12. Teachers in our schools know the material they teach. | SA | A | N | D | SD | DK |
| 13. Teachers in our schools care about students' needs. | SA | A | N | D | SD | DK |
| 14. Teachers expect students to do their very best. | SA | A | N | D | SD | DK |
| 15. Principals and assistant principals in our schools care about students' needs. | SA | A | N | D | SD | DK |
| 16. In general, parents do not take responsibility for their children's behavior in our schools. | SA | A | N | D | SD | DK |
| 17. Parents in this district are satisfied with the education their children are receiving. | SA | A | N | D | SD | DK |
| 18. Most parents really don't seem to know what goes on in our schools. | SA | A | N | D | SD | DK |
| 19. Parents play an active role in decision-making in my school. | SA | A | N | D | SD | DK |
| 20. This community really cares about its children's education. | SA | A | N | D | SD | DK |
| 21. Taxpayer dollars are being used wisely to support public education in the Broward County School District. | SA | A | N | D | SD | DK |
| 22. Sufficient student services are provided in the Broward County School District (e.g., counseling, speech therapy, health). | SA | A | N | D | SD | DK |
| 23. Site-based management has been implemented effectively in the Broward County School District. | SA | A | N | D | SD | DK |

PART C:

DIRECTIONS: For each item, please indicate whether you feel the Broward County School District situation is excellent (E), good (G), fair (F), or poor (P). Please circle the appropriate response (E, G, F, P) located to the right of each item. If you feel you do not have enough information to give an opinion, circle the don't know (DK) response.

- | | | | | | |
|--|---|---|---|---|----|
| 1. School board members' knowledge of the educational needs of students in the Broward County School District. | E | G | F | P | DK |
| 2. School board members' knowledge of operations in the Broward County School District. | E | G | F | P | DK |
| 3. School board members' work at setting or revising policies for the Broward County School District. | E | G | F | P | DK |
| 4. The district school superintendents' work as the educational leader of the Broward County School District. | E | G | F | P | DK |
| 5. The district school superintendents' work as the chief administrator (manager) of the Broward County School District. | E | G | F | P | DK |
| 6. Principals' work as the instructional leaders of their schools. | E | G | F | P | DK |
| 7. Principals' work as the managers of the staff and teachers. | E | G | F | P | DK |
| 8. Teachers' work in meeting students' individual learning needs. | E | G | F | P | DK |
| 9. Teachers' work in communicating with parents. | E | G | F | P | DK |
| 10. Teachers' attitudes about their jobs. | E | G | F | P | DK |
| 11. Students' ability to learn. | E | G | F | P | DK |
| 12. The amount of time students spend on task learning in the classroom. | E | G | F | P | DK |
| 13. Parents' efforts in helping their children to do better in school. | E | G | F | P | DK |
| 14. Parents' participation in school activities and organizations. | E | G | F | P | DK |
| 15. How well students' test results are explained to parents. | E | G | F | P | DK |
| 16. The condition in which the Broward County School District schools are kept. | E | G | F | P | DK |
| 17. How well relations are maintained with various groups in the community. | E | G | F | P | DK |
| 18. The opportunities provided by the district to improve the skills of teachers. | E | G | F | P | DK |
| 19. The opportunity provided by the district to improve the skills of school administrators. | E | G | F | P | DK |
| 20. The district's job of providing adequate instructional technology. | E | G | F | P | DK |
| 21. The district's use of technology for administrative purposes. | E | G | F | P | DK |

PART D: Work Environment. Please indicate your level of agreement or disagreement with each statement by placing an "X" in the appropriate column. (Definitions of Columns: SA = Strongly Agree; A = Agree; N = Neutral; D = Disagree; SD = Strongly Disagree; DK = Don't Know).

STATEMENT	SA	A	N	D	SD	DK
1. I find the Broward County School District to be an exciting, challenging place to work.						
2. The work standards and expectations in the Broward County School District are equal to or above those of most other school districts.						
3. the Broward County School District officials enforce high work standards.						
4. Most the Broward County School District teachers enforce high student learning standards.						
5. the Broward County School District teachers and administrators have excellent working relationships.						
6. <u>Teachers</u> who do not meet expected work standards are disciplined.						
7. <u>Staff</u> who do not meet expected work standards are disciplined.						
8. <u>Teacher</u> promotions and pay increases are based upon individual performance.						
9. <u>Staff</u> promotions and pay increases are based upon individual productivity.						
10. I feel that I have the authority to adequately perform my job responsibilities.						
11. I have adequate facilities in which to conduct my work.						
12. I have adequate equipment and computer support to conduct my work.						
13. The workloads are equitably distributed among teachers and among staff members.						
14. No one knows or cares about the amount or quality of work that I perform.						
15. Workload is evenly distributed.						
16. The failure of the Broward County School District officials to enforce high work standards results in poor quality work.						
17. I often observe other teachers and/or staff socializing rather than working while on the job.						

PART E: Job Satisfaction. Please indicate your level of agreement or disagreement with each statement by placing an "X" in the appropriate column. (Definitions of Columns: SA = Strongly Agree; A = Agree; N = Neutral; D = Disagree; SD = Strongly Disagree; DK = Don't Know).

STATEMENT	SA	A	N	D	SD	DK
1. I am very satisfied with my job in the Broward County School District.						
2. I plan to make a career in the Broward County School District.						
3. I am actively looking for a job outside of the Broward County School District.						
4. Salary levels in the Broward County School District are competitive.						
5. I feel that my work is appreciated by my supervisor(s).						
6. I feel that I am an integral part of the Broward County School District team.						
7. I feel that there is no future for me in the Broward County School District.						
8. My salary level is adequate for my level of work and experience.						
9. I enjoy working in a culturally diverse environment.						

PART F: Administrative Structure and Practices. Please indicate your level of agreement or disagreement with each statement by placing an "X" in the appropriate column. (Definitions of Columns: SA = Strongly Agree; A = Agree; N = Neutral; D = Disagree; SD = Strongly Disagree; DK = Don't Know).

STATEMENT	SA	A	N	D	SD	DK
1. Most administrative practices in the Broward County School District are highly effective and efficient.						
2. Administrative decisions are made quickly and decisively.						
3. the Broward County School District administrators are easily accessible and open to input.						
4. Authority for administrative decisions is delegated to the lowest possible level.						
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.						
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.						
7. The extensive committee structure in the Broward County School District ensures adequate input from teachers and staff on most important decisions.						
8. the Broward County School District has too many committees.						
9. the Broward County School District has too many layers of administrators.						
10. Most the Broward County School District administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.						
11. Central Office Administrators are responsive to school needs.						
12. Central Office Administrators provide quality service to schools.						

PART G: the Broward County School District Operations. Please indicate your opinion of the operations of each of the following district functions by placing an "X" in the appropriate column for each function.

District/Program Function	Should Be Eliminated	Needs Major Improvement	Needs Some Improvement	Adequate	Outstanding	Don't Know
a. Budgeting						
b. Strategic planning						
c. Curriculum planning						
d. Financial management and accounting						
e. Community relations						
f. Program evaluation, research, and assessment						
g. Instructional technology						
h. Pupil accounting						
i. Instructional coordination/supervision						
j. Instructional support						
k. Federal Program (e.g., Chapter I, Special Education) coordination						
l. Personnel recruitment						
m. Personnel selection						
n. Personnel evaluation						
o. Staff development						
p. Data processing						
q. Purchasing						
r. Law enforcement/security						
s. Plant maintenance						
t. Facilities planning						
u. Transportation						
v. Food service						
w. Custodial services						
x. Risk management						
y. Administrative Technology						

PART H: General Questions

DIRECTIONS: Please respond to each item as indicated. Please print your comments.

1. The overall operation of the Broward County School District is (Check [✓] one).

- Highly efficient
- Above average in efficiency
- Less efficient than most other school districts
- Don't know

2. The operational efficiency of the Broward County School District could be improved by (Check [✓] as many as apply):

- Offering fewer programs
- Increasing some class sizes
- Increasing teacher workload
- Reducing the number of administrators
- Reducing the number of support staff
- Privatizing some support services
- Reducing the number of facilities operated by the district
- Other (please specify) _____

3. Do you have suggestions to improve the overall efficiency and effectiveness of the management and performance of the Broward County School District? Please attach an additional page with comments or write on back, if needed.

PLEASE RETURN YOUR COMPLETED SURVEY BY NOVEMBER 2, 1998 IN THE ATTACHED POSTAGE-PAID ENVELOPE TO:

**MGT of America, Inc.
Post Office Box 38430
Tallahassee, Florida 32315-9958**

THANK YOU FOR YOUR COOPERATION!

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APPENDIX B:
SURVEY RESULTS

PERFORMANCE REVIEW OF THE BROWARD COUNTY SCHOOL DISTRICT

DISTRICT ADMINISTRATOR SURVEY RESULTS (n=198)

PART A:

<p>1. I think the overall quality of public education in the Broward County School District is:</p> <table border="0" style="width: 100%;"> <tr><td>Excellent</td><td style="text-align: right;">19%</td></tr> <tr><td>Good</td><td style="text-align: right;">67</td></tr> <tr><td>Fair</td><td style="text-align: right;">12</td></tr> <tr><td>Poor</td><td style="text-align: right;">3</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">1</td></tr> </table>	Excellent	19%	Good	67	Fair	12	Poor	3	Don't Know	1	<p>2. I think the overall quality of education in the Broward County School District is:</p> <table border="0" style="width: 100%;"> <tr><td>Improving</td><td style="text-align: right;">81%</td></tr> <tr><td>Staying the Same</td><td style="text-align: right;">12</td></tr> <tr><td>Getting Worse</td><td style="text-align: right;">5</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">2</td></tr> </table>	Improving	81%	Staying the Same	12	Getting Worse	5	Don't Know	2
Excellent	19%																		
Good	67																		
Fair	12																		
Poor	3																		
Don't Know	1																		
Improving	81%																		
Staying the Same	12																		
Getting Worse	5																		
Don't Know	2																		

Students are often given the grades A, B, C, D and F to denote the quality of their work. Suppose teachers and administrators were graded the same way.

<p>3. In general, what grade would you give the teachers in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>A</td><td style="text-align: right;">17%</td></tr> <tr><td>B</td><td style="text-align: right;">52</td></tr> <tr><td>C</td><td style="text-align: right;">22</td></tr> <tr><td>D</td><td style="text-align: right;">2</td></tr> <tr><td>F</td><td style="text-align: right;">0</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">8</td></tr> </table>	A	17%	B	52	C	22	D	2	F	0	Don't Know	8	<p>4. In general, what grade would you give the school-level administrators in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>A</td><td style="text-align: right;">17%</td></tr> <tr><td>B</td><td style="text-align: right;">52</td></tr> <tr><td>C</td><td style="text-align: right;">21</td></tr> <tr><td>D</td><td style="text-align: right;">5</td></tr> <tr><td>F</td><td style="text-align: right;">1</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">5</td></tr> </table>	A	17%	B	52	C	21	D	5	F	1	Don't Know	5
A	17%																								
B	52																								
C	22																								
D	2																								
F	0																								
Don't Know	8																								
A	17%																								
B	52																								
C	21																								
D	5																								
F	1																								
Don't Know	5																								

<p>5. In general, what grade would you give the district-level administrators in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>A</td><td style="text-align: right;">21%</td></tr> <tr><td>B</td><td style="text-align: right;">52</td></tr> <tr><td>C</td><td style="text-align: right;">17</td></tr> <tr><td>D</td><td style="text-align: right;">8</td></tr> <tr><td>F</td><td style="text-align: right;">2</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">2</td></tr> </table>	A	21%	B	52	C	17	D	8	F	2	Don't Know	2	<p>6. In what area of the district office do you work this year?</p> <table border="0" style="width: 100%;"> <tr><td>School Operations</td><td style="text-align: right;">9%</td></tr> <tr><td>Educational Programs, Student Support and Human Resource Development</td><td style="text-align: right;">25</td></tr> <tr><td>Accountability, Technology, Strategic Planning, and School Improvement</td><td style="text-align: right;">15</td></tr> <tr><td>Financial Management and Support Services</td><td style="text-align: right;">10</td></tr> <tr><td>District Administration</td><td style="text-align: right;">11</td></tr> <tr><td>Facilities Management and Construction</td><td style="text-align: right;">17</td></tr> <tr><td>Management/Facility Audits</td><td style="text-align: right;">2</td></tr> <tr><td>Office of the Comptroller</td><td style="text-align: right;">3</td></tr> <tr><td>Area Office</td><td style="text-align: right;">6</td></tr> <tr><td>Other</td><td style="text-align: right;">3</td></tr> </table>	School Operations	9%	Educational Programs, Student Support and Human Resource Development	25	Accountability, Technology, Strategic Planning, and School Improvement	15	Financial Management and Support Services	10	District Administration	11	Facilities Management and Construction	17	Management/Facility Audits	2	Office of the Comptroller	3	Area Office	6	Other	3
A	21%																																
B	52																																
C	17																																
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Don't Know	2																																
School Operations	9%																																
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Facilities Management and Construction	17																																
Management/Facility Audits	2																																
Office of the Comptroller	3																																
Area Office	6																																
Other	3																																

<p>7. I am a:</p> <table border="0" style="width: 100%;"> <tr><td>Female</td><td style="text-align: right;">51%</td></tr> <tr><td>Male</td><td style="text-align: right;">49</td></tr> </table>	Female	51%	Male	49	<p>9a. How long have you been in your current position in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>0-5 years</td><td style="text-align: right;">64%</td></tr> <tr><td>6-10</td><td style="text-align: right;">19</td></tr> <tr><td>11-15</td><td style="text-align: right;">12</td></tr> <tr><td>16 to 20 years</td><td style="text-align: right;">5</td></tr> <tr><td>21 years or over</td><td style="text-align: right;">2</td></tr> </table>	0-5 years	64%	6-10	19	11-15	12	16 to 20 years	5	21 years or over	2
Female	51%														
Male	49														
0-5 years	64%														
6-10	19														
11-15	12														
16 to 20 years	5														
21 years or over	2														

<p>8. What is your race/ethnic group?</p> <table border="0" style="width: 100%;"> <tr><td>White</td><td style="text-align: right;">72%</td></tr> <tr><td>Black</td><td style="text-align: right;">16</td></tr> <tr><td>Hispanic</td><td style="text-align: right;">8</td></tr> <tr><td>Asian</td><td style="text-align: right;">1</td></tr> <tr><td>Other</td><td style="text-align: right;">3</td></tr> </table>	White	72%	Black	16	Hispanic	8	Asian	1	Other	3	<p>9b. How long have you been in a similar position in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>0-5 years</td><td style="text-align: right;">47%</td></tr> <tr><td>6-10</td><td style="text-align: right;">24</td></tr> <tr><td>11-15</td><td style="text-align: right;">17</td></tr> <tr><td>16 to 20 years</td><td style="text-align: right;">8</td></tr> <tr><td>21 years or over</td><td style="text-align: right;">4</td></tr> </table>	0-5 years	47%	6-10	24	11-15	17	16 to 20 years	8	21 years or over	4
White	72%																				
Black	16																				
Hispanic	8																				
Asian	1																				
Other	3																				
0-5 years	47%																				
6-10	24																				
11-15	17																				
16 to 20 years	8																				
21 years or over	4																				

<p>10. How long have you worked in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>0-5 years</td><td style="text-align: right;">23%</td></tr> <tr><td>6-10</td><td style="text-align: right;">16</td></tr> <tr><td>11-15</td><td style="text-align: right;">18</td></tr> <tr><td>16 to 20 years</td><td style="text-align: right;">16</td></tr> <tr><td>21 years or over</td><td style="text-align: right;">28</td></tr> </table>	0-5 years	23%	6-10	16	11-15	18	16 to 20 years	16	21 years or over	28	
0-5 years	23%										
6-10	16										
11-15	18										
16 to 20 years	16										
21 years or over	28										

PART B:

STATEMENTS ON SURVEY INSTRUMENT	CATEGORY (SEE LEGEND)*					
	SA (%)	A (%)	N (%)	D (%)	SD (%)	DK (%)
1. The emphasis on learning in Broward County School District has increased in recent years.	56	32	7	2	3	3
2. Broward County schools are safe and secure from crime.	8	48	22	15	3	4
3. Our schools do not effectively handle misbehavior problems.	7	20	16	27	18	13
4. Our schools have sufficient space and facilities to support the instructional programs.	2	4	6	37	46	5
5. Our schools do not have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	4	12	14	33	23	15
6. Our schools can be described as "good places to learn."	15	61	13	6	3	3
7. There is administrative support for controlling student behavior in our schools.	15	46	12	11	4	12
8. Most students in our schools are motivated to learn.	8	49	15	12	3	14
9. Lessons are organized to meet students' needs.	5	34	21	8	1	31
10. The curriculum is broad and challenging for most students.	12	52	7	7	1	21
11. There is little a teacher can do to overcome education problems due to a student's home life.	3	16	12	39	21	8
12. Teachers in our schools know the material they teach.	9	50	20	4	1	18
13. Teachers in our schools care about students' needs.	16	60	10	3	1	10
14. Teachers expect students to do their very best.	15	55	15	5	1	9
15. Principals and assistant principals in our schools care about students' needs.	22	62	7	3	1	6
16. In general, parents do not take responsibility for their children's behavior in our schools.	6	30	21	28	6	9
17. Parents in this district are satisfied with the education their children are receiving.	4	37	26	18	4	12
18. Most parents really don't seem to know what goes on in our schools.	7	42	15	25	3	8
19. Parents play an active role in decision-making in my school.	6	15	17	11	2	49
20. This community really cares about its childrens' education.	13	45	17	18	0	8
21. Taxpayer dollars are being used wisely to support public education in the Broward County School District.	19	44	13	16	6	2
22. Sufficient student services are provided in the Broward County School District (e.g., counseling, speech therapy, health).	13	39	11	19	4	14
23. Site-based management has been implemented effectively in the Broward County School District.	14	39	14	13	4	17

Legend:

*SA = Strongly Agree, A = Agree, N = Neither Agree/Disagree, D = Disagree, SD = Strongly Disagree, DK = Don't Know

PART C:

STATEMENTS ON SURVEY INSTRUMENT	CATEGORY (see legend)				
	E (%)	G (%)	F (%)	P (%)	DK (%)
1. School board members' knowledge of the educational needs of students in the Broward County School District.	9	43	32	11	6
2. School board members' knowledge of operations in the Broward County School District.	7	32	38	19	4
3. School board members' work at setting or revising policies for the Broward County School District.	11	44	29	12	5
4. The district school superintendent's work as the instructional leader of the Broward County School District.	48	29	14	7	3
5. The district school superintendent's work as the chief administrator (manager) of the Broward County School District.	48	30	10	9	2
6. Principals' work as the instructional leaders of their schools.	21	46	18	3	12
7. Principals' work as the managers of the staff and teachers.	22	50	14	3	11
8. Teachers' work in meeting students' individual learning needs.	11	42	28	4	16
9. Teachers' work in communicating with parents.	8	35	32	6	19
10. Teachers' attitudes about their jobs.	6	33	36	9	17
11. Students' ability to learn.	10	55	18	2	16
12. The amount of time students spend on task learning in the classroom.	4	36	23	4	34
13. Parents' efforts in helping their children to do better in school.	1	25	37	14	22
14. Parents' participation in school activities and organizations.	2	19	40	21	18
15. How well students' test results are explained to parents.	4	28	26	16	26
16. The condition in which Broward County School District schools are kept.	6	50	34	8	3
17. How well relations are maintained with various groups in the community.	8	47	29	6	10
18. The opportunities provided by the district to improve the skills of teachers.	22	44	14	4	16
19. The opportunity provided by the district to improve the skills of school administrators.	17	44	21	12	7
20. The district's job of providing adequate instructional technology.	12	53	24	4	7
21. The district's use of technology for administrative purposes.	19	57	17	6	2

Legend:

*E = Excellent, G = Good, F = Fair, P = Poor, DK = Don't Know

PART D: Work Environment

STATEMENT	SA (%)	A (%)	N (%)	D (%)	SD (%)	DK (%)
1. I find the Broward County School District to be an exciting, challenging place to work.	42	38	10	7	4	0
2. The work standards and expectations in the Broward County School District are equal to or above those of most other school districts.	47	27	5	4	4	14
3. Broward County School District officials enforce high work standards.	41	37	12	7	4	0
4. Most Broward County School District teachers enforce high student learning standards.	14	37	16	4	1	28
5. Broward County School District teachers and administrators have excellent working relationships.	11	31	22	14	3	19
6. <u>Teachers</u> who do not meet expected work standards are disciplined.	5	20	15	20	10	30
7. <u>Staff</u> who do not meet expected work standards are disciplined.	6	31	22	24	11	6
8. <u>Teacher</u> promotions and pay increases are based upon individual performance.	3	7	7	31	26	26
9. <u>Staff</u> promotions and pay increases are based upon individual productivity.	4	9	11	32	37	8
10. I feel that I have the authority to adequately perform my job responsibilities.	31	37	7	13	12	0
11. I have adequate facilities to do my work.	29	42	11	10	8	0
12. I have adequate equipment and computer support to conduct my work.	32	42	10	6	10	0
13. The workloads are equitably distributed among teachers and among staff members.	7	17	17	10	10	39
14. No one knows or cares about the amount or quality of work that I perform.	10	12	15	33	30	1
15. Workload is evenly distributed.	5	24	18	27	18	8
16. The failure of Broward County School District officials to enforce high work standards results in poor quality work.	7	13	22	25	27	6
17. I often observe other teachers and/or staff socializing rather than working while on the job.	6	13	16	32	25	9

Legend:

*SA = Strongly Agree, A = Agree, N = Neither Agree/Disagree, D = Disagree, SD = Strongly Disagree, DK = Don't Know

PART E: Job Satisfaction.

STATEMENT	SA (%)	A (%)	N (%)	D (%)	SD (%)	DK (%)
1. I am very satisfied with my job in the Broward County School District.	31	41	15	6	6	0
2. I plan to make a career in the Broward County School District.	44	36	9	4	4	3
3. I am actively looking for a job outside of the Broward County School District.	4	5	13	30	48	1
4. Salary levels in the Broward County School District are competitive.	19	44	12	13	10	2
5. I feel that my work is appreciated by my supervisor(s).	27	38	15	7	12	1
6. I feel that I am an integral part of the Broward County School District team.	29	39	13	11	8	0
7. I feel that there is no future for me in the Broward County School District.	6	9	11	24	49	3
8. My salary level is adequate for my level of work and experience.	9	32	13	24	22	1
9. I enjoy working in a culturally diverse environment.	45	45	8	1	0	1

Legend:

*SA = Strongly Agree A = Agree, N = Neither Agree/Disagree, D = Disagree, SD = Strongly Disagree, DK = Don't Know

PART F: Administrative Structure and Practices.

STATEMENT	SA (%)	A (%)	N (%)	D (%)	SD (%)	DK (%)
1. Most administrative practices in Broward County School District are highly effective and efficient.	16	38	17	16	12	1
2. Administrative decisions are made quickly and decisively.	11	25	21	26	15	2
3. Broward County School District administrators are easily accessible and open to input.	10	40	21	15	14	1
4. Authority for administrative decisions is delegated to the lowest possible level.	4	15	18	33	25	6
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	6	36	16	16	11	15
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	24	34	12	17	10	3
7. The extensive committee structure in Broward County School District ensures adequate input from teachers and staff on most important decisions.	8	41	17	14	10	10
8. The Broward County School District has too many committees.	18	25	19	23	8	7
9. The Broward County School District has too many layers of administrators.	14	13	21	33	17	2
10. Most Broward County School District administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	9	38	23	15	14	1
11. Central Office Administrators are responsive to school needs.	15	50	13	5	3	15
12. Central Office Administrators provide quality service to schools.	15	49	16	3	2	15

Legend:

*SA = Strongly Agree, A = Agree, N = Neither Agree/Disagree, D = Disagree, SD = Strongly Disagree, DK = Don't Know

PART G: Broward County School District Operations.

District/Program Function	Should Be Eliminated (%)	Needs Major Improvement (%)	Needs Some Improvement (%)	Adequate (%)	Outstanding (%)	Don't Know (%)
a. Budgeting	1	13	21	33	21	12
b. Strategic planning	1	11	15	37	16	21
c. Curriculum planning	0	5	14	26	23	31
d. Financial management and accounting	0	14	17	32	18	19
e. Community relations	1	8	24	34	21	13
f. Program evaluation, research, and assessment	1	6	13	32	24	25
g. Instructional technology	1	11	27	34	8	20
h. Pupil accounting	0	3	9	33	14	41
i. Instructional coordination/supervision	0	5	14	34	13	34
j. Instructional support	0	7	13	34	17	29
k. Federal Program (e.g., Chapter I, Special Education) coordination	2	6	7	38	16	33
l. Personnel recruitment	0	16	20	36	16	13
m. Personnel selection	0	21	26	33	13	6
n. Personnel evaluation	1	16	20	54	12	2
o. Staff development	0	19	20	39	17	5
p. Data processing	1	13	15	39	11	22
q. Purchasing	1	14	19	41	10	16
r. Law enforcement/security	1	10	22	39	11	17
s. Plant maintenance	1	17	19	41	9	14
t. Facilities planning	1	20	24	31	8	16
u. Pupil transportation	1	7	12	43	18	20
v. Food service	0	1	8	45	18	28
w. Custodial services	1	16	12	41	9	22
x. Risk management	3	14	11	37	16	20
y. Administrative technology	1	15	20	40	15	10

PART H: General Questions

1. The overall operation of the Broward County School District is:

Highly efficient	16%
Above average in efficiency	63
Less efficient than most other school districts	13
Don't know	7

2. The operational efficiency of the Broward County School District could be improved by:

Offering fewer programs	15%
Increasing some class sizes	1
Increasing teacher workload	2
Reducing the number of administrators	14
Reducing the number of support staff	5
Privatizing some support services	27
Reducing the number of facilities operated by the district	6
Other	26

PERFORMANCE REVIEW OF THE BROWARD COUNTY SCHOOL DISTRICT

PRINCIPAL SURVEY RESULTS (n=138)

PART A:

<p>1. I think the overall quality of public education in the Broward County School District is:</p> <table border="0" style="width: 100%;"> <tr><td>Excellent</td><td style="text-align: right;">36%</td></tr> <tr><td>Good</td><td style="text-align: right;">59</td></tr> <tr><td>Fair</td><td style="text-align: right;">4</td></tr> <tr><td>Poor</td><td style="text-align: right;">0</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">0</td></tr> </table>	Excellent	36%	Good	59	Fair	4	Poor	0	Don't Know	0	<p>2. I think the overall quality of education in the Broward County School District is:</p> <table border="0" style="width: 100%;"> <tr><td>Improving</td><td style="text-align: right;">92%</td></tr> <tr><td>Staying the Same</td><td style="text-align: right;">6</td></tr> <tr><td>Getting Worse</td><td style="text-align: right;">2</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">0</td></tr> </table>	Improving	92%	Staying the Same	6	Getting Worse	2	Don't Know	0
Excellent	36%																		
Good	59																		
Fair	4																		
Poor	0																		
Don't Know	0																		
Improving	92%																		
Staying the Same	6																		
Getting Worse	2																		
Don't Know	0																		

Students are often given the grades A, B, C, D and F to denote the quality of their work. Suppose teachers and administrators were graded the same way.

<p>3. In general, what grade would you give the teachers in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>A</td><td style="text-align: right;">18%</td></tr> <tr><td>B</td><td style="text-align: right;">69</td></tr> <tr><td>C</td><td style="text-align: right;">12</td></tr> <tr><td>D</td><td style="text-align: right;">1</td></tr> <tr><td>F</td><td style="text-align: right;">0</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">1</td></tr> </table>	A	18%	B	69	C	12	D	1	F	0	Don't Know	1	<p>4. In general, what grade would you give the school-level administrators in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>A</td><td style="text-align: right;">37%</td></tr> <tr><td>B</td><td style="text-align: right;">52</td></tr> <tr><td>C</td><td style="text-align: right;">10</td></tr> <tr><td>D</td><td style="text-align: right;">0</td></tr> <tr><td>F</td><td style="text-align: right;">0</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">1</td></tr> </table>	A	37%	B	52	C	10	D	0	F	0	Don't Know	1
A	18%																								
B	69																								
C	12																								
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A	37%																								
B	52																								
C	10																								
D	0																								
F	0																								
Don't Know	1																								

<p>5. In general, what grade would you give the district-level administrators in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>A</td><td style="text-align: right;">21%</td></tr> <tr><td>B</td><td style="text-align: right;">54</td></tr> <tr><td>C</td><td style="text-align: right;">20</td></tr> <tr><td>D</td><td style="text-align: right;">3</td></tr> <tr><td>F</td><td style="text-align: right;">1</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">1</td></tr> </table>	A	21%	B	54	C	20	D	3	F	1	Don't Know	1	<p>6. In what type of school do you work this year?</p> <table border="0" style="width: 100%;"> <tr><td>Elementary School</td><td style="text-align: right;">65%</td></tr> <tr><td>Junior High/Middle School</td><td style="text-align: right;">16</td></tr> <tr><td>High School</td><td style="text-align: right;">12</td></tr> <tr><td>Other</td><td style="text-align: right;">7</td></tr> </table>	Elementary School	65%	Junior High/Middle School	16	High School	12	Other	7
A	21%																				
B	54																				
C	20																				
D	3																				
F	1																				
Don't Know	1																				
Elementary School	65%																				
Junior High/Middle School	16																				
High School	12																				
Other	7																				

<p>7. I am a:</p> <table border="0" style="width: 100%;"> <tr><td>Female</td><td style="text-align: right;">71%</td></tr> <tr><td>Male</td><td style="text-align: right;">29</td></tr> </table>	Female	71%	Male	29	<p>9a. How long have you been in your current position in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>0-5 years</td><td style="text-align: right;">65%</td></tr> <tr><td>6-10</td><td style="text-align: right;">20</td></tr> <tr><td>11-15</td><td style="text-align: right;">9</td></tr> <tr><td>16-20</td><td style="text-align: right;">4</td></tr> <tr><td>21 years or more</td><td style="text-align: right;">2</td></tr> </table>	0-5 years	65%	6-10	20	11-15	9	16-20	4	21 years or more	2
Female	71%														
Male	29														
0-5 years	65%														
6-10	20														
11-15	9														
16-20	4														
21 years or more	2														

<p>8. What is your race/ethnic group?</p> <table border="0" style="width: 100%;"> <tr><td>White</td><td style="text-align: right;">73%</td></tr> <tr><td>Black</td><td style="text-align: right;">20</td></tr> <tr><td>Hispanic</td><td style="text-align: right;">4</td></tr> <tr><td>Other</td><td style="text-align: right;">3</td></tr> </table>	White	73%	Black	20	Hispanic	4	Other	3	<p>9b. How long have you been in a similar position in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>0-5 years</td><td style="text-align: right;">36%</td></tr> <tr><td>6-10</td><td style="text-align: right;">30</td></tr> <tr><td>11-15</td><td style="text-align: right;">21</td></tr> <tr><td>16-20</td><td style="text-align: right;">8</td></tr> <tr><td>21 years or more</td><td style="text-align: right;">5</td></tr> </table>	0-5 years	36%	6-10	30	11-15	21	16-20	8	21 years or more	5
White	73%																		
Black	20																		
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Other	3																		
0-5 years	36%																		
6-10	30																		
11-15	21																		
16-20	8																		
21 years or more	5																		

<p>10. How long have you worked in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>0-5 years</td><td style="text-align: right;">2%</td></tr> <tr><td>6-10</td><td style="text-align: right;">4</td></tr> <tr><td>11-15</td><td style="text-align: right;">9</td></tr> <tr><td>16-20</td><td style="text-align: right;">16</td></tr> <tr><td>21 years or more</td><td style="text-align: right;">68</td></tr> </table>	0-5 years	2%	6-10	4	11-15	9	16-20	16	21 years or more	68	
0-5 years	2%										
6-10	4										
11-15	9										
16-20	16										
21 years or more	68										

PART B:

STATEMENTS ON SURVEY INSTRUMENT	CATEGORY (SEE LEGEND)*					
	SA (%)	A (%)	N (%)	D (%)	SD (%)	DK (%)
1. The emphasis on learning in Broward County School District has increased in recent years.	77	19	3	1	1	0
2. Broward County schools are safe and secure from crime.	14	77	8	2	0	0
3. Our schools do not effectively handle misbehavior problems.	3	10	7	45	34	1
4. Our schools have sufficient space and facilities to support the instructional programs.	3	11	10	42	35	0
5. Our schools do not have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	1	10	8	42	39	0
6. Our schools can be described as "good places to learn."	36	60	4	1	0	0
7. There is administrative support for controlling student behavior in our schools.	37	54	2	5	2	0
8. Most students in our schools are motivated to learn.	13	69	9	8	2	0
9. Lessons are organized to meet students' needs.	17	67	13	3	0	0
10. The curriculum is broad and challenging for most students.	28	59	8	5	1	0
11. There is little a teacher can do to overcome education problems due to a student's home life.	4	6	13	47	31	0
12. Teachers in our schools know the material they teach.	16	74	9	1	0	1
13. Teachers in our schools care about students' needs.	32	60	7	1	0	0
14. Teachers expect students to do their very best.	32	58	6	4	0	0
15. Principals and assistant principals in our schools care about students' needs.	55	43	2	1	0	0
16. In general, parents do not take responsibility for their children's behavior in our schools.	6	22	16	45	12	0
17. Parents in this district are satisfied with the education their children are receiving.	9	66	13	9	0	2
18. Most parents really don't seem to know what goes on in our schools.	4	37	21	31	7	1
19. Parents play an active role in decision-making in my school.	22	46	14	15	4	0
20. This community really cares about its childrens' education.	24	55	11	10	1	0
21. Taxpayer dollars are being used wisely to support public education in the Broward County School District.	18	55	13	10	3	2
22. Sufficient student services are provided in the Broward County School District (e.g., counseling, speech therapy, health).	16	41	10	30	4	0
23. Site-based management has been implemented effectively in the Broward County School District.	20	50	12	14	5	0

Legend:

*SA = Strongly Agree, A = Agree, N = Neither Agree/Disagree, D = Disagree, SD = Strongly Disagree, DK = Don't Know

PART C:

STATEMENTS ON SURVEY INSTRUMENT	CATEGORY (see legend)				
	E (%)	G (%)	F (%)	P (%)	DK (%)
1. School board members' knowledge of the educational needs of students in the Broward County School District.	6	35	46	11	2
2. School board members' knowledge of operations in the Broward County School District.	9	40	37	12	2
3. School board members' work at setting or revising policies for the Broward County School District.	10	40	42	8	1
4. The district school superintendent's work as the instructional leader of the Broward County School District.	52	31	13	3	0
5. The district school superintendent's work as the chief administrator (manager) of the Broward County School District.	52	31	13	5	0
6. Principals' work as the instructional leaders of their schools.	40	51	9	1	0
7. Principals' work as the managers of the staff and teachers.	49	47	3	1	0
8. Teachers' work in meeting students' individual learning needs.	23	58	16	2	0
9. Teachers' work in communicating with parents.	18	54	26	2	0
10. Teachers' attitudes about their jobs.	9	57	31	3	0
11. Students' ability to learn.	13	68	17	2	0
12. The amount of time students spend on task learning in the classroom.	13	52	31	4	0
13. Parents' efforts in helping their children to do better in school.	6	31	53	10	0
14. Parents' participation in school activities and organizations.	6	28	37	28	0
15. How well students' test results are explained to parents.	10	43	40	6	2
16. The condition in which Broward County School District schools are kept.	8	60	28	5	0
17. How well relations are maintained with various groups in the community.	13	59	26	2	0
18. The opportunities provided by the district to improve the skills of teachers.	34	51	13	2	0
19. The opportunity provided by the district to improve the skills of school administrators.	33	51	15	2	0
20. The district's job of providing adequate instructional technology.	19	40	30	11	0
21. The district's use of technology for administrative purposes.	27	49	20	4	0

Legend:

*E = Excellent, G = Good, F = Fair, P = Poor, DK = Don't Know

PART D: Work Environment

STATEMENT	SA (%)	A (%)	N (%)	D (%)	SD (%)	DK (%)
1. I find the Broward County School District to be an exciting, challenging place to work.	46	44	6	3	1	0
2. The work standards and expectations in the Broward County School District are equal to or above those of most other school districts.	63	28	3	1	1	4
3. Broward County School District officials enforce high work standards.	60	33	4	2	2	0
4. Most Broward County School District teachers enforce high student learning standards.	24	56	15	4	0	1
5. Broward County School District teachers and administrators have excellent working relationships.	18	55	21	4	0	2
6. <u>Teachers</u> who do not meet expected work standards are disciplined.	5	53	22	18	1	1
7. <u>Staff</u> who do not meet expected work standards are disciplined.	6	62	20	12	1	1
8. <u>Teacher</u> promotions and pay increases are based upon individual performance.	4	12	15	37	32	1
9. <u>Staff</u> promotions and pay increases are based upon individual productivity.	1	15	17	37	28	2
10. I feel that I have the authority to adequately perform my job responsibilities.	25	46	10	13	7	0
11. I have adequate facilities in which to conduct my work.	28	47	8	13	4	0
12. I have adequate equipment and computer support to conduct my work.	25	45	9	15	6	0
13. The workloads are equitably distributed among teachers and among staff members.	12	50	13	20	6	0
14. No one knows or cares about the amount or quality of work that I perform.	7	17	15	35	23	2
15. Workload is evenly distributed.	4	28	22	34	11	2
16. The failure of Broward County School District officials to enforce high work standards results in poor quality work.	4	11	16	32	35	2
17. I often observe other teachers and/or staff socializing rather than working while on the job.	1	6	10	53	30	0

Legend:

*SA = Strongly Agree, A = Agree, N = Neither Agree/Disagree, D = Disagree, SD = Strongly Disagree, DK = Don't Know

PART E: Job Satisfaction.

STATEMENT	SA (%)	A (%)	N (%)	D (%)	SD (%)	DK (%)
1. I am very satisfied with my job in the Broward County School District.	39	39	13	7	1	0
2. I plan to make a career in the Broward County School District.	51	44	3	0	2	1
3. I am actively looking for a job outside of the Broward County School District.	1	4	9	27	58	1
4. Salary levels in the Broward County School District are competitive.	22	59	9	5	3	2
5. I feel that my work is appreciated by my supervisor(s).	20	43	10	15	10	2
6. I feel that I am an integral part of the Broward County School District team.	29	37	18	10	6	1
7. I feel that there is no future for me in the Broward County School District.	2	3	7	28	57	2
8. My salary level is adequate for my level of work and experience.	12	42	12	24	10	1
9. I enjoy working in a culturally diverse environment.	58	42	1	0	0	0

Legend:

*SA = Strongly Agree A = Agree, N = Neither Agree/Disagree, D = Disagree, SD = Strongly Disagree, DK = Don't Know

PART F: Administrative Structure and Practices.

STATEMENT	SA (%)	A (%)	N (%)	D (%)	SD (%)	DK (%)
1. Most administrative practices in Broward County School District are highly effective and efficient.	22	45	13	16	4	0
2. Administrative decisions are made quickly and decisively.	18	50	14	17	2	1
3. Broward County School District administrators are easily accessible and open to input.	14	38	21	20	7	0
4. Authority for administrative decisions is delegated to the lowest possible level.	5	28	21	32	13	2
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	14	57	12	12	5	0
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	20	38	19	16	7	0
7. The extensive committee structure in Broward County School District ensures adequate input from teachers and staff on most important decisions.	9	45	22	14	10	0
8. The Broward County School District has too many committees.	18	35	19	22	5	2
9. The Broward County School District has too many layers of administrators.	19	25	17	28	10	0
10. Most Broward County School District administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	4	41	16	28	10	2
11. Central Office Administrators are responsive to school needs.	17	42	17	18	7	0
12. Central Office Administrators provide quality service to schools.	15	42	23	13	6	0

Legend:

*SA = Strongly Agree, A = Agree, N = Neither Agree/Disagree, D = Disagree, SD = Strongly Disagree, DK = Don't Know

PART G: Broward County School District Operations.

District/Program Function	Should Be Eliminated (%)	Needs Major Improvement (%)	Needs Some Improvement (%)	Adequate (%)	Outstanding (%)	Don't Know (%)
a. Budgeting	0	14	38	33	15	0
b. Strategic planning	3	11	20	50	15	1
c. Curriculum planning	1	10	26	43	20	0
d. Financial management and accounting	0	11	22	47	16	3
e. Community relations	0	7	15	61	18	0
f. Program evaluation, research, and assessment	0	7	22	52	17	2
g. Instructional technology	0	30	29	29	13	0
h. Pupil accounting	0	8	13	63	11	5
i. Instructional coordination/supervision	1	7	30	47	14	2
j. Instructional support	0	12	34	38	15	1
k. Federal Program (e.g., Chapter I, Special Education) coordination	1	15	18	38	12	16
l. Personnel recruitment	3	7	22	48	15	6
m. Personnel selection	0	5	22	53	18	1
n. Personnel evaluation	0	7	21	55	17	1
o. Staff development	0	10	23	46	20	0
p. Data processing	0	16	27	45	12	0
q. Purchasing	0	12	37	41	9	2
r. Law enforcement/security	0	6	27	53	12	3
s. Plant maintenance	0	24	32	36	8	0
t. Facilities planning	0	31	35	30	4	0
u. Transportation	2	18	39	31	7	4
v. Food service	1	15	26	51	7	2
w. Custodial services	2	19	35	36	8	0
x. Risk management	0	11	18	59	12	1
y. Administrative Technology	0	15	32	43	10	0

PART H: General Questions

1. The overall operation of the Broward County School District is:

Highly efficient	20%
Above average in efficiency	66
Less efficient than most other school districts	6
Don't know	8

2. The operational efficiency of Broward County School District could be improved by:

Offering fewer programs	23%
Increasing some class sizes	2
Increasing teacher workload	1
Reducing the number of administrators	12
Reducing the number of support staff	6
Privatizing some support services	42
Reducing the number of facilities operated by the district	9
Other	17

PERFORMANCE REVIEW OF THE BROWARD COUNTY SCHOOL DISTRICT

TEACHER SURVEY RESULTS (n=425)

PART A:

<p>1. I think the overall quality of public education in the Broward County School District is:</p> <table border="0" style="width: 100%;"> <tr><td>Excellent</td><td style="text-align: right;">9%</td></tr> <tr><td>Good</td><td style="text-align: right;">59</td></tr> <tr><td>Fair</td><td style="text-align: right;">26</td></tr> <tr><td>Poor</td><td style="text-align: right;">6</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">1</td></tr> </table>	Excellent	9%	Good	59	Fair	26	Poor	6	Don't Know	1	<p>2. I think the overall quality of education in the Broward County School District is:</p> <table border="0" style="width: 100%;"> <tr><td>Improving</td><td style="text-align: right;">51%</td></tr> <tr><td>Staying the Same</td><td style="text-align: right;">23</td></tr> <tr><td>Getting Worse</td><td style="text-align: right;">22</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">4</td></tr> </table>	Improving	51%	Staying the Same	23	Getting Worse	22	Don't Know	4
Excellent	9%																		
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Improving	51%																		
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Students are often given the grades A, B, C, D and F to denote the quality of their work. Suppose teachers and administrators were graded the same way.

<p>3. In general, what grade would you give the teachers in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>A</td><td style="text-align: right;">19%</td></tr> <tr><td>B</td><td style="text-align: right;">59</td></tr> <tr><td>C</td><td style="text-align: right;">16</td></tr> <tr><td>D</td><td style="text-align: right;">2</td></tr> <tr><td>F</td><td style="text-align: right;">1</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">5</td></tr> </table>	A	19%	B	59	C	16	D	2	F	1	Don't Know	5	<p>4. In general, what grade would you give the school-level administrators in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>A</td><td style="text-align: right;">10%</td></tr> <tr><td>B</td><td style="text-align: right;">45</td></tr> <tr><td>C</td><td style="text-align: right;">29</td></tr> <tr><td>D</td><td style="text-align: right;">10</td></tr> <tr><td>F</td><td style="text-align: right;">4</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">3</td></tr> </table>	A	10%	B	45	C	29	D	10	F	4	Don't Know	3
A	19%																								
B	59																								
C	16																								
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F	4																								
Don't Know	3																								

<p>5. In general, what grade would you give the district-level administrators in the Broward County School District?</p> <table border="0" style="width: 100%;"> <tr><td>A</td><td style="text-align: right;">5%</td></tr> <tr><td>B</td><td style="text-align: right;">24</td></tr> <tr><td>C</td><td style="text-align: right;">34</td></tr> <tr><td>D</td><td style="text-align: right;">19</td></tr> <tr><td>F</td><td style="text-align: right;">9</td></tr> <tr><td>Don't Know</td><td style="text-align: right;">9</td></tr> </table>	A	5%	B	24	C	34	D	19	F	9	Don't Know	9	<p>6. In what type of school do you teach this year?</p> <table border="0" style="width: 100%;"> <tr><td>Elementary School</td><td style="text-align: right;">49%</td></tr> <tr><td>Junior High/Middle School</td><td style="text-align: right;">20</td></tr> <tr><td>High School</td><td style="text-align: right;">22</td></tr> <tr><td>District Office</td><td style="text-align: right;">2</td></tr> <tr><td>Other</td><td style="text-align: right;">8</td></tr> </table>	Elementary School	49%	Junior High/Middle School	20	High School	22	District Office	2	Other	8
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<p>7. I am a:</p> <table border="0" style="width: 100%;"> <tr><td>Female</td><td style="text-align: right;">83%</td></tr> <tr><td>Male</td><td style="text-align: right;">18</td></tr> </table>	Female	83%	Male	18	<p>9. What grade or grades are you teaching this year?</p> <table border="0" style="width: 100%;"> <tr><td>Pre-K</td><td style="text-align: right;">6%</td><td style="text-align: right;">7</td><td style="text-align: right;">16%</td></tr> <tr><td>K</td><td style="text-align: right;">14</td><td style="text-align: right;">8</td><td style="text-align: right;">17</td></tr> <tr><td>1</td><td style="text-align: right;">15</td><td style="text-align: right;">9</td><td style="text-align: right;">18</td></tr> <tr><td>2</td><td style="text-align: right;">16</td><td style="text-align: right;">10</td><td style="text-align: right;">20</td></tr> <tr><td>3</td><td style="text-align: right;">16</td><td style="text-align: right;">11</td><td style="text-align: right;">21</td></tr> <tr><td>4</td><td style="text-align: right;">17</td><td style="text-align: right;">12</td><td style="text-align: right;">22</td></tr> <tr><td>5</td><td style="text-align: right;">15</td><td style="text-align: right;">Adult</td><td style="text-align: right;">5</td></tr> <tr><td>6</td><td style="text-align: right;">15</td><td></td><td></td></tr> </table>	Pre-K	6%	7	16%	K	14	8	17	1	15	9	18	2	16	10	20	3	16	11	21	4	17	12	22	5	15	Adult	5	6	15		
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6	15																																				

8. What is your race/ethnic group?

White	83%
Black	11
Hispanic	5
Asian	0
Other	1

10. How long have you taught in the Broward County School District?

0-5 years	25%
6-10	26
11-15	17
16-20	15
21 years or more	17

PART B:

STATEMENTS ON SURVEY INSTRUMENT	CATEGORY (SEE LEGEND)*					
	SA (%)	A (%)	N (%)	D (%)	SD (%)	DK (%)
1. The emphasis on learning in Broward County School District has increased in recent years.	27	42	10	9	7	4
2. Broward County schools are safe and secure from crime.	4	42	19	26	5	3
3. Our schools do not effectively handle misbehavior problems.	21	31	14	24	8	2
4. Our schools have sufficient space and facilities to support the instructional programs.	1	15	8	38	37	1
5. Our schools do not have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	9	18	15	40	15	3
6. Our schools can be described as "good places to learn."	12	56	17	14	2	0
7. There is administrative support for controlling student behavior in our schools.	8	48	15	18	9	1
8. Most students in our schools are motivated to learn.	5	51	15	19	8	1
9. Lessons are organized to meet students' needs.	15	63	10	7	2	3
10. The curriculum is broad and challenging for most students.	9	67	9	12	1	1
11. There is little a teacher can do to overcome education problems due to a student's home life.	10	23	18	40	8	1
12. Teachers in our schools know the material they teach.	19	68	7	2	1	2
13. Teachers in our schools care about students' needs.	29	58	7	3	1	2
14. Teachers expect students to do their very best.	33	56	7	3	1	1
15. Principals and assistant principals in our schools care about students' needs.	21	55	9	11	3	1
16. In general, parents do not take responsibility for their children's behavior in our schools.	17	33	21	24	3	2
17. Parents in this district are satisfied with the education their children are receiving.	3	44	26	15	2	11
18. Most parents really don't seem to know what goes on in our schools.	13	43	14	22	3	5
19. Parents play an active role in decision-making in my school.	8	33	19	24	11	4
20. This community really cares about its childrens' education.	10	43	20	19	5	3
21. Taxpayer dollars are being used wisely to support public education in the Broward County School District.	2	21	20	31	19	6
22. Sufficient student services are provided in the Broward County School District (e.g., counseling, speech therapy, health).	11	42	10	22	12	3
23. Site-based management has been implemented effectively in the Broward County School District.	4	25	25	19	10	18

Legend:

*SA = Strongly Agree, A = Agree, N = Neither Agree/Disagree, D = Disagree, SD = Strongly Disagree, DK = Don't Know

PART C:

STATEMENTS ON SURVEY INSTRUMENT	CATEGORY (see legend)				
	E (%)	G (%)	F (%)	P (%)	DK (%)
1. School board members' knowledge of the educational needs of students in the Broward County School District.	2	19	40	30	10
2. School board members' knowledge of operations in the Broward County School District.	2	24	41	18	15
3. School board members' work at setting or revising policies for the Broward County School District.	2	21	40	22	16
4. The district school superintendent's work as the instructional leader of the Broward County School District.	4	23	34	30	10
5. The district school superintendent's work as the chief administrator (manager) of the Broward County School District.	5	23	32	28	12
6. Principals' work as the instructional leaders of their schools.	15	44	28	12	2
7. Principals' work as the managers of the staff and teachers.	18	44	28	10	1
8. Teachers' work in meeting students' individual learning needs.	19	54	24	3	1
9. Teachers' work in communicating with parents.	20	51	24	4	1
10. Teachers' attitudes about their jobs.	6	38	40	14	1
11. Students' ability to learn.	5	51	36	8	0
12. The amount of time students spend on task learning in the classroom.	4	50	34	9	3
13. Parents' efforts in helping their children to do better in school.	1	17	53	28	2
14. Parents' participation in school activities and organizations.	3	17	40	39	1
15. How well students' test results are explained to parents.	5	34	39	15	8
16. The condition in which Broward County School District schools are kept.	4	40	40	15	1
17. How well relations are maintained with various groups in the community.	4	42	37	5	12
18. The opportunities provided by the district to improve the skills of teachers.	18	54	22	6	0
19. The opportunity provided by the district to improve the skills of school administrators.	8	32	16	5	40
20. The district's job of providing adequate instructional technology.	11	45	29	13	2
21. The district's use of technology for administrative purposes.	11	43	15	5	27

Legend:

*E = Excellent, G = Good, F = Fair, P = Poor, DK = Don't Know

PART D: Work Environment

STATEMENT	SA (%)	A (%)	N (%)	D (%)	SD (%)	DK (%)
1. I find the Broward County School District to be an exciting, challenging place to work.	19	48	19	10	4	0
2. The work standards and expectations in the Broward County School District are equal to or above those of most other school districts.	17	39	14	8	3	20
3. Broward County School District officials enforce high work standards.	13	50	19	11	4	3
4. Most Broward County School District teachers enforce high student learning standards.	17	60	11	6	1	5
5. Broward County School District teachers and administrators have excellent working relationships.	5	31	28	20	12	4
6. <u>Teachers</u> who do not meet expected work standards are disciplined.	3	28	17	25	8	19
7. <u>Staff</u> who do not meet expected work standards are disciplined.	3	27	18	23	7	22
8. <u>Teacher</u> promotions and pay increases are based upon individual performance.	2	5	9	31	47	6
9. <u>Staff</u> promotions and pay increases are based upon individual productivity.	1	6	9	25	34	25
10. I feel that I have the authority to adequately perform my job responsibilities.	28	46	8	12	6	0
11. I have adequate facilities in which to conduct my work.	22	48	9	13	8	0
12. I have adequate equipment and computer support to conduct my work.	20	37	9	17	17	0
13. The workloads are equitably distributed among teachers and among staff members.	7	34	14	22	20	3
14. No one knows or cares about the amount or quality of work that I perform.	9	18	16	34	21	1
15. Workload is evenly distributed.	4	33	16	25	17	6
16. The failure of Broward County School District officials to enforce high work standards results in poor quality work.	5	20	23	28	14	10
17. I often observe other teachers and/or staff socializing rather than working while on the job.	3	11	10	39	33	4

Legend:

*SA = Strongly Agree, A = Agree, N = Neither Agree/Disagree, D = Disagree, SD = Strongly Disagree, DK = Don't Know

PART E: Job Satisfaction.

STATEMENT	SA (%)	A (%)	N (%)	D (%)	SD (%)	DK (%)
1. I am very satisfied with my job in the Broward County School District.	25	43	15	12	5	0
2. I plan to make a career in the Broward County School District.	34	43	11	5	3	4
3. I am actively looking for a job outside of the Broward County School District.	1	6	11	32	47	3
4. Salary levels in Broward County School District are competitive.	7	41	14	20	13	5
5. I feel that my work is appreciated by my supervisor(s).	17	41	15	14	11	1
6. I feel that I am an integral part of the Broward County School District team.	15	38	19	18	9	1
7. I feel that there is no future for me in the Broward County School District.	2	6	14	31	43	4
8. My salary level is adequate for my level of work and experience.	4	15	11	33	37	1
9. I enjoy working in a culturally diverse environment.	35	49	11	2	2	1

Legend:

*SA = Strongly Agree A = Agree, N = Neither Agree/Disagree, D = Disagree, SD = Strongly Disagree, DK = Don't Know

PART F: Administrative Structure and Practices.

STATEMENT	SA (%)	A (%)	N (%)	D (%)	SD (%)	DK (%)
1. Most administrative practices in the Broward County School District are highly effective and efficient.	4	25	20	29	14	10
2. Administrative decisions are made quickly and decisively.	4	29	21	27	12	8
3. Broward County School District administrators are easily accessible and open to input.	4	24	19	26	18	10
4. Authority for administrative decisions is delegated to the lowest possible level.	1	9	17	21	14	38
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	7	38	19	24	11	1
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	18	34	18	11	4	16
7. The extensive committee structure in the Broward County School District ensures adequate input from teachers and staff on most important decisions.	2	22	20	26	18	12
8. The Broward County School District has too many committees.	27	31	15	7	2	19
9. The Broward County School District has too many layers of administrators.	35	26	15	10	2	12
10. Most Broward County School District administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	4	21	21	21	16	17
11. Central Office Administrators are responsive to school needs.	2	16	21	18	12	31
12. Central Office Administrators provide quality service to schools.	2	17	23	17	10	31

Legend:

*SA = Strongly Agree, A = Agree, N = Neither Agree/Disagree, D = Disagree, SD = Strongly Disagree, DK = Don't Know

PART G: Broward County School District Operations.

District/Program Function	Should Be Eliminated (%)	Needs Major Improvement (%)	Needs Some Improvement (%)	Adequate (%)	Outstanding (%)	Don't Know (%)
a. Budgeting	0	27	34	12	1	26
b. Strategic planning	2	16	25	24	3	32
c. Curriculum planning	1	18	31	36	6	9
d. Financial management and accounting	1	21	23	20	1	35
e. Community relations	1	19	29	32	5	13
f. Program evaluation, research, and assessment	2	17	25	33	2	21
g. Instructional technology	0	23	28	34	7	8
h. Pupil accounting	0	10	21	33	2	34
i. Instructional coordination/supervision	2	10	26	42	5	15
j. Instructional support	2	21	28	35	7	8
k. Federal Program (e.g., Chapter I, Special Education) coordination	3	15	21	27	8	27
l. Personnel recruitment	3	12	15	30	2	38
m. Personnel selection	1	15	20	33	3	29
n. Personnel evaluation	2	14	25	44	2	14
o. Staff development	1	11	23	48	12	6
p. Data processing	0	7	13	35	4	41
q. Purchasing	1	14	20	21	2	42
r. Law enforcement/security	0	17	26	38	5	15
s. Plant maintenance	1	19	24	34	5	18
t. Facilities planning	1	27	23	20	3	28
u. Pupil transportation	1	15	21	32	3	29
v. Food service	1	13	20	46	5	15
w. Custodial services	1	16	25	42	10	8
x. Risk management	2	8	17	33	4	38
y. Administrative technology	1	9	13	32	6	39

PART H: General Questions

1. The overall operation of Broward County School District is:

Highly efficient

3%

Above average in efficiency	48
Less efficient than most other school districts	32
Don't know	16

2. The operational efficiency of Broward County School District could be improved by:

Offering fewer programs	15%
Increasing some class sizes	2
Increasing teacher workload	1
Reducing the number of administrators	35
Reducing the number of support staff	11
Privatizing some support services	18
Reducing the number of facilities operated by the district	14
Other	30

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