

# ISLE OF WIGHT COUNTY SCHOOLS SCHOOL DIVISION EFFICIENCY REVIEW

## FINAL REPORT



**Submitted by:**



**June 6, 2006**

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**Submitted by:**



**2123 Centre Pointe Boulevard  
Tallahassee, Florida 32308-4930**

**June 6, 2006**

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## ***EXECUTIVE SUMMARY***

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## ***EXECUTIVE SUMMARY***

The Commonwealth of Virginia has created the School Efficiency Review program, which provides outside educational expertise to school divisions for assistance in utilizing educational dollars to the fullest extent possible. This program involves contracting with educational experts to perform efficiency reviews for select school divisions within the Commonwealth that volunteer to participate. School division efficiency reviews, in conjunction with the Standards of Learning results, enable Virginians to see how well each school division is performing and ensure that ideas for innovative reform are made available to all school divisions in the Commonwealth.

Since its creation in 2003 the program has expanded every year and has included more than ten school divisions in the 2005-06 school year. In August of 2005, MGT of America was awarded a contract to conduct an Efficiency Review of Isle of Wight County Schools. As stated in the Request for Proposals (RFP), the purpose of the study is to conduct an external review to provide findings, commendations, recommendations, and include projected costs and/or cost savings with recommendations. The object of the review is to identify ways that IWCS could realize cost savings in non-instructional areas in order to redirect those funds towards classroom activities.

### ***Isle of Wight County Schools***

Isle of Wight County Schools is located in the Hampton Roads area of Virginia, covering 319 square miles. Division administrative functions are housed in the Isle of Wight Courthouse Complex, the Educational Annex, and in Windsor Elementary School.

The division is responsible for educating over 5,000 students using nearly 800 staff in Isle of Wight County. Over 31 percent of the division's students are disadvantaged according to the most current Virginia Department of Education Web statistics.

Isle of Wight County Schools has an annual budget of \$51.8 million for division operations during the current school year. For the 2004 Fiscal Year, the budget was comprised of over 29 percent local funds, nearly 24 percent state funds, over four percent federal funds, while loans, bonds and other funds rounded out the budget funds.

### ***Review Methodology***

The methodology MGT used to prepare for and conduct the Isle of Wight County Schools Efficiency Review is described in this section. Throughout our practice we have discovered that to be successful, an efficiency review of a school division must:

- be based upon a very detailed work plan and time schedule;
- specifically take into account the unique student body and environment within which the school division operates;
- obtain input from board members, administrators, staff, and the community;

- identify the existence, appropriateness, and use of specific educational objectives;
- contain comparisons to other similar school divisions to provide a reference point;
- follow a common set of guidelines tailored specifically to the division being reviewed;
- include analyses of the efficiency of work practices;
- identify the level and effectiveness of externally imposed work tasks and procedures;
- identify both exemplary programs and practices as well as needed improvements;
- document all findings; and
- present straightforward and practical recommendations for improvements.

With this in mind, our methodology primarily involved a focused use of Virginia review guidelines as well as MGT's audit guidelines following the analysis of both existing data and new information obtained through various means of employee input. Each of the strategies we used is described below.

***Review of Existing Records and Data Sources***

During the period between project initiation and beginning our on-site review, we simultaneously conducted many activities. Among these activities were the identification and collection of existing reports and data sources that provided us with recent information related to the various administrative functions and operations we would review in Isle of Wight County Schools.

More than 100 documents were requested from IWCS. Examples of materials MGT requested included, but were not limited, to the following:

- school board policies and administrative procedures;
- organizational charts;
- program and compliance reports;
- technology plan;
- annual performance reports;
- independent financial audits;
- plans for curriculum and instruction;
- annual budget and expenditure reports;
- job descriptions;
- salary schedules; and
- personnel handbooks.

Data were analyzed from each of these sources and the information was used as a starting point for collecting additional data during our on-site visit.

***Diagnostic Review***

A diagnostic review of Isle of Wight County Schools was conducted in January 2006. An MGT consultant interviewed central office administrators, community leaders, school board members, and county board of supervisors concerning the management and operations of IWCS.

***Employee Surveys***

To secure the involvement of central office administrators, principals/assistant principals, and teachers in the focus and scope of the efficiency review, three on-line surveys were prepared and disseminated in January 2006. Through the use of anonymous surveys, division staff were given the opportunity to express their views about the management and operations of Isle of Wight County Schools. These surveys were similar in format and content to provide a database for determining how the opinions and perceptions of central office administrators, principals/assistant principals, and teachers vary.

The survey results are contained in Appendix A. Specific survey items pertinent to findings in the functional areas MGT reviewed are presented within each chapter.

***Conducting the Formal On-Site Review***

A team of seven consultants conducted the formal on-site review of Isle of Wight County Schools during the week of March 13, 2006. As part of our on-site review, we examined the following IWCS systems and operations:

- Division Administration
- Personnel and Human Resources Management
- Financial Management
- Purchasing, Warehousing, and Fixed Assets
- Education Service Delivery and Management
- Facilities Use and Management
- Transportation
- Technology Management

Prior to the on-site review, each team member was provided with an extensive set of information about IWCS operations. During the on-site work, team members conducted detailed reviews of the structure and operations of Isle of Wight County Schools in their assigned functional areas. All IWCS schools were visited at least once, and most schools were visited more than once.

Our systematic assessment of Isle of Wight County Schools included the use of MGT's *Guidelines for Conducting Management and Performance Audits of School Districts*. In addition, the Commonwealth of Virginia school efficiency review guidelines were used. Following our collection and analysis of existing data and new information, we tailored our guidelines to reflect local policies and administrative procedures; the unique conditions of IWCS, and the input of administrators in the school division. Our on-site



review included meetings with appropriate central office and school-level staff as well as Isle of Wight County staff, and reviews of documentation provided by these individuals.

### **Comparison Summary**

When comparing data on Isle of Wight County Schools to the other specified school divisions within the Commonwealth of Virginia, Isle of Wight has a lower than average number of teachers and teacher aides and is slightly above average on the number of principals/assistant principals per 1,000 students; a lower than average number of guidance counselors and librarians per 1,000 students; and the second-lowest number of teachers per 1,000 students. Isle of Wight has a higher student/teacher ratio for grades kindergarten through seventh as well as for grades eight through twelve than the division average. Isle of Wight County Schools report the third-lowest administration disbursements per pupil. In regard to receipts by fund source, the division reports that most of their funds come from local funds and when compared to the peer divisions, Isle of Wight is below the comparison division average for both state and federal funds.

In terms of student demographics, Isle of Wight has the second-lowest student population and the instruction dollars spent per pupil is reported at \$5,597, which is above the peer division average. Isle of Wight also spends above the peer division average on administration with spending \$246 per pupil on administration. Isle of Wight has the second-highest percentage of economically disadvantaged students.

### **Fiscal Impact**

Based on the analyses of data obtained from interviews, surveys, community input, state and division documents, and first-hand observations in Isle of Wight County Schools (IWCS), the MGT team developed 42 commendations and 97 recommendations in this report. Twenty-three (23) recommendations have fiscal implications.

As shown below in Exhibit 1, full implementation of the recommendations in this report would generate a gross savings of more than \$1.2 million over five years, with a net cost of approximately \$2.1 million. It is important to note that many of the recommendations MGT made without specific fiscal impacts are expected to result in a net cost savings to the division, depending on how the division elects to implement them. It is also important to note that costs and savings presented in this report are in 2005-06 dollars and do not reflect increases due to salary or inflation adjustments.

Exhibit 1 shows the total costs and savings for all recommendations.

**EXHIBIT 1  
SUMMARY OF ANNUAL SAVINGS AND COSTS**

CATEGORY	YEARS					TOTAL FIVE-YEAR SAVINGS (COSTS)
	2006-07	2007-08	2008-09	2009-10	2010-11	
TOTAL SAVINGS	\$166,807	\$266,003	\$266,003	\$266,003	\$266,003	\$1,230,819
TOTAL (COSTS)	(\$634,271)	(\$694,742)	(\$694,742)	(\$696,492)	(\$696,492)	(\$3,416,739)
TOTAL NET SAVINGS (COSTS)	(\$467,464)	(\$428,739)	(\$428,739)	(\$430,489)	(\$430,489)	(\$2,185,920)
ONE-TIME SAVINGS (COSTS)						\$23,466
<b>TOTAL FIVE-YEAR NET SAVINGS (COSTS) INCLUDING ONE-TIME SAVINGS (COSTS)</b>						<b>(\$2,162,454)</b>

**Commendations**

Detailed commendations for exemplary efficiencies are found in the full report in Chapters 2 through 9. The commendations for which Isle of Wight County Schools is recognized are:

- The Isle of Wight County School Board, Superintendent, administration, and staff are commended for developing a comprehensive meeting agenda information packet that is provided members of the School Board and for posting the agenda and meeting minutes on the Web site **(Chapter 2)**.
- Isle of Wight School Division and County are commended for actively investigating and instituting shared services to ensure efficient use of taxpayer dollars **(Chapter 2)**.
- IWCS School Board and administration are commended for containing legal services expenses **(Chapter 2)**.
- The Isle of Wight County School Board, administration, and community are commended for revitalizing the Education Foundation which is providing distinguished support to education **(Chapter 2)**.
- The Isle of Wight County School Board and administration are commended for developing a comprehensive, updated Strategic Plan to include projections, goals, and strategies through 2010 **(Chapter 2)**.
- Isle of Wight County School Board is commended for meeting all minimum Commonwealth school staffing criteria as set forth in the revised Standards of Quality **(Chapter 2)**.
- IWCS is commended for creating a proactive plan regarding the recruitment, hiring, and retention of qualified teachers **(Chapter 3)**.

- IWCS is commended for providing principals with a list of appropriate interview questions **(Chapter 3)**.
- IWCS is commended for establishing an excellent relationship with the Isle of Wight County Sheriff's Office through which all of the fingerprinting is conducted and for requiring the new hire to absorb the cost of fingerprinting **(Chapter 3)**.
- IWCS is commended for implementing an effective method of handling employee concerns and issues **(Chapter 3)**.
- IWCS is commended for developing and utilizing a comprehensive evaluation model for administrators and teachers and for compiling a thorough handbook presenting the programs **(Chapter 3)**.
- The division should be commended for cross-training staff in the Finance Department in order to ensure continuity of services during those instances when staff are absent for extended periods of time **(Chapter 4)**.
- The division's efforts to establish an internal audit function has resulted in a useful and effective control over the financial management practices of the schools **(Chapter 4)**.
- The Finance Department is able to process the division's monthly payroll on schedule with minimal resources assigned **(Chapter 4)**.
- The division is actively monitoring its insurance policies and pursuing changes as needed to help maintain its financial position **(Chapter 4)**.
- The division has adopted comprehensive procedures for monitoring its fixed assets, which contribute to its efforts to properly account for and maintain custody over its tangible property **(Chapter 4)**.
- IWCS is commended for the addition of Lead Teachers who strengthen the school improvement process through their contributions **(Chapter 5)**.
- Isle of Wight County Schools is to be commended for the emphasis they place on reading at every level of the organization **(Chapter 5)**.
- The entire faculty and staff of Isle of Wight County Schools are commended for its exemplary special education model **(Chapter 5)**.
- The students of Isle of Wight County Schools consistently scored above the state average in every sub group on the state's testing program **(Chapter 5)**.
- The Isle of Wight is to be commended for the progress being made on achieving 100 percent proficiency for students by 2014 as measured by the RaMP score **(Chapter 5)**.
- IWCS is to be commended for the improvement in both reading and math scores **(Chapter 5)**.

- Isle of Wight County Schools is to be commended for achieving the AYP and for the success they have achieved on state tests **(Chapter 5)**.
- The division is to be commended for using a process that gives specific direction to the building school improvement teams **(Chapter 5)**.
- Isle of Wight Administration and School Board are commended for developing and implementing comprehensive maintenance and facilities sections of the Six-Year Strategic Plan **(Chapter 6)**.
- Isle of Wight County Schools principals and custodial personnel are commended for maintaining clean and attractive facilities and grounds **(Chapter 6)**.
- IWCS is commended for custodial staffing ratios per square feet of buildings that are in compliance with the American School and University standards **(Chapter 6)**.
- IWCS is commended for an innovative and responsive compensation program to enhance driver availability to support school programs **(Chapter 7)**.
- Special recognition is given to the information systems technicians for commendable accomplishments coordinating and implementing routing and scheduling requirements for Isle of Wight County Schools Division **(Chapter 7)**.
- IWCS has implemented resource teachers to assist in the integration of technology for the division **(Chapter 8)**.
- The Web site for IWCS is updated with a user-friendly content management application that allows a wealth of division information for parents, students, and other stakeholders **(Chapter 8)**.
- The technology coordinator has implemented an effective work order system, and all staff have been trained to use the system **(Chapter 8)**.
- The Technology Department captures customer satisfaction through surveys **(Chapter 8)**.
- IWCS has incorporated appropriate filters on servers to carefully screen Web sites by staff and students **(Chapter 8)**.
- IWCS Technology Department collects survey data from staff regarding training offered **(Chapter 8)**.
- Cafeteria managers provide clear and orderly instructions for food service staff by their specific role in each school kitchen in order to ensure all duties are completed **(Chapter 9)**.
- Staff are cross-trained on all food-service related duties within their respective school kitchens and cafeterias **(Chapter 9)**.

- IWCS has drafted a student wellness policy and anticipated implementation during the next school year **(Chapter 9)**.
- The Food Service Department is commended for maintaining clean facilities **(Chapter 9)**.
- IWCS produces monthly profit and loss statements by each school for food service operations **(Chapter 9)**.
- The division is commended for using dual control methods for daily cash collection regarding food service operations **(Chapter 9)**.
- IWCS is commended for providing several options for parents and students to attain the cafeteria menus **(Chapter 9)**.

### **Major Findings and Recommendations**

Although this Executive Summary briefly highlights key efficiency issues in IWCS, detailed recommendations for improving operations are found throughout the main body of the full report. Fiscal impacts using existing resources should be scheduled by the division using a comprehensive implementation plan in order to systematically allocate staff time. Major findings and recommendations for improvement include the following:

- Establish a divisionwide Education Development Council assigned responsibility for working with the School Board and Board of Supervisors to ensure appropriate working relationships that are focused on the education of Isle of Wight students and addressing the stated concerns of students, parents, and other citizens as well as the growth needs of the division **(Chapter 2, Recommendation 2-5)**.
- Reorganize Isle of Wight County Schools central office administration **(Chapter 2, Recommendation 2-11)**.
- Reorganize the Superintendent's Administrative Cabinet to include the following seven positions: Director of Planning, Accountability, and Technology, Executive Director for Administrative Services, Executive Director for Teaching and Learning, Director of Finance, Executive Assistant/Communications Officer, and three principal representatives; and institute a new agenda that focuses on organizational development and climate and other matters as noted in statements to follow **(Chapter 2, Recommendation 2-12)**.
- Vigorously proceed to implement the communication elements of Six-Year Strategic Plan as updated **(Chapter 2, Recommendation 2-13)**.
- Employ one teacher to assume the current Windsor High School Activity/Athletic Director's teaching assignments **(Chapter 2, Recommendation 2-14)**.
- Create a policy that provides for a list of employees by position who are authorized to view personnel folders other than their own, the specific type(s)

of personnel files the person is allowed to view, and the procedure for gaining access to the files (**Chapter 3, Recommendation 3-3**).

- Ensure that all medical information is filed in folders exclusively for health information and stored in locked cabinets within a secured area with limited access (**Chapter 3, Recommendation 3-4**).
- Require the position Director of Human Resources to have and maintain at least the Professional in Human Resources (PHR) certification in conjunction with the accepted degrees and experience outside the field of human resources if the director does not have a degree in human resources or related field (**Chapter 3, Recommendation 3-7**).
- Assign the role of contact person for employee questions about benefits to the person of assistant director of human resources and provide IWCS employees with information on the new process as well as the contact information for inquiries related to employee benefits (**Chapter 3, Recommendation 3-9**).
- Analyze the expenses incurred for recruiting activities annually to determine which events and activities yielded the best results in new hires and should be included in the recruitment plan for the upcoming school year (**Chapter 3, Recommendation 3-13**).
- Allocate a specific portion of the budget for the Department of Human Resources for advertisement and recruitment expenses and maintain separate records of expenses for teacher positions and support positions (**Chapter 3, Recommendation 3-14**).
- Redistribute some of the responsibilities associated with key accounting and payroll functions to improve internal controls in the Finance Department (**Chapter 4, Recommendation 4-1**).
- Maintain separate custody of student body funds from public funds used by school operations (**Chapter 4, Recommendation 4-4**).
- Hire a central purchasing officer to coordinate acquisitions throughout the division (**Chapter 4, Recommendation 4-5**).
- Develop a comprehensive employee safety training program (**Chapter 4, Recommendation 4-10**).
- Reorganize the Isle of Wight County Schools instructional administration (**Chapter 5, Recommendation 5-1**).
- Continue plans to begin immediate development of curricular maps and other materials (**Chapter 5, Recommendation 5-2**).
- Research a commercial special education software package for future deployment (**Chapter 5, Recommendation 5-4**).

- Adopt a board policy and administrative guideline that establishes testing protocols for all national and state tests (**Chapter 5, Recommendation 5-8**).
- Formalize the division's approach to instructional professional development related to curriculum with the division resuming control over all staff development offerings (**Chapter 5, Recommendation 5-10**).
- Reorganize the Administrative and Educational Services Department to include responsibility for custodial services, fully implementing the organizational recommendations located in Chapter 2.0 of this report (**Chapter 6, Recommendation 6-1**).
- Conduct a detailed facilities' condition study, identify facility replacement and expansion needs, and update the CIP accordingly (**Chapter 6, Recommendation 6-4**).
- Develop and implement a minor maintenance and preventative maintenance (PM) program (**Chapter 6, Recommendation 6-7**).
- Review, adopt, and implement a divisionwide energy management program including incorporating energy management information and assignments in the new employee orientation program (**Chapter 6, Recommendation 6-10**).
- Coordinate with IWC Public Works for use of their automated fuel control system (**Chapter 7, Recommendation 7-4**).
- Ensure full integration of school principals, school administrators and the transportation supervisor into the bell planning and implementation process (**Chapter 7, Recommendation 7-6**).
- Optimize IWCS' bus capacity by assigning this process as the sole responsibility of the transportation supervisor (**Chapter 7, Recommendation 7-7**).
- Hire two additional full-time mechanics (**Chapter 7, Recommendation 7-8**).
- Implement spare bus policy mandating 10 percent of the peak use bus fleet as spares (**Chapter 7, Recommendation 7-11**).
- Establish a 10-year bus replacement cycle replacing ten percent of the bus fleet yearly (**Chapter 7, Recommendation 7-12**).
- Develop and implement a Disaster Recovery Plan for Isle of Wight County Schools (**Chapter 8, Recommendation 8-1**).
- Reorganize the Department of Technology and provide resource teachers with clear and concise job descriptions, as well as proper evaluation forms (**Chapter 8, Recommendation 8-2**).

- Conduct a formal cost-benefit analysis for migrating the division's telephone system to operate over the WAN, and present a recommended approach to the board (**Chapter 8, Recommendation 8-8**).
- Restructure the food service operations (**Chapter 9, Recommendation 9-1**).
- Shift food service staff to ensure most, if not all, Meals Per Labor Hour are at benchmark levels (**Chapter 9, Recommendation 9-2**).
- Establish a policy to create appropriate reports for reviewing food and labor costs on a monthly basis to ensure these costs are in line with best practices (**Chapter 9, Recommendation 9-6**).
- Implement strategies designed to raise participation to 25 percent for breakfast (**Chapter 9, Recommendation 9-7**).



## **1.0 INTRODUCTION**

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## **1.0 INTRODUCTION**

In September 2005, the Commonwealth of Virginia contracted with MGT of America, Inc., to conduct a School Division Efficiency Review of Isle of Wight County Schools (IWCS). The review focused on the financial, organizational, and operational effectiveness of Isle of Wight County Schools. Exhibit 1-1 shows an overview of MGT's work plan and Exhibit 1-2 provides the timeline for the project activities.

### **1.1 Overview of Isle of Wight County Schools**

Isle of Wight County is located in the Hampton Roads area of Virginia, covering 319 square miles. Division administrative functions are housed in the Isle of Wight Courthouse Complex, Educational Annex, as well as Windsor Elementary School.

The division is responsible for educating over 5,000 students using nearly 800 staff in Isle of Wight County. Over 31 percent of the division's students are disadvantaged according to the most current Virginia Department of Education Web statistics.

Isle of Wight County Schools has an annual budget of \$51.8 million for division operations during the current school year.

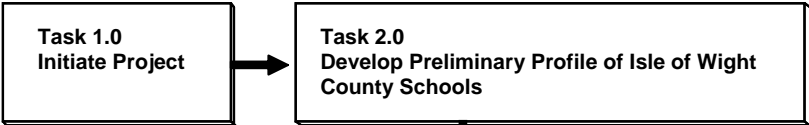
### **1.2 Methodology**

The methodology MGT used to prepare for and conduct the IWCS School Division Efficiency Review is described in this section. Throughout our practice we have discovered that to be successful, an efficiency review of a school division must:

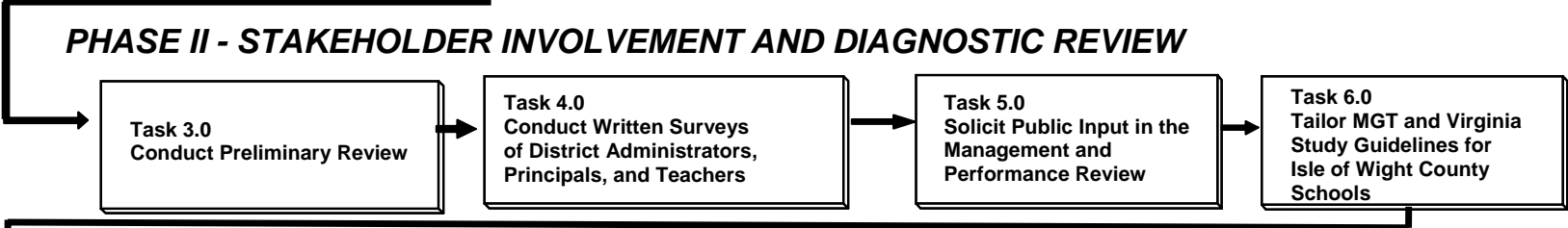
- be based upon a very detailed work plan and time schedule;
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- obtain input from board members, administrators, staff, and the community,
- identify the existence, appropriateness, and use of specific educational objectives;
- contain comparisons to other similar school divisions to provide a reference point;
- follow a common set of guidelines tailored specifically to the division being reviewed;
- include analyses of the efficiency of work practices;
- identify the level and effectiveness of externally imposed work tasks and procedures;

EXHIBIT 1-1  
OVERVIEW OF THE WORK PLAN FOR THE EFFICIENCY REVIEW  
OF ISLE OF WIGHT COUNTY SCHOOLS

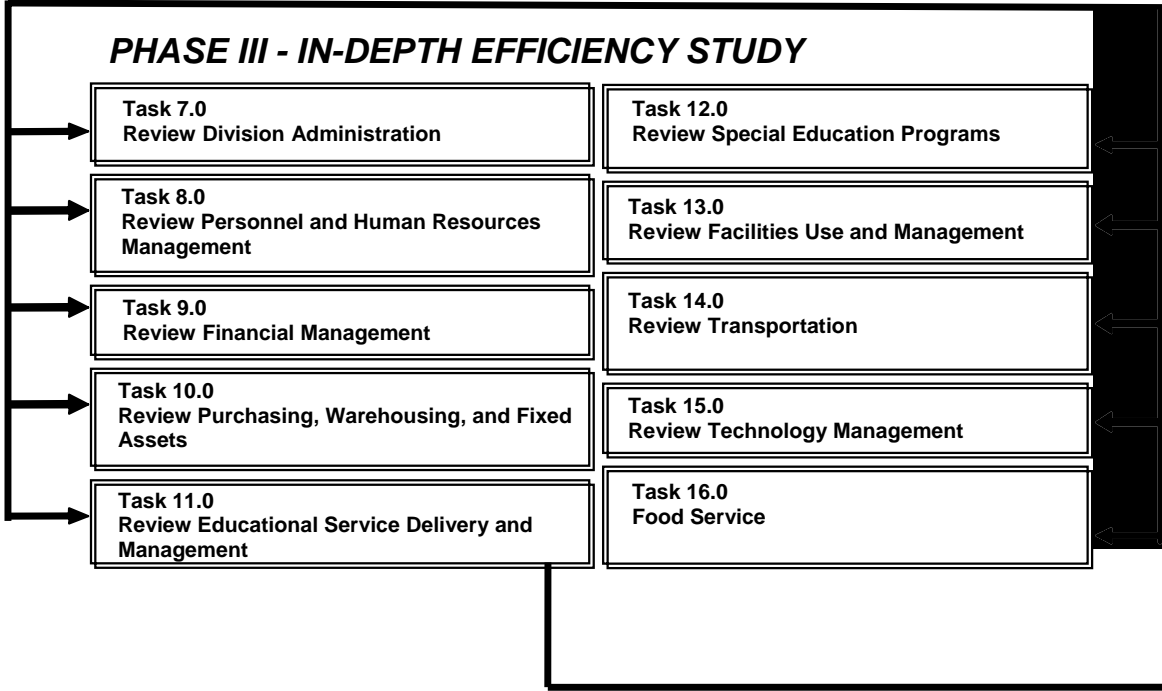
**PHASE I - PROJECT INITIATION**



**PHASE II - STAKEHOLDER INVOLVEMENT AND DIAGNOSTIC REVIEW**



**PHASE III - IN-DEPTH EFFICIENCY STUDY**



**PHASE V -  
PROJECT REPORTING**



**PHASE IV -  
COMPARISON TO OTHER  
SCHOOL DIVISIONS**



**EXHIBIT 1-2  
TIMELINE FOR THE EFFICIENCY REVIEW OF  
ISLE OF WIGHT COUNTY SCHOOLS**

TIME FRAME	ACTIVITY
September 2005	<ul style="list-style-type: none"> <li>■ Finalized contract with the Commonwealth of Virginia.</li> <li>■ Designed tailor-made, written surveys for central office administrators, principals, and teachers.</li> </ul>
January, 2006	<ul style="list-style-type: none"> <li>■ Collected and analyzed existing and comparative data available from the school division.</li> <li>■ Produced profile tables of Isle of Wight County Schools.</li> <li>■ Disseminated surveys to administrators and teachers.</li> </ul>
January 24-25, 2006	<p>On-site visit with Isle of Wight County Schools.</p> <ul style="list-style-type: none"> <li>■ Conducted diagnostic review.</li> <li>■ Collected data.</li> <li>■ Interviewed School Board members.</li> <li>■ Interviewed central office administrators.</li> </ul>
January, 2006	Analyzed collected data.
January, 2006	Tailored review guidelines and trained MGT team members using findings from the above analyses.
Week of March 13, 2006	Conducted formal on-site review, including school visits.
March–April, 2006	Requested additional data from the school division and analyzed data.
March–April, 2006	Prepared Draft Report.
May 2, 2006	Submitted Draft Report.
May 17 – 24, 2006	Revised Draft Report
June 6, 2006	Submitted Final Report

- identify both exemplary programs and practices as well as needed improvements;
- document all findings; and
- present straightforward and practical recommendations for improvements.

With this in mind, our methodology primarily involved a focused use of Virginia review guidelines as well as MGT's audit guidelines following the analysis of both existing data and new information obtained through various means of employee input. Each of the strategies we used is described below.

### **Review of Existing Records and Data Sources**

During the period between project initiation and beginning our on-site review, we simultaneously conducted many activities. Among these activities were the identification and collection of existing reports and data sources that provided us with recent information related to the various administrative functions and operations we would review in Isle of Wight County Schools.

More than 100 documents were requested from IWCS. Examples of materials MGT requested included, but were not limited, to the following:

- school board policies and administrative procedures;
- organizational charts;
- program and compliance reports;
- technology plan;
- annual performance reports;
- independent financial audits;
- plans for curriculum and instruction;
- annual budget and expenditure reports;
- job descriptions;
- salary schedules; and
- personnel handbooks.

Data were analyzed from each of these sources and the information was used as a starting point for collecting additional data during our on-site visit.

### **Diagnostic Review**

A diagnostic review of Isle of Wight County Schools was conducted on January 24-25, 2006. MGT consultants interviewed central office administrators, school board members, and county personnel concerning the management and operations of Isle of Wight County Schools.

### **Employee Surveys**

To secure the involvement of central office administrators, principals/assistant principals, and teachers in the focus and scope of the efficiency review, three on-line surveys were prepared and disseminated in January 2006. Through the use of anonymous surveys,

administrators and teachers were given the opportunity to express their views about the management and operations of Isle of Wight County Schools. These surveys were similar in format and content to provide a database for determining how the opinions and perceptions of central office administrators, principals/assistant principals, and teachers vary. Of note, a school board member did actively pursue staff to complete surveys during visits to schools which was not consistent with MGT's protocol; however, survey results are still considered of value to this report.

IWCS staff was given from January 23, 2006 through February 6, 2006 to respond. The IWCS response rates for the three surveys were as follows: seventy (70) percent of central office administrators returned a survey, as did 94 percent of principals and assistant principals, and 58 percent of teachers. MGT compared all survey responses among the three employee groups and compared all IWCS administrators and teachers to those in the more than 40 districts where we have conducted similar surveys.

The survey results are contained in Appendix A. Specific survey items pertinent to findings in the functional areas MGT reviewed are presented within each chapter.

### **Conducting the Formal On-Site Review**

A team of seven consultants conducted the formal on-site review of Isle of Wight County Schools during the week of March 13, 2006. As part of our on-site review, we examined the following IWCS systems and operations:

- Division Administration
- Personnel and Human Resources Management
- Financial Management Systems
- Education Service Delivery and Management
- Special Programs
- Facilities Use and Management
- Transportation
- Technology Management
- Food Services

Prior to the on-site review, each team member was provided with an extensive set of information about IWCS operations. During the on-site work, team members conducted detailed reviews of the structure and operations of Isle of Wight County Schools in their assigned functional areas. All public schools in Isle of Wight County were visited at least once, and most schools were visited more than once.

Our systematic assessment of Isle of Wight County Schools included the use of MGT's *Guidelines for Conducting Management and Performance Audits of School Districts*. In addition, the Commonwealth of Virginia school efficiency review guidelines were used. Following our collection and analysis of existing data and new information, we tailored our guidelines to reflect local policies and administrative procedures; the unique conditions of Isle of Wight County Schools, and the input of administrators in the school division. Our on-site review included meetings with appropriate central office and school-level staff as well as Isle of Wight county officials, and reviews of documentation provided by these individuals.

### **1.3 Comparisons to Other School Divisions**

To effectively facilitate ongoing, systemic improvement and to overcome the continual challenges of a changing environmental and fiscal landscape, a school division must have a clear understanding of the status of its internal systems and processes. One way to achieve this understanding is to compare the operations of one school division to others with similar characteristics. MGT has found that such comparisons with other school divisions yield valuable insights and often form a basis for determining efficient and effective practices for a school division interested in making improvements. For these comparisons to be meaningful, however, the comparison school divisions must be chosen carefully. Ideally, a school division should be compared with others that are not only similar in size and demographics, but also similar in operations and funding.

The practice of benchmarking is often used to make such comparisons between and among school divisions. Benchmarking refers to the use of commonly held organizational characteristics in making concrete statistical or descriptive comparisons of organizational systems and processes. It is also a performance measurement tool used in conjunction with improvement initiatives to measure comparative operating performance and identify best practices.

With this in mind, MGT initiated a benchmarking comparison of the Isle of Wight County Schools to provide a common foundation from which to compare systems and processes within the school division with those of other similar systems. As comparisons are made, it is important for readers to keep in mind that when comparisons are made across more than one division, the data are not as reliable, as different school divisions have different operational definitions and self-reported data by peer school divisions can be subjective.

The Virginia Department of Education has developed a cluster code to identify similar school divisions for comparison purposes. Cluster identifiers were created by using data including, but not limited to the cost per student for each major area, major drivers of costs, and ranking of costs. Isle of Wight County Schools is identified in Cluster 4 according to the Virginia Department of Education's Web site. IWCS and MGT selected the peer school divisions for the review. The Virginia public school divisions chosen for comparison were:

- Pulaski County Public Schools;
- Gloucester County Schools;
- Prince George County Public Schools; and
- Culpeper County Public Schools.

Exhibit 1-3 illustrates how the comparison school divisions compare to Isle of Wight County Schools in terms of enrollment, number of schools, and number of school division staff for the most current school year available from the Virginia Department of Education's Web site. As can be seen:

- IWCS (5,167) has slightly less than the average student population of 5,796;
- With 174 students per 1,000 people in the general population, IWCS is at the comparison average for student to general population ratio;

- IWCS' percent of economically disadvantaged students (31.1%) is higher than the peer division average (25.0%); and
- IWCS, with nine schools, has one more school than the peer division average of eight schools.

**EXHIBIT 1-3  
OVERVIEW OF PEER PUBLIC SCHOOL DIVISIONS  
2004-05 SCHOOL YEAR**

SCHOOL DIVISION	CLUSTER IDENTIFICATION	TOTAL STUDENT POPULATION	STUDENT POPULATION PER 1,000 GENERAL POPULATION	PERCENT ECONOMICALLY DISADVANTAGED	TOTAL NUMBER OF SCHOOLS
<b>Isle of Wight County</b>	<b>4</b>	<b>5,167</b>	<b>174</b>	<b>31.1</b>	<b>9</b>
Pulaski County	4	4,939	141	38.9	9
Gloucester County	4	6,149	177	11.7	9
Prince George County	4	6,236	189	19.9	8
Culpeper County	4	6,489	189	23.4	8
<b>Division Average</b>	<b>N/A</b>	<b>5,796</b>	<b>174</b>	<b>25.0</b>	<b>8</b>

Sources: Virginia Department of Education, Web site, 2006.  
United States Census Bureau, 2000 Census Data.

Exhibit 1-4 offers a comparison of classroom teachers per 1,000 students among the comparison school divisions. As shown in the exhibit:

- IWCS has fewer teachers per 1,000 students, at 76.15, than the peer school average of 81.61;
- In grades K through 7, IWCS has a ratio of 12.8 students per classroom teaching position, which is slightly higher than the division average; and
- In grades 8 through 12, IWCS has a ratio of 13.6 students per classroom teaching position, the highest of all the peer divisions.



**EXHIBIT 1-4  
TEACHER STAFFING LEVELS AND PUPIL: TEACHER RATIOS  
PEER SCHOOL DIVISIONS  
2003-04 SCHOOL YEAR\***

<b>SCHOOL DIVISION</b>	<b>TOTAL TEACHERS PER 1,000 STUDENTS</b>	<b>RATIO OF PUPILS TO CLASSROOM TEACHING POSITIONS FOR GRADES K-7**</b>	<b>RATIO OF PUPILS TO CLASSROOM TEACHING POSITIONS FOR GRADES 8-12</b>
<b>Isle of Wight County</b>	<b>76.15</b>	<b>12.8</b>	<b>13.6</b>
Pulaski County	88.29	10.8	12.3
Gloucester County	81.35	12.8	11.6
Prince George County	73.99	13.9	12.9
Culpeper County	88.29	12.2	10.1
<b>Division Average</b>	<b>81.61</b>	<b>12.5</b>	<b>12.1</b>

Source: 2003-04 Superintendent's Annual Report for Virginia, Virginia Department of Education, Web site, 2006.

\*Ratios based on End-of-Year enrollments.

\*\*Pupil/teacher ratios for elementary and secondary may vary because of the reporting of teaching positions for middle school grades 6 - 8.

Exhibit 1-5 displays revenue percentages by federal, state, and local funding sources. As is shown:

- IWCS received the second lowest percentage of its funds, 29.41 percent, from local sources, than the peer division average of 34.02 percent;
- IWCS, at 23.84 percent, received the lowest percentage of its funds from state sources than its peer divisions, and was 14 percent lower than the peer average (37.66); and
- IWCS received a lower percentage of its funds, 4.10 percent, from federal sources, than the peer division average of 7.63 percent.

**EXHIBIT 1-5  
RECEIPTS BY FUND SOURCE  
PEER SCHOOL DIVISIONS  
2004 FISCAL YEAR**

SCHOOL DIVISION	SALES AND USE TAX	STATE FUNDS	FEDERAL FUNDS	LOCAL FUNDS	OTHER FUNDS	LOANS, BONDS, ETC. <sup>1</sup>
<b>Isle of Wight County</b>	<b>5.92%</b>	<b>23.84%</b>	<b>4.10%</b>	<b>29.41%</b>	<b>1.28%</b>	<b>35.45%</b>
Pulaski County	9.42%	43.51%	12.23%	31.47%	3.38%	0.00%
Gloucester County	7.84%	36.72%	5.68%	33.81%	2.30%	13.64%
Prince George County	8.75%	48.84%	10.42%	28.08%	3.78%	0.13%
Culpeper County	8.38%	35.40%	5.72%	47.32%	3.18%	0.00%
<b>Division Average</b>	<b>8.06%</b>	<b>37.66%</b>	<b>7.63%</b>	<b>34.02%</b>	<b>2.78%</b>	<b>9.84%</b>

Source: 2003-04 Superintendent's Annual Report for Virginia, Virginia Department of Education, Web site, 2006.

<sup>1</sup>Represents proceeds from Literary Fund Loans, the sale of bonds, and interest earned bank notes and/or investments.

Exhibit 1-6 displays the disbursements per pupil for operating a regular school day and for administration. As is shown:

- On regular instruction-related items, IWCS spent \$5,597 per student, which was more than the peer division average of \$5,275; and
- On administration-related items, IWCS spent \$246 per student, which was more than the peer division average of \$223.

**EXHIBIT 1-6  
DISBURSEMENTS PER PUPIL FOR  
INSTRUCTION AND ADMINISTRATION  
PEER SCHOOL DIVISIONS  
2004 FISCAL YEAR**

SCHOOL DIVISION	INSTRUCTION PER PUPIL <sup>1</sup>	ADMINISTRATION PER PUPIL <sup>2</sup>
<b>Isle of Wight County</b>	<b>\$5,597.14</b>	<b>\$245.68</b>
Pulaski County	\$4,917.92	\$270.07
Gloucester County	\$5,326.30	\$184.81
Prince George County	\$4,811.17	\$204.90
Culpeper County	\$5,723.44	\$210.32
<b>Division Average</b>	<b>\$5,275.20</b>	<b>\$223.16</b>

Source: 2003-04 Superintendent's Annual Report for Virginia, Virginia Department of Education, Web site, 2006.

<sup>1</sup> Represents expenditures for classroom instruction, guidance services, social work services, homebound instruction, improvement of instruction, media services, and office of the principal. This column does not include expenditures for technology instruction, summer school, or adult education, which are reported in separate columns within this table. This column also excludes local tuition revenues received for divisions 001 - 207, and prorates the deduction of these revenues across administration, instruction, attendance and health, pupil transportation, and operations and maintenance categories. Local tuition is reported in the expenditures of the school division paying tuition.

<sup>2</sup> Represents expenditures for activities related to establishing and administering policy for division operations including board services, executive administration, information services, personnel, planning services, fiscal services, purchasing, and reprographics.

#### **1.4 Overview of Final Report**

MGT's final report is organized into 10 chapters. Chapters 2 through 9 present the results of the School Division Efficiency Review of Isle of Wight County Schools. Findings, commendations, and recommendations are presented for each of the operational areas of the school division which we were required to review. In each chapter, we analyze each function within the school division based on the current organizational structure. The following data on each component are included:

- description of the current situation in Isle of Wight County Schools;
- a summary of our study findings:
  - findings from report and data sources which we obtained
  - a summary of our on-site findings;
- MGT's commendations and recommendations for each finding;
- implementation strategies and a completion timeline for each recommendation; and
- a five-year fiscal impact for recommended costs or cost savings which are stated in 2005-06 dollars.

We conclude this report with a summary of the fiscal impact of our study recommendations in Chapter 10 (which will be included in the final report).

## ***2.0 DIVISION ADMINISTRATION***

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## **2.0 DIVISION ADMINISTRATION**

In this chapter the findings and recommendations for the overall organization of Isle of Wight County Schools (IWCS) are presented. The major sections of the chapter include:

- 2.1 Introduction and Legal Foundation
- 2.2 School Board Governance
- 2.3 Policies and Procedures
- 2.4 Legal Services
- 2.5 Organization and Management

### **CHAPTER SUMMARY**

Isle of Wight County Schools is led and managed by a Superintendent who is engaged under a 2003 to 2007 contract for employment.

Contained within this chapter are commendations for actions and activities associated with division management.

- The Isle of Wight County School Board, Superintendent, administration, and staff are commended for developing a comprehensive meeting agenda information packet that is provided members of the School Board and for posting the agenda and meeting minutes on the Web site.
- Isle of Wight School Division and County are commended for actively investigating and instituting school services to ensure efficient use of taxpayer dollars.
- IWCS School Board and administration are commended for containing legal services expenses.
- The Isle of Wight County School Board, administration, and community are commended for revitalizing the Education Foundation which is providing distinguished support to education.
- The Isle of Wight County School Board and administration are commended for developing a comprehensive, updated Strategic Plan to include projections, goals, and strategies through 2010.
- Isle of Wight County School Board is commended for meeting all minimum Commonwealth school staffing criteria as set forth in the revised Standards of Quality.

Recommendations contained in this chapter are essentially focused on effecting better working relationships with the Board of Supervisors, improving communications within the school division, and addressing significant issues regarding equity among schools within the county. Among these recommendations are key suggestions that should assist the Superintendent and School Board as they continue to consider all aspects of improving the school division.

- Redefine site-based management responsibilities of principals to exclude functions that can more efficiently managed at the division-level.
- Establish with the Isle of Wight County Board of Supervisors a collaboratively developed Memorandum of Agreement for shared or consolidated services.
- Establish a divisionwide Education Development Council assigned responsibility for working with the School Board and Board of Supervisors to ensure appropriate working relationships that are focused on the education of Isle of Wight students and addressing the stated concerns of students, parents and other citizens as well as the growth needs of the division.
- Expand student representation to the School Board to two members, one from each of the two high schools and provide an orientation and training to ensure that they understand their assigned roles.
- Reorganize the Superintendent's Administrative Cabinet to include the following seven positions: Director of Planning, Accountability, and Technology, Executive Director for Administrative Services, Executive Director for Teaching and Learning, Director of Finance, Executive Assistant/Communications Officer, and three principal representatives; and institute a new agenda that focuses on organizational development and climate and other matters as noted in statements to follow.
- Vigorously proceed to implement the communication elements of Six-Year Strategic Plan as updated.
- Employ one teacher to assume the current Windsor High School Activity/Athletic Director's teaching assignments.

## **2.1 Introduction and Legal Foundation**

Conditions in Isle of Wight County Schools of importance to this review include:

- recent reorganization of the central office administration resulting in reducing the span of control for the Assistant Superintendent for Instructional services;
- significant community discord between the north and south portions of Isle of Wight County, particularly in regards to program, funding, and facilities equity for the high schools;
- Board of Education and Board of Supervisors' issues over funding education; and
- a Board of Education member who is strongly opposed to the administrative practices of the division and leads a community opposition force.

The Superintendent, in interviews with MGT, emphasized the difficulties of dealing with the north and south county issues, funding education while being fiscally dependent on another agency, and dealing with increasing student enrollment. IWCS is fiscally dependent upon the County Board of Supervisors since Commonwealth of Virginia, Code of Virginia, Title 22.1, and other controlling regulations assign final budget approval and appropriations authority to the Supervisors.

The Superintendent, administrative staff, school board members, and county representatives stated in interviews with MGT that the most significant challenge is overcoming barriers to effective relationships between the governing bodies, resolving difference between areas of the county, and developing funding for programs and growth.

**2.2 School Board Governance**

The educational system in Isle of Wight County Schools is the result of Commonwealth of Virginia legislation authorizing the establishment of city and county school divisions. The members of the five-member school board are now elected from resident districts for four-year terms.

Exhibit 2-1 provides an overview of the members of the IWCS School Board. The exhibit shows that:

- three members have served one year or less on the current, elected Board of Education;
- one is a part-time marketing manager while one is retired; and ;
- three will be up for reelection in 2007.

**EXHIBIT 2-1  
ISLE OF WIGHT COUNTY SCHOOLS  
SCHOOL BOARD MEMBERS  
MARCH 2006**

NAME	TITLE	TERM EXPIRES	YEARS OF SERVICE AS OF END OF 12/31/05	OCCUPATION
Duck, J. Kevin	Chairman	12/31/07	2	Insurance Agent
Bunch, Kenneth M.	Vice-Chairman	12/31/10	1.5	Director of Business Development & Special Projects
Bradby, Dr. George A.		12/31/07	11	Senior Safety Engineer
DeGroft, Herbert W.		12/31/10	0*	Retired
Olin, Barbara B.		12/31/07	5	Part-time marketing manager

Source: IWCS Superintendent's Office and the Clerk of the Board, 2006.

\* Also served on Board January 1999-December 2004.

Regular School Board meetings are held on the second Thursday of each month and are held at the Board of Supervisors meeting room that easily accommodates the public. Regular meeting locations, dates, and times are posted on the IWCS Web site and advertised as required by law. Regular open meetings are held at 7:00 p.m., unless otherwise noted. The public is welcome to attend all regular meetings and citizens wishing to address the school board are provided an opportunity to do so.

In addition to regular meetings, the school board holds closed meetings for certain purposes. The fourth Monday of the month at 6:00 p.m. is reserved for school board meetings to hold student disciplinary hearings which are closed. Other closed meetings may include:

- discussion of individual personnel;
- negotiations of material terms for purchase of property or a specific contract for employment;
- attorney-client privilege as relates to litigation preparation and execution; and
- other matters as permitted under Commonwealth of Virginia law.

School board worksessions and special meetings are scheduled as needed and open to the public.

Minutes of all regular meetings are recorded by the School Board Clerk, transcribed and School Board approved at the next regular meeting. Approved minutes are then published on the Web site. Minutes are not maintained for closed meetings; rather, the School Board Deputy Clerk prepares a record of motions and related votes. Minutes and supplementary data are stored in a secured, non-fireproof storage area.

## **FINDING**

The meeting agenda is comprehensive and provides for public, administrative, and Board member input. The IWCS School Board meeting agenda and approved meeting minutes are now posted on the division's Web site, which provides the public a convenient way to view topics for consideration by the School Board.

Approximately two weeks prior to the school board meeting the Superintendent and the School Board Chair begins developing the agenda in collaboration with division staff. Information is compiled and provided to the School Board Clerk to include in each school board meeting agenda and supporting agenda packet.

The School Board meeting agenda typically may be organized into the following 13 sections and a closed meeting provision follows, if needed:

- Call to Order
- Roll Call
- Welcome
- Pledge of Allegiance
- Isle of Wight Achievers



- Special Presentations
- Requests to Speak
- Consent Agenda
- Instructional Issues
- Superintendent's Report
- Business
- Board Member Requests for Future Agenda Items
- Adjourn

Following preparation of a proposed or draft agenda, and organization of supporting documents, the agenda is printed and delivered to each School Board member on the Friday prior to the Thursday meeting. Interviews with School Board members reveals essential satisfaction with the information provided for each meeting and the availability of additional information if needed. MGT's review of meeting documents confirms this assertion.

On the Friday prior to the Thursday meeting the agenda is also posted on the IWCS Web site for public viewing and availability to the media and other concerned parties.

#### **COMMENDATION**

**The Isle of Wight County School Board, Superintendent, administration, and staff are commended for developing a comprehensive meeting agenda information packet that is provided members of the School Board and for posting the agenda and meeting minutes on the Web site.**

#### **FINDING**

The School Board Clerk creates a final hardcopy version of the School Board meeting agenda and packet for distribution and has begun the process of creating an electronic version of the agenda and minutes of meeting proceedings. However, no plan has been developed to move to the next level of a fully electronic document that could be electronically transmitted to School Board members, student representative(s), administration and staff, and other interested parties including the media.

#### **RECOMMENDATION**

##### **Recommendation 2-1:**

**Develop a plan for converting the School Board meeting agenda and supporting documents' packet to electronic format for transmission to School Board members and other stakeholders and, ultimately, for archival purposes.**

Implementation of this recommendation can result in reducing the quantity of paper used to develop School Board meeting agendas and supporting information packets. Additionally, meeting information can more readily and timely be transmitted to the members and other interested persons.

The plan should include the following considerations:

- training for each School Board member in using electronic version of the meeting agenda and packet without having to print the entire document;
- providing at the Board meeting location a laptop for viewing the documents (this has the added advantage of making prior meetings' information available to each member should the need arise); and
- equipping the Board meeting room with a projector and screen for projecting the section of the agenda under consideration to permit the entire Board and audience to view the item(s) under consideration.

Development of the plan should lead to establishment of a budget item to permit full implementation. Full implementation should permit more efficient access to needed information and the establishment of all meeting information in a form for safekeeping and archival storage.

**FISCAL IMPACT**

A conservative estimated cost for implementing the hardware portion of this recommendation would be approximately \$2,850. This amount includes purchasing six laptops for the board members and the clerk at approximately \$550 each; a projector at roughly \$2,200; and a scanner for less than \$100. Training can be accomplished using existing division technology personnel. Final costs for full implementation of this recommendation will be determined when the plan is fully developed.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Purchase Six Laptop Computers, a Projector and a Scanner	(\$2,850)	\$0	\$0	\$0	\$0
<b>Total</b>	<b>(\$2,850)</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

**FINDING**

Important Board of Education records of meetings and supporting documentation (supplemental minutes) are prepared by the Board Clerk and placed in a regular storage room that is not fire rated and no other backup copy of important past proceedings is maintained in any other medium and safeguarded from potential disasters (tornadoes, floods, etc.). However, since Fall 2005 the Board Clerk has been maintaining electronic copies of agendas and some agenda information on a computer but no backup data is kept in secured storage.

Fires and/or severe weather could result in the loss of essential records. Best practices suggest that duplicates of valuable records should be kept off premises in safe storage or maintained in fire-rated vaults or cabinets on premises.

**RECOMMENDATION**

**Recommendation 2-2:**

**Provide fire-rate storage for valuable Board of Education meeting records.**

The implementation of this recommendation should result in purchasing one four-drawer, fire-rated lockable storage file cabinet. This cabinet should be used to store old records that have not yet been submitted to the state archives for permanent storage. This recommendation should ensure that important documents would not be lost in the event of a severe catastrophe.

Current board agenda, minutes, and other records that are now stored on the hard drive of the division computer can be duplicated onto CD ROMs. The CDs could then be stored in secured bank safe deposit box or similar secure location.

**FISCAL IMPACT**

This recommendation could be accomplished by purchasing one four-drawer, fire-rated lockable storage file cabinet and one small, lockable fire-rated safe-box. Office suppliers have file drawers meeting these requirements for approximately \$1,300 and stores such as Wal-Mart offer safe-box that could easily contain over 100 CDs at less than \$70. The total one-time cost for this implementation of this recommendation could be \$1,370.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Purchase One Four-Drawer, Fire-Rated Lockable Storage File Cabinet	(\$1,300)	\$0	\$0	\$0	\$0
Purchase One Small, Lockable Fire-Rated Safe-Box	(\$70)	\$0	\$0	\$0	\$0
<b>Total</b>	<b>(\$1,370)</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

**FINDING**

Board policy BHB, School Board Members In-Service Activities, reflects the requirements of Virginia code and supports active member involvement in training activities; however, no evidence that a local, formal new board member orientation program has been developed and implemented.

Following their election all board members received correspondence from the Superintendent providing copies of documents as required by Commonwealth law. Additionally the letter indicated how the Board member may contact the Superintendent should they desire additional information. However, no formal local organized orientation was prepared for all newly elected members and scheduled over a period of time to permit a full review of all of the operational aspects of the division.

VSBA records indicate full Board and Superintendent involvement in state-level training and other meetings. All board members and the superintendent are involved in training and conferences offered by the Virginia School Board Association (VSBA) and other activities. The newest members have been involved in the VSBA orientation for board members.

## **RECOMMENDATION**

### **Recommendation 2-3:**

#### **Develop and implement a full school board member local orientation and development program.**

Implementation of this recommendation should result in the development of a comprehensive local school board member development program that, minimally, should cover the following topics:

- the role of the board member as reflected in Commonwealth of Virginia law and by best practices. The National School Boards Association (NSBA) and VSBA can provide valuable information for this portion of the training;
- policy development;
- effective community and media relations;
- use of technology in carrying out board responsibilities;
- boardmanship;
- effective committee development and work;
- development of strategies designed to enhance relationships with other governmental bodies;
- a review of the division's planning documents and related processes for their development/updating;
- a review of the division's budget and associated development and adoption time-lines; and
- other local items that are deemed important to include.

The program should be implemented over a scheduled series of meetings allowing the participants to assimilate information in an orderly and systematic fashion and avoid overloading participants with too much information at any one session.

A Board Development Program can be developed in conjunction with the VSBA. An additional resource for board development can be secured from NSBA.

## **FISCAL IMPACT**

The cost of this recommendation cannot be estimated until the program is designed and decisions are made as to where training services are to be obtained. However, the program can be developed and implemented by the division at no additional cost by obtaining information from VSBA that outlines the topics to be presented.

## **FINDING**

The IWCS and Isle of Wight County Board of Supervisors have adopted agreements on reviewing shared services for several service areas including purchasing, building and grounds maintenance, information technology, and transportation maintenance.

In a May 11, 2006 memorandum to the Superintendent, the joint Shared Services Task Group, reported the status of work, including:

- development of a memorandum of agreement to allow the County Parks and Recreation programs access to school property;
- continuation of the informal exchange of equipment as needed;
- County and schools to continue cooperation in the area of information technology;
- determined that no savings would be incurred by combining legal services;
- determined that if vehicle maintenance were combined a large capital expense would be incurred;
- agreed to a joint venture in procurement;
- is planning the investigation of building and ground maintenance;  
and
- has established a joint fuel contract.

## **COMMENDATION**

**Isle of Wight School Division and County are commended for actively investigating and instituting shared services to ensure efficient use of taxpayer dollars.**

## **FINDING**

The IWCS and Isle of Wight County Board of Supervisors do not have an adopted policy or letter/memorandum of agreement governing shared services. As a result, when the issue of shared services is brought up there are no mutually agreed upon guiding principals that ensure effective results.

The Public Works Department from time-to-time lends specialized equipment to the school division and occasionally borrows lawn equipment and other items that they may need but do not have in their inventory. Personnel interviewed report that these relationships are very good and cooperation is excellent.

Recently, the division has provided services to the Board of Supervisors through the Technology department but these are reported to cease since the Board of Supervisors has determined to employ a position in their technology department for this purpose. It was reported to MGT consultants that discussions had taken place regarding sharing vehicle maintenance services with the IWCS providing these, but discussions have not lead to any sharing of services due to the lack of cost effectiveness. The two Boards have agreed to sharing services in the areas of building and grounds usage and have agreed to share procurement services once the County employs a person to the position.

No provisions exist to guide a study of other responsibilities that might lead to the development of shared services and possible reductions in costs to the taxpayers of Isle of Wight County.

Other areas of potential shared services should be studied and are under consideration by the Shared Services Task Group. However, an extensive listing could be prepared for further review and an agreement as to how to manage joint or shared services incorporated into policy and procedures.

## **RECOMMENDATION**

### **Recommendation 2-4:**

**Establish a collaboratively developed Memorandum of Agreement for continuing to identify shared or consolidated services, their periodic review, and expand the review to include additional areas of operations with the Board of Supervisors.**

Implementation of this recommendation should result in the drafting and adoption of a developed policy and procedures or memorandum of agreement for guiding the assessment of joint services possibilities, implementation, and annual review of progress.

The types of additional services could include the following:

- building and grounds services maintenance (planned by the Task Group);
- warehousing;
- capital projects management;
- courier and mail services;
- technology applications (examine annually to determine needs);
- records management;
- risk management including related training;
- staff development;
- surplus property and storage;
- Workers' Compensation; and
- human resources.

Such a memorandum of agreement should address the following considerations:

- protocol for the review of potential shared services and the review of progress in implementation and status of savings (annually) and including team member selection, community representation, requirements to identify all pros and cons (factors supporting and constraining factors), and process for resolving conflict;
- process for resolving disputes that may arise during the implementation of a shared service and during the term of its existence by an outside neutral party;
- development of a realistic plan of action with thoroughly developed procedures for implementation and management of shared services;
- expressed understanding of the responsible coordinating agency and department within the assigned agency;
- specific provisions for funding and other needed resources;
- requirements for evaluation of those shared services that are developed including time-lines and benchmarks for assessment; and
- other considerations as deemed necessary.

The concept of involving local business representatives along with county and division personnel is being employed as a means of ensuring the successful development of needed agreements to guide shared services development.

#### **FISCAL IMPACT**

This recommendation can be implemented at no additional cost to the division.

#### **FINDING**

The relationship between the School Board and the Board of Supervisors has been strained over issues of financing school operations. Interviews conducted revealed that some members of the Board of Supervisors and community believe that the school division could better manage its resources. This matter is further complicated by the belief on the part of many north and south end community members that their respective areas are not getting a fair or equitable share of the school resources.

The IWCS Strategic Plan for 2004-2010 within the School Board Section XI contains an important goal and related strategy. Item XI-12 states, *to arrange quarterly meetings with the Board of Supervisors and to set those dates as a part of the school calendar*. A March 3, 2006 memorandum to school board members provides a status report on the various sections of the strategic plan but does not refer to the portion devoted to the school board. The March 2006 *Six Year Strategic Plan, Action Plans* does not address the strategy.

Two public forums were held during the on-site review. There were statements of opinions regarding the school division that reflected a need for increased opportunities for parents, community members and employees to address areas of concern. A variety of comments and statements of opinions were received, indicating a desire for:

- increased involvement of school board and administration in PTA and other events;
- change in Westside Elementary start and end time;
- additional input into decision-making process;
- equitable treatment of high schools in county—including athletic director's position; and
- improved relations of school division, including for the superintendent with the public.

Other comments indicated concerns with:

- school board is for policy concerns, not day-to-day operational procedures and rogue members of the board materially affecting the IWCS management to perform their duties;
- need for consensus on the board, board currently divided;
- school board should present public response of board, not individual personal response; and
- school board should be cohesive unit, not fragmented and quarreling amongst themselves.

The public forum held at Smithfield Middle School had some of the highest participation rates of any held by MGT consultants in previous reviews; however, a School Board member was present for one of the forums which was not consistent with the protocol provided to the School Board and School Division.

## **RECOMMENDATION**

### **Recommendation 2-5:**

**Establish a divisionwide Education Advisory Council assigned responsibility for working with the School Board and Board of Supervisors to ensure appropriate working relationships that are focused on the education of Isle of Wight students and addressing the concerns of students, parents, and other citizens as well as the growth needs of the division.**

Implementation of this recommendation should result in the appointment of a community-based advisory group, similar to the currently existing Budget Advisory Committee and recently formed Education Foundation, with the assigned responsibility to assist with improving the working relationship with the IWCS School Board,



Superintendent and all stakeholders throughout the school division. This Education Advisory Council should play a major role in bringing together community members to resolve issues related to parent-student –community concerns, increasing student enrollment, funding necessary for educational programs and assisting in supporting equity in funding and programs between the north and south portions of Isle of Wight County.

The following protocols should be considered for the appointment of members to this recommended Education Advisory Council:

- Two community members to be appointed by the School board, one from the northern and one from the southern portion of the county.
- A community member appointed by the Superintendent
- Two PTA representatives, one from the northern and one from the southern portions of the county
- A teacher and a principal, one from the northern section and one from the southern section of the county
- A member from the local school district Education Foundation
- An employee representing support personnel, one from the northern and one from the southern portions of the county
- A member of the Governing Board of the local Chamber of Commerce

(Education Advisory Council would consist of an eleven member Board)

The Superintendent of Schools should serve as district liaison to the council, providing such information and assistance as is necessary to carrying out their assignments.

In order to facilitate and improve the working relationship between the School Board and Board of Supervisors, it would be beneficial if the County Manager, a Board of Supervisors member, and a School Board member were invited to attend scheduled meetings with the Education Advisory Council periodically. It is also recommended that the Superintendent and County Manager periodically meet and exchange relevant information concerning school and county operations and finances.

The council should begin its work by holding a series of open meetings designed to ensure adequate public input and a full airing of all issues. The council should, after an in-depth examination of issues make recommendations to the Superintendent for consideration in the decision-making process. The School Board is responsible for the oversight and final resolution of all matters related to the school system operations. The assistance provided by the Education Advisory Council should provide valuable assistance to the Superintendent and School Board in improving community relations throughout the school district and with the Board of Supervisors.

## **FISCAL IMPACT**

This recommendation can be implemented at no additional cost to the division.

## **FINDING**

The IWCS School Board has one high school student representative for Board meetings, alternating representation from the two high schools annually.

This commendable practice involves students in the business of the School Board and can provide important insights into the governance processes; however, two conditions exist: first, each year the student assigned this important role does so without any training that might prepare them for fulfilling their role; and, two, only one of the two division high schools is represented during a given year.

Only a brief orientation is provided student representation, yet, the student representative could be involved in a VSBA provided orientation as are regularly elected school board members.

Activity at the MGT sponsored public forums held at each of the high schools revealed clear elements of belief that each school and or area of the division was not being equitable treated by the division. A first step in addressing this could include having representation from each of the two high schools.

## **RECOMMENDATION**

### **Recommendation 2-6:**

**Expand student representation to the School Board to two members, one from each of the two high schools and provide an orientation and training to ensure that they understand their assigned roles.**

Implementation of this recommendation should provide both high school student communities with representation at School Board meetings. This structure should afford each high school constructive input to the School Board and the Board an opportunity to hear first-hand the views from each of the high schools' students.

Implementation of this recommendation should result in contacting the VSBA to request establishment of a orientation session for student liaisons to school boards. Such an activity could be held in conjunction with the normally schedule orientation or training opportunities made available to school boards.

Overall, the implementation of this recommendation should constitute an additional step in the process of establishing initiatives designed to reconcile real and perceived differences that may exist between the north and south areas of the division and county.

Subsequent information was provided to the on-site visit that a Fall 2006 session is planned.

**FISCAL IMPACT**

The cost of implementing this recommendation cannot be fully estimated until the orientation/training frameworks are established. For purposes of planning, MGT estimates that there could be a minimal cost for a local orientation, limited to transporting two students to a location for orientation and providing training materials. Additionally, for each School Board meeting, the provision of one additional meeting agenda packet. The costs for these are estimated at \$120 annually for the board packet (\$10 per packet for 12 meetings) and \$32 for travel for two students to travel by automobile to a central location in the county for orientation training for a total annual cost of \$152. The five-year cost could be \$760.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Student Local Travel to Orientation Training	(\$32)	(\$32)	(\$32)	(\$32)	(\$32)
One Additional School Board Meeting Agenda Packet	(\$120)	(\$120)	(\$120)	(\$120)	(\$120)
<b>Total</b>	<b>(\$152)</b>	<b>(\$152)</b>	<b>(\$152)</b>	<b>(\$152)</b>	<b>(\$152)</b>

**2.3 Policies and Procedures**

The development of policy and procedures constitutes the means by which an organization can communicate expectations to its constituents. In addition, adopting policy and establishing related procedures provide the mechanism for:

- establishing the School Board’s expectations and what may be expected from the Board;
- keeping the School Board and the administration out of trouble;
- establishing an essential division between policy making and administration roles;
- creating guidelines within which people operate;
- providing reasonable assurances of consistency and continuity in decisions;
- providing legal basis for the allocation of funds, facilities, and other resources;
- facilitating and guiding the orientation of the School Board members and employees; and
- acquainting the public with, and encouraging citizen involvement within, structured guidelines.

Policy and procedures, therefore, reveal the philosophy and position of the School Board and should be stated clearly enough to provide for executive or staff direction.

Commonwealth of Virginia law (22.1-253.13:7) contains specific provisions governing school board policy. The law requires that policies be up-to-date and reviewed at least every five years and revised as needed. The policies must address the following eight overall areas:

- a system of two-way communication between employees and the local school board and its administrative staff;
- the selection and evaluation of all instructional materials purchased by the division, with clear procedures for handling challenged controversial materials;
- standards of student conduct and attendance, and related enforcement procedures;
- school-community communications and involvement;
- guidelines to encourage parents to provide instructional assistance to their children;
- information about procedures for addressing school division concerns with defined recourse for parents;
- a cooperatively-developed procedure for personnel evaluation; and
- grievance, dismissal procedures, and other procedures as prescribed by the General Assembly and School Board.

Each division school and the public library has a copy of the IWCS policy manual. The Board Clerk coordinates the updating of the manual and maintains a listing of the assignment of copies of the manual. There are a total of 69 manuals with 63 distributed and 6 extras available for use. The policy manual has been placed online; however, the hardcopy maintained in the Superintendent's Office by the Board Clerk is the official copy.

The policies have been codified using the National School Board Association's (NSBA) model with specific model policy language procured from the Virginia School Board Association (VSBA). The policy manual is composed of 12 chapters or major classifications denoted as sections with each section containing a detailed table of contents. Individual policies are coded within these A-L sections (chapters). The manual contains alphabetical subject and topical indices in the front of the document following an overall table of contents.

Exhibit 2-2 presents the IWCS policy manual classifications (chapters), titles, and policy codes.

**EXHIBIT 2-2  
ISLE OF WIGHT COUNTY SCHOOLS  
SCHOOL BOARD ORGANIZATION OF POLICY HANDBOOK**

<b>CLASSIFICATION</b>	<b>SECTION TITLES</b>	<b>POLICY CODES</b>
A	Foundations and Basic Commitments	AA - AFA
B	School Board Governance and Operations	BB - BHE
C	General School Administration	CA - CMA
D	Fiscal Management	DA - DO
E	Support Services	EA - EIA
F	Facilities Development	FA - FG
G	Personnel	GA - GDQ
H *	Negotiations	None
I	Instructional Program	IA - INDC
J	Students	JB - JP
K	School-Community Relations	KA - KQ
L	Education Agency Relations	LA - LI
	Table of Contents	n/a
	Topical Index	n/a
	Code Finder Index	n/a

Source: IWCS School Board Policy Manual, 2006.

\* The Supreme Court of Virginia has stated that neither Virginia constitution or statutory authority exists for school boards to enter into collective bargaining agreements with their employees.

**FINDING**

Exhibit 2-3 shows the revision status of IWCS School Board policies. As can be seen the majority of provisions in the policy manual have been reviewed or adopted within the required time limits of Commonwealth law. However, 14 policies have not been reviewed within the last 10 years and another 85 are in need of review. Those in need of immediate attention include:

- EBCC Fire Inspections, EDCA Motor Vehicles, and EFD Food Sanitation;
- GBEAA Smoking on School Premises, GBLB Personnel Directory, GCBF Sick-Leave Bank, and GCDB Filling Administrative Vacancies;
- IHE Class Rank, IICB Tours, and IJA Speakers and Presenters, and
- JECB Grade Placement, JECC Promotion and Retention, and JECD Awards

**EXHIBIT 2-3  
ISLE OF WIGHT COUNTY SCHOOLS  
BOARD POLICIES REVISION STATUS  
MARCH 2006**

CHAPTER	TITLE	NUMBER OF POLICIES EXAMINED	NUMBER OF POLICIES ADOPTED/UPDATED/RESTATED IN:			
			PRIOR to 1995-96	1995-2000	2000-05	2005-06
A	Foundations and Basic Commitments	6	0	0	4	2
B	School Board Governance and Operations	35	0	13	19	3
C	General School Administration	14	0	8	5	1
D	Fiscal Management	18	1	6	10	1
E	Support Services	31	3	8	19	1
F	Facilities Development	10		5	5	0
G	Personnel	61	4	17	32	8
H	Negotiations *	0	0	0	0	0
I	Instructional Program	51	3	10	31	7
J	Students	53	3	9	32	9
K	School-Community Relations	27	0	7	18	2
L	Education Agency Relations	7	0	2	4	1
<b>TOTALS</b>		<b>313</b>	<b>14</b>	<b>85</b>	<b>179</b>	<b>35</b>

Source: IWCS Board Policy Manual, 2006.

\* The Supreme Court of Virginia has stated that neither Virginia constitution or statutory authority exists for school boards to enter into collective bargaining agreements with their employees.

**RECOMMENDATION**

**Recommendation 2-7:**

**Review and update the policy manual provisions as required by Virginia code.**

Implementation of this recommendation should be accomplished as soon as possible to ensure that all policy provisions are consistent with Virginia code and other controlling regulations. The School Board has a membership in the VSBA that also includes the policy update service. The policy update service could be expanded to include the Web based policy document for an additional \$600 annually. Currently, the school Board expends \$8,118 for dues and the policy service combined.

Reviewing and updating the policy manual provisions ensures that the School Board and division are in compliance with essential rules and serves to protect the Board and administration legally.

**FISCAL IMPACT**

Implementation of this recommendation can be accomplished with existing resources since the division already has a paid membership with VSBA that includes the policy updating service.

**FINDING**

School Board policies are codified in an alphabetical system as noted in Exhibit 2-2. Virginia Statute 22.1-253.13:7 provides for a variety of policy provisions that the School Board must address and include in its policy manual. Exhibit 2-4 shows samples of required state provisions that are addressed in the current policy manual along with the specific code.

**EXHIBIT 2-4  
SAMPLE VIRGINIA REQUIRED POLICY TOPICS  
AND RELATED ISLE OF WIGHT SCHOOL BOARD POLICIES**

REQUIRED TOPIC	APPLICABLE POLICY
Selection and evaluation of all instructional materials	IM, IIA, IIAA, IIAB
Process for parents to address concerns related to the division	KL, KLB, GBLA
System of two-way communication between employees and school board	BG, GBB, GBD
Cooperatively developed personnel evaluation procedures	GCM, GCN, GDN
Grievance, dismissal, and other procedures	GBM, GBMA, GCDA, GCPD, GDPD
Standards of student conduct and attendance	JED, JFC, JFCB, EEACC
School-community communications and involvement	KA, KC, KD, KG, KM
Guidelines encouraging parents to provide instructional assistance to their children	IGBC, IKA
Procedures for handling challenged and controversial materials	KLB

Source: IWCS School Board Policy Manual, 2006.

Additionally, federal law and related regulations require that local boards of education include other provisions. Some of these provisions relate to IDEA, labor standards, *No Child Left Behind*, Family Medical Leave, and other topics; however, at present, school board members and school division personnel cannot easily identify those policies that are a result of these requirements. If School Board members or division staffs are not specifically familiar with the state, federal or other requirements, they cannot easily refer to the policy manual to see if the particular policy or issue is included.

**RECOMMENDATION**

**Recommendation 2-8:**

**Code, by assigning an identifying asterisk, School Board policies that are required by Virginia code and other controlling regulations.**

The implementation of this recommendation should result in placing an asterisk by the letter code of each policy that is required by Virginia code and other controlling regulations. This designation should enable school board members, central office

personnel and school-level employees, as well as other stakeholders, to know which policies must be developed and adopted by the school board. Furthermore, this coding system should make it easier for staff to readily identify important provisions that must be kept up-to-date and consistent with all requirements, thus increasing employee efficiency in this process.

This recommendation should be implemented simultaneously with recommendation 2-6.

### **FISCAL IMPACT**

This recommendation can be accomplished with existing resources and at no additional cost to Isle of Wight County Schools.

### **FINDING**

A central listing of policy referenced handbooks and other documents is unavailable. The policy and procedures manual contains a number of references to procedural documents related to policy implementation but it is difficult to obtain these when needed. For example policy AC references nondiscrimination and could identify related division documents that support the policy; KG identifies a facilities use procedure and use fees document that must be developed by the superintendent and are included in the manual; DJA, Purchasing Authority; and CF, School Building Administration, references severe weather and disaster plans. To obtain some of these documents a person would have to visit several offices, consuming large quantities of valuable time and effort.

Requirements for student behavior, procedures related to drug testing, and other matters are included in this referencing process. While MGT consultants were able to review some of these documents, we were unable to identify a central listing of all such materials and documents. This situation suggests that neither the School Board nor various administrators and other employees could, if required, identify and review these documents in an expeditious manner.

### **RECOMMENDATION**

#### **Recommendation 2-9:**

**Create a policy provision containing a listing of existing procedural manuals, handbooks, and planning documents and, on the Web site, create a series of hot links from the manual to the cited documents or procedures.**

Creating this document should provide IWCS with a compilation of important procedures and operation manuals, handbooks, and other materials. Also, this provision should serve as a valuable tool for the orientation of new school board members as well as new school division personnel. Some school systems have included in their policy manual such a provision within the equivalent Section B, *School Board Governance and Operations*.

This provision may be phrased as follows:

*The School Board has plans, manuals, handbooks and codes that outline procedures to be followed relative to stated topics. The plans, manuals, handbooks, and codes listed below may be adopted by*



*reference as part of these policies when required by other board provisions, Commonwealth of Virginia code, or other controlling requirements. These include, but are not limited to...*

Within this portion of the policy manual, the titles of various documents could be listed. This list should become an important resource for school board members and employees to understand the extent of activity and responsibilities involved in managing a complex organization.

Exhibit 2-5 provides a partial listing of the types of documents often included in such a document.

**EXHIBIT 2-5  
SAMPLE LIST OF PROCEDURAL, OPERATIONAL, PLANNING  
AND OTHER DOCUMENTS**

**Administration**

Crisis Management Plan(s)  
Emergency Plan  
Employee Handbook(s)  
Facility Use Fees  
Strategic Plan  
Staff Development Plan  
Safety Plan  
General Outline of Revenue and Meal Accountability Procedures  
Human Resources Management and Development (HRMD) Plan  
Capital Project Priority List  
Transportation Procedures Manual  
Food Service Procedures

**Instructional & Student Services**

After-School Child Care Program Manual  
Code of Student Conduct  
Testing Procedures Manual  
Alternative Education Plan  
Instructional Material Manual  
Instructional Technology Plan  
Limited-English Proficient LEP Plan  
Manual for Admissions and Placement in Special Education Programs  
Student Graduation Requirements  
School Handbooks  
School Health Procedures Manual  
School Improvement Plans  
Special Programs and Procedures Manual  
Student Education Records Manual  
Student Services Plan  
Truancy Plan

**Other Documents**

*Add other documents that are available*

Source: Created by MGT of America, 2006.

Upon the cyclical review of policies as required by Commonwealth code, the development and adoption of the list of documents and a series of hot links should be created between the policy manual and related documents. This action should result in providing the policy manual user easy access to other related information thus increasing user efficiency by reducing time required to locate needed documents.

This recommendation can be implemented with recommendations 2-6 and 2-7.

### **FISCAL IMPACT**

This recommendation could be accomplished with existing personnel and at no additional cost to IWCS.

### **2.4 Legal Services**

Costs for legal services have increased dramatically over the last three decades due to a number of factors. These factors include due process activity associated with disciplinary proceedings, complicated issues related to special education students, risk management matters, and a variety of other issues. Areas of special education and student disciplinary activity are particularly troublesome and require special legal expertise. These areas are typically complicated by the complexities of federal requirements and the relationship to local and state regulations coupled with the school system's need to maintain an orderly educational environment.

Virginia code (22.1-82) provides authority for the school board to:

*...employ legal counsel to advise it concerning any legal matter or to represent it, any member thereof or any school official in any legal proceeding to which the school board, member or official may be a party, when such proceeding is instituted by or against it or against the member or official by virtue of his actions in connection with his duties as such member or official.*

### **FINDING**

Legal services are obtained primarily through the local attorney of H. Woodrow Crook, PC and the Legal Assistance program of the VSBA. Expenditures have been kept to a minimum by limiting the use of services at School Board meetings and with careful management of student hearings, special education protocols, and human resources.

The Exhibit 2-6 shows the expenses as reported to MGT consultants for a three-year period, but not including the last six months of 2005-06.

The attorney charges the School Board \$150 for legal services and \$75 per hour for the services of paralegal personnel. The attorney's regular client charges are \$190 for services and \$95 for paralegal services. The School Board attorney participates in the Council of School Attorneys organization.

**EXHIBIT 2-6  
LEGAL EXPENSES  
2003-2005**

<b>VENDOR</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>
Crook	\$33,910	\$31,010	\$29,610
Hunton & Williams *	33,970	0	0
VSBA Legal Service	500	500	500
<b>Total</b>	<b>\$68,380</b>	<b>\$31,510</b>	<b>\$30,110</b>

Source: IWCS Office of the Superintendent, 2006.

\*Special litigation

**COMMENDATION**

**IWCS School Board and administration are commended for containing legal services expenses.**

**FINDING**

The IWCS School Board does not have a written contract with the attorney providing routine legal services. Additionally, there is no record of the assessment of services even though personnel and School Board members report a high degree of satisfaction with the current providers.

While the costs for legal services are kept to a minimum (see Exhibit 2-6), it is common practice to establish a contract with those attorneys or firms providing services. Periodically, the services should be reviewed and formally assessed by the School Board and administration.

**RECOMMENDATION**

**Recommendation 2-10:**

**Establish a written School Board approved contract for legal services and assess those services annually.**

The implementation of this recommendation should result in the creation of a standard contract for legal services. Such a contract should include provisions for standard hourly fees for attorney, paralegal, clerical assistance, expenses, and other cost items. Additionally, the types of services to be provided including attendance at board meetings and student hearings, consultations, contract reviews, and other matters should be addressed. The contract should state if on retainer or simple hourly fee basis or combination and provide for a termination clause.

Additionally, implementation of this recommendation should include the periodic assessment of the legal services to ensure that client needs are being met at the most optimum cost possible.

## **FISCAL IMPACT**

This recommendation can be accomplished with existing resources and at no additional cost to Isle of Wight County Schools.

### **2.5 Organization and Management**

Section 2.5 reviews the IWCS organization, decision making, management, planning and accountability, public information, and school organization and management functions.

#### **2.5.1 Division Organization**

The executive and administrative functions of IWCS are managed through a system that is organized into line and staff relationships that define official spans of authority and communication channels.

As is reported in this section, IWCS is a relatively traditional organization with two primary layers within the central office: the Assistant Superintendent for Instructional Services, Assistant Superintendent for Administration and Educational Services, two directors; and the principals. Other positions reporting to the superintendent include the executive assistant and public information positions.

These minimum layers facilitate communication of information and decisions through the system and to its public; however, they create special challenges because of some broad spans of control. The Superintendent has reorganized the central office and this review has taken recent reorganization actions into consideration.

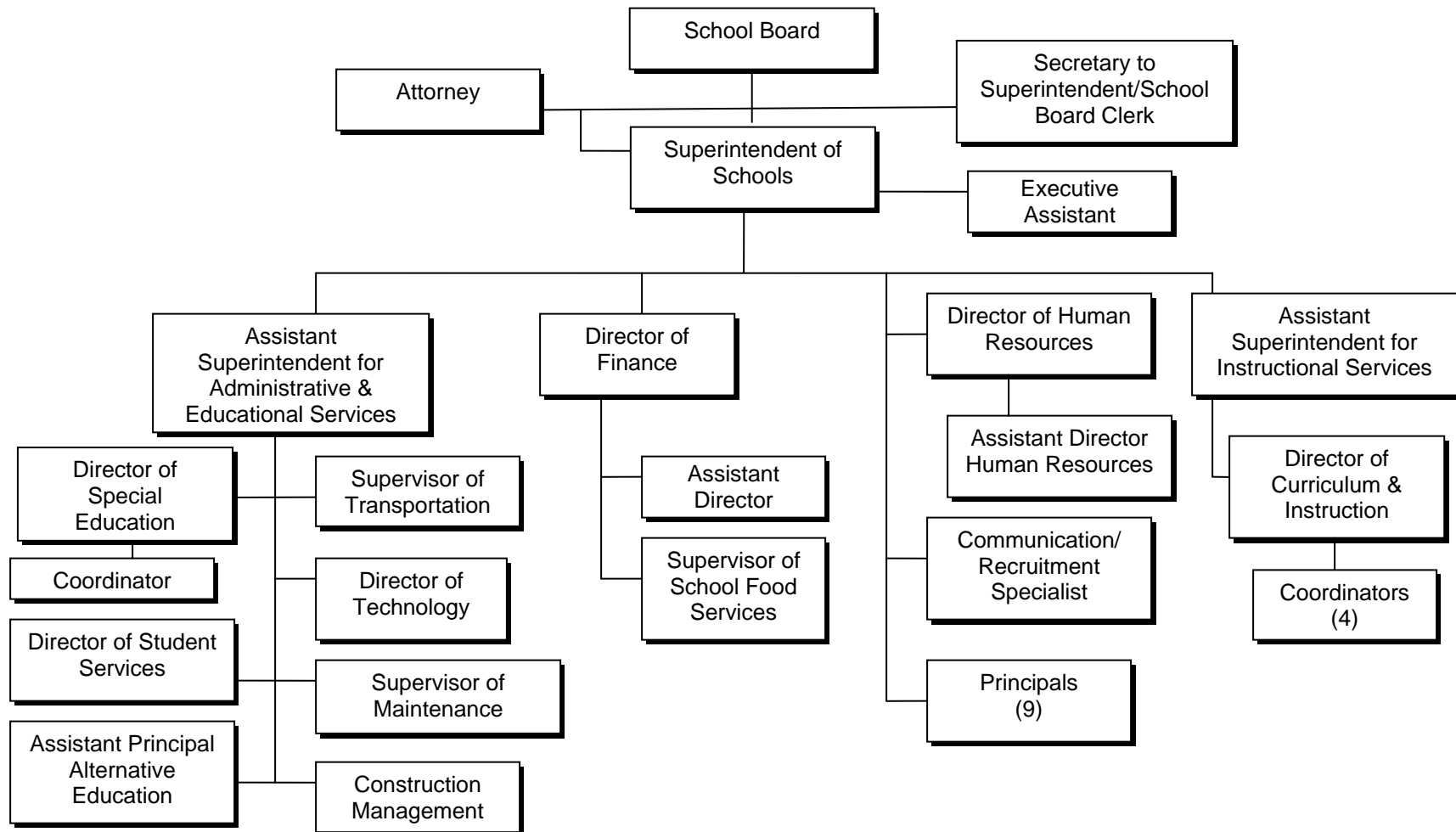
## **FINDING**

Assignment of major responsibilities between the two assistant superintendent positions creates significant issues related to workloads and alignment of similar or related functions.

As shown in Exhibit 2-7, the Superintendent has a total of 16 direct reports including the nine principals and seven central office administrators and staff. The Assistant Superintendent for Instructional Services has one direct report while the Assistant Superintendent for Administration and Educational Services has seven.

The Human Resources Department is headed by an Executive Director position reporting directly to the Superintendent while in many school systems of this size a lesser position would administer the function and report to an assistant superintendent or executive director.

**EXHIBIT 2-7  
ISLE OF WIGHT COUNTY SCHOOLS  
CURRENT ORGANIZATION STRUCTURE  
MARCH 2006**



Source: IWCS Office of Superintendent, 2006.

The Assistant Superintendent for Administration and Educational Services with seven primary administrative direct reports coordinates all curriculum, technology, transportation, alternative education, and facilities with the exception of the student services, federal programs, early childhood, grants, mathematics, and other functions that are assigned to the Assistant Superintendent for Instructional Services. However, the primary functions assigned to the Assistant Superintendent for Instructional Services are managed by a direct report position, director of curriculum and instruction.

Exhibit 2-8 shows the current assignment of functions to each of the major departments. As shown, the following assignment/alignment issues exist:

- A significant imbalance in assignment of functions between the two assistant superintendent positions with the Assistant Superintendent for Administration and Educational Services 21 areas, some of which are clearly teaching and learning functions;
- The Assistant Superintendent for Instructional Services is, based on functional assignments, a combination of student services and teaching and learning but without full responsibility for the teaching and learning areas; and
- Other minor alignment issues such as assignment of benefits.

## **RECOMMENDATION**

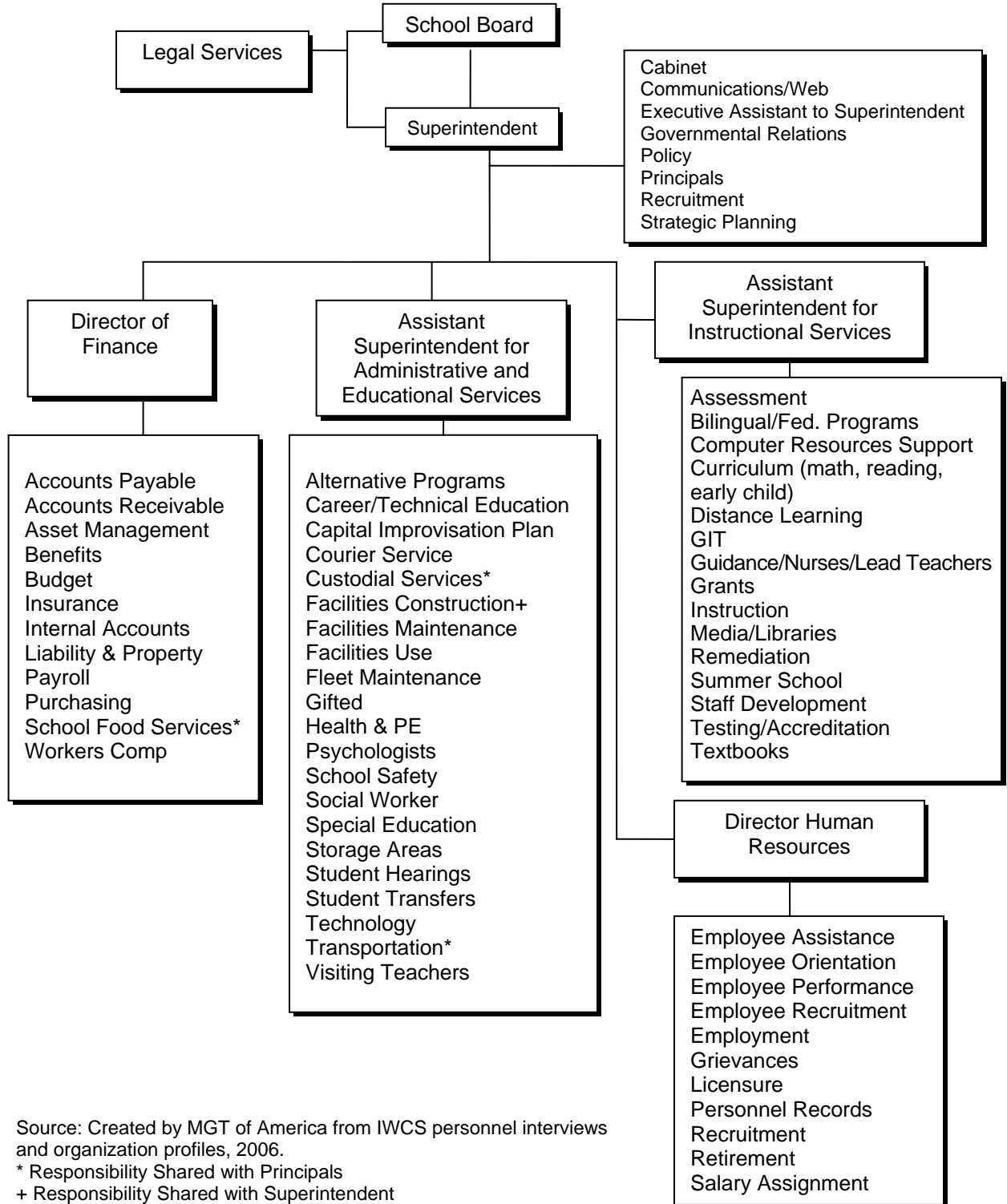
### **Recommendation 2-11:**

#### **Reorganize Isle of Wight County Schools central office administration.**

Exhibits 2-9 and 2-10 show the recommended realignment of functions and proposed organization for IWCS. Implementation of this recommendation should result in the following modifications to the current organizational plan and be consistent with the Board and Superintendent's overall goals:

- reduces the direct reports to the Superintendent from 16 to 13 by consolidating the Communications/Recruitment and the Executive Assistant to the Superintendent positions and assigning Human Resources and Finance units to the Administrative Services Department. Continue principals reporting to the Superintendent;
- changes the titles of the two assistant superintendent positions to Executive Director for Administrative Services and Executive Director for Teaching and Learning;
- reduces the direct reports to the Executive Director for Administrative Services from seven to four and increases the direct reports to the Executive Director for Teaching and Learning from one to four;

**EXHIBIT 2-8  
ISLE OF WIGHT COUNTY SCHOOLS  
CURRENT FUNCTION ASSIGNMENTS  
MARCH 2006**

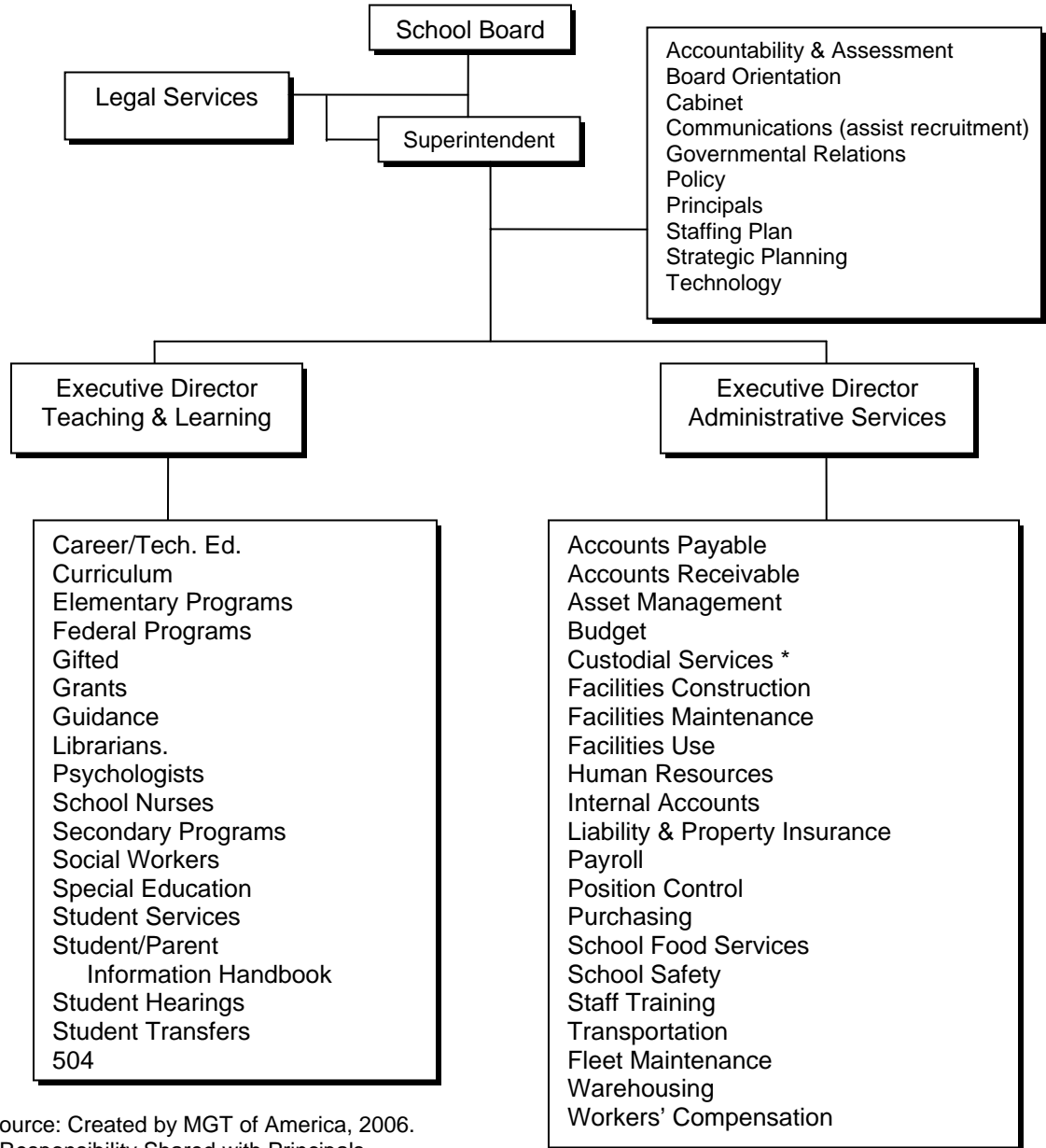


Source: Created by MGT of America from IWCS personnel interviews and organization profiles, 2006.  
 \* Responsibility Shared with Principals  
 + Responsibility Shared with Superintendent

- redistributes functional assignments more equitably between the two executive director positions with emphasis on aligning similar functions to the extent feasible;
- consolidates facilities related functions under a Supervisor of Facilities Operations reporting to the Executive Director for Administrative services;
- reassigns the Director of Technology and related functions from the Administrative Services Department to the Superintendent's Office and incorporate planning and accountability functions;
- reassigns Alternative Education from the Administrative Services Department to the Teaching and Learning Department;
- consolidates human resource and finance functions under Administrative Services; and
- aligns student services functions within the Teaching and Learning Department under the Director of Student Services.

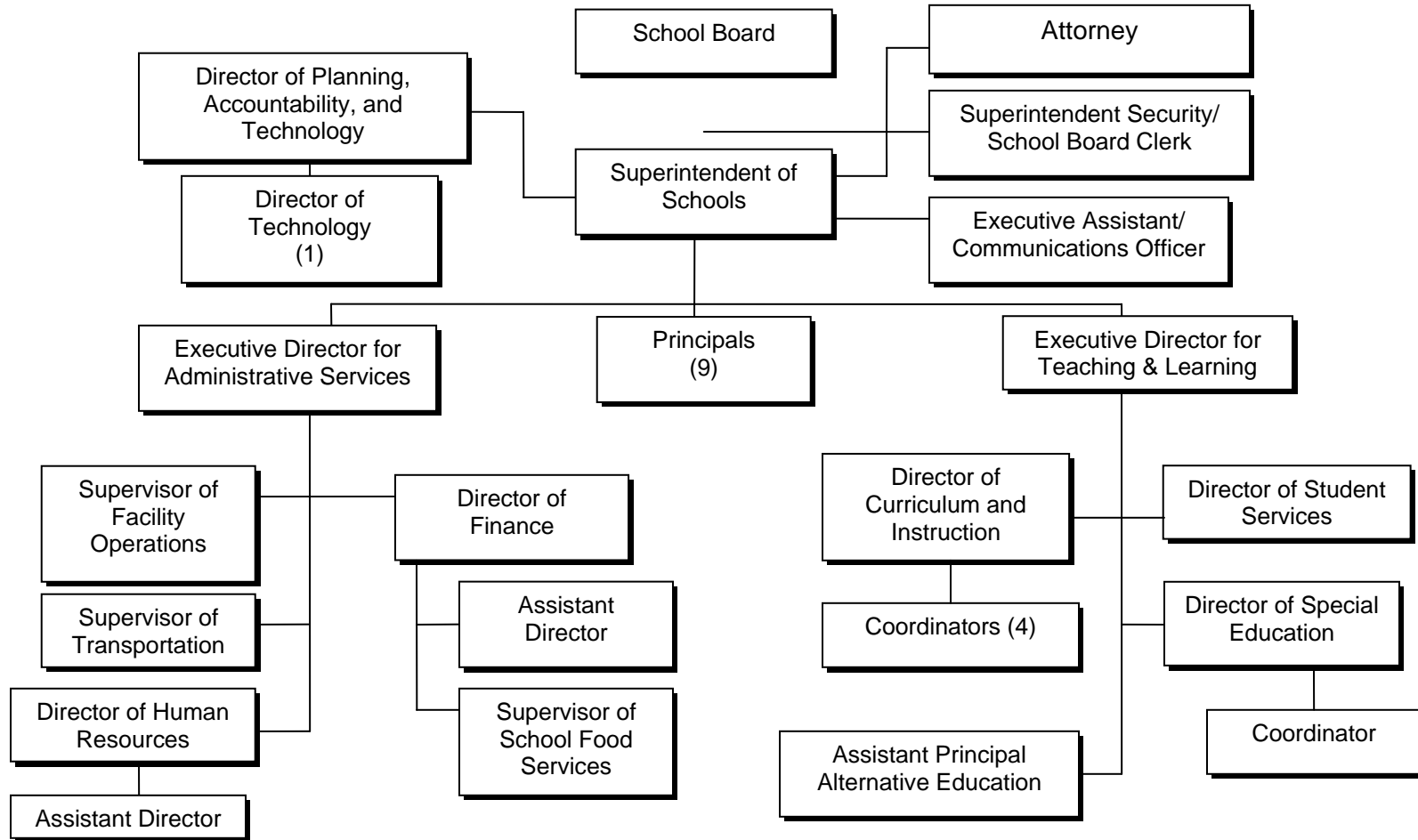


**EXHIBIT 2-9  
ISLE OF WIGHT COUNTY SCHOOLS  
PROPOSED FUNCTION ASSIGNMENTS**



Source: Created by MGT of America, 2006.  
\* Responsibility Shared with Principals

**EXHIBIT 2-10  
ISLE OF WIGHT COUNTY SCHOOLS  
PROPOSED ORGANIZATIONAL STRUCTURE**



Source: Prepared by MGT of America, 2006.

Exhibit 2-11 shows the disbursements per pupil for administration in IWCS and the comparison peer divisions. As can be seen three of the peer divisions and the average for all divisions are less than Isle of Wight.

**EXHIBIT 2-11  
DISBURSEMENTS PER PUPIL FOR ADMINISTRATION  
AMONG PEER SCHOOL DIVISIONS  
2004 FISCAL YEAR**

SCHOOL DIVISION	ADMINISTRATION PER PUPIL *
<b>Isle of Wight County</b>	<b>\$245.68</b>
Pulaski County	\$270.07
Gloucester County	\$184.81
Prince George County	\$204.90
Culpeper County	\$210.32
<b>Division Average</b>	<b>\$223.16</b>

Source: 2003-04 Superintendent's Annual Report for Virginia, Virginia Department of Education, Web site, 2006.

\* Represents expenditures for activities related to establishing and administering policy for division operations including board services, executive administration, information services, personnel, planning services, fiscal services, purchasing, and reprographics.

Exhibit 2-12 provides a summary and rationale for the recommended changes and refers to other chapters/sections for additional discussion.

**EXHIBIT 2-12  
SUMMARY OF RECOMMENDED  
POSITION ASSIGNMENTS/CLASSIFICATIONS  
AND RATIONALE**

CURRENT POSITION	ACTION	RATIONALE
Superintendent	Reduce the direct reports to the Superintendent from 16 to 13 by consolidation of the Communications/Recruitment and the Executive Assistant to the Superintendent positions and assigning Human Resources and Finance units to the Administrative Services Department. Continue principals reporting to the Superintendent.	Equalizes workloads. The maintaining of principal direct reports is consistent since they must maintain strong working relationships with the tow executive directors.

**EXHIBIT 2-12 (Continued)  
SUMMARY OF RECOMMENDED  
POSITION ASSIGNMENTS/CLASSIFICATIONS  
AND RATIONALE**

<b>CURRENT POSITION</b>	<b>ACTION</b>	<b>RATIONALE</b>
Assistant Superintendent for Administrative and Educational Services and Assistant Superintendent for Instructional Services	Changing the titles of the two assistant superintendent positions to Executive Director for Administrative Services and Executive Director for Teaching and Learning.	A division with an enrollment of less than 10,000 often has executive directors rather than assistant superintendents when the need arises for two key administrative leadership positions reporting directly to the superintendent. As the division enrollment approaches the higher numbers, a deputy or associate superintendent position may be considered in a defined role.
Assistant Superintendent for Administrative and Educational Services and Assistant Superintendent for Instructional Services	Reduce the direct reports to the Executive Director for Administrative Services from seven to four and increases the direct reports to the Executive Director for Teaching and Learning from one to four.	Equalizes workloads and realigns functions into related departments.
Assistant Superintendent for Administrative and Educational Services and Assistant Superintendent for Instructional Services	Redistributes functional assignments between the two executive director positions with emphasis on aligning similar functions to the extent feasible (see Exhibit 2-9 for recommended assignment of functions).	Equalizes workloads and realigns functions into related departments. See Chapters 3-9 for more detailed (discussions)
Supervisor of Maintenance	Convert Supervisor of Maintenance position to Supervisor of Facilities Operations. Consolidate facilities related functions under a Supervisor of Facilities Operations reporting to the Executive Director for Administrative services.	Places related functions within a single department under the management of a supervisor. Providing for continuity of services among all facilities areas including maintenance, construction, and custodial). See Chapter 6.0 for a more detailed discussion)

**EXHIBIT 2-12 (Continued)  
SUMMARY OF RECOMMENDED  
POSITION ASSIGNMENTS/CLASSIFICATIONS  
AND RATIONALE**

<b>CURRENT POSITION</b>	<b>ACTION</b>	<b>RATIONALE</b>
Director of Human Resources	Reassign from the Superintendent to the Administrative Services Department.	Reduce the direct reports to the Superintendent.
Director of Finance	Reassign from the Superintendent to the Administrative Services Department.	Reduce the span of control of the Superintendent.
Executive Assistant to the Superintendent and Communications/Recruitment Officer	Consolidate the positions of Executive Assistant to the Superintendent and Communications/Recruitment Officer into one position with responsibilities for executive assistance to the superintendent, communications including Web, and assisting Human Resources with critical recruitment assignments.	In a division of this enrollment you rarely have two positions dedicated to the current assigned responsibilities. Exhibit 2-11 shows that administrative costs are above the average for the peer divisions and this action should contribute to reducing costs without impacting efficiency in delivering services.
Director of Technology	Reassign from the Administrative Services Department to the Superintendent's Office and incorporate planning and accountability functions.	This recommendation places accountability and technology in a "neutral" location within the organizational structure to help ensure that no one department dominates the services of technology or adversely influences accountability efforts.
Director of Student Services	Align student services functions within the Teaching and Learning Department under the Director of Student Services.	This action brings together related services within one department and under the management of a position designed to effectively carry out those responsibilities.

Source: Created by MGT of America, 2006.

**FISCAL IMPACT**

Exhibit 2-13 shows the costs and savings resulting from executive level position changes proposed in this recommendation. Salary figures include cost for fringe benefits estimated at 25 percent of scheduled salary.

**EXHIBIT 2-13  
SUMMARY OF RECOMMENDED  
POSITION ASSIGNMENTS/CLASSIFICATIONS  
SAVINGS AND (COSTS)**

POSITION	ACTION	SAVINGS/(COST) *		
		CURRENT SALARY *	PROPOSED SALARY *	SAVINGS/(COST) *
Executive Assistant to the Superintendent	Eliminate	\$79,123	\$0	\$79,123
Communications/Recruitment Officer	Eliminate	58,833	0	58,833
Executive Assistant to the Superintendent and Communications/Recruitment Officer	Employ	n/a	\$79,123	(79,123)
Supervisor of Maintenance	Change title to Supervisor of Facility Operations	No change	n/a	n/a
Assistant Superintendent for Administrative Educational Services	Change title to Executive Director for Administrative Services	No change	n/a	n/a
Assistant Superintendent for Instructional Services	Change title to Executive Director for Teaching and Learning	No change	n/a	n/a
<b>Total</b>		<b>\$137,956</b>	<b>\$79,123</b>	<b>\$58,833</b>

Source: Prepared by MGT of America, 2006.

\* Includes 25 percent costs for fringe benefits.

Exhibit 2-14 shows how these figures were calculated.

**EXHIBIT 2-14  
COMPUTATION OF TOTAL SALARIES**

<b>POSITION</b>	<b>SALARY</b>	<b>FRINGE BENEFITS</b>	<b>TOTAL</b>
Executive Assistant to the Superintendent	\$63,298	\$15,825	\$79,123
Communications/Recruitment Officer	47,066	11,767	\$58,833
Executive Assistant to the Superintendent and Communications/Recruitment Officer	63,298	15,825	\$79,123

The summary of all savings and costs for each year during the period 2006 through 2011 is shown below. As can be seen a total of \$58,833 can be saved the first year. The five-year savings can be \$294,165.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Eliminate Executive Assistant to the Superintendent	\$79,123	\$79,123	\$79,123	\$79,123	\$79,123
Eliminate Communications/Recruitment Officer	58,833	58,833	58,833	58,833	58,833
Employ Executive Assistant to the Superintendent and Communications/Recruitment Officer	(79,123)	(79,123)	(79,123)	(79,123)	(79,123)
<b>Total</b>	<b>\$58,833</b>	<b>\$58,833</b>	<b>\$58,833</b>	<b>\$58,833</b>	<b>\$58,833</b>

**2.5.2 Decision Making, Management, Communications, Planning and Public Information**

The current Superintendent is in his third year of a four-year contract as executive officer in IWCS. The Superintendent's contract, initiated in June 2003 for a four-year period, provides the terms and conditions for employment. The contract includes specific provisions for benefits and compensation increases consistent with those of other IWCS administrative and professional employees. Additionally, the School Board provides automobile use reimbursement for school business, pays for a family health plan, provides the cost of state supported life insurance, 24 days paid annual vacation leave (2 days per month), two days per month sick leave, and other benefits provided 12 month employees of the School Board. The contract in all respects is consistent with Commonwealth of Virginia law and sound business practice.

## **FINDING**

The Education Foundation provides important support to the Isle of White Division schools and its teachers.

The Education Foundation in the spring of 2002 was dormant and inactive with required legal status expired. With the appointment of new superintendent of schools, the issue of an active foundation was raised and positive support developed.

The legal hurdles were overcome and the current foundation has made significant strides. Among its achievements are representing all areas of the county in its membership, providing teachers who have earned National Board Certification a \$2,000 annual supplement, and with future plans for giving selected graduating senior students scholarships.

As the foundation develops it can be a unifying factor in support of the school division.

## **COMMENDATION**

**The Isle of Wight County School Board, administration, and community are commended for revitalizing the Education Foundation which is providing distinguished support to education.**

## **FINDING**

The Superintendent leads and manages the division, with input from a Superintendent's Administrative Cabinet and by direct consultation with administrative and support staff; however, the cabinet does not include principal representation and survey results and interviews with personnel indicate that involvement of staff in actual decision-making could be improved.

The Superintendent's Administrative Cabinet is composed of the two assistant superintendents, director positions, the Director of Human Resources, the Director of Finance, the Communication/Recruitment Officer, and the Executive Assistant to the Superintendent for a membership of seven including the Superintendent.

The Superintendent's Administrative Cabinet meets weekly, county office staff meetings are held as needed, and principals meetings are held as deemed needed. The Administrative Cabinet meets guided by an agenda with the Executive Assistant to the Superintendent taking notes that serve as a reminder of matters requiring follow-up. Follow-up notes are distributed to the Administrative Cabinet members. An examination of agendas and follow-up notes for Administrative Cabinet meetings shows that attention is given to many details of division operations and that long term planning discussion and strategic issues such as organizational health and climate are not a center piece of activity.

MGT collected survey responses from central office administrators. With 19 of 27 persons responding Exhibit 2-15 shows the responses to items relating to decision making and management of the divisions. As can be seen, response from IWCS central office administrators are predominately less positive than those in other school systems.



Areas of specific concern relate to timeliness of decisions, delegation practices, and accessibility.

**EXHIBIT 2-15  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS AND  
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

<b>PART F: ADMINISTRATIVE STRUCTURE/PRACTICES</b>	(% A + SA) / (% D + SD) <sup>1</sup>	
	<b>ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS</b>	<b>OTHER SCHOOL DISTRICT ADMINISTRATORS</b>
1. Most administrative practices in the school district are highly effective and efficient.	16/42	54/23
2. Administrative decisions are made promptly and decisively.	10/64	44/33
3. School district administrators are easily accessible and open to input.	42/31	65/18
4. Authority for administrative decisions is delegated to the lowest possible level.	16/64	28/44
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	37/27	52/18
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	63/16	40/37
7. The extensive committee structure in the school district ensures adequate input from teachers and staff on most important decisions.	42/32	50/20
8. The school district has too many committees.	0/84	37/32
9. The school district has too many layers of administrators.	10/74	19/64
10. Most administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	31/43	54/25

Source: MGT of America, 2006.

<sup>1</sup> Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*. The *neutral* and *don't know* responses are omitted.

There are various committees and advisory groups including but not limited to the following:

- Career and Technical Education;
- Teacher Council;
- Records Management;
- School Health Advisory Board;
- Local Special Education Advisory Committee;
- Staff Development Council;
- Assessment Committee;
- Report Card Committee;
- Gifted Advisory Committee;
- Program of Studies Committee;
- Learning Center Steering Committee; and
- Calendar Committee.

The committees and advisory groups are focused on specific areas of operations. A review of the agendas and meeting notes from the Administrative Cabinet leads the MGT consultants to believe that the meetings primarily informational but afford opportunities for bringing issues for discussion. Interviews with many personnel confirmed this perspective.

## **RECOMMENDATION**

### **Recommendation 2-12:**

**Reorganize the Superintendent's Administrative Cabinet to include the following seven positions: Director of Planning, Accountability, and Technology, Executive Director for Administrative Services, Executive Director for Teaching and Learning, Director of Finance, Executive Assistant/Communications Officer, and three principal representatives; and institute a new agenda that focuses on organizational development and climate and other matters as noted in statements to follow.**

With the implementation of the proposed organizational plan and realignment of functions, a newly configured Superintendent's Administrative Cabinet composed of seven positions could be developed. Including principals in the Administrative Cabinet should result in ensuring school-level input at the primary decision making level of activity. Minutes rather than follow-up notes of meeting activity should be prepared and distributed to all administrative staff.

The Superintendent and the Superintendent's Administrative Cabinet should perform the following functions:

- coordinate all planning development through the recommended Planning, Accountability, and Technology Department;
- ensure that all participants are encouraged to bring ideas and strategies to the discussion so that the wealth of talent and experiences are drawn upon to support important decisions;

- review projections and alternative “what if” analyses, as part of long-range planning;
- establish and maintain focus on mission, goals, and related initiatives of the system;
- analyze and interpret data to ensure that decisions are based upon accurate and complete information;
- ensure community involvement;
- monitor internal and external communications to ensure effective communication of decisions and related information;
- communicate the vision of the organization to all stakeholders;
- guide program evaluation;
- identify and participate in training designed to ensure that the team functions effectively;
- engage in orchestrating the specific and purposeful abandonment of obsolete, unproductive practices and programs;
- maintain focus on continuous division and school improvement;
- monitor the division’s organizational climate; and
- coordinate the development and equitable allocation of resources (fiscal, personnel, facilities, technology, etc.).

Decisions should be based upon the best information available and have appropriate input. Day-to-day operation decisions would be delegated to the administrators responsible for their respective units and departments and closest to the issues. Within the organizational plan, the Administrative Cabinet members would maintain effective, frequent communications (almost daily) to ensure consistency and effective monitoring of activities. The Superintendent would continue to maintain daily communications with various administrators.

The Superintendent’s Administrative Cabinet should continue meeting on a regularly scheduled basis and with a developed agenda. This group should focus upon consensus building to achieve important goals and objectives. Decisions and activities of the cabinet would be effectively communicated to impacted parties through copies of meeting minutes and e-mail requiring confirmation of receipt.

Planning should become the centerpiece of activity from the perspective of responsibility for ensuring that all related planning processes and effective plan monitoring are ongoing processes. The placing of the planning function at the executive level in the organization (see Exhibits 2-9 and 2-10), with specific oversight responsibility assigned to the Superintendent and the Director for Planning, Accountability, and Technology, reflects the important nature of ensuring that planning processes are data-driven and that outcomes can be independently assessed.

The sophisticated development of this process should contribute information that can drive the school system's planning and accountability implementation processes and improve internal communications.

It may be appropriate to consider specialized group development training for the Superintendent's Administrative Cabinet. MGT has had significant success with Facilitative Leadership training. This training focuses on developing processes related to effective decision-making involvement of personnel and can be easily obtained through Interaction Associates, San Francisco, California or Interaction Designs, Tallahassee, Florida. Neither organization has any relationship with MGT of America.

**FISCAL IMPACT**

This recommendation can be implemented at no additional cost to the division; however, if training in facilitative leadership skills is desired the one-time cost could be \$5,000 for the training and related materials.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Facilitative Leadership Training for the Administrative Cabinet	(\$5,000)	\$0	\$0	\$0	\$0

**FINDING**

The IWCS *Strategic Plan 2004–2010* was updated and distributed in March 2006. In March 2006 the School Board was provided a summary of progress for ten areas of the plan. The original *Strategic Plan for 2004-2010* contains 11 primary areas of concentration including: Curriculum and Instruction, Student Life, Technology, Communications, Human Resources, Finance, Maintenance, Transportation, Food Services, Facilities, and School Board. Additionally, a mission statement, shared beliefs, division goals, and series of information appendices are included in this comprehensive document.

The March 2006, Six-Year Strategic Plan Action Plans provides detailed progress in each area except the school board; however, the report is comprehensive in content and extremely useful in detail presentations.

**COMMENDATION**

**The Isle of Wight County School Board and administration are commended for developing a comprehensive, updated Strategic Plan to include projections, goals, and strategies through 2010.**

**FINDING**

The update to the Six-Year Strategic Plan 2004-2010 contains detailed information related to public information and communications and the proposed Executive Assistant

to the Superintendent Communications/Recruitment Officer should vigorously work towards successful implementation.

The updated plan includes the following:

- update and expand the division's Web pages;
- develop a broad range of promotional materials;
- continue and expand community meetings;
- expand opportunities for student and staff recognition;
- organize a formal School-Business Partnership Program;
- review and expand internal communications programs;
- establish additional communications links regionally;
- explore additional opportunities to utilize public access television channel; and
- invite Board of Supervisors participation in school-related groups.

The elements of this plan contribute and support previous Recommendations 2-4, 2-5, and 2-12.

## **RECOMMENDATION**

### **Recommendation 2-13:**

**Vigorously proceed to implement the communication elements of Six-Year Strategic Plan as updated.**

The implementation of this recommendation should result in committing staff and fiscal resources to an energetic and expeditious path of developing and operationalizing formalizing a comprehensive communication program and include, minimally, as a first priority the following:

- develop a broad-based division community support initiative that is designed to reach into all areas of the county;
- continue and expand community meetings particularly as relates to implementation of Recommendation 2-5;
- review and expand internal communications programs and use as a vehicle for communication Administrative Cabinet discussions and activity within the division (see Recommendation 2-12);
- invite Board of Supervisors participation in school-related groups (see Recommendation 2-4);

- coordinate the involvement of central office and school administrators in civic and other community organizations;
- coordinate public information strategy/techniques training delivery to school personnel when needed; and
- develop and coordinating production and distribution of internal and external publications and news releases.

This recommendation is designed to bring together the public information/community relations dimension, and promote systematic coordination of related activity.

**FISCAL IMPACT**

The cost of implementing this recommendation is included in the updated Six-Year Strategic Plan, March 2006 and, therefore, could be implemented within existing resources and at no additional cost to IWCS until such time as the plan is expanded.

**2.5.3 School Organization and Management**

IWCS provides instructional programs to students in two high schools, two middle schools, and five elementary schools plus one Alternative Education center. The nine high, middle, and elementary schools are staffed with principals and assistant principal positions as well as activities/athletic, guidance, and library positions. The Alternative Education center is administered by an assistant principal. Exhibit 2-16 shows data related to various positions in IWCS as compared to five peer divisions. As can be seen IWCS compares favorably with the average for the peer divisions but three divisions with lower enrollment have a lower ratio of administrators to students. Pulaski County with nearly a 1,000 fewer students has a higher ratio.

**EXHIBIT 2-16  
STAFF PER 1,000 STUDENTS  
AMONG PEER SCHOOL DIVISIONS  
2003-04 SCHOOL YEAR\***

SCHOOL DIVISION	STUDENTS AVERAGE DAILY MEMBERSHIP	PRINCIPALS/ ASSISTANT PRINCIPALS PER 1,000 STUDENTS
<b>Isle of Wight County</b>	<b>4,969</b>	<b>3.62</b>
Pulaski County	4,874	4.67
Gloucester County	6,109	3.11
Prince George County	5,992	3.17
Culpeper County	6,153	3.25
<b>Division Average</b>	<b>5,619</b>	<b>3.56</b>

Source: 2003-04 Superintendent's Annual Report for Virginia, Virginia Department of Education, Web site, 2006.

\*Ratios based on Average Daily Membership (ADM).

Exhibit 2-17 shows IWCS enrollment and the number of assistant principals, guidance counselors, librarians, and activities positions assigned to each school.

**EXHIBIT 2-17  
ISLE OF WIGHT COUNTY SCHOOLS  
ENROLLMENT AND POSITION INFORMATION**

SCHOOL	ENROLLMENT FALL 2005-06	POSITIONS		
		PRINCIPAL	ASSISTANT PRINCIPAL	ACTIVITY/DEAN (non-teaching)
<b>Elementary Schools</b>				
Carrollton	464	1	1	0
Carrsville	236		1	0
Hardy	459	1	1	0
Westside	790	1	1	0
Windsor	611	1	1	0
<b>Elementary Total</b>	<b>2,560</b>	<b>4</b>	<b>5</b>	<b>0</b>
<b>Middle Schools</b>				
Smithfield	587	1	1	0
Windsor	364	1	1	0
<b>Middle School Total</b>	<b>951</b>	<b>2</b>	<b>2</b>	<b>0</b>
<b>High Schools</b>				
Smithfield	1,159	2	1	2
Windsor	516	1	1	0
<b>High School Total</b>	<b>1,675</b>	<b>3</b>	<b>2</b>	<b>2</b>
Alternative Education Center	<b>variable</b>	<b>1</b>	<b>*</b>	<b>0</b>
<b>Grand Total</b>	<b>5,186</b>	<b>10</b>	<b>9</b>	<b>2</b>

Source: Prepared by MGT from IWCS data, 2006.

\* Reports to the Assistant Superintendent for administrative and Educational services.

**FINDING**

The administrative and support staffing of IWCS is consistent with and meets all state standards. The one high school is provided an activities/athletic position and while the middle school is not staffed with an activities position; however, a supplement for athletic and other activities is provided.

**COMMENDATION**

**Isle of Wight County School Board is commended for meeting all minimum Commonwealth school staffing criteria as set forth in the revised Standards of Quality.**

## **FINDING**

One high school is provided an activities/athletic position while the other high school is not; creating an inequity in the management of activities/athletic programs.

Windsor High School has a supplemented athletic director who is assigned full time teaching responsibilities. His athletic responsibilities involve coaching as well as coordination of all other athletics for the students.

MGT consultants experiences in similar situations has revealed that when a position is assigned responsibility for full-time or near full-time teaching in conjunction with athletic program direction and coordination, the teaching responsibilities are jeopardized because of the requirements to respond to all sorts of emergencies and other tasks associated with a full scale athletic program.

The contemporary high school offers girls and boys' sports in separate teams in areas of football, basketball, soccer, volleyball, track and field events, and other areas of competition. The organization of support for these programs in IWCS requires the school-level personnel to be responsible for all aspects of these activities including ensuring that fields and facilities are ready for safe use by students, that budgets are properly prepared, safe equipment provided each sport, requirements of law (such as Title IX), and many other tasks including assisting the principal in employing coaches in all sports.

## **RECOMMENDATION**

### **Recommendation 2-14:**

**Employ one teacher to assume the current Windsor High School Activity/Athletic Director's teaching assignments.**

Implementation of this recommendation should equalize responsibility coverage for athletic/activities program between the tow high schools. Each school has many athletic and activities programs that must be appropriately coordinated and managed. Carrying out these responsibilities while assigned full-time or near full-time teaching responsibilities is not a realistic approach in the contemporary high school.

Implementation of this recommendation also creates situation where the School Board and administration ensures adequate staffing to assist in safeguarding the use of proper equipment, oversight of maintenance of grounds and facilities, and compliance with regulations such as federal Title IX requirements and IDEA in student activities.

## **FISCAL IMPACT**

Exhibit 2-18 shows the costs and its calculation resulting from the recommended school-level position changes proposed in this recommendation. Salary figures include cost for fringe benefits estimated at 25 percent of scheduled salary.



**EXHIBIT 2-18  
COMPUTATION OF TOTAL SALARIES**

<b>POSITION</b>	<b>SALARY</b>	<b>FRINGE BENEFITS</b>	<b>TOTAL</b>
Employ a teacher to assume the current Windsor High School Activity/Athletic Director's teaching assignment	\$36,000	\$9,000	\$45,000

Source: Prepared by MGT of America, 2006.

\* Includes 25 percent costs for fringe benefits.

The summary costs for each year during the period 2006 through 2011 is shown below. As can be seen the first-year cost is \$45,000 with a five-year total of \$225,000.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Employ One Teacher to Assume Windsor High School Activity/Athletic Director's Teaching Assignments	(\$45,000)	(\$45,000)	(\$45,000)	(\$45,000)	(\$45,000)

**FINDING**

Principals are assigned responsibilities in areas of custodial services including procurement of supplies, employment and supervision of personnel, and training. Additionally, they are responsible for evaluation of personnel including custodial, school bus drivers, and food service. Assistant principals, if assigned, conduct school bus ride-a-longs and bus drills. School-level administrators are responsible for covering bus accidents.

The emphasis in the Six-Year Strategic Plan 2004-2010 for IWCS is clearly the improvement of instruction and raising student's levels of achievement. While each school has been assigned a lead teacher to assist in this process, it is acknowledged by both central office and school-level personnel that a first priority for principalship leadership should be related directly those strategic plan stated objectives and strategies.

**RECOMMENDATION**

**Recommendation 2-15:**

**Redefine site-based management responsibilities of principals to exclude functions that can more efficiently managed at the division-level.**

MGT consultants believe that for IWCS to continue to improve student academic performance, reduce dropout rates, and increase graduation rates the principal must be freed to focus on these primary issues. To accomplish this requires a review of thee

standards governing school-based management and making determinations as to what is best handled from the central administration's level of authority.

Some school systems have developed site-based standards and handbooks to ensure that school principals can focus on essential student achievement related matters. Typically guidelines are established that assign the following activities and tasks to the central office-level for implementation or coordination:

- employment and training of custodial personnel;
- performance review of bus drivers, food service personnel, and custodians;
- ordering and delivering supplies for support services areas of operation;
- providing supplies for custodial personnel including restroom supplies, floor cleaning materials, and other cleaning agents;
- conducting school bus drills, route riding; and
- payroll report preparation for bus drivers, food service personnel, and custodians.

Additionally, the central office generally conducts safety inspections, facilities cleanliness inspections and such matters to ensure a standard of safe and clean schools throughout the division.

Once site-based responsibilities are redefined and approved by the School Board an implementation plan can be devised and scheduled for operationalizing.

### **FISCAL IMPACT**

This recommendation can be implemented at no additional cost and/or savings to the division; yet, once the site-based management responsibilities for principals are developed certain costs and/or savings could be incurred.

### **3.0 PERSONNEL AND HUMAN RESOURCES**

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### **3.0 PERSONNEL AND HUMAN RESOURCES**

The findings, recommendations, and commendations regarding the operation and functions of the Department of Human Resources of the Isle of Wight County Schools (IWCS) are presented in this chapter. The findings are presented in these categories:

- 3.1 Organization and Management
- 3.2 Personnel Policies and Procedures
- 3.3 Job Classifications, Job Descriptions, and Employee Compensation
- 3.4 Recruitment, Hiring, and Retention
- 3.5 Evaluation and Professional Development

#### **CHAPTER SUMMARY**

The Department of Human Resources in IWCS is responsible for providing services to nearly 800 staff members in the division, but the division does not have an employee handbook. The division places a high priority on recruiting efforts, but the Department of Human Resources does not have a budget exclusively for recruiting teachers. An annual survey to solicit input from IWCS employees regarding the services provided by the Department of Human Resources and the quality of these services would be beneficial.

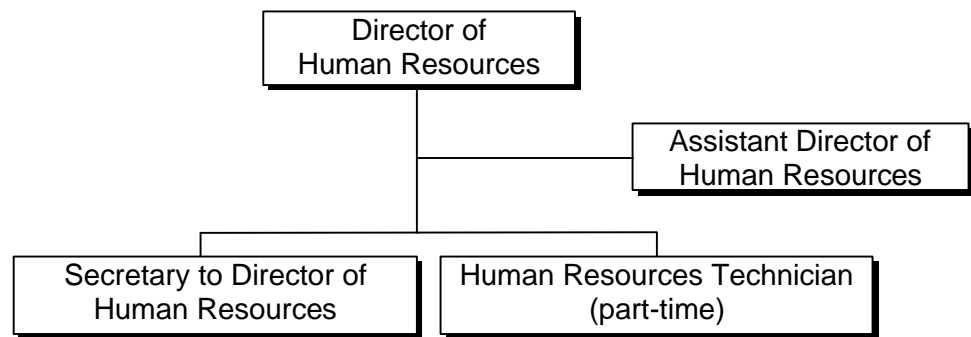
This chapter outlines our findings, commendations, and recommendations relating to the Department of Human Resources. Our recommendations include:

- developing and implementing an annual, on-line customer satisfaction survey to evaluate the quality of services provided to IWCS employees;
- ensuring that the personnel records interface with all other databases;
- developing and updating annually an employee handbook for IWCS staff;
- implementing a systematic review of employee job descriptions for each position in the division at least every five years;
- requiring the position Director of Human Resources to have certifications in human resources in conjunction with the accepted degrees outside the field of human resources;
- implementing a system for all job applications to be submitted on-line;
- developing an ongoing employee recognition program;
- developing a formal staffing plan and a data-driven position control system; and
- adopting a budget exclusively for recruitment.

### 3.1 Organization and Management

The Department of Human Resources is responsible for planning, implementing, and maintaining a sound system of human resource management that complies with the laws of Virginia and the rules of the State Board of Education and is consistent with the mission of the school division. Exhibit 3-1 shows the organizational structure of the staff in the Department of Human Resources.

**EXHIBIT 3-1  
ISLE OF WIGHT COUNTY SCHOOLS  
CURRENT ORGANIZATIONAL STRUCTURE  
DEPARTMENT OF HUMAN RESOURCES**



Source: IWCS, Department of Human Resources, 2006.

All proposed changes to the organizational structure or function of the Department of Human Resources recommended by MGT are consistent with prevailing accepted best practices and are focused on improving the overall efficiency of department's operations, which ultimately will result in better customer service and customer satisfaction.

#### **FINDING**

The Department of Human Resources lacks consistency in how phone calls are received and messages returned. Human Resources has one outside telephone line listed for the department. One full-time and one part-time person are assigned to answer incoming calls. When no one is able to answer the telephone, callers are directed to leave a voicemail message.

MGT heard in interviews and from the public forum that leaving messages happens often, and messages are not returned in a timely fashion. Some individuals indicated that they have called back several times in order to reach someone in the Department of Human Resources without having to leave another voicemail message.

#### **RECOMMENDATION**

##### **Recommendation 3-1:**

**Implement a centralized telephone system to answer incoming calls in the new administration offices and establish a practice of returning phone calls within one business day.**

Having a centralized answering service for all administrative offices should allow fewer interruptions for staff conducting departmental operations. A central receptionist would be able to answer many general questions related to IWCS such as school division services, calendar items, directions to the office, and contact information. Also, a receptionist would be able to direct the caller to the most appropriate department depending on the inquiry and would help alleviate the time employees spend answering calls that should be handled by a different office. A practice should be created and enforced to return all calls within one business day. The phone calls do not need to provide answers, but should indicate that the message was received and staff will have an answer by a set date. This recommendation should reduce the frustration callers feel when they have to be transferred to other departments or wait for a returned phone call.

IWCS administrative offices will be moving into a new facility that includes a reception area, which should help facilitate this recommendation.

### **FISCAL IMPACT**

This recommendation can be implemented with existing resources and staff.

### **FINDING**

The Department of Human Resources does not have a process in place to survey employees with respect to the personnel services that are being provided. The customers of the Department of Human Resources are IWCS employees; thus, a customer satisfaction survey can be used to evaluate current services and provide insight into areas that need improvement.

MGT found through interviews with board members and staff and through comments provided during the charette that help is needed in order to efficiently and effectively run Human Resources for IWCS.

An annual customer satisfaction survey would offer an objective means for gathering input about the services provided to IWCS. The survey should include open-ended items so that employees could comment more specifically about services or issues that they feel need improvement as well as those that they deem exemplary.

### **RECOMMENDATION**

#### **Recommendation 3-2:**

**Develop and implement an annual, on-line employee survey that will assist the Department of Human Resources in evaluating the quality of its services and identifying areas that need improvement.**

A customer satisfaction survey is essentially a performance review. Results of the review should be an effective tool in evaluating current performance and determining areas in need of improvement.

## **FISCAL IMPACT**

This recommendation can be implemented with existing resources using current human resources staff and programmers in the Technology Department.

## **FINDING**

IWCS does not have a written policy regarding who has access to personnel files. In the School Board Policy manual, Policy GBL states that past and present employees of IWCS shall have access to their files that are maintained by Isle of Wight County Schools. It also states that any information requested by banks or other institutions will not be released without the written permission from the employee.

Personnel files are kept in cabinets that are locked at night and are located in the human resources receptionist area behind the receptionist's desk. Currently, the Department of Human Resources requires any staff person requesting to view any personnel file to sign for it. However, there is no list of persons who are authorized to view files or the specific files they are authorized to view.

The Department of Human Resources Management of Virginia, Policy 6.10, describes Personnel Records Management for employees covered under the Virginia Personnel Act. Personnel records are to be maintained in a secure location and are confidential in nature. Therefore, access to the information in the records is to be restricted.

## **RECOMMENDATION**

### **Recommendation 3-3:**

**Create a policy that provides for a list of employees by position who are authorized to view personnel folders other than their own, the specific type(s) of personnel files the person is allowed to view, and the procedure for gaining access to the files.**

Having written policies should ensure that all employees must follow the same process for accessing files containing personal information. A written policy should also give employees confidence that only authorized persons have access to their personal information.

## **FISCAL IMPACT**

This recommendation can be implemented with existing funds.

## **FINDING**

Employee medical information is included in the regular personnel files in the Department of Human Resources.

As a part of the methodology for performance studies, MGT reviews personnel files. MGT's review found the "Employee Physician's Certificate" in all employees' files and an additional medical form for one employee. Due to patient confidentiality regulations as a

result of the Health Insurance Portability and Accountability Act of 1996, all individually identifiable health information such as the results of the Tuberculin Skin Test on the Employee Physician's Certificate should be secured in files separate from other information related to employment. No one should be able to view any forms containing medical information unless the employee has granted that person written permission.

**RECOMMENDATION**

**Recommendation 3-4:**

**Ensure that all medical information is filed in folders exclusively for health information and stored in locked cabinets within a secured area with limited access.**

Having medical information separate from other employee information should ensure its confidentiality. School Board Policy GBE states that, as a condition of employment, all employees must submit a certificate signed by a licensed physician, nurse practitioner, or registered nurse employed by a local health department verifying that they appear free of communicable tuberculosis. This certificate, along with any other medical information necessary for health insurance, is confidential and should be treated as such.

**FISCAL IMPACT**

The cost of implementing this recommendation will be the cost of new folders and labels for current employees and a reserve of 10 percent. A box of 50 file folders with one fastener can be purchased for about \$17.00, and a package of 200 labels cost about \$6.00. For 820 employees, it will take 17 boxes of 50 folders each, which equals \$289. It will take five boxes of 200 labels at a cost of \$30 (5 x \$6.00). Thus, the startup cost would be about \$319 (\$289 plus \$30).

The cost for 200 folders and labels is about \$74 (\$17 x 4 boxes of 50 folders and \$6 for one package of labels). Maintaining a reserve of 10 percent will be two boxes of 50 folders and 100 labels, which would cost less than \$40. This is probably an overestimation of expenses because of the electronic procurement system in Virginia through which IWCS can order these materials.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Purchase Folders and Labels for Employ Medical Files	(\$319)	(\$40)	(\$40)	(\$40)	(\$40)

**FINDING**

The division does not ensure that forms related to employment in personnel files are secured and in an organized format in the personnel folders.

The personnel file folders lack consistency in the organization of information within the file. Recently, the Department of Human Resources changed the type of personnel file



folders to multi-sections. The design of the new folder provides more ease in removing or securing documentation and is more efficient for locating documentation. However, MGT found some type of disorganization in almost each one of the office folders reviewed. Papers were not secured and sets of required documents were not in chronological order by contract year. Human Resources has developed a written, logical pattern of organization for the documentation that should be found in each folder, but this format was not consistently followed.

Another issue relates to the timely purging of applications on file. When an application is received, Human Resources creates a file folder for the prospective employee. On the outside tab of the folder, Human Resources affixes a label identifying the year the application for employment is received and labels for the first two letters of the first name and the first two letters of the last name of the applicant. MGT was told that applications for employment are kept for two years. In the file cabinet containing the applicant folders, there were labels from 2003 and earlier.

## **RECOMMENDATION**

### **Recommendation 3-5:**

**Ensure that all documentation in personnel files is secured and is in the correct order when filed and that files are purged at the designated time.**

Utilizing a logical system for filing saves time and mistakes in a human resources management office; however, it is important that the system be followed precisely for the system to be beneficial and achieve the results for which it was designed.

## **FISCAL IMPACT**

This recommendation can be implemented with existing resources.

## **FINDING**

IWCS does not effectively integrate the employee databases across the division.

The Department of Human Resources currently keeps employee information in a stand-alone system that does not interface with other departments in the school division. This practice causes duplication of efforts and unnecessary manual actions. One example involves the “acceptable computer system use agreement” that all employees must sign and return when hired and with each subsequent contract. The form is submitted to Human Resources with all required forms related to employment. Human Resources enters pertinent information into an Excel spreadsheet; then, the spreadsheet is forwarded electronically to the technology department where the process of assigning computer access codes and email addresses is completed. When employees are hired during the year, the spreadsheet is again forwarded to the Technology Department with the new hires highlighted in red so that the Technology Department can easily identify them.

Another example of a process that involves duplication of efforts and unnecessary steps to complete is the dissemination of employee financial information to the finance

department. The human resources technician enters employee information into the applicant tracking portion of the current database/Intranet. Next, the Assistant Director of Human Resources enters employee information into an Excel spreadsheet that she maintains. The secretary to the Director of Human Resources types out a sheet exclusively of financial information, which is printed and included with forms related to compensation and benefits submitted by the employee. All of these forms are then forwarded to the Finance Department where a staff member enters the information necessary to meet their fiscal responsibilities to IWCS employees.

During the summer of 2006, IWCS will be converting to MUNIS. It is imperative that the system provide adequate continuity in processes among the departments and that human resources employees be trained thoroughly.

## **RECOMMENDATION**

### **Recommendation 3-6:**

#### **Ensure that the personnel records interface with all other databases.**

When all databases and records management systems interface, time can be saved, and the possibility of using inconsistent information on employees will be minimized. Interfacing makes the processes for payroll and benefits administration more efficient and ensures that each department is using the same information for an employee throughout the division.

## **FISCAL IMPACT**

This recommendation can be implemented with existing resources using programmers from IWCS Technology Department.

## **FINDING**

The position of Director of Human Resources is not required to have a degree in the field of human resources or any related certifications.

The IWCS job description for Director of Human Resources currently requires:

*any combination of education and experience equivalent to graduation from an accredited college or university with major course work in education, human resources or related field and extensive school administration or human resources experience.*

Although the current Director of Human Resources does not have certification in the field of human resources, she does have several years of professional experience in education administration that included functions of human resources administration. Her credentials and relevant experience do meet the current education and experience requirements for this position.

Two nationally-recognized certifications in the field of human resources are the Professional in Human Resources (PHR) and the Senior Professional in Human

Resources (SPHR), the more advanced level. Each of these certifications is intended for professionals who have at least two years of professional (exempt-level) human resource work experience. Both PHR and SPHR certifications indicate persons holding the certification have successfully completed an examination of their knowledge of all functional areas in human resources, which are:

- Strategic management;
- Workforce planning and employment;
- Human resource development;
- Compensation and benefits;
- Employee and labor relations; and
- Occupational health, safety, and security.

Currently, neither the PHR certification nor the SPHR certification is required for the position of Director of Human Resources.

### **RECOMMENDATION**

#### **Recommendation 3-7:**

**Require the position Director of Human Resources to have and maintain at least the Professional in Human Resources (PHR) certification in conjunction with the accepted degrees and experience outside the field of human resources if the director does not have a degree in human resources or related field.**

IWCS should require the Director of Human Resources to have certification in human resources management if the person does not have a degree in human resources or a related field. By requiring the director to have this certification, the division establishes performance accountability while operating a more efficient department.

### **FISCAL IMPACT**

There will be no fiscal impact with the implementation of this recommendation if the division amends the job description for Director of Human Resources and applies it to future vacancies. However, if the division elects to implement this recommendation immediately, there will be a one-time cost involved. The division should assume these costs for the current director.

The cost for the PHR examination is \$300 for persons who are not members of the Society for Human Resource Management (SHRM). The closest location to take the examination is Newport News, VA, which is approximately 30 miles from the IWCS administrative offices. The current rate for travel reimbursement accepted by the Internal Revenue Service is \$.445 per mile, which applies to use of a personal vehicle. Using these two figures, the cost to IWCS to require the current Director of Human Resources to obtain a PHR certification is about \$314, which may vary due to actual mileage for travel.

Each certification is awarded for a period of three years and recertification is required at the end of this time period. The position of Director of Human Resources is required to have certification from the Virginia Department of Education as are teachers in public schools. Teachers receive reimbursement for continuing education that leads to

recertification or upgrades in current certifications. The employment contract for the director should include a specific allocation for reimbursement for recertification or for continuing education to maintain the required qualifications of the position of Director of Human Resources for IWCS.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Require Current Director of Human Resources to Acquire Professional in Human Resources (PHR) Certification	(\$314)	\$0	\$0	\$0	\$0

**3.2 Personnel Policies and Procedures**

Policies guiding the Department of Human Resources in the delivery of services to IWCS employees are set forth in the *Board Policy Manual: Section G: Personnel*. Within this section of the manual, policies and regulations regarding personnel are presented and include staff procurement, staff position changes, employee relations, employee benefits, health and safety, professional staff, employment, professional development, and staff evaluation.

**FINDING**

There is no divisionwide employee handbook for IWCS staff.

An employee handbook is a comprehensive guide to procedures and policies that affect all employees. Schedules, deadlines, and day-to-day operational guidelines are necessary for the effective and efficient operation of a division's personnel function. An effective employee handbook provides clear expectations about policies and regulations.

Additionally, a comprehensive handbook protects the division by ensuring that employees are well-informed about policies and regulations, particularly those related to conditions of employment, various types of grievance procedures, certification status, performance evaluation, and reclassification. No manual that provides an overview of and timelines for ongoing employee and division responsibilities exists.

Exhibit 3-2 shows an excerpt of a comprehensive and exemplary employee handbook implemented by the Ponca City (OK) School District.

**EXHIBIT 3-2  
SAMPLE EMPLOYEE HANDBOOK**

CATEGORY	DESCRIPTION OF CONTENTS
Introduction	Introduction to the use of the handbook.
Staff Directory	Administrative offices and departments.
Board Goals	Board of Trustee goals and members.
School Year Calendar	School calendar.
Employment	Employment policies such as job vacancies, contract and non-contract employment, credentials and records, criminal history records, searches, and alcohol and drug testing.
General Instructions	General instructions for teacher planning periods, supplementary duties, outside employment and tutoring, teacher appraisals, employee involvement, and staff development.
Compensation and Benefits	Compensation and benefits such as salaries, wages, and stipends; paychecks; automatic payroll deposit; payroll deductions; monthly pay schedule; overtime compensation; travel expense reimbursements; leave and absences; and workers' compensation benefits.
Employee Relations and Communications	Employee relations and communications to include recognition and appreciation, district communications, complaints and grievances, harassment, drug-abuse prevention, safety, visitors, copyrighted materials, pest control, media information, and textbooks.
General Procedures	General procedures covering bad weather closing, emergencies, safety procedures, threatening weather, purchasing procedures, personnel records, and building use.
Termination of Employment	Termination issues such as resignations, dismissals, exit procedures, and reports to the State Board for Educator Certification.
Student Issues	Student issues including student records, parent and student complaints, administering medication, student discipline, student attendance, and parent-teacher conferences.

Source: Ponca City School District, Employee Handbook, 2004–05.

Note: Only a partial listing of contents is included.

**RECOMMENDATION**

**Recommendation 3-8:**

**Develop and update annually an employee handbook for IWCS staff.**

The handbook will serve as a guide for all employees. Each employee should be given a copy of the adopted handbook at the beginning of each school year at the orientation for all employees. Employees who are hired during the year should receive a copy of the handbook at the time of employment and should be required to participate in an orientation with a human resources representative.

Some of the information typically discussed in such handbooks includes:

- an overview of services performed by the Department of Human Resources;
- description of staffing and personnel classifications;
- the terms and conditions employment contracts;

- finger printing procedures;
- employment status changes such as transfers;
- procedures, models and benchmarks for performance appraisal;
- requirements for certification;
- guidelines for staff development;
- a description employee benefits;
- Americans with Disabilities Act compliance;
- employee responsibilities;
- grievance procedures;
- payroll requirements and procedures;
- leave policies and procedures;
- procedures for obtaining a substitute;
- timelines for processing all personnel transactions; and
- requirements for submitting records for personnel files.

An employee handbook should also include items such as the mission and goals of the school division, an annual school calendar, emergency procedures, telephone numbers, and a directory of schools, central office personnel, and the names of school board members.

The manual should also be posted on the school division Web site. This recommendation will make information more easily accessible, should eliminate unnecessary duplication costs, and should facilitate efficient updates.

The division could provide employees the option of receiving the handbook either electronically or in hard copy. This practice should allow employees easy reference to essential employment policies, procedures, and forms when questions or issues arise. A form for staff to sign affirming that the handbook has been received should be included in the handbook. The signed form should be kept on file in Human Resources.

A comprehensive and readily available employee handbook is an important and effective way for school divisions to communicate with their employees. By providing the handbook either electronically or in hard copy, the division ensures ready access to essential employment information, policies, and forms which affect each employee working in the division.

## **FISCAL IMPACT**

The fiscal impact of this recommendation cannot be determined until the division decides how the handbook will be published and what information is going to be included. There are many options to consider, from bound to loose leaf notebooks. Some of the choices include reprinting each year, and others involve only adding pages for updates and revisions. Also, the division may want to choose a format with pages for individual schools to include information specific to their school. When it has been established exactly what information will be included and how the handbook will be published, the fiscal impact can be determined.

## **FINDING**

The Department of Human Resources does not have a current staff member who is designated as the contact person for employees with questions about their benefits.

Confusion exists among IWCS employees when they have questions regarding employee benefits as they are unsure who to contact. The Department of Human Resources does not have a benefits specialist position which is typically the person who handles questions from employees regarding their benefits. Fringe benefits offered to employees of IWCS are described in the human resources section of the school board Policy GCBC. MGT was told that employees who make inquiries to the Department of Human Resources regarding benefits are generally referred to the Finance Department.

Payroll is a part of the Finance Department in IWCS. The introductory paragraph to school board Policy DL describes payroll procedures as:

*The Finance Department, in accordance with schedules approved by the school board, will pay wages, salaries, and supplemental payments to employees. The Finance Department will maintain records that accurately reflect the compensation and related benefits of each employee.*

Per board policies, both the Department of Human Resources and the Finance Department have responsibilities relating to employee benefits. However, the role of the Finance Department is generally associated with processing compensation and benefits.

## **RECOMMENDATION**

### **Recommendation 3-9:**

**Assign the role of contact person for employee questions about benefits to the position of assistant director of human resources and provide IWCS employees with information on the new process as well as the contact information for inquiries related to employee benefits.**

A benefits specialist is generally the expert on benefits offered by a school division and is the primary contact for employees regarding inquiries about benefits. The Department of Human resources does not have this position, but human resources representatives are already familiar with the benefits package offered to IWCS employees since they are actively involved in the recruiting and hiring processes.

### **3.3 Job Classifications, Job Descriptions, and Employee Compensation**

A carefully developed job classification system and well-written job descriptions are essential for effective personnel management, which includes the correct assignment of pay grades. Job descriptions should serve as a basis for annual performance evaluations, which in turn guide administrative decisions regarding employees' promotion and retention. Moreover, job descriptions are becoming increasingly important in defending workers' compensation and civil lawsuits. Standards for jobs are set when a description of a job is clearly stated.

Currently, employees in IWCS are classified as either "professional" or "support" personnel. "Professional" includes administrators and teachers whereas "support" includes all other staff. The following positions are considered administrators:

- assistant superintendent;
- executive director;
- director;
- assistant director;
- principal;
- assistant principal;
- coordinator;
- assistant to the superintendent;
- specialist;
- school psychologist; and
- office manager/clerk of board.

In January 2006, IWCS was presented the final report of a classification and compensation study that had been commissioned by IWCS. The study was approved unanimously by the IWCS School Board.

#### **FINDING**

IWCS does not have a process or procedure in place for periodic review and update of job descriptions.

Job descriptions for professional positions in IWCS have not been updated since 2000. Descriptions for professional positions and support positions were recommended in the classification and pay plan study conducted in 2000. In 2005, job descriptions for support personnel were updated as a result of the classification and compensation study. The professional position descriptions provided to MGT were found in the 2000 study, but the job descriptions for support positions were found in the 2005 study.

Current IWCS job descriptions include:

- general definition and conditions of work;
- essential functions/typical tasks;
- knowledge, skills and abilities; and
- education and experience.



However, there are other criteria related to jobs that are usually included in the job description. Some of these other areas are:

- the supervisor and evaluator of the employee;
- the employee(s) supervised and evaluated by the employee;
- terms of employment;
- job classification level; and
- dates of adoption, review, and revision of the job description.

School divisions utilizing best practices regularly review job descriptions to ensure that they accurately reflect the actual duties of each job and are properly dated and signed. Administrators or supervisors review the revised or newly created job description with employees, and the employees sign their job descriptions. The signed forms are filed in their personnel folders, and each employee receives a copy of the signed job description.

Job descriptions that are incomplete, not updated, or missing prevent the division from holding employees accountable for job performance. In addition, the ability of supervisors to conduct valid and effective employee performance appraisals for those whose job descriptions are not complete or updated is minimized at best.

Many divisions assign the responsibility of overseeing the process of updating job descriptions to the director or administrator of the Human Resources office. In addition, division-level and building-level administrators should work with the Department of Human Resources to update job descriptions for their staff. The Director of Human Resources should ensure that every current position of employment in the division has a job description which has been reviewed and updated on schedule.

## **RECOMMENDATION**

### **Recommendation 3-10:**

**Develop and implement a board policy governing the systematic review of employee job descriptions.**

A job description is an essential element in human resources administration. As stated earlier, the job description is the foundation for hiring, promotion, and retention of employees. It should reflect the qualifications expected by the employer for the position, and each job description should include appropriate degrees or certifications as identified by current industry standards or required by law. The job description should serve as a basis for annual evaluations and in defense of any workers' compensation or civil lawsuits.

A procedure and timeline should be established by the Department of Human Resources for reviewing and updating job descriptions on a regular cycle. The division should consider reviewing one-fifth of the job descriptions each year. Currently, there are fewer than 100 job descriptions, so reviewing about 20 per year should not put a hardship on the Department of Human Resources. IWCS should begin with the professional positions since it has been over five years since they were updated.

## **FISCAL IMPACT**

This recommendation can be implemented with existing resources. The supervisor or director of each department should review one-fifth of the staff positions every year. Each person holding a position in review should submit a list all the activities or tasks in which they are involved and the approximate percentage of time they spend on each one. Then, the supervisor should compare the job description and the person's actual responsibilities. If the job description and current responsibilities are in alignment, then nothing needs to be changed. If they are not, then either the job description should be revised and approved or the person's responsibilities should be changed.

## **FINDING**

There are no job descriptions for the assistant director of human resources or the human resources technician. The assistant director's position has been filled for over two years, and the technician position has been filled since January 2006. A recent classification and compensation study conducted only included job descriptions for support staff. The previous study conducted in 2000 had job descriptions for Director of Human Resources and Human Resources Specialist.

Both the Assistant Director of Human Resources and Human Resources Technician positions were filled before formal job descriptions were written. Each has important responsibilities related to the operation of the Department of Human Resources, but descriptions of these responsibilities have not been written and adopted.

## **RECOMMENDATION**

### **Recommendation 3-11:**

**Create and approve job descriptions for assistant director of human resources and the human resources technician.**

Written job descriptions ensure that the responsibilities and expectations of a position are defined and not left to subjective interpretation. Also, compensation issues are linked to well-developed and meaningful job descriptions, which should be reviewed and updated on a regular basis. All board-approved positions in the division should have a job description on file. The job descriptions should be available in a hard copy format and electronically for persons to review. New employees should be given a copy of their job descriptions when hired.

## **FISCAL IMPACT**

This recommendation can be implemented with existing resources.

### **3.4 Recruitment, Hiring, and Retention**

The Department of Human Resources is responsible for maintaining an adequate workforce by ensuring that all available employee positions are filled with qualified personnel. To maintain appropriate staffing levels, the department monitors the positions

allocated to schools and departments and ensures that personnel are recruited, hired, and processed to fill these positions.

**FINDING**

IWCS does not have a formal or automated staffing plan nor a comprehensive position control system.

School Board Policy GCA states:

*The superintendent and his/her staff have the responsibility to determine the personnel needs of the Isle of Wight County Schools and shall seek and select the most qualified candidates to recommend for employment to the school board.*

*The staffing levels for each school or department shall be determined by the personnel department in cooperation with principals, assistant superintendents, and supervisors within available allotments and funding.*

The Virginia Standards of Quality sets minimum staffing requirements at the school level for classroom teachers, principals, assistant principals, librarians, guidance counselors, clerical personnel, technology support, and resource teachers in art, music, physical education, and instructional technology. As noted in the “Proposed Operating Budget” for the 2006-07 fiscal year that was recently presented to the school board, only 2 staff positions have experienced a noticeable change from the 2003-04 fiscal year—teachers and instructional assistants. As shown in Exhibit 3-3 for the 2003-04 school year, the number of teachers and teacher aides per 1,000 students were appreciably lower in IWCS than in the peer divisions.

**EXHIBIT 3-3  
STAFF PER 1,000 STUDENTS AMONG PEER SCHOOL DIVISIONS  
2003-04 SCHOOL YEAR\***

SCHOOL DIVISION	STUDENTS AVERAGE DAILY MEMBERSHIP	PRINCIPALS/ASSISTANT PRINCIPALS PER 1,000 STUDENTS	TEACHERS PER 1,000 STUDENTS	TECHNOLOGY INSTRUCTORS PER 1,000 STUDENTS	TEACHER AIDES PER 1,000 STUDENTS	GUIDANCE COUNSELORS/ LIBRARIANS PER 1,000 STUDENTS
<b>Isle of Wight County</b>	<b>4,969</b>	<b>3.62</b>	<b>72.30</b>	<b>0.00</b>	<b>9.86</b>	<b>3.82</b>
Pulaski County	4,874	4.67	81.19	2.26	22.65	6.15
Gloucester County	6,109	3.11	75.31	0.38	14.82	4.94
Prince George County	5,992	3.17	68.64	1.17	9.51	4.42
Culpeper County	6,153	3.25	85.32	0.00	17.55	2.76
<b>Division Average</b>	<b>5,619</b>	<b>3.56</b>	<b>76.55</b>	<b>0.76</b>	<b>14.88</b>	<b>4.42</b>

Source: 2003-04 Superintendent's Annual Report for Virginia, Virginia Department of Education, Web site, 2006.

\*Ratios based on Average Daily Membership (ADM).

When asked to see a staffing plan or the procedures for allocation of staff, IWCS indicated that there was no formal position control plan in place. No clear information was provided on how central office level positions are reconciled to ensure departments are not overstaffed.

## **RECOMMENDATION**

### **Recommendation 3-12:**

#### **Develop a formal staffing plan and a data-driven position control system.**

The lack of a well-defined plan to account for staff positions and assignment of personnel can lead to overstaffing and excess expenditures for personnel. Although data from the 2003-04 school year indicate that the number of staff positions in IWCS is either in line with or lower than the peer divisions, an established staffing plan should preclude future potential issues related to staffing numbers. The Finance and Human Resource Departments should work together to establish a written staffing plan, and then with the assistance of Technology Department, they should create and implement a position control system in the personnel database to manage staffing more efficiently or as mentioned in Chapter 4 – Financial Management of this report, automate this process as part of the new financial system being implemented in the division.

Subsequent to the onsite visit, MGT found that MUNIS will contain a position control module. It is imperative that this module be implemented.

## **FISCAL IMPACT**

Costs resulting from this recommendation are dependent on the vendor's scope of the new financial system being implemented. If for some reason the position control module in MUNIS does not get implemented, then an internal product should be developed using internal staff from the Technology Department.

## **FINDING**

MGT was presented the IWCS "Hiring Plan" for the 2005-06 school year, which was prepared by the Department of Human Resources. The report is written in several sections, including background on national, statewide, and local teacher shortages, the scope of the problem, conclusion, references, and four appendices of data. The scope of the problem describes current and new strategies for hiring and retaining teachers and outlines a monthly plan of tasks(s) and targeted group involved in the task(s). The plan states that IWCS will implement some of the teacher retention opportunities, which include welcome packets of housing information and coupons to local businesses, a school-based mentoring program, tuition assistance, housing assistance, and a National Board Certification stipend.

The appendices feature information to substantiate and enhance an aggressive hiring plan. Included are a list of the top 10 critical shortage teaching endorsement areas in Virginia, a list of referral sources as named by newly hired employees, suggested questions for interviewing prospective teachers, and a month-by-month list of recruiting activities for the 2006-07 school year.

The hiring plan indicates that IWCS human resources has established a proactive approach to the problems currently facing most school systems in the United States in the recruiting, hiring, and retention of quality teachers.

**COMMENDATION**

**IWCS is commended for creating a proactive plan regarding the recruitment, hiring, and retention of qualified teachers.**

**FINDING**

IWCS does not conduct an analysis of recruiting expenses to determine the cost-effectiveness of recruiting efforts overall or of individual recruiting events.

In the “Hiring Plan” for 2005-06, over 40 recruiting events have been identified as potential job fairs. In the general ledger from the 2004-05 school year (see the following finding for further explanation), over \$32,000 was spent on recruitment and advertising efforts in addition to the \$21,000 spent to hire two teachers from the Visiting International Faculty.

IWCS provided an analysis of the referral sources identified by new teachers hired in 2004-05 as shown in Exhibit 3-4. Of the 51 teachers on the list, two (four percent) identified “job fair advertising/posting” as the source for locating a teaching vacancy in IWCS. The highest percentage of referral sources (39 percent), “advertising/posting,” includes all other arenas, such as newspapers, universities, and IWCS Web site, in which IWCS advertised vacancies.

**EXHIBIT 3-4  
REFERRAL SOURCES FOR THE NEWLY HIRED TEACHERS  
2004-05 SCHOOL YEAR**

REFERRAL SOURCES LISTED	REPLIES	
	NUMBER	PERCENTAGE
Advertisement/Posting	20	39%
Job Fair Advertisement/Posting	2	4%
Employee of IWCS	5	10%
Friend/Relative	5	10%
Internet	6	12%
Would like to teach where I live/grew up	3	6%
Self	1	2%
VIF program	2	4%
College	1	2%
No reply	6	12%
<b>Total Number/Percentage</b>	<b>51</b>	<b>100%</b>

Source: IWCS Department of Human Resources, 2004-05.

Due to the expenses being combined in the financial report, it is difficult to determine exactly how much was spent on trips to job fairs and other recruiting events. In the Campbell County School Division in Virginia, recruiting teachers is often difficult due to their small size and their distance from a metropolitan area, a situation similar to Isle of Wight. However, in order to attract quality teachers to their school division, they have focused on building strong relationships with colleges and universities in their area and attending select recruiting events like the Virginia Teach-In. The Virginia Department of Education advertises the Teach-in, which attracts teacher candidates from across the

country and virtually eliminates this cost for the division. The estimated cost for three people from Campbell County to attend when it was a two-day event was about \$800. It is now a one day event. Due to Isle of Wight's proximity to Richmond, the cost should not be prohibitive.

## **RECOMMENDATION**

### **Recommendation 3-13:**

**Analyze the expenses incurred for recruiting activities annually to determine which events and activities yielded the best results in new hires and should be included in the recruitment plan for the upcoming school year.**

IWCS has an extensive recruiting schedule. Some events are local and involve minimum expense. Others involve travel and overnight stays for more than one IWCS representative. Exhibit 3-5 displays a sample strategic plan for effective teacher recruitment. By utilizing the plan outlined or a similar strategy annually, a school division can recruit more effectively so that they meet their needs and they keep costs down.

## **FISCAL IMPACT**

The recommendation can be implemented with existing resources.

## **FINDING**

The Department of Human Resources does not have a specific budget for recruiting, nor does the department account for the advertising and recruiting expenditures for teachers and support personnel separately.

MGT received a printout of the general ledger transaction register for July thru June for the 2004-05 school year on which an IWCS human resources representative had highlighted all recruiting expenses. Recruiting expenses were found under "other purchased services," "staff development," and "advertising." The \$21,000 accounted for in the "other purchased services" paid the fee for two teachers hired through the Visiting International Faculty who agree to teach in IWCS for three years. Over \$32,000 in expenses identified in the "staff development" and "advertising" categories includes advertising and recruiting teachers and support personnel.

The Department of Human Resources does not separate the expenses for recruiting teachers and for recruiting support personnel. Attracting highly qualified teachers usually requires promoting IWCS outside the local area, so IWCS will probably sustain greater expenses recruiting teachers. The expenditures for these two distinct employee groups should be maintained to a level of detail that will provide for accountability of the expenses.

Additionally, the same two ledger sections include expenses for staff development and advertising for other departments throughout the division. The Department of Human Resources should be able to account for their expenses exclusively.

## **RECOMMENDATION**

### **Recommendation 3-14:**

**Allocate a specific portion of the budget for the Department of Human Resources for advertisement and recruitment expenses and maintain separate records of expenses for teacher positions and support positions.**

IWCS has an extensive recruiting schedule. Some events are local and involve minimum expense. Others involve travel and overnight stays for one or more IWCS representatives. Having a specific budget for advertising and recruiting will allow the Department of Human Resources to plan these activities more purposefully and cost-effectively.

Also, with the implementation of a strategic recruiting plan as previously recommended, the creation of a budget will be simplified. The implementation of this recommendation will make it easier to monitor spending.

Representatives from the Department of Human Resources should work collaboratively with those involved in creating the budget to ensure implementation of this recommendation.

## **FISCAL IMPACT**

The recommendation can be implemented with existing resources.

## **FINDING**

The Director of Human Resources provides principals with a list of “legal vs. illegal questions” to guide them when interviewing applicants. After applicants have been screened for eligibility, human resources sends the principals a list of the applicants and an attached list of acceptable questions to ask in an interview and those that are not. This list is shown in Exhibit 3-6.

## **COMMENDATION**

**IWCS is commended for providing principals with a list of appropriate interview questions.**

## **FINDING**

The IWCS hiring process requires too many manual steps and results in unnecessary delays during the application process. Applications are found on the IWCS Web site, but applicants must print out the form and mail in the application.

**EXHIBIT 3-5  
SAMPLE STRATEGIC PLAN FOR EFFECTIVE TEACHER RECRUITMENT**

<b>Mission Statement: (Enter the mission statement for the Department of Human Resources)</b>
<b>Goal: (example) “To ensure that every classroom is staffed by a highly qualified teacher”</b>
<b>Objectives:</b> <ul style="list-style-type: none"><li>■ State in very specific, measurable terms.</li><li>■ Include valid performance measures and well-defined strategies for each objective.</li></ul>
<b>Performance Measures:</b> <ul style="list-style-type: none"><li>■ The number of teachers hired as a direct result of the specific initiative</li><li>■ The recruitment budget and expenses</li><li>■ An accurate record of each recruiting activity in order to evaluate its effectiveness, using such details and indicators as:<ul style="list-style-type: none"><li>- Name of recruitment activity</li><li>- Description of typical attendees (e.g., certified teachers, pre-service teachers, mid-career professionals from other occupations, former military personnel)</li><li>- Date</li><li>- Location</li><li>- School Representative(s)</li><li>- Expenses</li><li>- Number of contacts made</li><li>- Number of teachers hired</li></ul></li></ul>
<b>Strategies:</b> <ul style="list-style-type: none"><li>■ Conducting an annual needs assessment for the upcoming recruitment year.</li><li>■ Attending recruitment activities that should be the most cost-effective for meeting the division’s needs, especially for hard-to-fill positions and for minority candidates, as indicated by the results of the current needs assessment and the Annual Recruitment Report from the previous year.</li><li>■ Offering financial incentives such as signing bonuses that will require commitments from the candidates.</li></ul>
<b>Annual Plan Evaluation:</b> <ul style="list-style-type: none"><li>■ Analyze all data collected from each recruitment initiative, including data from previous years in order to show trends.</li><li>■ Report to Superintendent and School Board.</li><li>■ Utilize report results in future planning.</li></ul>

Source: Created by MGT of America, Inc., 2006.



**EXHIBIT 3-6  
ISLE OF WIGHT COUNTY SCHOOLS  
LIST OF LEGAL VERSUS ILLEGAL INTERVIEW QUESTIONS**

Legal vs. Illegal Questions		
Category	May Ask	Potentially Discriminating
Gender and family issues	<input checked="" type="checkbox"/> If applicant has relatives already employed by the organization	<input checked="" type="checkbox"/> Gender of applicant <input checked="" type="checkbox"/> Number of children <input checked="" type="checkbox"/> Marital status <input checked="" type="checkbox"/> Spouse's occupation <input checked="" type="checkbox"/> Child-care arrangements <input checked="" type="checkbox"/> Health-care coverage through spouse
Race	<input checked="" type="checkbox"/> No questions may be asked.	<input checked="" type="checkbox"/> Applicant's race or color of skin <input checked="" type="checkbox"/> Photo to be affixed to application
National origin or ancestry	<input checked="" type="checkbox"/> Whether applicant has a legal right to be employed in the U.S. <input checked="" type="checkbox"/> Ability to speak/write English fluently (if job-related)	<input checked="" type="checkbox"/> Ethnic association of surname <input checked="" type="checkbox"/> Birthplace of applicant or applicant's parents <input checked="" type="checkbox"/> Nationality, lineage, national origin <input checked="" type="checkbox"/> Nationality of applicant's spouse <input checked="" type="checkbox"/> Whether applicant is a citizen of another country <input checked="" type="checkbox"/> Applicant's native tongue <input checked="" type="checkbox"/> Maiden name
Religion	No questions may be asked.	<input checked="" type="checkbox"/> Religious affiliation <input checked="" type="checkbox"/> Religious holidays observed
Age	<input checked="" type="checkbox"/> If applicant is over age 18 <input checked="" type="checkbox"/> If applicant is over age 21 (if job-related)	<input checked="" type="checkbox"/> Date of birth <input checked="" type="checkbox"/> Date of high school graduation <input checked="" type="checkbox"/> Age
Disability	<input checked="" type="checkbox"/> Whether applicant can perform essential job-related functions	<input checked="" type="checkbox"/> If applicant has a disability <input checked="" type="checkbox"/> Nature or severity of disability <input checked="" type="checkbox"/> Whether applicant has ever filed worker's compensation claim <input checked="" type="checkbox"/> Recent or past surgeries and dates <input checked="" type="checkbox"/> Past medical problems
Other	<input checked="" type="checkbox"/> Convictions if performance-related <input checked="" type="checkbox"/> Academic, vocational, or professional schooling <input checked="" type="checkbox"/> Training received in the military <input checked="" type="checkbox"/> Membership in any union or trade or professional association related to the position <input checked="" type="checkbox"/> Employment references	<input checked="" type="checkbox"/> Number and kinds of arrests <input checked="" type="checkbox"/> Height or weight except if a bona fide occupational qualification <input checked="" type="checkbox"/> Veteran status, discharge status, branch of service <input checked="" type="checkbox"/> Contact in case of an emergency (at application or interview stage)

*The rule of thumb: If a question is job related, it is probably legal. If it is not job related, be careful. Questions that involve race, creed, sex, national origin, marital status, number of children, handicaps, and so on are illegal.*

Source: IWCS Department of Human Resources, 2006.

The hiring process as outlined in the School Board Policy GCA-R states that applicants will be notified within one week of application receipt. MGT received many comments during interviews and during the Public Forum that notification has taken more than a month in some cases. Furthermore, some applicants had to call the division to check on the status of applications a month after mailing them to IWCS.

When applications are received, human resources staff enter the information into the human resources database, create a folder and enter the applicant's information, and then file the folder. Once the application is reviewed by Human Resources, it must be compared to the personnel requests submitted by principals. Then in hardcopy form, a list of potential employees is sent to the appropriate principals for their review.

A best practice that MGT has observed in several other school divisions is the availability of a computer that is dedicated to the on-line application process. A Human Resources staff member is assigned to assist prospective employees who wish to complete their applications in the Human Resources office. This is especially convenient for those who do not have a home computer. Having a person who is knowledgeable about the application process to assist with the applicant is also beneficial.

## **RECOMMENDATION**

### **Recommendation 3-15:**

**Implement a system so that all job applications will be submitted on-line and applicants will receive immediate notification electronically that their application has been received.**

The more steps in a hiring process that can be conducted electronically, the more quickly the hiring process can be completed. Handling paper work is a time-consuming and tedious process which can result in inadvertent mistakes such as applications being lost or misplaced.

The division should make this a requirement in applying for jobs in IWCS. As a convenience for those applicants who do not have access to a computer, the division should make a computer that is dedicated to the application process available in the human resources office. In this case, the applicant should receive a print out of his/her application, verifying that the application has been received.

## **FISCAL IMPACT**

This recommendation should be able to be implemented with existing resources. The Department of Human Resources should work with the Technology Department to set up a computer for this purpose.

## **FINDING**

IWCS does not have a form for new employees to sign stating that they have received the new employee package. The new employee package contains:

- Brochure on Employee Assistance Program;
- Brochure on benefits package;
- Procedures for fingerprinting;
- Form W-4;
- Form VA-4
- Sheet of health and dental premiums;
- Direct deposit authorization form;
- Payroll procedures;
- A guide to understanding your paycheck;
- Handbook for members of the Virginia Retirement System;\*\*
- Sheet of voluntary employee benefits;
- Information on the Legal Resources Plan;
- Information of the Flexible Spending Accounts;
- Copy of IWCS School Board Policy GCBF on the sick leave bank;
- Form for participation in sick leave bank;
- “Classroom teacher” job description;\*\*
- School instructional calendar;
- Application for a Virginia license;\*\*
- Employment Eligibility Verification (I-9);
- Employee physician’s certificate;
- Copy of IWCS School Board Policy GBEA on controlled substances\*;
- Copy of IWCS School Board Policy IIBEA on acceptable computer use;
- Acceptable Computer System Use Agreement\*;
- Copy of IWCS School Board Policies GBA/JFHA and GBA-F/JFHA-F on harassment;
- Form to verify receipt of “Sexual Harassment Regulation” in IWCS\*;
- Form for verification of previous experience in other school division;\*\*
- Certificate of accumulated sick leave;\*\*
- Verification of continuing contract status in previous school division;\*\*
- Brochure on optional group life insurance;\*\*
- Form for designation of beneficiary; \*\* and
- Business cards for the director and the assistant director of Human Resources.

\*These forms must be signed and returned by all employees.

\*\*These are included only in new teacher packages.

## **RECOMMENDATION**

### **Recommendation 3-16:**

**Include a checklist of all information in the new employee package that the new employee must sign.**

The new employee packages are comprehensive. It is in the best interest of the employee and the division to have a system of verification of all information provided to the employee. A signed checklist is evidence of the exact information provided to the

employee by the division with the signature affirming that the information was received by the employee.

### **FISCAL IMPACT**

This recommendation can be implemented with existing resources.

### **FINDING**

IWCS mails new employee packets to new hires. The process takes time and creates delays in the hiring process in addition to being an unnecessary expense for the Department of Human Resources.

Each new employee in IWCS receives a comprehensive packet of information assembled exclusively for new employees. There are roughly 30 forms and brochures that are included in each packet. Some forms must be signed and returned whereas others are simply information on items like policies or benefits relating to the person's employment that should be kept by the employee.

Some of the forms that must be signed and returned provide critical and time-sensitive employee information that must be disseminated to other departments. For example, the Finance Department must have employee information on salaries and benefits. A delay in providing information to payroll could affect the person's receiving a paycheck. MGT found that in fall, 2005, information on some new employees who were hired at the beginning of school did not reach payroll until the end of the first payroll period.

In addition to payroll information, there is a form called "Acceptable Computer System Use" that every new employee must sign and return. The Department of Human Resources submits this information to the Technology Department before they can provide the new employees with email addresses and access codes for the intranet, both of which are essential for receiving and conveying communication within the division.

New employees are also given training in harassment and other workplace issues. Forms verifying that the employee has received the training must be signed and given to Human Resources to be included in their personnel files.

### **RECOMMENDATION**

#### **Recommendation 3-17:**

**Require all new employees in the local area to meet with a representative of the Department of Human Resources to complete all paperwork within one week of hire.**

All new employees should meet with a human resources representative as soon as possible after being hired to complete all the paperwork and undergo the training required of all new employees. Prior to the meeting, a representative from the Department of Human Resources should phone or email new hires, reminding them of the information they should bring to complete their file. When the new employee meets with the Human Resources staff person, all forms should be signed, and the employee should be provided copies of every form they have signed.

Mailing a packet to local employees is an additional expense and adds unnecessary time to the hiring process. Time is of the essence, especially at the beginning of a school year when trying to fill vacant teacher and support positions critical to the effective management of schools.

**FISCAL IMPACT**

The implementation of this recommendation should save the division the money currently being spent to mail the packets. During the 2004-05 school year, IWCS lost 134 employees. Sixty percent (80) were teachers and 40 percent (54) support staff. If IWCS had to replace the same number of positions this year and 80 percent of these were mailed new employee packets, IWCS would have to mail 107 packets (64 plus 43).

The new teacher packet weighs about 18 ounces, which costs \$4.20 to mail at today's rate. The new employee package for support personnel weighs almost 9 ounces, which would cost \$2.55 to mail with the additional weight of the mailing envelope. The mailing cost alone for 107 packets would be approximately \$378.45 (64 times \$4.20 plus 43 times \$2.55). A box of 100 10" x 13" envelopes runs about \$10.00 and a package of 1,000 labels about \$23, which totals about \$14 for 107 new employees. So, the total cost to mail 107 new employee packets would be about \$393, which IWCS could save with the implementation of this recommendation.

Also to note, this cost savings would be in addition to the labor cost for the time spent to prepare the packets for mailing and any duplication of materials necessary to replace forms lost or misplaced.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Discontinue Mailing New Employee Packets	\$393	\$393	\$393	\$393	\$393

**FINDING**

IWCS conducts all fingerprinting through the Isle of Wight County Sheriff's Office, which is in the same office complex as the Department of Human Resources.

All new employees must submit to fingerprinting in order to be employed in any Virginia public school. When an applicant is hired in IWCS, the new employee visits the sheriff's office where fingerprinting is conducted through LiveScan. The new hire pays IWCS for the fingerprinting, and IWCS submits the payment to the sheriff's office. This process reduces the time associated with the fingerprinting process for IWCS as results are usually received within 48 hours.

**COMMENDATION**

**IWCS is commended for establishing an excellent relationship with the Isle of Wight County Sheriff's Office through which all of the fingerprinting is conducted and for requiring the new hire to absorb the cost of fingerprinting.**

**FINDING**

IWCS has a limited employee recognition program.

One of the acknowledgments offered by IWCS to employees is a pin for years of service, a commendable area of recognition. This award is presented for years of service in five year increments. Also, IWCS gives a banquet each year for all employees who are retiring.

While each of these annual recognitions is laudable and should be continued, employees should be recognized throughout the year. An effective recognition program should be ongoing and should have a positive impact on employee morale. During the onsite visit to IWCS, MGT noted low employee morale in interviews throughout the division.

As shown in Exhibit 3-7, in the survey conducted by MGT, less than two-thirds of the administrators (63 percent) and the teachers (61 percent) feel that their work is appreciated by their supervisor(s) whereas 76 percent of the principals feel their work is appreciated. Again, less than two-thirds of the administrators (63 percent) and the teachers (58 percent) feel that they are an integral part of the IWCS team, but 88 percent of the principals do feel like an integral part of the team.

**EXHIBIT 3-7  
COMPARISON SURVEY RESPONSES  
WITHIN ISLE OF WIGHT COUNTY SCHOOL DIVISION**

SURVEY ITEM	(% A + SA) / (% D + SD) <sup>1</sup>		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
I feel that my work is appreciated by my supervisor(s).	63/32	76/18	61/28
I feel that I am an integral part of Isle of Wight County School Division team	63/32	88/6	58/24

Exhibit 3-8 shows examples of a Support Employee Recognition Program. These examples illustrate accomplishments that can be recognized for individuals or groups of employees on a regular basis. In addition to these examples, another school system honors three employees monthly with an award of “employee of the month.” The tributes are presented to a certified employee, a support employee, and a “friend of education” for volunteer efforts toward a project in the schools.

**EXHIBIT 3-8  
SUPPORT EMPLOYEE RECOGNITION PROGRAM  
EXAMPLES OF ACCOMPLISHMENTS THAT MAY WARRANT AWARD**

1. Superior accomplishment of regularly assigned duties.
2. Exceptional achievement of project goals.
3. Noteworthy accomplishments over a sustained period.
4. Specific contributions to the school division's mission.
5. Continuous marked improvement.
6. Special acts or efforts that exceed normal expectation.
7. Safety improvements.
8. Energy conservation.
9. Productivity enhancements.
10. Improving quality.
11. Overcoming adverse obstacles or unusual circumstances.
12. Increasing program effectiveness.
13. Having a positive impact on co-workers.
14. Showing initiative.
15. Volunteering.
16. Identifying a solution to a problem.
17. Improving the work environment.
18. Dependability.
19. Flexibility.
20. Positive attitude.

Source: Created by MGT of America, 2006.

**RECOMMENDATION**

**Recommendation 3-18:**

**Develop an ongoing employee recognition program that includes all employees.**

An effective employee recognition program acknowledges all categories of employees and demonstrates management's appreciation of their efforts, both individually and collectively. The recognition should be deserved, specific, and individualized to the person or group being recognized. Most important, it should be dispensed with regularity. There are numerous ways to recognize the accomplishments noted in Exhibit 3-8. Introduction at a board meeting, certificates, announcement in school newsletters, division email, and gift certificates are just a few. These would have minimal cost for the division, but would go a long way to build employee morale.

## **FISCAL IMPACT**

The fiscal impact will be determined by the methods of recognition chosen by IWCS, but should be minimal.

## **FINDING**

IWCS utilizes an IWCS Teacher Council to provide a voice for all school-based employees through which they can express their concerns and from which they will receive answers.

The Council meets monthly. Membership comprises faculty representatives elected by their peers from each of the nine IWCS schools and an Isle of Wight Education Association representative. Teacher Council members solicit input regarding concerns or questions from fellow employees, and then they email the input to the Central Office/Instructional Services liaison, who also serves as the Teacher Council secretary. All of the questions and concerns are compiled and submitted to the superintendent and his cabinet for further review and/or investigation prior to the council meeting.

The council members, the superintendent, and his cabinet attend the meetings. At the meeting, each issue on the list is addressed for the purpose of achieving clarification and resolution. The minutes of the meeting are disseminated to all IWCS employees through the district news email. MGT consultants were also advised that other school divisions have used the IWCS Teacher Council model when establishing similar organizations in their systems.

## **COMMENDATION**

**IWCS is commended for implementing an effective method of handling employee concerns and issues.**

## **FINDING**

The Human Resources Technician is a part-time position earning an hourly wage, but payroll records list this position as full-time earning an annual salary. The hourly wage and the salary do not compute to the same earnings.

The records system in the personnel database maintained by Human Resources does not interface with the system in the Finance Department. Therefore, many entries must be done manually by both departments. Manual processes can lead to errors when entering information, as in the case of the example provided within this finding.

## **RECOMMENDATION**

### **Recommendation 3-19:**

**Reconcile all payroll records to ensure that all employees are being paid according to their approved salary.**



All payroll records should reflect the approved salary or wage for all employees. This alignment begins with the appropriate information being submitted from the hiring records. As noted earlier, the personnel database in the Human Resources office is a stand-alone system that does not interface with payroll records, so the offices must rely on manual entry of employee information. Until the new system is in place, it is of utmost importance that all records and information entered into the IWCS database be verified as correct.

### **FISCAL IMPACT**

The fiscal impact can be implemented with existing resources.

### **3.5 Evaluation and Professional Development**

According to school Board Policy GCN, all personnel in IWCS will be evaluated, the purpose of which is to raise the quality of instruction and educational service, raise standards of the division as a whole, and help the individual grow and improve. Board Policy GCL states that IWCS will provide a program of high quality professional development.

### **FINDING**

The performance evaluation model for administrators and teachers in IWCS are comprehensive and well-developed. The model for administrators begins by describing the primary function, qualifications, and organizational relationships of the IWCS administrator. The handbook continues with detailed descriptions of job responsibilities in five areas: Planning and Assessment; Instructional Leadership; Safety and Organizational Management for Learning; and Professionalism. Next, the handbook list sources of evaluation data, followed by an overview and definitions of the ratings used in the evaluation and the implementation schedule. Last, copies of all forms in the administrator's evaluation are included.

The teacher's evaluation is named A.S.P.I.R.E., an acronym for *A Standard for Professionals: Inspiring Resourceful Educators*. The handbook begins with an introduction and rationale for evaluation, sources of evaluation data, and frequently asked questions about the teacher evaluation. Next are found all evaluation forms, implementation schedule, and copies of board policies related to teacher evaluations.

### **COMMENDATION**

**IWCS is commended for developing and utilizing a comprehensive evaluation model for administrators and teachers and for compiling a thorough handbook presenting the programs.**

### **FINDING**

IWCS offers an extensive array of staff development activities for professional staff prior to the beginning of school and during the year. Some of the activities are designed for all

employees, and others are specific to a grade level or subject areas. Others are held at individual schools.

During interviews, staff indicated that every employee has an opportunity to participate in the process of selecting and planning staff development activities. For this purpose, IWCS has a Staff Development Council. It comprises one representative from each elementary, middle, and high school and from Instructional Services. Other representatives from Instructional Services, Educational Services, and the central office may be invited to participate, but are not required to attend. The council's primary role is to "build relationships among schools and serve as a focus group for professional development initiatives." The representatives serve as liaisons between the council and school sites, communicating ideas and suggestions for professional development received from the staff at the building and division level.

Exhibit 3-9 and Exhibit 3-10 present the results from the employee survey conducted by MGT regarding opinions about staff development. In Exhibit 3-9, more than half of the respondents in each of the employee groups rate staff development in IWCS as needing either some or major improvement. In Exhibit 3-10, more than half of the administrators and principals rate the staff development provided for teachers as *good* or *excellent*, but a slightly greater percentage of teachers believe the activities are *fair* or *poor* than *good* or *excellent*. With respect to staff development for school administrators, almost 60 percent of the principals believe that they are *fair* or *poor* whereas over half of the central office administrators rate these opportunities as *good* or *excellent*. Teachers were split in their assessment.

**EXHIBIT 3-9  
ISLE OF WIGHT COUNTY SCHOOLS  
COMPARISON SURVEY RESPONSES  
WITHIN ISLE OF WIGHT COUNTY SCHOOL DIVISION**

PART G: SCHOOL DIVISION/PROGRAM FUNCTION	% NEEDS SOME IMPROVEMENT + %NEEDS MAJOR IMPROVEMENT / % ADEQUATE <sup>1</sup> + %OUTSTANDING		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
Personnel evaluation	52/37	65/35	42/53
Staff development	58/42	58/41	55/42

Source: MGT of America, Inc. Survey, 2006.

<sup>1</sup> Percent responding *Needs Some Improvement* or *Needs Major Improvement* / Percent responding *Adequate* or *Outstanding*. The *should be eliminated* and *don't know* responses are omitted.

At the end of each activity, the participants are asked to complete an evaluation form on which they rate the activity in four areas: 1) knowledge of the presenter, 2) presentation; 3) handout materials, and 4) usefulness. There is also a space for comments. The results are tabulated and analyzed to determine the quality of the program.

**EXHIBIT 3-10  
ISLE OF WIGHT COUNTY SCHOOLS  
COMPARISON SURVEY RESPONSES  
WITHIN ISLE OF WIGHT COUNTY SCHOOL DIVISION**

PART C	(%G +%E) / (%F + %P) <sup>1</sup>		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
Staff development opportunities provided by Isle of Wight County School Division for teachers.	58/37	53/47	48/50
Staff development opportunities provided by Isle of Wight County School Division for school administrators.	53/42	41/59	24/20

Source: MGT of America, Inc. Survey, 2006.

<sup>1</sup> Percent responding *Good* or *Excellent* / Percent responding *Fair* or *Poor*. The *don't know* responses are omitted.

MGT was given copies of the evaluation results from several staff development activities, including an overall analysis of all the activities during staff development week, August 25-31, 2004. The overall ratings ranged from 2.7 to 4.0 out of a 4.0, but most were about 3.5 or greater. According to the survey results, there seems to be a discrepancy between current opinions about staff development expressed through the MGT survey and the evaluations from selected activities.

**RECOMMENDATION**

**Recommendation 3-20:**

**Include the evaluations of the previous year's staff development activities and the suggestions and comments from the professional staff as a high priority in planning professional development activities.**

The purpose of the Staff Development Council is to ensure that all professional staff are represented in the planning and development process for professional development activities and that worthwhile and appropriate activities are offered by IWCS. Effective professional development is vital to the professional growth of school division employees.

**FISCAL IMPACT**

This recommendation can be implemented with existing resources.

## **4.0 FINANCIAL MANAGEMENT**

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## **4.0 FINANCIAL MANAGEMENT**

In this chapter, the findings and recommendations for the financial management of the Isle of Wight County Schools (IWCS) are presented. The chapter includes the following sections:

- 4.1 Organization and Staffing
- 4.2 Annual Budget
- 4.3 Financial System
- 4.4 Accounting for School Funds
- 4.5 Purchasing
- 4.6 Payroll
- 4.7 Risk Management
- 4.8 Fixed Assets

### **CHAPTER SUMMARY**

The review team found that the basic financial operations of the division were generally wellrun and that employees of the Finance Department were dedicated and hardworking. Staff members are knowledgeable about their responsibilities and have good working relationships with one another. Furthermore, the department has been able to perform many financial activities and services despite having limited staff resources.

Despite these characteristics, participants in the review team's survey responded that improvements are needed in some of the major functions of the department. Specifically, 74 percent of administrators, 59 percent of principals, and 47 percent of teachers believe that at least some improvement is needed in the financial management and accounting area. Some observers raised concerns about the department's ability to provide the appropriate level of data needed to make financial decisions.

One of the most significant changes affecting the department is the implementation of a new financial accounting and reporting system. The department expects that the new system, which becomes operational in July 2006, will address many of the issues that have precluded the department from performing its financial management activities effectively. In the meantime, it is important for the department to work closely with the vendor to ensure that its requirements are sufficiently addressed within the framework of the new system.

The recommendations reported in this chapter address improving the efficiency of the Finance Department and the division as a whole. In addition, because of the fiduciary role of the department, certain recommendations also focus on strengthening internal controls throughout the organization. Some of the key recommendations include:

- redistributing specific responsibilities of key accounting and payroll functions to improve internal controls;
- restructuring the presentation of the budget document to provide more useful information to stakeholders;

- customizing the new financial system to take advantage of efficiencies generated by automating key processes;
- separating student body funds from the public funds used to support operations at each school;
- hiring a purchasing officer to coordinate acquisitions of goods and services among the schools and departments; and
- automating the time reporting system throughout the division to improve efficiencies in processing timesheets.

## **INTRODUCTION**

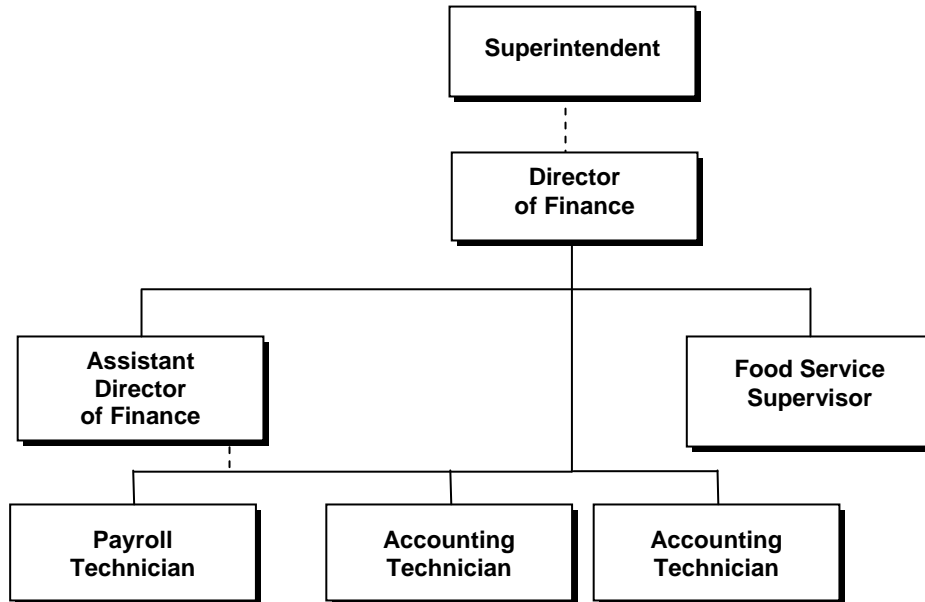
Successful financial management of a school division encourages educational success by enabling school divisions to operate in a fiscally responsible manner in order to achieve the objectives of its overall mission. By adequately managing financial resources, school divisions are able to recruit, retain, and reward qualified educators, build and maintain suitable facilities for divisional operations, provide sufficient educational resources for students, and create the capacity to meet increasing performance requirements. Most importantly, a division's financial management structure should meet statutory requirements for equity and adequacy.

The Isle of Wight School Division's Finance Department is responsible for overseeing financial operations throughout the division. The department performs numerous financial activities, including preparing the annual budget, accounting for financial transactions, managing federal grants, purchasing and paying for goods and services, and processing employee payroll. The department also serves as the central point of contact for any financial-related issue pertaining to the division.

### **4.1 Organization and Staffing**

Exhibit 4-1 illustrates the current organizational structure of the Finance Department. The department consists of the Director of Finance, the Assistant Director of Finance, a payroll technician, and two accounting technicians. The department also includes the Food Services Supervisor, although this individual is located in a different building from the other department staff and works primarily with the food services personnel at the schools.

**EXHIBIT 4-1  
ISLE OF WIGHT COUNTY SCHOOLS  
FINANCE DEPARTMENT  
ORGANIZATION CHART**



Source: Isle of Wight School Division Finance Department and interviews with staff, 2006.

The Director of Finance is the head of the department and has overall responsibility for the department's operations. The director is also responsible for preparing the division's budget and handling the division's risk management functions, such as workers' compensation and liability insurance. The Director of Finance reports directly to the Superintendent.

The Assistant Director of Finance is in charge of overseeing the financial system, including maintaining the general ledger used to record financial activity pertaining to the division. Other key responsibilities of this position include managing the division's fixed assets inventory and conducting internal audits of the schools' financial records.

The other staff members in the department have also been assigned specific responsibilities. The payroll technician processes monthly payroll for all staff in the division. One of the accounting technicians handles accounts payable activity and the other technician is responsible for reporting financial data for federal grants, issuing purchase orders, and processing continuation of health benefits for former employees under the federal Consolidated Omnibus Budget Reconciliation Act (COBRA).

In addition to the Finance Department staff, the schools have their own personnel who are responsible for performing financial-related functions specific to their campuses. Each school has a bookkeeper who handles accounting and purchasing duties, and maintains custody of the school's funds. The bookkeepers also perform a wide range of other administrative tasks for their schools.

## **FINDING**

Because of the small size of the Finance Department, staff members have been cross-trained in several key functions, thus minimizing the disruption of services in the event that one or more individuals are absent. During the past year, there have been a few instances when individuals have covered for one other during extended absences. The department has continued to accommodate the needs of the division during these periods without having to hire new staff.

## **COMMENDATION**

**The division should be commended for cross-training staff in the Finance Department in order to ensure continuity of services during those instances when staff are absent for extended periods of time.**

## **FINDING**

Although the department has been able to function effectively given its size compared with its breadth of responsibilities, the integrity of its fiscal operations could be improved by establishing a greater separation of duties among staff.

Separation of duties is an important safeguard that should be in place in any organization to prevent instances of errors or irregularities in financial operations. The concept of separation of duties calls for checks and balances to occur at various stages of a process in order to reduce the likelihood of errors or irregularities. A core fundamental of this concept is that no one individual should be assigned the responsibility for handling a process from beginning to end.

The small size of the Finance Department has resulted in several functions that are often handled by a single staff member with little or no involvement from other staff. For instance, the processing of payroll activity is performed exclusively by the payroll technician. Similarly, one of the accounting technicians is primarily responsible for processing the division's accounts payable from inception to payment.

Assigning responsibilities in this manner places the division at risk of not identifying potential errors in the processing of transactions, even if the errors are inadvertent. Furthermore, in the event of an irregularity, the employee assigned the task is at risk of being held responsible for wrongdoing, regardless of the intent. Implementing steps to provide adequate separation of duties would not only protect the division's financial position, but would also serve to look after the employees' best interests.

## **RECOMMENDATION**

### **Recommendation 4-1:**

**Redistribute some of the responsibilities associated with key accounting and payroll functions to improve internal controls in the Finance Department.**

Although maintaining a structure that promotes separation of duties is important within an entity, it is often difficult to implement in small organizations such as the Finance



Department, primarily because there are so few individuals within the department to share in the various responsibilities. Nevertheless, the department can leverage upon the cross-training experiences it has undertaken to restructure certain tasks among its staff. Some activities that can be separated include the following:

- the accounts payable data entry function should be separated from the accounts payable check disbursement function;
- the payroll processing function should be separated from the payroll check disbursement function;
- the vendor file maintenance function should be separated from both the purchase order data entry function and the accounts payable data entry function;
- the mail should be received and opened by someone other than the accounting technician who processes accounts payable; and
- the input of new employees or employee pay changes into the payroll system should be made by someone other than the payroll technician.

In addition to reassigning certain duties, the division could also assign review responsibilities to specific staff. For instance, the Assistant Director of Finance could review payroll and accounting transactions on a regular basis to verify their appropriateness. By involving other staff in these responsibilities, the department will be able to strengthen its internal control structure, thereby protecting the division's financial position.

#### **FISCAL IMPACT**

There is no fiscal impact associated with this recommendation.

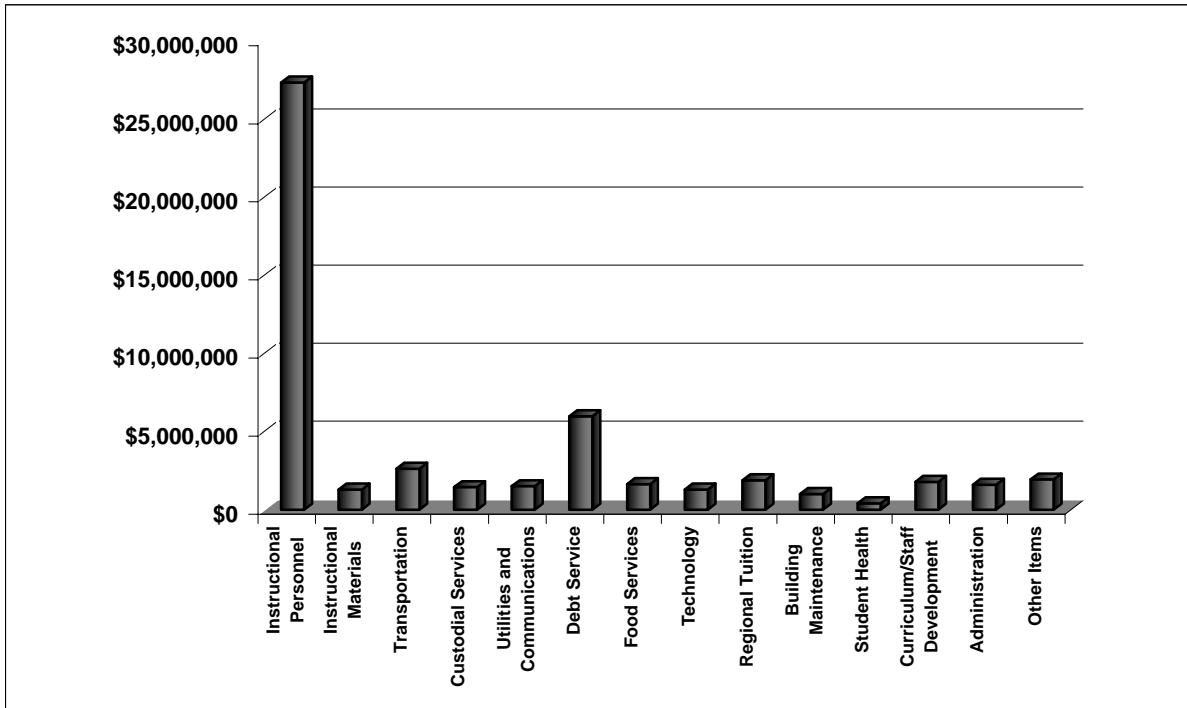
#### **4.2 Annual Budget**

The Finance Department is responsible for preparing the division's annual budget. The budget establishes the spending plan for the division throughout the fiscal year. The budget cycle begins in November with the solicitation of budget requests from schools and departments and ends in May with the approval of the final budget by the County Board of Supervisors.

During the budget preparation process, the Finance Department consults with the Superintendent and school board to develop revenue and expenditure projections. The department estimates revenues based on expected enrollment for the upcoming year. When projecting expenditures, the department focuses particularly on personal services costs, which represent the largest share of the division's expenditures. It develops these projections by analyzing wage and benefit information, reviewing anticipated changes in staffing, and evaluating other relevant factors, such as potential salary increases.

In May 2005, the County Board of Supervisors adopted the division's budget for the 2005-06 school year. Exhibit 4-2 summarizes the approved budgeted expenditures for the year. Over half of the projected expenditures are for instructional personnel and many other expenditure categories are comprised almost entirely of staff costs.

**EXHIBIT 4-2  
ISLE OF WIGHT COUNTY SCHOOLS  
2005-06 SCHOOL YEAR BUDGET**



Source: Isle of Wight School Division Operating Budget, 2005-06.

**FINDING**

The division's budget is presented in a format that can be challenging for the public to comprehend. In particular, the budget does not provide sufficient detail regarding costs pertaining to schools or grade levels. Instead, the budget presents revenues and expenditures by program and functional category. Although this presentation meets the minimum reporting requirements described in the Virginia Administrative Code, this level of detail only provides a limited amount of information for authoritative bodies and the public in their evaluation of the division's financial outlook. Under this format, users are unable to identify and compare anticipated expenditures by grade level or by school, which tend to be more familiar frames of reference.

Furthermore, the budget does not provide sufficient detail on the extent to which the division is meeting any of its goals and objectives. Aside from some brief references in the Superintendent's introductory message, there is no discussion in the budget document describing how the division's funding decisions impact its ability to achieve

specific goals and objectives. The lack of specific discussion may raise questions regarding whether certain funding decisions are justified.

Despite the limited amount of detail, the division believes that the budget provides sufficient information to assist school board members in their review of overall operations. The division pointed out that school board members have limited time to review the budget and that they tend to focus on the division as a whole, rather than the specific details. The division also stated that the board members have been very positive in their feedback of the budget document.

The review team's survey of division administrators, principals, and teachers identified that about two-thirds of each group's respondents believed that the division's budgeting function needs some type of improvement. Community members also expressed concerns with the development of the budget. For instance, one comment addressed the need for more detail in the breakdown of the budget in order to truly assess costs.

With school divisions facing increasing demands, while at the same time experiencing declines in revenue, it is critical that all division and county leaders have a full understanding of the budget issues in order to make informed decisions. Similarly, the budget needs to serve as the means for communicating the division's fiscal responsibilities to employees, parents, community members, and other stakeholders.

The National Advisory Council on State and Local Budgeting (NACSLB) is an organization that assists public entities in improving their budget practices, including the presentation of budget information. NACSLB developed a framework to provide guidance in these areas, including a step that addresses the presentation of the budget in a clear and comprehensible format. Exhibit 4-3 identifies the items that NACSLB recommends for inclusion in a budget document to make it understandable to decision makers and the public.

**EXHIBIT 4-3  
NACSLB RECOMENDATIONS FOR  
BUDGET DOCUMENT CONTENTS**

- **Table of Contents**
- **Introduction**
  - superintendent's message;
  - statement of school division goals;
  - information regarding the division's strategic plan;
  - organizational chart;
  - overview of the school division and the services provided; and
  - student population trends.
- **Budgetary Process**
  - overview of the budget process;
  - calendar for budget development;
  - board policies as they relate to the budget process; and
  - detailed explanation of state funding formulas.

Source: *National Advisory Council on State and Local Budgeting Practices*, Copyright 1998.

## **RECOMMENDATION**

### **Recommendation 4-2:**

**Restructure the presentation of the budget document to provide more useful information to decision makers and the public.**

The division should strive to present clear and relevant information in its budget document that will address specific areas of interest for decision makers and stakeholders. In particular, the division should be cognizant of the budget's audience and focus on providing sufficient details that can be easily understood. In addition to the school board members, other interested parties include the County Board of Supervisors, county officials, division staff, parents of students, and community members. This diversity of this audience underscores the need for developing a thorough and detailed document.

An example of a budget that provides useful information at an appropriate level of detail for decision makers and the public is the budget document for the York County Public Schools Division. Some of the more notable components of this budget include the following:

- an executive summary providing highlights of the budget in an easy-to-understand format;
- description of the budget preparation process and timeline for preparation;
- description of goals and detailed discussion of objectives achieved by fiscal year;
- description of performance measurements for non-instructional activities and a recap of past performance;
- analyses and explanations of changes in amounts budgeted from year to year;
- numerous charts, graphs, and tables illustrating significant budget issues;
- a breakout of budgeted revenues and expenses by individual grade level and by type of school (elementary, middle, high);
- a glossary of terms; and
- statistical information on the county and school division.

By presenting its budget in a user-friendly format, the division will be able to communicate its financial information more effectively and maintain the trust of decision makers and other stakeholders. The division can also continue to present budget information at a summary level to the extent that the school board members are comfortable and familiar with this format.

## **FISCAL IMPACT**

This recommendation can be accomplished using existing resources within the school division, although it will require some shuffling of responsibilities. Since the Director of Finance has the primary responsibility for preparing the budget, some of his other duties will need to be reassigned or temporarily shifted to other departments in the division during the budget preparation period. The division will need to prioritize this effort, particularly during the first budget cycle when developing the format of the additional budget detail.

### **4.3 Financial System**

The division utilizes the county's financial system to record and track its financial activity. The financial system is integrated among county entities, which provides the division and the County Budget and Finance Office with the ability to share financial data. This integration also aids in reporting budget and accounting data for financial presentation purposes, which is useful for the county when incorporating the division's data within the countywide financial statements.

## **FINDING**

The current financial system has significant limitations, which hinder the division from performing its financial management responsibilities effectively. Most notably, the system does not have a position control module to track personnel resources. The ability to utilize position control within a financial system allows an organization to account for budgeted staff positions and to determine whether they are filled at any given point during the year.

Position control is also a useful tool for the personnel department because it provides accountability for tracking employment hires and terminations. Proper use of position control ensures that individuals are hired only if there are budgeted and vacant positions available to be filled. Without this feature, the division must track the status of positions manually, which is a labor-intensive process. The lack of position control creates opportunities for overspending resources for unfunded positions.

Another drawback of the current system is its limited ability to automate the processing of payroll activities, particularly in the data entry and reconciliation of employee timesheets. The system is not equipped to accept online timesheets or to download the data for payroll purposes, thus resulting in staff having to process these documents manually.

Staff in the Finance Department also expressed concerns about the financial system's effectiveness. They stated that the account code structure is cumbersome to work with and that it is often difficult to extract information in a format that is easily understandable or usable. Furthermore, there are some redundancies in the coding structure, resulting in duplicative codes being used to record financial activity.

The County Budget and Finance Office is currently implementing a new financial system to be used throughout the county beginning in July 2006. The division's Finance

Department is working closely with the county to implement the system within the division. From the county's perspective, one of the main reasons for changing financial systems is to correct problems resulting from the existing system's erroneous handling of adjustments in tax billings for assessments of personal property. Both the County Budget and Finance Office and the division's Finance Department believe that the new system will be more user friendly and will improve efficiencies in financial reporting and accounting.

## **RECOMMENDATION**

### **Recommendation 4-3:**

#### **Customize the new financial system to take advantage of efficiencies that can be generated by automating key processes.**

The implementation of a new financial system is a positive step towards improving efficiencies in the division's financial management practices. The timing of this implementation also presents an ideal opportunity to automate certain processes. Since the Finance Department is currently working with the vendor to implement the new system, it should inquire about the applicability of existing modules that can be integrated during the implementation phase.

Examples of automation opportunities that the division should pursue include the following:

- a position control system to account for budgeted staff positions throughout the division;
- the ability to upload data from the schools' financial records, such as receipts and disbursements;
- reporting of budgeted and actual expenditures at specific levels of detail, including by individual school; and
- automation of the payroll process to allow for the online processing of employee timesheets.

The Director of Finance observed that the new system has a limited capacity to perform position control, but concluded that its functions appear to fall short of the features desired by the division. Given these expected limitations, the Finance Department, in conjunction with the county, should actively engage the vendor in modifying the system to meet the division's needs. By prioritizing and addressing these requirements up front, the division will reap the benefits of automation through increased accuracy in financial reporting and improved efficiencies in transaction processing.

## **FISCAL IMPACT**

Costs resulting from this recommendation will be dependent on the extent to which the integration of the proposed modules is considered to be within the scope of the system's base cost. Any cost savings resulting from operational efficiencies should offset those amounts.

#### **4.4 Accounting for School Funds**

The division operates under a decentralized structure for funding expenditures pertaining to its schools. The schools have considerable autonomy in that they retain physical custody over their funds, purchase most goods and services independent of the Finance Department, and maintain their own financial records. Schools receive allotments in the form of actual transfers administered by the Finance Department. At the beginning of the school year, the Finance Department deposits 35 percent of each school's annual allotment into the school's respective activity fund. During the course of the year, the Director of Finance reviews the amounts spent and replenishes the fund in accordance with the school's remaining budget.

Each school employs a bookkeeper who is responsible for tracking the school's allotment, maintaining custody of the transferred funds, and using the funds to pay for school operations and activities. Bookkeepers are responsible for ordering goods and services and paying invoices on behalf of the school, similar to the duties that the Finance Department personnel perform on behalf of the division.

In addition, each school uses a stand-alone financial reporting database to record and monitor its financial activity. The database is not linked to the division's financial system or to the databases of the other schools. Instead, the schools report this information to the Finance Department by submitting monthly reconciliation reports containing details on allotments, transfers, and disbursements.

#### **FINDING**

The division has implemented an internal audit function to oversee the accounting of funds maintained by the schools. In addition to reviewing and reconciling data from the monthly reconciliation reports, the Assistant Director of Finance conducts an annual internal audit of activity funds and cafeteria funds at each school. The audits include assessing processes performed at the schools, reviewing internal controls, and testing a sample of revenue and expenditure transactions.

The prior year audits identified that certain schools were not promptly depositing cash receipts and others had overspent portions of their allotments. One of the division's standard procedures is to follow up on prior years' findings, so these issues will be reviewed again during the next audit.

#### **COMMENDATION**

**The division's efforts to establish an internal audit function has resulted in a useful and effective control over the financial management practices of the schools.**

#### **FINDING**

Schools use the same bank account for holding and disbursing funds pertaining to student body activities with public funds used for school operations. Each school has a bank account that is designated for school-related activities. The school uses this

account for receipts and disbursements pertaining to activities of the student body, such as athletics, clubs, and extracurricular events. However, each school uses the same account to collect and disburse funds for administrative and instructional purposes.

Because funds generated and used for student activities pertain directly to the student body, it stands to reason that these funds belong to the student body, rather than the school. As the designated custodian of these funds, however, the school has a fiduciary responsibility to ensure that they are only used for their intended purposes. Mixing these funds with school operations allotments raises concerns about whether inappropriate disbursements could be made.

Title 8, Agency 20, Chapter 240, Section 20 of the Virginia Administrative Code states the following in regard to school activity funds:

*Each school shall keep an accurate record of all receipts and disbursements so that a clear and concise statement of the condition of each fund may be determined at all times. It shall be the duty of each principal to see that such records are maintained in accordance with this chapter and rules promulgated by the local school board. The principal or person designated by him shall perform the duties of school finance officer or central treasurer. The school finance officer shall be bonded, and the local school board shall prescribe rules governing such bonds for employees who are responsible for these funds.*

Each school uses a financial reporting database for tracking its funds. The database assigns an account code for each activity category and tracks receipts and disbursements by category. Although each school uses separate codes for student activities and school allotments, all of these funds are accumulated and recorded as a lump-sum balance in a single bank account. The structure of the bank account does not provide any safeguards to prevent the school from disbursing student activity funds for school operations. For instance, a school could unknowingly disburse funds raised by a student club to pay for instructional services simply because the funds were available in the bank account.

A strong internal control structure prescribes separate physical custody between student activity funds and public funds. Many school districts require their schools to maintain separate bank accounts that are used solely for the purpose of holding student activity funds. Other districts address the situation by handling the custody and disbursement of instructional and administrative funds centrally for all schools, thereby leaving the schools only responsible for the student activity funds.

## **RECOMMENDATION**

### **Recommendation 4-4:**

**Maintain separate custody of student body funds from public funds used for school operations.**

The division should structure its approach for maintaining custody of resources to ensure that there is separate safekeeping of the funds used for student body activities from the funds used to support administration, instruction, and operations at the schools. One



approach would be for the division to remove all responsibility from the schools for holding and disbursing public funds. In fact, the division believes that a large portion of the school operations disbursement functions currently taking place at the schools will shift to the Finance Department as a result of enhanced capabilities of the new financial system as well as the division's effort to centralize procurement. By moving this responsibility to the Finance Department, the schools will be able to focus more exclusively on safeguarding the student body funds.

The schools should exercise due care to ensure that student activity funds are only used for their intended purposes. In addition, the schools should establish a procedure to ensure that all activity associated with this account is subject to the knowledge and approval of a student body representative. Implementing these practices will help promote the internal control structure among the schools and preserve the integrity of their fiduciary management.

#### **FISCAL IMPACT**

There is no fiscal impact associated with this recommendation.

#### **4.5 Purchasing**

The division's purchasing function is highly decentralized. Schools and departments are responsible for their own purchases and the Finance Department has a limited role in these efforts. Furthermore, the division does not have a central warehouse, thus requiring that the schools and departments maintain custody of their acquisitions.

#### **FINDING**

The division does not have a centralized function to coordinate purchases throughout the organization. Without this function, the division has not taken advantage of opportunities to leverage its purchasing power through quantity discounts and other negotiated pricing. The absence of a centralized purchasing authority also contributes to operational inefficiencies. Staff at the schools and departments must conduct research of products and prices on their own, which may result in duplicative efforts across the division.

The department's current policies allow schools to purchase goods and services of up to \$1,500 on their own, without needing to seek approval from the Finance Department. The schools assign these responsibilities to the bookkeepers, who process requests, seek price quotations, select vendors, verify receipt of items, and pay invoices. Although this dispensation provides flexibility for the schools, it can also result in inconsistencies in the cost and quality of items acquired, which raises concerns about whether the division is obtaining the best value from its purchases.

Without a uniform approach for purchasing goods and services, schools may be inconsistent in their efforts to acquire products that provide the best value to the division. For instance, two schools that independently researched pricing options for the same product may end up acquiring the item at significantly different prices, simply because they contacted different vendors. In addition, by not coordinating purchases, the division

is not taking advantage of volume discounts often provided by vendors for purchases of large quantities.

## **RECOMMENDATIONS**

### **Recommendation 4-5:**

**Hire a central purchasing officer to coordinate acquisitions throughout the division.**

Establishing a position to coordinate purchasing efforts will improve organizational efficiencies and contribute to cost savings across the division. The purchasing officer should be responsible for overseeing the procurement efforts of all schools and departments in the division. In this role, the purchasing officer can identify situations in which frequently purchased items can be acquired more efficiently and at substantial cost savings. For example, most schools will have similar needs for general instructional equipment and supplies. Rather than having each school acquire the products independently, the purchasing officer could identify vendors that offer quantity discounts and coordinate the pooled purchase of the items at periodic intervals throughout the year. Alternatively, if the schools desired flexibility in placing orders, the purchasing officer could arrange for open purchasing agreements with vendors that would allow the schools to order the products at any time.

The division and the county have discussed the possibility of establishing a shared position between the two entities that would serve as the purchasing officer for both the county and the division. Both organizations believe that a single individual could handle the joint responsibility and that this arrangement would be beneficial to everyone.

## **FISCAL IMPACT**

Implementation of this recommendation will require a projected annual allocation of \$26,000 for the division's share of the estimated salary and benefit costs associated with this position, assuming that the county agrees to jointly fund the position. The expected cost savings resulting from the coordination of purchasing efforts will offset the costs of this position to a certain degree, although the actual amount of savings cannot be determined at this time. Cost savings may also increase in succeeding years as the purchasing officer gains proficiency in identifying shared purchasing opportunities. Furthermore, the department will most likely experience operational efficiencies resulting from the centralization of the purchasing functions, which may also justify the additional costs of the position.

### **Recommendation 4-6:**

**Utilize cooperative purchasing agreements and other procurement tools consistently throughout the division.**

School divisions in Virginia are required to follow the Virginia Public Procurement Act. The act allows for the use of cooperative purchasing agreements to maximize purchasing power across public entities. Cooperative purchasing agreements are contracts between government agencies and vendors to purchase goods and services at

favorable rates. Any school division, including the Isle of Wight, can purchase from these agreements even though the division did not participate in establishing the contract.

The division also has access to other procurement tools, such as eVA, Virginia's electronic procurement system. This system provides an efficient and cost-effective method to procure goods and services by allowing a purchaser to request quotes from vendors and acquire items electronically via a centralized web site. Although the system has gained popularity among public entities, the reaction at the Isle of Wight has been mixed. Not all schools have used eVA on a regular basis. Some bookkeepers believe that eVA is difficult to use and that the results do not generate substantial cost savings. Other bookkeepers are convinced of the system's value, particularly when procuring specialty products are difficult to find.

As part of its efforts to centralize the purchasing function, the division should establish specific parameters for the required use of purchasing agreements and other tools, rather than simply allowing staff to use them at their discretion. For instance, the division should develop and circulate a list of existing purchasing agreements and specify those commodities that must be acquired through the agreements. In addition, the division should publish policies describing the types of acquisitions and dollar thresholds of purchases that must be procured through eVA. By implementing these practices, the division will be able to recognize cost savings in future years.

#### **FISCAL IMPACT**

Implementation of this recommendation will result in annual cost savings from future purchases of goods and services, although it is unclear at this time as to the amount of expected savings.

#### **4.6 Payroll**

The Finance Department is responsible for processing payroll for all staff in the division. Specific responsibilities include reconciling employee timesheets, recording information to the payroll system, processing payroll deductions, and generating checks and direct deposit transfers.

#### **FINDING**

The payroll technician processes the monthly payroll for the entire division, which consists of over 800 employees, including administrators, teachers, instructional assistants, administrative support staff, food service workers, custodians, and bus drivers. This effort requires the technician to perform several tasks each month to ensure that payroll expenses are adequately supported and deductions are correctly calculated and posted. Despite the high volume of transactions, the technician has been able to complete these tasks promptly, thus allowing for the timely distribution of checks and transfers.

## **COMMENDATION**

**The Finance Department is able to process the division's monthly payroll on schedule with minimal resources assigned.**

## **FINDING**

Although the payroll technician has been able to process the division's payroll on time, the process of collecting and submitting timesheets has been cumbersome and time-consuming. The division's procedures for reviewing and reconciling employee timesheets are labor-intensive, resulting in substantial staff resources expended in this effort.

Each school or department has a timekeeper who is responsible for collecting staff timesheets and summarizing the amounts reported. The timekeeper is generally either the bookkeeper or another administrative support team member. After verifying the completeness of the information and preparing summary reports, the timekeeper forwards this information to the payroll technician.

Timekeepers spend an inordinate amount of time each month reviewing and validating timesheets. A major contributing factor to the inefficiencies is the extra time incurred to handle the numerous types of timesheets used throughout the division. The division developed separate timesheets for different classifications of employees, but in doing so, created additional complexities in the reporting process. Exhibit 4-4 identifies some of these timesheets, which vary in their format depending on the employment classifications.

Timekeepers collect and record data from the various timesheets differently depending on the format in which the data is presented. For example, the document used for bus drivers is a weekly timesheet that requires the timekeeper to manually add up the hours for each bus run performed by the driver. Since bus drivers often perform several runs during the week and each monthly pay period consists of four or five weeks, the timekeepers spend a substantial amount of time processing this data.

**EXHIBIT 4-4  
EXAMPLES OF DIFFERENT TIMESHEETS USED  
AT ISLE OF WIGHT COUNTY SCHOOLS**

Certificate of Certified Employee's Absence – 12-Month Employees
Certificate of Absence for Support Staff – 10- and 11-Month Employees
Employee's Timesheet
Employee's on 90-Day Trial Timesheet
Driver Education Timesheet
School Bus Drivers and Aides Weekly Timesheet
Homebound Instructor Timesheet
Under Hood Inspection and Fueling Summary Timesheet
Substitute Teacher Timesheet
Substitute Custodian Timesheet

Source: Isle of Wight School Division Finance Department Payroll Procedures, 2006.

In contrast, the division has an automated time and attendance system that it uses for tracking some of its other hourly employees. The system is equipped with remote terminals that allow employees to swipe their time badges when starting and ending a shift, similar to the use of a time clock. The timekeeper has the ability to download the data into the system's software and produce reports that summarize the time worked. These features have helped the timekeepers process the data for these employees more efficiently.

Despite using this system for some of its staff, the division lacks an organization-wide automated system for collecting, reviewing, and reconciling timesheet data. A large percentage of employees continue to submit paper timesheets, which requires the timekeepers to recalculate totals and verify balances manually.

Many organizations are using online time reporting for their employees, which provides an efficient means for collecting data for payroll purposes. The use of an automated system also reduces the likelihood of data transfer errors.

**RECOMMENDATION**

**Recommendation 4-7:**

**Automate the processes for time reporting throughout the division to improve efficiencies in the processing of timesheets.**

The division should attempt to automate its processes for collecting and reporting timesheet data for all employees, including providing the capability for staff to submit timesheets electronically. The division already utilizes an automated timekeeping system for many of its employees and could also develop an online reporting process for other employee classifications.

The division has determined that there are certain classifications, such as bus drivers, for which timekeeping will still need to be handled manually due to the inaccessibility of time clocks for these employees. Nevertheless, the division should explore options for minimizing the administrative burden on the timekeepers. One option would be to

develop an interface that would allow timekeepers to enter time data from the bus drivers' manual timesheets directly into an online system. By allowing timekeepers to enter the starting and ending times of shifts through the interface, the system could automatically calculate hours worked, thereby relieving staff from having to calculate these amounts manually.

Automating these processes throughout the division will aid in the timekeepers' efforts to review and summarize time data and will facilitate a more efficient approach for submitting the data for payroll purposes. Automation will also reduce the need for multiple variations of timesheets, since the centralized system can be customized to accept the specific data needed for each employee classification.

As addressed in Recommendation 4-3, the division should inquire about the functionality of the new financial system and its ability to contribute to the automation efforts.

### **FISCAL IMPACT**

Potential costs resulting from this recommendation are dependent on the degree to which the division will need to customize the new financial reporting system to assist in automating its time reporting processes. The division plans to explore options for modifying its financial system, including establishing the capability for extracting data from other timekeeping systems.

### **FINDING**

The Finance Department is performing some activities pertaining to employee benefits that appear to be outside of its scope of responsibilities. These tasks are related to personnel administration and should be performed by the division's Human Resources Department.

The division of responsibilities between the Finance Department and the Human Resources Department has not always been clear. Staff in the Finance Department cited instances of employees who were confused as to which department to contact for assistance with personnel issues, including questions pertaining to benefits. In these situations, employees would often request the Finance Department to provide guidance on particular benefits. Although it is reasonable to expect the Finance Department to process payroll deductions pertaining to employee benefits, the role of distributing information on benefits and responding to questions should be handled by individuals who are experienced in personnel matters.

Many school districts, such as the Austin Independent School District in Texas, the Charleston County School District in South Carolina, and the Dinwiddie County Public Schools in Virginia have placed the responsibility of benefits administration within the human resources office, rather than the finance office. These organizations have established the human resources office as the focal point for all employment-related services, including benefits.

## **RECOMMENDATION**

### **Recommendation 4-8:**

#### **Assign the benefits administration function to the Department of Human Resources.**

Administration of employment benefits is a standard function performed by an organization's human resources department. As addressed in Chapter 3.0, the assistant director of human resources should be assigned the role of benefits specialist. Formally assigning these responsibilities will allow the Finance Department to focus on areas directly within its own span of control, thereby improving its effectiveness in serving the division.

## **FISCAL IMPACT**

There is no fiscal impact associated with this recommendation.

### **4.7 Risk Management**

Risk management functions include assessing and managing a variety of risks that are inherent in school division operations. It includes the identification, analysis, and reduction of risk through insurance and safety programs to protect the division's assets and employees. For instance, workers' compensation is intended to protect division employees in the event of work-related injuries. Property insurance and casualty insurance protect the division from liabilities arising from property damage, bodily injury, and other situations in which the division may be at risk. Group health insurance covers division employees from the effects of catastrophic illness by spreading the risk across a pool of employees.

The division insures itself against loss for real and personal property, liability, vehicle loss or damage, and employee crime through various insurance policies. Most insurance coverage is provided through policies with the Virginia Municipal Liability Pool. Workers' compensation is provided through the School System of Virginia Group Self Insurance Association. The division provides health insurance to its employees through Anthem Blue Cross and Blue Shield.

Isle of Wight County also provides risk management services for the school division. All bank accounts, except for the schools' activity funds, are managed centrally by the County Treasurer's Office. The Treasurer is responsible for investing excess cash in the accounts. The county has an official investment policy, which addresses standards for the custody of all county funds. The policy includes guidelines for investing under the "prudent person" rule, which states the following:

*"Investments shall be made with judgment and care, under circumstances then prevailing, which persons of prudence, discretion and intelligence exercised in the management of their own affairs, not for speculation, but for investment, considering the probable safety of their capital as well as the probably income to be derived."*

## **FINDING**

The division is in the process of selecting a new carrier for its property and liability insurance coverage. Its current carrier has provided coverage for more than 10 years. However, the division is interested in comparing costs and benefits of other insurance plans that are currently available on the market. The division also plans to review the financial capacity of the carriers to find an appropriate fit. It has contracted with an insurance consultant to assist with developing a request for proposals (RFP) and selecting a new carrier.

At this time, the division has determined that it will continue with its current policies for workers' compensation and health insurance for the remainder of 2006; however, it is considering issuing another RFP next year to establish a new workers' compensation policy.

By periodically reviewing its existing insurance policies, the division is able to monitor whether it needs to modify the levels of coverage due to changes in its operations and financial situation. In addition, the division can compare its policies with the marketplace to gauge whether it is obtaining the best value for its costs.

## **COMMENDATION**

**The division is actively monitoring its insurance policies and pursuing changes as needed to help maintain its financial position.**

## **FINDING**

Despite the effort to review its insurance policies, the division does not have a centralized coordinator over its various risk management functions. Specifically, it does not have a central point of contact to ensure that activities are coordinated, processes are reviewed and updated when needed, and all risk management needs are being addressed.

The division has assigned specific responsibilities to its staff for performing activities pertaining to risk management. For example, the Director of Finance is responsible for reviewing the division's insurance needs and securing needed coverage. He also tracks costs pertaining to the carriers and administrators. For workers' compensation claims, a secretary in the Superintendent's Office is responsible for processing and managing the claims resulting from division staff. She collects relevant information regarding the claim and submits it to the third party administrator.

Although it appears that staff members are performing their assigned responsibilities, no single division employee has the responsibility for ensuring that related functions are coordinated efficiently. This lack of central oversight raises concerns about whether risk management practices have been conducted in the best interests of the division.



## **RECOMMENDATION**

### **Recommendation 4-9:**

#### **Assign a staff member to assume the division's risk management responsibilities.**

To enhance the effectiveness of a risk management program, the division should centralize the management of all related activities and responsibilities; however, this concept does not imply that one employee must perform all the various functions. Rather, central management of a risk management program eliminates redundant processes and ensures all efforts are coordinated and accomplished according to division policy. In particular, it is important that the interrelated tasks of insurance coverage, safety, and management of loss data be coordinated by a central management staff member.

In addition to overseeing insurance coverage, monitoring workers' compensation, and providing for safety and crisis management, a central risk management function should ensure that the division has addressed issues such as:

- asbestos management plan;
- integrated pest management;
- blood borne pathogen exposure control plan;
- natural disaster contingency plan;
- security;
- first-aid training;
- administrators' training;
- sexual harassment prevention training;
- substitute teacher safety training;
- bus driver training;
- safe and drug free schools; and,
- business and continuity plans.

## **FISCAL IMPACT**

There is no fiscal impact associated with this recommendation since current staff can assist with this effort; especially since financial stipends will be automated, thus reducing time spent on routine duties.

## **FINDING**

The division does not have a formal safety training program for its employees. The only type of structured training that the division provides is for its bus drivers. The division offers semiannual training through videos, handouts, and group discussion on topics such as the importance of ongoing vigilance while driving. In addition, the division provides formal training to all new bus drivers in accordance with the Virginia Department of Education. This training includes 24 hours of classroom education and another 24 hours of behind-the-wheel instruction.

An analysis of the division's claims for workers' compensation during the five-year period from July 2000 to June 2005 identified a total of 215 claims filed at a total cost of

\$72,205. The average cost per claim of \$336 is relatively low, indicating that the majority of claims appear to be for minor injuries that could possibly have been prevented through proper safety training.

Organizations that provide safety training to their employees have experienced fewer incidents involving employee injuries. These organizations typically review injury claims on a regular basis and tailor their safety programs to focus on reducing the occurrences of on-the-job accidents pertaining to those claims.

**RECOMMENDATION**

**Recommendation 4-10:**

**Develop a comprehensive employee safety training program.**

The division should emphasize the importance of safety in the workplace by implementing a safety training program throughout the organization. The training should cover general workplace safety as well as safety in areas that have historically resulted in a high number of workers' compensation claims.

The division may want to consider partnering with the county to develop a joint safety program. By coordinating with the county, the division can share the administrative responsibilities of developing and maintaining an effective program.

**FISCAL IMPACT**

By implementing a comprehensive safety training program, the division should be able to reduce its workers' compensation claims by 5 percent in the first year and 10 percent in succeeding years. Based on the claims history for the past two fiscal years, the estimated savings would be \$10,539 over a five-year period.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Develop a Comprehensive Safety Training Program	\$1,171	\$2,342	\$2,342	\$2,342	\$2,342

**4.8 Fixed Assets**

An effective fixed asset management system should account for division property accurately and protect it from theft or misappropriation. The system should also have the capability to identify items requiring replacement due to obsolescence. A fixed asset is defined as an item acquired for use in the division's operations that has a useful life of at least one year and is generally not intended to be resold in the ordinary course of business. Examples of fixed assets include land, building, machinery, computer and office equipment, and furniture.

**FINDING**

The division actively tracks its fixed assets as part of its overall financial management responsibilities. Specifically, the division maintains a property control program that is designed to:

- provide officials with information required to control the use and location of school property;
- assist administrators in planning for equipment replacement;
- identify property for insurance purposes; and
- provide information required for district and county financial reports.

The total value of the division's fixed assets as of June 30, 2005 was \$16.1 million. Exhibit 4-5 provides details on the activity by asset type during fiscal year 2004-05. For financial statement purposes, only those assets valued at \$5,000 or greater are reported in the general ledger. Certain assets, such as equipment and furniture, are depreciated over time to reflect their current estimated values during the course of their useful lives.

**EXHIBIT 4-5  
FIXED ASSETS AS REPORTED IN THE ANNUAL FINANCIAL REPORT  
2004-05 SCHOOL YEAR**

DESCRIPTION	BALANCE JULY 1, 2004	ADDITIONS	DELETIONS	BALANCE JUNE 30, 2005
<b>Capital assets – non-depreciable:</b>				
Land	\$1,619,726	\$0	\$0	\$1,619,726
Construction in progress	4,289,246	17,217,779	0	21,507,025
Total non-depreciable capital assets	\$5,908,972	\$17,217,779	\$0	\$23,126,751
<b>Capital assets – depreciable</b>				
Buildings and building improvements	\$54,518,807	\$145,323	\$0	\$54,664,130
Furniture and equipment	7,282,385	1,728,230	105,185	8,905,430
Total depreciable capital assets	\$61,801,192	\$1,873,553	\$105,185	\$63,569,560
<b>Less accumulated depreciation</b>				
Buildings and building improvements	\$16,908,567	\$1,271,926	\$0	\$18,180,493
Furniture and equipment	4,856,023	668,549	105,185	5,419,387
Total accumulated depreciation	\$21,764,590	\$1,940,475	\$105,185	\$23,599,880
Total depreciable capital assets, net of depreciation	\$40,036,602	\$(66,922)	\$0	\$39,969,680
<b>TOTAL FIXED ASSETS</b>	<b>\$45,945,574</b>	<b>\$17,150,857</b>	<b>\$0</b>	<b>\$63,096,431</b>

Source: Isle of Wight School Division, General Ledger, 2004-05.

The division maintains two fixed asset ledgers, one for capitalizable assets and the other for controllable assets. Capitalizable assets are those assets that must be capitalized and depreciated in accordance with generally accepted accounting principles promulgated by the Governmental Accounting Standards Board. The division defines a capitalizable asset as one with a useful life in excess of two years and a fair market value of at least \$5,000 at the time of acquisition. These assets are depreciated using the straight-line method with useful lives based on a standard composite table developed by American Appraisal Associates, an independent valuation consulting firm.

Controllable assets are those items that are not required to be capitalized, but must be inventoried for security purposes due to a substantial risk of theft or misappropriation. These assets are fully expensed in the year they are acquired. Examples of controllable assets include the following:

- computer equipment, including workstations, laptops, printers, and scanners;
- audio-visual equipment, such as television monitors, stereos, and compact disc players;
- video projectors;
- camcorders and digital cameras;
- power tools;
- two-way radio equipment; and
- other high-profile equipment susceptible to loss or theft.

The division affixes property tags to capitalizable and controllable assets whenever possible. The tags contain a unique identifier and bar code, which allows the division to record the physical location of the item. Assets that are not tagged include land, licensed motor vehicles and trailers, telephone systems, network servers, and other equipment that cannot easily be tagged. Nevertheless, the division also tracks these assets using a different set of identifying codes.

The division also performs a physical inventory of all capitalizable and controllable assets at least once a year. Each school site or department is responsible for physically identifying all assets contained on the property report provided by the Finance Department. The school or department administrator updates the report based on any differences, such as for items that cannot be located. The Finance Department will adjust the fixed asset ledger based on the results on the inventory and can also audit these results, depending on its comfort level with the adjustments. The most recently completed inventory took place in November 2004 and the division is currently undergoing its annual inventory for fiscal year 2005-06.

#### **COMMENDATION**

**The division has adopted comprehensive procedures for monitoring its fixed assets, which contribute to its efforts to properly account for and maintain custody over its tangible property.**

**5.0 EDUCATIONAL SERVICE  
DELIVERY**

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## 5.0 EDUCATIONAL SERVICE DELIVERY

This chapter provides a summary of the delivery and evaluation of educational services to students in the Isle of Wight County Schools (IWCS). The five major sections of the chapter include:

- 5.1 Organization and Management of Curriculum and Instruction
- 5.2 Curriculum and Instruction
- 5.3 Use of Testing Data for Instructional Purposes
- 5.4 School Improvement
- 5.5 Instructional Professional Development

### CHAPTER SUMMARY

The Isle of Wight County Schools (IWCS) is a school division experiencing many changes. Located in the eastern part of Virginia, the division consists of 5,167 students with an economically disadvantaged factor of 31.1 percent, compared to its peer public school division's average rating of 25 percent. The division consists of five elementary schools, two middle and two high schools. Isle of Wight consists of 319 square miles, strategically located in one of Virginia's busiest transportation hubs. Figures supplied by the Chamber of Commerce indicate the community's expected annual growth over the next 25 years will be 11.4 percent, a significant increase by any standard. H.M. Land Registry has established the average home value at \$269,482 over the October-December 2005 time frame. Enrollment data for IWCS are shown in Exhibit 5-1:

**EXHIBIT 5-1  
ENROLLMENT DATA  
2003-2005**

SCHOOL YEAR	TOTAL STUDENTS
2003-04	5,111
2004-05	5,148
2005-06	5,186

Source: Isle of Wight County Schools, 2006

Long perceived as an agricultural community, the reality defies this description. New people have brought new expectations and the time of change is just beginning. Within this context, Isle of Wight County Schools offers an educational program designed to meet the needs of every child.

There is a strong sense of pride within the division's employees pertaining to the progress being made on improving student performance. Expectations are extremely high and there is a sense of awareness that more remains to be accomplished. Rather than being discouraged about the challenges that the division faces, school personnel communicate a determination and confidence that the future is a bright one and they are capable of achieving even higher standards of excellence.

The division's student performance data, accreditation status for each building, success in deploying the inclusion model in its schools, and special education program justify this

sense of optimism. There are numerous success stories which will be detailed in the remainder of this chapter; there are also challenges. Corroborating this statement were interviews, survey results, and progress towards their critical success factors. Taken collectively, this information points a clear path towards achieving high standards of excellence for their children. The chapter will highlight both well-deserved commendations as well as opportunities for improvement. The division recognizes the importance to:

- focus more strongly on strengthening the curriculum;
- increase professional development opportunities but focus the opportunities specifically on school improvement plans;
- continue to strengthen the inclusive practices in all schools; and
- improve the system that supports the disaggregating of data within buildings for the purpose of making sound decisions concerning curriculum and pedagogy.

Toward that end, the recommendations will focus on creating an organizational structure that facilitates efforts to attain high academic achievement for every student. By assigning specific administrative functions that contribute to more effective coordination and planning of tasks, the division will provide a more cohesive support system for the curricular and instructional functions of the division's operations. Key recommendations that will assist the division in attaining its goals are as follows:

- realign the functions of central office administration in accordance with the proposed organizational chart presented in Chapter 2 of this report;
- institute a staffing formula that ensures an equitable distribution of resources;
- extend current initiatives to base decisions on good information by moving professional development systematically to the level of the classroom teacher;
- identify, collect, and disseminate best practices that are currently occurring in IWCS schools;
- identify key professional development opportunities critical to the realization of the division's goals for teachers, students, and technology integration and develop procedures to ensure that they translate to changed instructional practices;
- continue efforts to develop curriculum maps based on the progress towards curriculum alignment presently being achieved;
- relocate the Alternative Education Program to the Smithfield site, and

- expand the role of central administration in the planning and execution of strategies for school improvement.

## **INTRODUCTION**

Prior to the site visit, surveys were sent to central office administrators, school level administrators, and teachers to ask for feedback regarding various aspects of division services. The responses of IWCS central office administrators and principals were merged with those of similar groups of administrators in other school divisions.

In MGT surveys of IWCS central office administrators, principals, and teachers as shown in Exhibit 5-2, there is a strong consensus that teachers enforce high standards of learning for students. Central office administrators either agreed or strongly agreed that this was true (85 percent); principals felt even more strongly about this issue (89 percent); while teachers gave themselves at 86 percent on enforcing high standards of learning. In the survey question, "Our schools can be described as 'good places to learn'," central office rated this at 90 percent, building principals at 100 percent, and teachers at 82 percent. It is interesting to note that teachers rated themselves lower than the rating given by administrators. During the site visit, MGT consultants conducted teacher focus groups as well as meeting with teachers individually. Without exception, teachers were very proud that their focus was on student learning. Also without exception, teachers felt that they could do even more for students. The standards they set for themselves were exemplary; the candid comments that were made to improve the system were less self-serving and more directed towards eliminating barriers to success. As good as teachers felt they were, they were quick to point out that they could be better.

Exhibit 5-2 displays the responses of school employees on key issues related to educational service delivery. Employees were asked to indicate the degree to which they agreed or disagreed with a series of statements regarding the quality of service offered to schools by central office personnel. Responses to the first statement, "IWCS Central Office is responsive to school needs" differed significantly among the three groups, with 69 percent of central office administrators and 53 percent of principals agreeing or strongly agreeing with the statement, but only 33 percent of teachers giving that response. The second statement, "Central Office provides quality service to schools" also drew disparate responses among the three groups. Fifty-eight percent of central office administrators and 53 percent of principals agreed or strongly agreed, while only 32 percent of teachers responded accordingly. Both questions indicate a significant variance in views towards central office support towards the mission of the schools.

There was a much higher level of agreement among all three groups on the subject of instructional coordination and supervision and instructional support. When asked to rate these areas as adequate/outstanding or needs some/major improvement, there was unanimous agreement among all three groups that some/major improvement was needed with a range of 42 to 49 percent of members in each group indicating both areas need some or major improvement.



**EXHIBIT 5-2  
SURVEY RESPONSES OF ISLE OF WIGHT COUNTY SCHOOLS EMPLOYEES**

SURVEY ITEM	ADMINISTRATORS		PRINCIPALS		TEACHERS	
	% AGREE OR STRONGLY AGREE	% DISAGREE OR STRONGLY DISAGREE	% AGREE OR STRONGLY AGREE	% DISAGREE OR STRONGLY DISAGREE	% AGREE OR STRONGLY AGREE	% DISAGREE OR STRONGLY DISAGREE
IWCS Central Office is responsive to school needs	69%	16%	53%	35%	33%	38%
IWCS Central Office provides quality service to schools	58%	16%	53%	41%	32%	35%
Our schools have the necessary instructional materials and supplies	79%	10%	100%	0%	56%	29%
IWCS teachers enforce high learning standards for students	85%	0%	89%	6%	86%	6%
Our schools can be described as "good places to learn"	90%	5%	100%	0%	82%	7%
	<b>ADEQUATE - OUTSTANDING</b>	<b>SOME/MAJOR IMPROVEMENT</b>	<b>ADEQUATE - OUTSTANDING</b>	<b>SOME/MAJOR IMPROVEMENT</b>	<b>ADEQUATE - OUTSTANDING</b>	<b>SOME/MAJOR IMPROVEMENT</b>
Instructional coordination and supervision	47%	42%	53%	47%	43%	49%
Instructional support	43%	43%	53%	47%	49%	48%

Source: Isle of Wight County Schools, MGT Survey Results, 2006.

Exhibit 5-3 presents survey responses of IWCS administrators compared to administrators in other school divisions. MGT consultants also surveyed other division administrators on the same issues related to educational services. In each survey area, Isle of Wight administrators consistently gave themselves a score significantly less than that of other administrators MGT has surveyed. Administrators work hard, care greatly, and want to do better. Interviews with IWCS administrators consistently reinforce this opinion. It appears that IWCS administrators agree with teachers and principals that their contributions to the mission of schools can be improved. However, the conclusions from

this study indicate that they are, indeed, making a significant contribution already. They simply want to do more.

**EXHIBIT 5-3  
COMPARISON SURVEY RESPONSES OF ISLE OF WIGHT COUNTY SCHOOLS  
ADMINISTRATORS AND  
ADMINISTRATORS IN OTHER SCHOOL DIVISIONS**

SURVEY ITEM	IWCS Administrators		Other Division Administrators	
	% AGREE + STRONGLY AGREE	% DISAGREE + STRONGLY DISAGREE	% AGREE + STRONGLY AGREE	% DISAGREE + STRONGLY DISAGREE
Central office administrators are responsive to school needs.	69%	16%	76%	8%
Central office administrators provide quality service to schools	58%	16%	77%	6%
The emphasis on learning in this division has increased in recent years	100%	0%	89%	4%
Our schools have the necessary instructional materials and supplies	90%	5%	84%	5%
Our schools can be described as "good places to learn"	90%	5%	68%	12%

Source: Isle of Wight County Schools MGT Survey Results, 2006.

At first glance, these data suggest that there is major disagreement among the groups concerning support for efforts to improve student learning and that this is an area of conflict between the groups. This is not the case. Although staff will quickly state that they are concerned, they will also state emphatically that it is the system that needs to be improved. Recognition is given to the individuals who are working hard to make a difference. The focus, they state, needs to be on enhancing the system and processes used in order to accelerate the pace by which improvements can be made.

**5.1 Organization and Management of Curriculum and Instruction**

In order to create efficient and effective educational processes that promote the highest possible levels of student achievement, a school system's organization and procedures must be thoughtfully aligned, and communicated to and understood by educators at all levels. Personnel at the division level must have expertise in the aspects of education for which they are responsible. Resources must be leveraged to maximize the capacity of the division's staff, and processes for clear and frequent communication and co-planning among division-level support staff and school-level recipients of their services must be developed and protected.

**FINDING**

The visiting team was provided a current organizational structure for the Instructional and Administrative Services for IWCS. The chart states that the Assistant

Superintendent for Educational and Administrative Services is responsible for the following areas:

- Student Services
- Transportation
- Technology
- Special Education
- Facilities
- Coordinator of Instruction

The Instructional Services has the following responsibilities:

- Curriculum and Instruction
- Coordinators of Instruction
  - Elementary, Guidance & Assessment
  - Reading
- Title I

As shown in Exhibit 5-4, the present instructional-related organizational chart lacks clarity in the reporting structure for the division. The function assigned to each department impedes the ability of the division level staff to perform job responsibilities and make more significant contributions to the mission of the schools. The present organizational chart inhibits the division administrators from performing his/her duties and responsibilities in an effective and efficient manner. Teachers and administrators reported in interviews with MGT consultants that the more “logical” reporting format would have the special education area reporting directly to the Assistant Superintendent of Instructional Services rather than the Assistant Superintendent for Education and Administration Services. Since the background and training for the Assistant Superintendent for Instructional Services was in the area of special education, the logic for the present assignment was questioned.

The offices for the majority of the personnel assigned to the instructional area are in four separate portable classrooms, at a different site from the office of the superintendent. Personnel reporting directly to both assistant superintendents are often located in separate facilities on this site. Although this problem will be alleviated in the near future with the occupation of a new facility, the present situation exacerbates the communication issues within the instructional area and between buildings, as well as contributing to the staff’s confusion on roles and responsibilities.

Personnel interviewed during the diagnostic visit recognized the communication issues this organizational structure creates. Survey results clearly indicate dissatisfaction with the effectiveness of the central office staff’s contributions on a consistent and predictable basis. Interviews with IWCS personnel reinforced the level of frustration with the present system. A frequent comment by administrators, teachers, and aides was that central office leadership, “always seems to be getting new titles and new job descriptions.”

It should be noted that during the interviews with senior staff there is a willingness to perform these varied duties. The issue is that the duties for instructional services are not aligned properly in order to ensure maximum effectiveness for an organization committed to achieving high academic success for every student.

## **RECOMMENDATION**

### **Recommendation 5-1:**

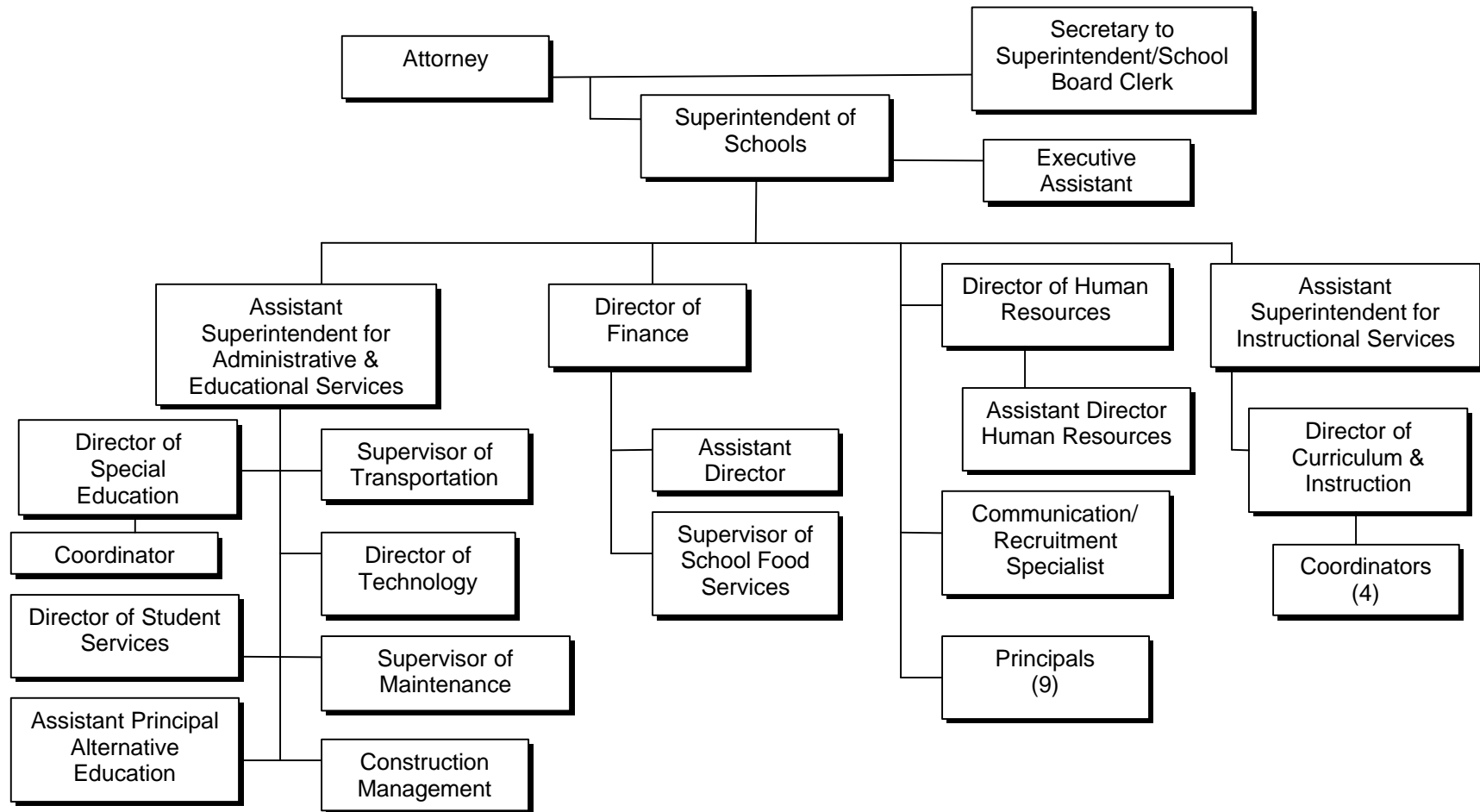
#### **Reorganize the Isle of Wight County Schools instructional administration.**

MGT recommends realigning the function assignments for the superintendent, the Assistant Superintendent for Administration and Educational Services and the Assistant Superintendent of Instructional Services into a system that will support the instructional aims of the division. The proposed organizational structure would focus efforts to improve the instructional program. All appropriate functions would therefore be assigned to the Executive Director for Teaching and Learning. Implementation of this recommendation will ensure that coordination of instructional issues will occur in a concerted and intentional effort, aligning efforts towards common goals and objectives. The proposed changes will improve communications between central administration, building principals, and teachers. This will allow the instructional team to speak with one voice in communicating its efforts to improve student learning to the school board and community.

Furthermore, MGT is recommending (please see Chapter 2) that the planning, accountability and technology be placed with the superintendent so they will not be unduly influenced by either the support or the instruction side of the division. It has been MGT consultants' experience that when these functions are placed on either side, duties become influenced by the side of placement. Therefore, this placement will enable a more fair and balanced approach for IWCS.

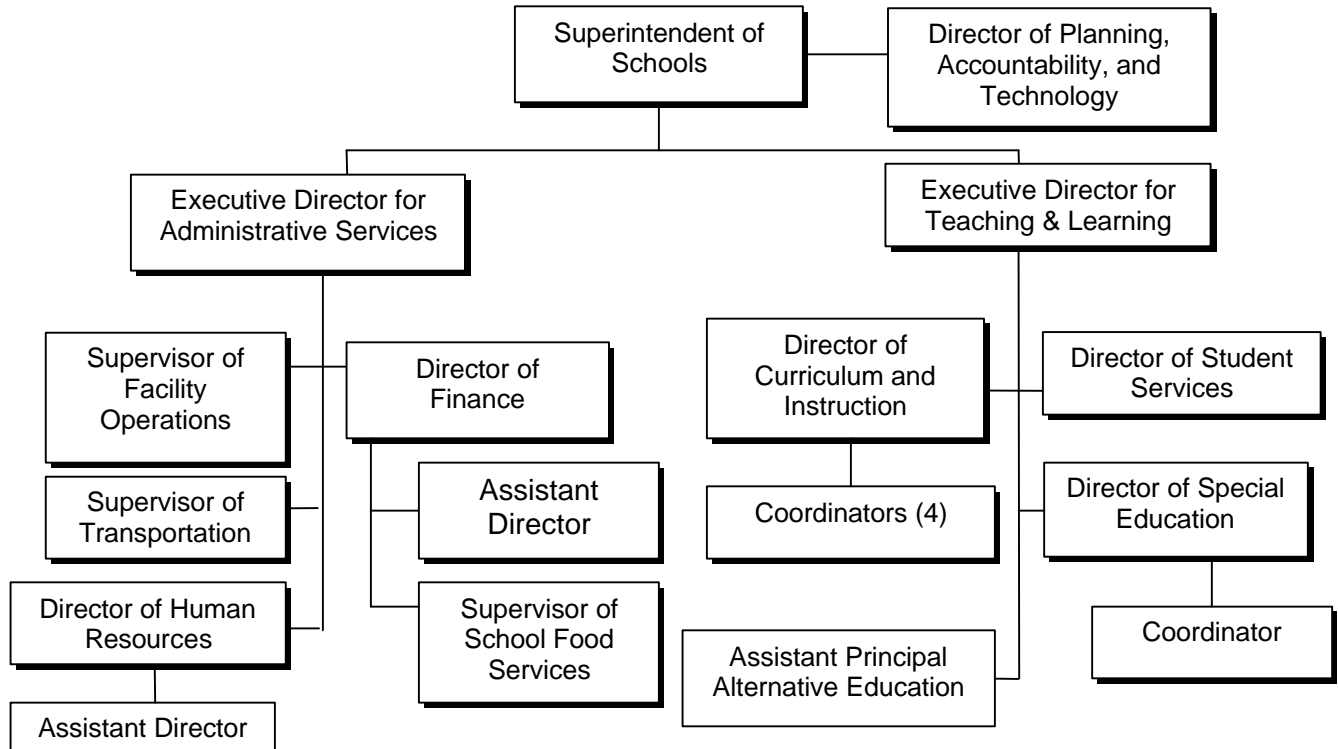
Planning for long-term, comprehensive, and coordinated improvement will be attained in a collaborative model. Responsibilities can be clearly articulated so that every person in the organization is clear on who is responsible for doing what. The development of a clear and precise communication plan would be an inevitable outcome of this organizational structure to ensure that curricular decisions are aligned across areas of responsibilities. A summary of the advantages for adopting this recommendation are contained in the division administration chapter.

**EXHIBIT 5-4  
ISLE OF WIGHT COUNTY SCHOOLS  
CURRENT ORGANIZATION STRUCTURE  
MARCH 2006**



Source: IWCS Office of Superintendent, 2006.

**EXHIBIT 5-5  
ISLE OF WIGHT COUNTY SCHOOLS  
PROPOSED INSTRUCTIONAL-RELATED ORGANIZATIONAL STRUCTURE**



Source: Prepared by MGT of America, March 2006.

**FISCAL IMPACT**

This recommendation can be implemented with existing resources.

**5-2 Curriculum and Instruction**

Successful school systems have stated guidelines and expectations that underlie a sound, challenging curriculum. It is far more than state standards, providing enrichment and remediation opportunities for students based upon their individual needs. Grounded in research-based strategies and driven by sound data to make decisions, it defines and buttresses realization of clear learning goals. The curriculum encompasses relationships between goals, specific learning objectives, instructional activities, and student assessments. It also identifies a scope and sequence in which information, skills, and concepts are taught and reinforced throughout the years to inculcate learning into students' knowledge base. Effective curricular guiding documents also build in assessments and periodic monitoring of both student achievement and the effectiveness of the documents themselves. Materials can then be identified and purchased that assist in teaching concepts and knowledge not addressed in division curricular resources and that provide for student remediation and enrichment.

Prominently displayed across the entrance to school buildings in Isle of Wight is the following sign:

We're fully accredited!  
No Child Left Behind  
Standards of Learning  
Southern Association of Colleges and Schools

On August 16, 2005 the Virginia Department of Education released school and division results for No Child Left Behind. All Isle of Wight County elementary, middle, and high schools are fully accredited by federal standards. The division also met AYP standards, a noteworthy accomplishment. Further, each school has also received accreditation from the Southern Association of Colleges and Schools, also a significant accomplishment among school divisions. The division is fully accredited by the Virginia Department of Education and has worked assiduously in order to achieve these high standards as evidenced by their efforts to align curriculum standards to results.

The division has been engaged in an active process to align curriculum to the Standards of Learning, develop pacing guides that will generate 9-week tests on the standards, provide classroom support to demonstrate best practices, and generally focus all their energies towards improving student achievement, one child at a time. It is working.

## **FINDING**

The division is moving in the direction of implementing curriculum mapping as the next step in their efforts to align the curriculum to testing standards. Over a period of three years, the division embarked upon an effort to align its curriculum to the SOL's. The Commonwealth of Virginia provided Standards of Learning to all school divisions as a first step in aligning standards to curriculum to measurable results. IWCS school leadership formed teacher groups to examine the SOL's in the belief that this collective wisdom would produce the best results. The division then created pacing guides that communicate to teachers the content to be taught on a week-by-week basis. The Flanagan Tests for Higher Standards were used to develop the 9-weeks testing program. The process was a long one, taking years to develop the first drafts of the documents. The curriculum guides presented teachers and administrators with an opportunity to develop specific approaches towards improving student test scores.

## **RECOMMENDATION**

### **Recommendation 5-2:**

**Continue plans to begin immediate development of curricular maps and other materials.**

The advantages to following a more prescriptive process have been captured in an article from Education Leadership:

“Curriculum maps can be aligned both horizontally and vertically, organizing content, skills, assessments, and resources over time. A curriculum map can also serve as a tool for collecting data about the

implemented curriculum in a school and in a district—the instruction that students are experiencing. By mapping what's actually taught and when it's taught, teachers produce data that can be used with assessment data to make modifications in instruction (*Educational Leadership*, December 2003/January 2004).”

## **FISCAL IMPACT**

The cost of purchasing a commercial package for curriculum alignment represents a significant investment for the division. For example, Collaborative Learning, Inc. charges a flat fee of \$59.40 per student per year for both components of their package. This package enables a school division to load their curriculum Master Map as well as the Diary Map, which gives teachers access to numerous other components. Presently, there are 2,401 school districts in Indiana using this software. MGT of America, Inc. is not recommending this, nor any specific commercial company. The recommendation for the Isle of Wight is to take their present efforts at curriculum mapping to the next level of deployment.

One of the most active proponents of Curriculum Mapping is Heidi Hayes Jacobs whose book, *Getting Results with Curriculum Mapping*, has often been used as a guide for moving curriculum alignment to the next level. Most noteworthy, Spotsylvania School Division and Fairfax County School Division, both in the Commonwealth of Virginia, are excellent examples of how to do curriculum mapping the right way. Their web sites contain a wealth of information concerning this process. This information is shared with IWCS personnel in response to the initiatives already underway.

## **FINDING**

Lead teachers were added to each building for the express purpose of visiting classrooms, offering best practices techniques, and serving as leaders in analyzing test scores. These teachers were charged with the responsibility of serving as mentors to experienced and young teachers alike. When asked about their role, the response was, “To help teachers every way we can.” The results of the decision to add lead teachers to efforts to improve student learning have been far reaching. Teachers and administrators both reported that the role of the lead teachers within the buildings has been critical to their success.

The school improvement teams within buildings, comprising the building leadership, lead teachers, and classroom teachers have worked collaboratively together to examine data in a manner that allows them to make adjustments in pedagogy. The data is disaggregated to the specific proficiencies required at each grade level, thereby ensuring that teachers know exactly what learning needs to be emphasized. The teams also understand the concept of “power standards” in that not all SOL’s are of equal importance, permitting them to emphasize those standards that are most critical to a child’s success on the state-wide testing program.

## **COMMENDATION**

**IWCS is commended for the addition of lead teachers who strengthen the school improvement process through their contributions.**



## **FINDING**

There is a strong belief that reading is a gateway to academic success and the emphasis placed on reading is reflected in this belief by the division. Reading specialists were introduced into the middle and high school curriculums. The English teachers and reading specialists team emphasize to the students the importance of good reading skills. Teachers reported that the relationships have, for the most part, been extremely positive. English teachers have incorporated reading pedagogy into their teaching styles, benefiting students. Teachers also reported that high school students are really enjoying the class with no sense of stigmatism. Middle school teachers reported that the students are pulled from fine arts for reading classes and those students are resentful.

Hardy Elementary School is a “Reading School.” The emphasis placed on reading in that school is evident. Blocks of time are established for reading; every adult in the building places an emphasis on reading and models this belief by their actions. The principal of the school is an exemplar for every student and adult by his unwavering support of reading.

Parent volunteers abound. In an interview with the PTA President, the extent of the volunteer program was described to MGT consultants. The president assumes the responsibility of organizing these volunteers. The emphasis for the volunteers is placed on individual student help – especially for reading. Resource teachers often use the parent volunteers to help integrate the inclusion method into the classrooms. Reading scores for Hardy elementary school consistently reflect this emphasis with students.

## **COMMENDATION**

**Isle of Wight County Schools is to be commended for the emphasis they place on reading at every level of the organization.**

## **FINDING**

Transforming data into usable information that changes the approach teachers take in the classrooms is the challenge faced by most school divisions. IWCS is no exception. This is the ultimate goal for the division as stated in MGT interviews with administrators and teachers. Although many strides have been taken, there are opportunities for improvement. The key to developing usable data lies with the alignment of curriculum guides with SOL's, and the subsequent development of “leading indicators” of success through the nine week tests.

Teachers expressed frustration that the pacing guides are slow to be deployed after they reach the central office level. These guides are critical to creating the nine week testing program, an essential element in understanding the progress students are making prior to the high stakes testing in the spring. The nine week tests are designed to serve as “leading indicators” to measure student success and are a critical component for teachers to adjust daily activities to reflect information learned from the data. Concern was also expressed about the level of support given to the buildings for data analysis. That responsibility continues to fall largely to the school staff, using the Data Disaggregator Software, soon to be replaced by Virginia's Educational Information Management System (EIMS). Teachers expressed additional concern that the new

software provided by the state will not give them the capacity to delve as deeply into the data as the Disaggregator programs allows. The decision to change software was made by the Commonwealth.

The function of testing has been assigned to a Coordinator of Instruction. This position is also responsible for Guidance, K-5 Curriculum and Instruction, middle school social studies, and the accreditation process. The position must coordinate all the testing protocols to ensure that the tests are administered in a manner conducive to ethical behavior. Further, the position must ensure that all the materials are sent to the buildings and then returned. The position must train the school test coordinators within the buildings. The on-line testing program falls within the responsibilities of this coordinator's position. There is little time left to assist directly in the analysis of data. According to the organizational chart, this position is to report directly to the Director of Curriculum and Instruction; the reality is that the position reports directly to the Assistant Superintendent for Instructional Services and is evaluated by that person.

This is not to suggest that the testing position is without responsibilities in the area of testing. However, in addition to the other duties assigned, the mechanics of administering the tests require a substantial amount of effort, leaving little time to understand the data to any in-depth level.

At the high school level, many of the testing requirements have been assigned to the guidance counselors, making it very difficult to accomplish the more typical guidance responsibilities. During the site visit, this concern was expressed by teachers and principals during interviews.

## **RECOMMENDATION**

### **Recommendation 5-3:**

**Consolidate the responsibilities of testing as a function of the Executive Director for Teaching and Learning with appropriate line staff relationships to others assigned to testing and data analysis.**

Presently, the responsibility for testing and data analysis have been assigned to numerous people. Given the heavy emphasis placed by the division on analysis of testing data, it is logical that these duties be coordinated into an efficient means to ensure alignment of all the factors involved in testing. Teachers need more assistance in understanding what the data is telling them with an opportunity to respond to this data in a meaningful manner. All the pieces seem to be in place to create a dynamic process for data analysis and response. The division simply needs to put the pieces together in a more logical fashion.

## **FISCAL IMPACT**

Implementation of this recommendation can be accomplished with existing resources.

## **FINDING**

Perhaps the strongest area within the IWCS educational services area is the special education delivery model. IWCS approaches special education students in the same manner as do most other school divisions in the nation, utilizing an inclusion model. Yet they are able to achieve some exciting results for all their children. A closer examination of this area will illustrate how they are able to accomplish this enviable goal.

As a general philosophy, the division tends not to treat special education students in a manner unique to them. Rather, they are concerned with meeting the needs of any student who is struggling. Hence, they initiate "Child Study" meetings for every student who is struggling, either academically, emotionally, or both. Teacher teams, with the involvement of special education teachers and the psychologist, resolve matters before they become more complicated. Attempts are made to work with county officials to strategize on how best to help students. Although there are still issues with making Child Study a total success, the philosophy is the right one and more progress will be made on implementation strategies. Within this backdrop, the division educates its children that have been deemed "eligible" for special education services using a inclusion model.

The department is under the leadership of a vibrant individual who is committed to meeting the needs of all students, especially those that have been referred to special education. Her commitment is a reflection of the enthusiasm that is shared by the teachers and students within the division. All have embraced the concept of "inclusion" and are working diligently to make this concept work.

Teachers, aides, administrators, and parents all spoke with pride about the special education program. Without a doubt, the inclusion of special education children into the regular classroom environment has been a challenge. Teachers were highly complimentary on the assistance given to them by special education teachers as they worked towards delivering the Individualized Education Programs (IEP) of each child. The anecdotal stories most often heard were about the general education student's ability to adjust and then embrace children with special needs. Teachers reported that the students understood tolerance much more readily because of these experiences and that this was genuine. By way of illustration, adults were anxious to share the story of a high school student who was elected as the prom king recently. The election of this young man was intended as a reflection of his status within the school and was universally embraced by the student body. Teachers reported that these stories are common within their buildings and they report them with a great deal of pride. Parents state that the stigma of having a child in a special needs program is greatly lessened by the inclusion model that has been enthusiastically supported by the professional teaching community.

There exists other data to support the progress made within special education. During the past five years, there have been no appeals filed against the division. There has been a total of four complaints filed since 2002; one was ruled in favor of the parent; one settled out of court.

Within the past five years, Isle of Wight County Schools underwent Federal Program Monitoring through the Virginia Department of Education. The division received official notification that they were in substantial compliance with federal and state regulations pertaining to special education.

State testing results have been impressive for this cohort group and will be discussed in detail in section 6.3, Use of Data for Instructional Purposes.

Exhibit 5-6 indicates the number of referrals made over the last three years as well as those students found to be eligible. The total number of tested students saw a dramatic drop during the 2005-06 school year, suggesting that early intervention programs within the buildings, such as “Child Study” are successful. Although the statistics are respectable, the director considers this as an opportunity to improve. She is committed to providing additional resources to the roughly 25 percent who are deemed “ineligible” but still need special help.

**EXHIBIT 5-6  
REFERRAL RATES  
SPECIAL EDUCATION STUDENTS  
2003-06 SCHOOL YEARS**

<b>YEAR</b>	<b>ELIGIBILITY MEETINGS</b>	<b>DEEMED ELIGIBLE</b>	<b>SUCCESS RATE</b>
2003-04	157	121	77%
2004-05	190	138	73%
2005-06	75	56	75%

Source: Isle of Wight County Schools, 2006

Exhibit 5-7 presents Medicaid reimbursements. The division has seen a significant increase in the amount of funds generated through Medicaid during the past four years. At present, these funds are deposited into the division’s general education fund and not specifically to the special education accounts.

**EXHIBIT 5-7  
MEDICAID REIMBURSEMENTS  
2003-06 SCHOOL YEARS**

<b>YEAR</b>	<b>TOTAL RECEIVED</b>
2003	\$3,981.51
2004	\$29,972.72
2005	\$38,974.24
2006	\$49,270.94*

Source: Isle of Wight County Schools, 2006.

\*partial year

**COMMENDATION**

**The entire faculty and staff of Isle of Wight County Schools are commended for its exemplary special education model.**

**FINDING**

The database for tracking special education information was developed for IWCS under the leadership of its former director. The database allows for storage and retrieval of information that includes:

- Eligibility dates;
- Individual Education Plans (IEP's); and
- Section 504 Plan due dates.

The program allows for the generating of numerous reports, forms for taking minutes of IEP meetings, behavior intervention plans, and all letters to parents regarding scheduled meetings. The program is maintained by in-house technicians and updates can be made by the system's designer. The system allows administrators access to all information across buildings while restricting access between buildings. The program has been purchased and maintaining it is not a serious cost to the division.

The present special education software package is useful and well-used by the division's employees; however there are problems with all software packages that are proprietary – support of those packages can be withdrawn without any notification. There is no need to move too quickly on purchasing a commercial software program. The present software works well for the division. It would be a wise move for the department to understand what is presently on the market to prepare for any eventuality. These packages have improved significantly over the past years and if nothing else, the division leadership can become aware of the capabilities of commercial special education software vs. the one presently being used.

## **RECOMMENDATION**

### **Recommendation 5-4:**

**Research a commercial special education software package for future deployment.**

There are several companies that provide a commercial software package for special education. Cost varies greatly depending on the components selected and a host of other variables. Tranquility Solutions ([www.tranquilitysolutions.com](http://www.tranquilitysolutions.com)); 4GLSchools ([www.4GLschools.com](http://www.4GLschools.com)) and Lumen software ([www.lumensoftware.com](http://www.lumensoftware.com)) are companies that provide such services.

## **FISCAL IMPACT**

The cost for purchasing a commercial education software package cannot be determined at this time. The cost will depend on the software selected and the components selected from the software package.

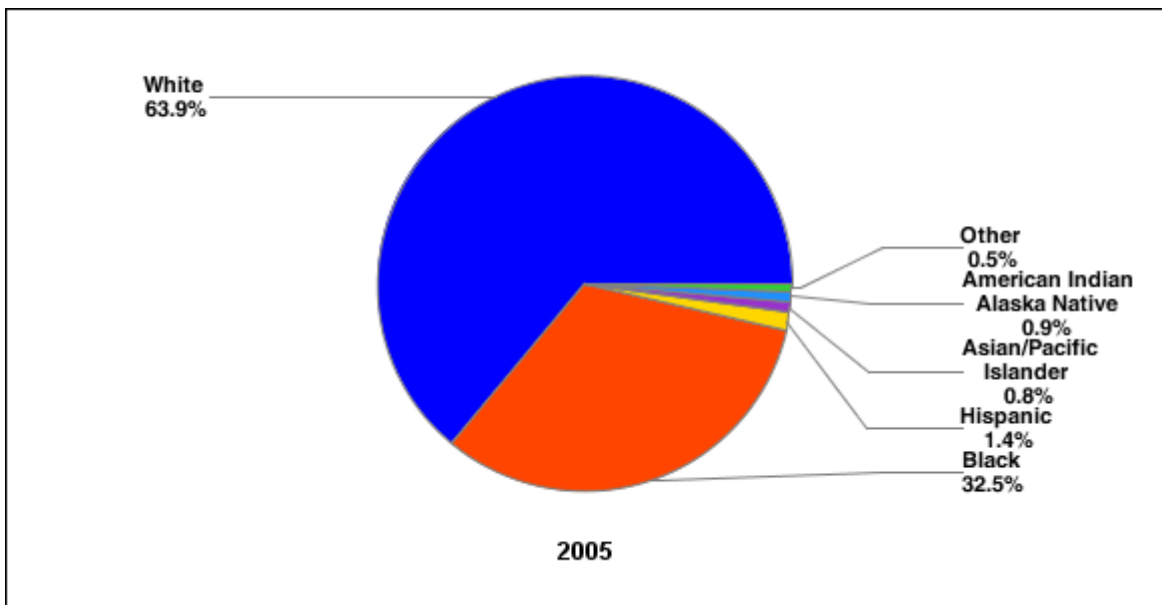
### **5.3 Use of Testing Data for Instructional Purposes**

Isle of Wight County Schools is focused on student learning. The Commonwealth of Virginia, school board, and community have articulated the factors critical to their success. AYP scores are often used as a one of the key determinants in whether the school division is doing well or not. There are other key indicators as well. The division met AYP standards for every school, including the division. Exhibit 5-8 shows the racial and ethnic composition of the division. The majority of students (63.9 percent) are white, and African American students are the largest minority group (37.5 percent). Hispanics,

Asians, and Native-Americans each comprise approximately one percent of the division's student enrollment.

The division's student body is an important contextual factor because of the need to reduce the achievement gaps between student groups. To make AYP standards for the division, each sub-group must also meet standards. When the division is successful in achieving AYP standards for both the division and each school, Exhibit 5-8 clearly indicates that the results are the product of hard work and good programs.

**EXHIBIT 5-8  
ENROLLMENT OF RACIAL AND ETHNIC GROUPS  
2004-05**



Source: Standards & Poor's, School Matters, 2006.

**FINDING**

IWCS student test scores are consistently higher than the state average in every sub-group. The "achievement gap" continues to narrow for IWCS students as measured by every key indicator from the Commonwealth of Virginia's Report Card on the division's progress.

Exhibit 5-9 presents the Reading and Math results by sub-group. An examination of reading scores indicates that African Americans in the Commonwealth of Virginia averaged 69.9 percent proficiency while IWCS Black students scored 76.1, much better than the state average. IWCS students performed well in every sub-category compared to state averages. For example, state reading averages for females were 83.9 while IWCS females scored 86.3; averages for males in the state were 78 but IWCS males scored 83.4; scores in reading for the economically disadvantaged were 68.3 (state) 76.6 (IWCS); and children with disabilities scored 55.3 (state) 60.5 (IWCS). In every subgroup, reading scores for IWCS students were consistently better than the state average.

Math scores were equally impressive. Exhibit 5-9 also presents results for IWCS students by sub-groups for math. State averages by sub-groups indicate that blacks scored 72.3 (state) IWCS Blacks scored 77.5 percent proficient; females scored 84.7 (state) IWCS females scored 86.6; math scores for the economically disadvantaged scored 73.2(state) IWCS students scored 78.7; and children with disabilities averaged 60 percent proficient (state average) IWCS students scored 62.1percent.

**EXHIBIT 5-9  
STUDENT PERFORMANCE DATA  
ETHNIC SUB GROUPS  
READING/MATH  
2005**

<b>ISLE OF WIGHT COUNTY PUBLIC SCHOOLS, VIRGINIA</b>	<b>THIS DIVISION</b>	<b>STATE</b>
How Students Performed on State Reading and Math Tests		
Reading Proficiency (%)	84.9	80.9
Math Proficiency (%)	85.9	83.5
How does Reading proficiency vary by subgroup? (%)		
All Students	84.9	80.9
White	89.1	85.9
Black	76.1	69.9
Hispanic	N/A	72.5
Asian/Pacific Islander	N/A	87.0
American Indian/Alaska Native	N/A	81.7
Female	86.3	83.9
Male	83.4	78.0
Economically Disadvantaged	76.6	68.3
English Language Learners	N/A	69.4
Students with Disabilities	60.5	55.3
Migrant	N/A	56.2
How does Math proficiency vary by subgroup? (%)		
All Students	85.9	83.5
White	90.3	88.3
Black	77.5	72.3
Hispanic	75.0	76.6
Asian/Pacific Islander	100.0	92.0
American Indian/Alaska Native	N/A	81.9
Female	86.6	84.7
How does Math proficiency vary by subgroup? (%) (Continued)		
Male	85.3	82.9
Economically Disadvantaged	78.7	73.2
English Language Learners	N/A	76.1
Students with Disabilities	62.1	60.0
Migrant	N/A	70.8

**EXHIBIT 5-9 (CONTINUED)  
STUDENT PERFORMANCE DATA  
ETHNIC SUB GROUPS  
READING/MATH  
2005**

ISLE OF WIGHT COUNTY PUBLIC SCHOOLS, VIRGINIA	THIS DIVISION	STATE
How do students perform overall in Reading and Math?		
Reading and Math Proficiency (RaMP) (%)	85.5	82.4
How does overall Reading and Math Proficiency (RaMP) vary by subgroup? (%)		
All Students	85.5	82.4
White	89.8	87.3
Black	76.9	71.3
Hispanic	75.0	74.9
Asian/Pacific Islander	100.0	90.1
American Indian/Alaska Native	N/A	81.8
Female	86.5	84.4
Male	84.5	80.9
How does overall Reading and Math Proficiency (RaMP) vary by subgroup? (%) (Continued)		
Economically Disadvantaged	77.8	71.1
English Language Learners	N/A	73.2
Students with Disabilities	61.4	57.9
Migrant	N/A	64.1
How much progress must the division make per year to reach 100% proficiency by 2014?		
RaMP Up Target (% pts.)	1.6	2.0

Source: Standard & Poor's, School Matters, 2006.

On every indicator, IWCS scores were better than the state average as referenced in Exhibit 5-9. The overall test scores in both Reading and Math were significantly better than the state average – Reading +4 points; Math +2.4 points.

**COMMENDATION**

**The students of Isle of Wight County Schools consistently scored above the state average in every sub group on the state's testing program.**

**FINDING**

Exhibit 5-9 also presents a new type of indicator – the RaMP score. This score gives a division an indication on the progress being made towards achieving the goal of No Child Left Behind. All schools must reach 100 percent proficiency in reading and math combined by 2014. The RaMP Up Target serves as a complement to the Adequate Yearly Progress (AYP) target schedules set by the states by identifying the average annual gains that a division must make to reach the goal of 100 percent. The RaMP is calculated by dividing the percentage of students that have not attained proficiency by the number of years until 2014. Isle of Wight compares favorably with the Commonwealth of Virginia in reaching this goal. The IWCS score is 1.6 compared to the



state average of 2.0. A division that has reached the 100 percent goal would have a RaMP score of "0".

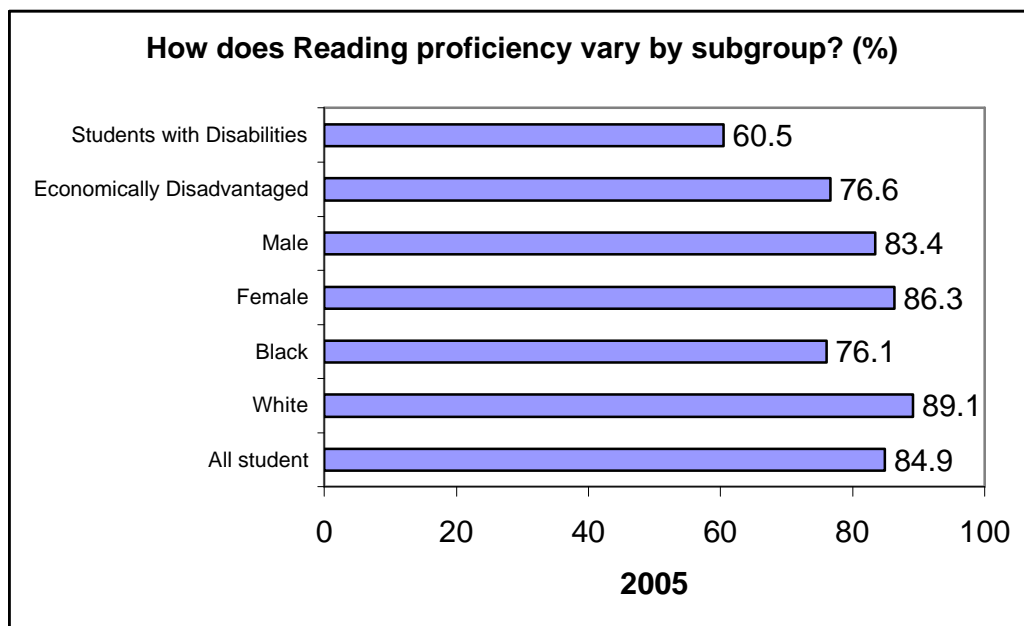
**COMMENDATION**

**The Isle of Wight is to be commended for the progress being made on achieving 100 percent proficiency for students by 2014 as measured by the RaMP score.**

**FINDING**

Exhibit 5-10 presents IWCS test results for reading in bar graph format, comparing the various sub-groups within the division. The ultimate goal is to eliminate any differences within the sub-groups. Comparing the scores achieved by White students to the students with disability indicates a 23.4 point difference.

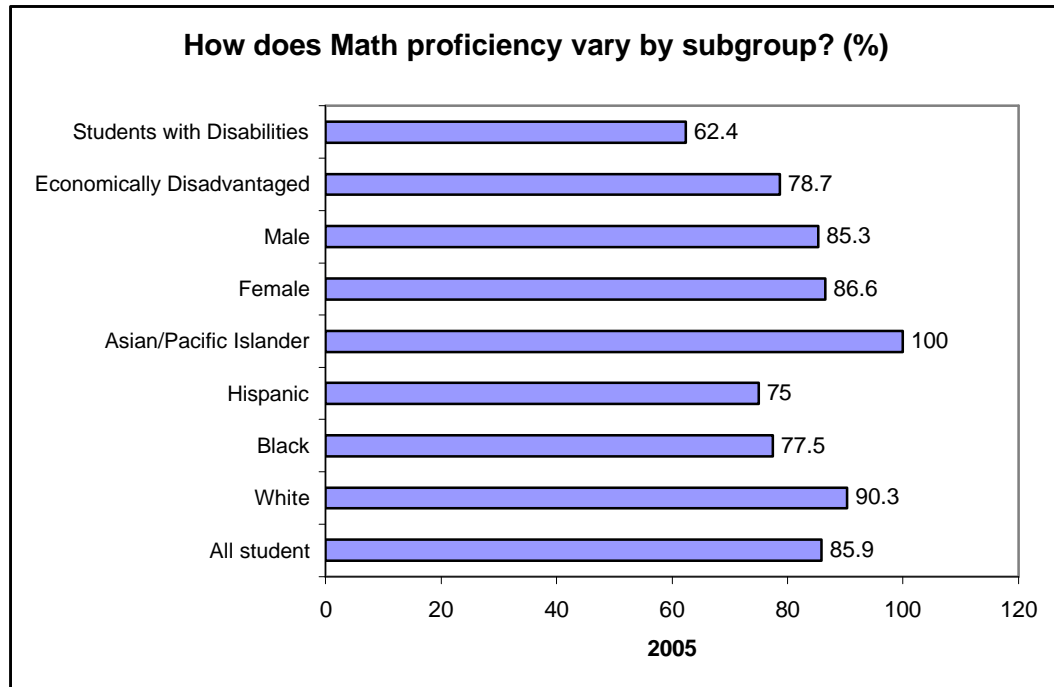
**EXHIBIT 5-10  
ISLE OF WIGHT COUNTY SCHOOLS DIVISION STUDENT PERFORMANCE DATA  
SUB GROUP SCORES  
READING**



Source: Standards & Poor's, School Matters, 2006.

As shown in Exhibit 5-11 comparisons for Math scores among sub-groups within the division demonstrate progress among subgroups. The difference between the top scoring group (Whites) compared to the lowest achieving group (disabled) was 28.2.

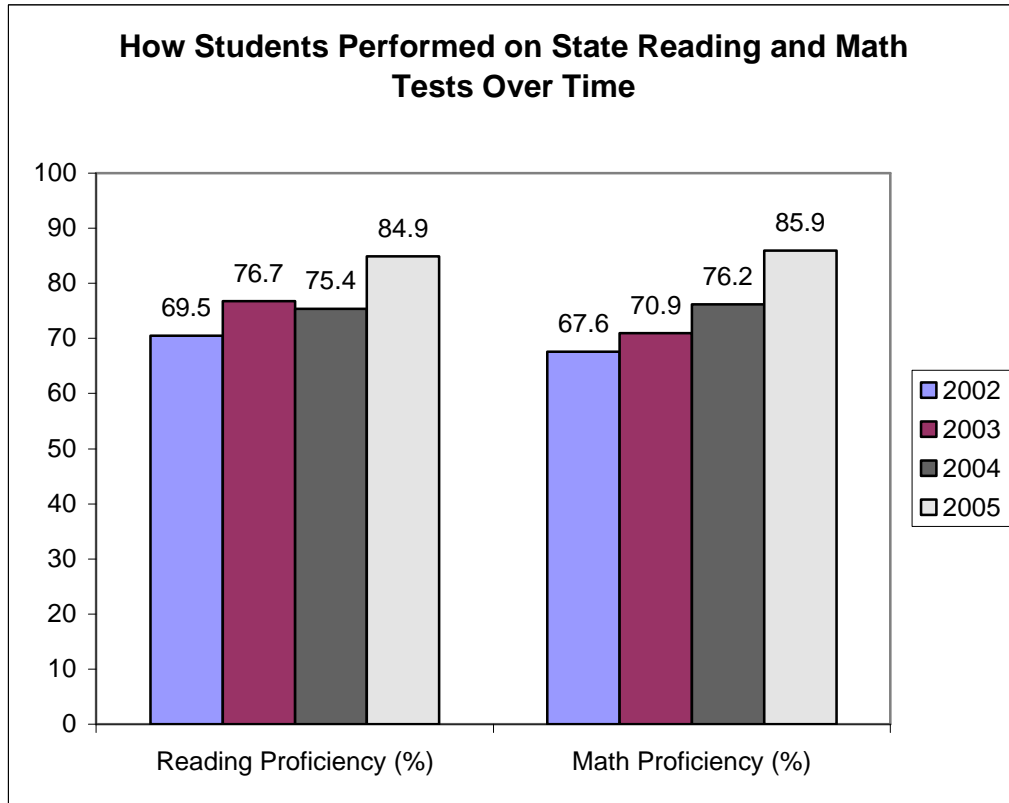
**EXHIBIT 5-11**  
**ISLE OF WIGHT COUNTY SCHOOLS DIVISION STUDENT PERFORMANCE DATA**  
**SUB GROUP SCORES**  
**MATH**  
**2004-2005**



Source: Standards & Poor's, School Matters, 2006.

Exhibit 5-12 presents trend data for reading and math from 2002-05. The data indicates that, over these years, IWCS has consistently demonstrated upward movement, with very few exceptions. Reading scores increased by 15.4 percent from 2002-05 while math scores increased 18.1 over the same time frame.

**EXHIBIT 5-12  
ISLE OF WIGHT COUNTY SCHOOLS DIVISION READING/MATH BY GRADES  
TRENDS 2002-05**



Source: Standards & Poor's, School Matters, 2006

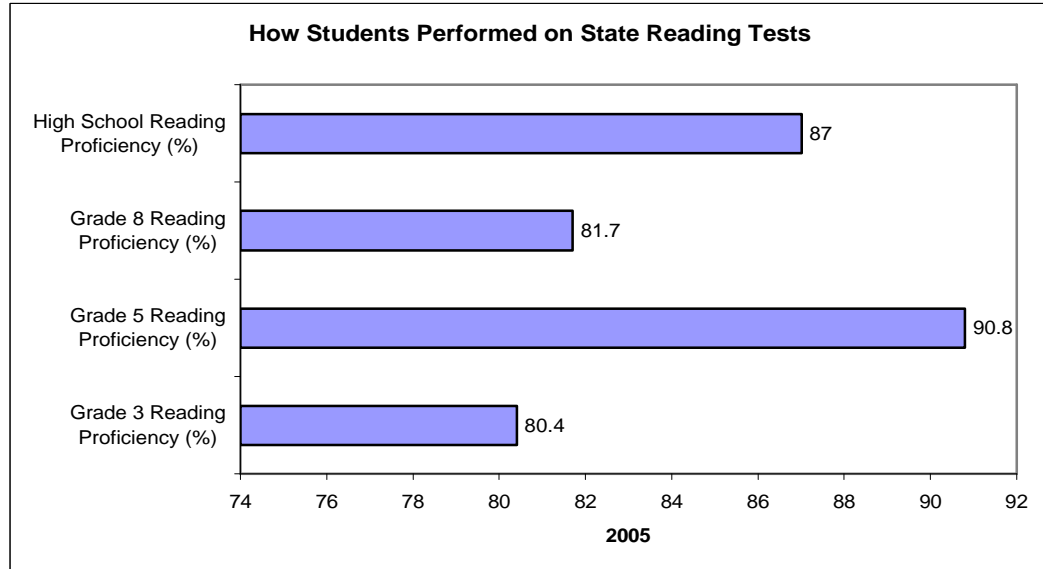
Exhibit 5-13 presents data examined by each grade level for both reading and math. From 2002 to 2005, grade 3 test scores increased by 18.4 percent; grade 5 by 18.7 percent; grade 8 by 17.7 percent; and high school by 5.9 percent.

Exhibit 5-14 presents the math scores, which were equally impressive. Math test scores increased over the same time period in grade 3 by 11.2 percent; grade 5 by 22 percent; grade 8 by 25.7 percent; and high school by 15.7 percent.

**COMMENDATION**

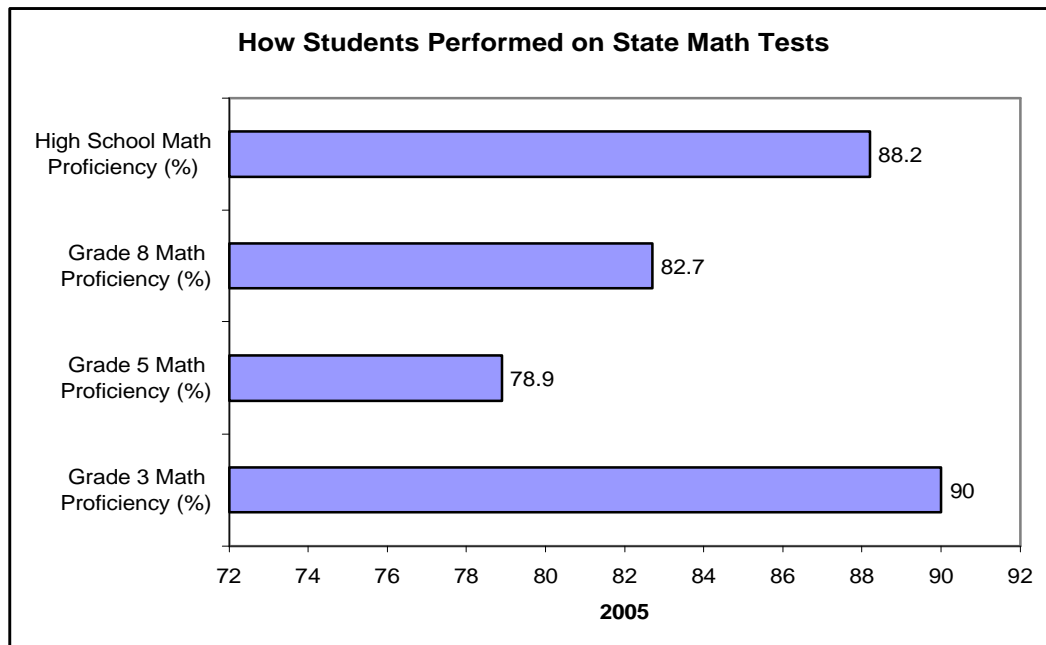
**IWCS is to be commended for the improvement in both reading and math scores.**

**EXHIBIT 5-13  
ISLE OF WIGHT COUNTY SCHOOLS DIVISION  
READING BY GRADES  
2005**



Source: Standards & Poor's, School Matters, 2006

**EXHIBIT 5-14  
ISLE OF WIGHT COUNTY SCHOOLS DIVISION  
MATH BY GRADES  
2005**



Source: Standards & Poor's, School Matters, 2006

**FINDING**

Exhibit 5-15 presents other important data for consideration. An examination of the other key indicators presents a slightly different view of the critical success factors. The division's scores for students taking the ACT, SAT, PSAT, and AP present mixed results. ACT scores were slightly lower than the state average by a negative 1.1 points; participation was also below the state average with a negative 3.3 points. The SAT results were similar. The state average was 1,018; IWCS students scored on average 985 (-33). Participation in the SAT test was .07 less than the state average. PSAT/NMSQT scores were similar in pattern. The AP scores were more positive. IWCS students scored a positive 3.6 points higher than the state average while participation rate in AP classes was a lower 3.6 points.

**EXHIBIT 5-15  
ISLE OF WIGHT COUNTY SCHOOLS NATIONAL TEST RESULTS  
2004-05**

	THIS DIVISION	STATE
<b>ACT - Average Score</b>	19.7	20.8
<b>ACT - Participation Rate (%)</b>	7.3	10.6
<b>SAT Reasoning Test - Average Score</b>	985.0	1,018.0
<b>SAT Reasoning Test - Participation Rate (%)</b>	57.6	58.3
<b>PSAT/NMSQT - Average Score</b>	137.1	139.0
<b>PSAT/NMSQT - Participation Rate (%)</b>	71.1	66.8
<b>AP - Scores 3 or Above (%)</b>	64.8	61.2
<b>AP - Participation Rate (%)</b>	21.9	25.5

Source: Standard & Poor's Education Matters, 2006

**COMMENDATION**

**Isle of Wight County Schools is to be commended for achieving the AYP and for the success they have achieved on state tests.**

**RECOMMENDATION**

**Recommendation 5-5:**

**Increase the emphasis on other indicators of success by developing strategies that will improve test results.**

Principals indicated during interviews with MGT consultants that they were aware of these test results and are presently incorporating these concerns into individual school improvement plans. It is expected that this added emphasis will produce results that are more consistent with the other test results being achieved by the division.

**FISCAL IMPACT**

Implementation of this recommendation can be accomplished with existing resources.

## **FINDING**

Not all critical success indicators are positive. Not all trends are as significant as the division's leadership and teachers would like them to be. The standards for this division are high ones and to take the next step in a continuous improvement process, support systems must be in place at every level. The system must achieve total alignment in all its efforts if the next performance level is to be achieved. The division needs to take further initiatives to support the efforts of principals, teachers, and staff to improve student learning at every level.

## **RECOMMENDATION**

### **Recommendation 5-6:**

**Research the Baldrige Model for Continuous Improvement to ascertain key components of a data-driven, research based school division process focused on achieving results.**

The Baldrige Model for Continuous Improvement is a proven model for achieving substantial and sustained results. The criteria used to achieve these results, philosophical basis for doing so, and results oriented approach are a good fit for this division. MGT is not recommending that IWCS adopt this model. The recommendation is that key instructional leaders understand how this model works. The division already uses many of the concepts contained in this model. A thorough understanding will help the division leadership by placing their present initiatives into a larger context and providing a vocabulary necessary to communicate clearly division goals. For example, it appears inevitable that the division will soon have conversations about a "Balanced Score Card." At the board level, it would be helpful to the overall goals of the buildings that have been articulated in the School Improvement Plans to have conversations about a "Dashboard" and/or about valid customer requirements.

Regardless of what components the division chooses to use or discard from the Baldrige Model, research into this model will be a productive one. Often, IWCS school personnel struggle for the vocabulary to express concepts. Baldrige should be able to provide that vocabulary. If the division's leadership, faculty, staff, and community were willing to settle for a lesser standard, this research would be unimportant. However, the standards they have set for themselves require additional efforts to align all its efforts towards achieving measurable successes. Additional information concerning the Baldrige Model for Continuous Improvement can be found on the following web site:  
[www.quality.nist.gov](http://www.quality.nist.gov)

## **FISCAL IMPACT**

Implementation of this recommendation can be accomplished with existing resources.

## **FINDING**

Elementary teachers reported that the new report card for the system is cumbersome and difficult to use. Parents are complaining to teachers that they are confused by the new reporting system. The report card is a large document, two pages long and filled

with information directly related to the Standards of Learning. Furthermore, the document contains information on student work ethics.

## **RECOMMENDATION**

### **Recommendation 5-7:**

**Eliminate the paper version of the report card by using an electronic grade card for elementary students.**

The secondary schools have already instituted electronic report cards and have reported to MGT consultants that this has been successful. Division leadership is cautious to move the elementary parent report card to an electronic format for fear that the infrastructure cannot support such a move. The Director of Technology reports that he is agreeable to making this happen as quickly as possible and has budgeted additional dollars to improve the infrastructure to accommodate this change. Teachers are supportive of this move and would like to see it happen as expeditiously as possible.

## **FISCAL IMPACT**

The technology department indicated to MGT consultants that money had been budgeted to improve the technology infrastructure for 2006. The department was confident that these changes would allow the deployment of an electronic report card for the elementary schools. Therefore, the implementation of this recommendation can be accomplished with existing resources.

## **FINDING**

The IWCS policy and procedures manual lacks a specific policy and accompanying administrative guidelines for testing protocols resulting in ambiguous testing procedures. In this age of high stakes testing, it is important for boards to establish ethical standards and testing procedures that govern how tests are administered to students. There will always be those who question the validity of test results when those results indicate clear progress. The formal adoption of ethical standards and testing protocols serve as a pre-emptive move to stave off any issues that might arise from testing results.

In order to ensure that standardized test results are not questioned by others, boards across the country are now articulating through formal board action, a professional conduct to be followed when testing students. This alleviates any potential controversy before issues arise. Having the right system in place before it is needed will allow for the proper response to this issue.

## **RECOMMENDATION**

### **Recommendation 5-8:**

**Adopt a board policy and administrative guideline that establishes testing protocols for all national and state tests.**

The Virginia Schools Boards Association provides a board policy service to school divisions in the Commonwealth which could be utilized to develop such a policy.

## **FISCAL IMPACT**

Implementation of this recommendation can be accomplished with existing division resources and through the Virginia School Boards Association.

### **5.4 School Improvement**

At a presentation to the Virginia School Board's Association, Isle of Wight County Schools presented their school improvement model to conference participants. The presentation was centered on the research of Jim Collins' book, Good to Great. The presenters used the following quote from Collins:

*"Greatness is not a function of circumstance. Greatness is a matter of conscious choice. Goodness is the enemy of greatness."*

The division's school improvement initiative is based on this premise and is producing school improvement documents that are guiding building teams to set a vision and develop a road map for achieving the vision. During interviews with MGT consultants at the site visit, staff reported that these plans are an important part of the school's improvement strategies and are making a difference.

## **FINDING**

The Commonwealth of Virginia provides a basic framework to school divisions that dictates the format for school improvement plans. The plans must be based on a six-step model which was shared with the building administrators in advance. Training on the process was provided by the Assistant Superintendent for Instructional Services during the administrative work week, along with an individual Data Disaggregator diskette provided by the Coordinator of Instruction for Testing. A memo was provided that detailed each of the specific steps. A due date was set for October 17, 2005.

In a memo presented to the administrative team, the specific six components for the school improvement plan were provided. They include:

- I. Data Capture and Reporting
- II. Data Analysis
- III. Goal/Objective Setting
- IV. Action Step Development
- V. Monitoring and Adjusting
- VI. Communicating the Plan

The division provided sample school improvement plans for 2005-2006 to MGT consultants from schools within the division that demonstrated adherence to the format. The format used contained these elements:

- Measurable objectives to the target areas;



- Strategies for meeting the objectives;
- Specific goal areas;
- Resources needed
- Data sets for each of the major areas;
- Person (s) responsible, and
- Projected timeframe.

The plans submitted for review all contained these elements. One plan contained a specific mission statement; the others did not.

School improvement team assignments at the division level were determined. A team of three individuals with a designated chair was given the responsibility of reviewing the plans prior to adoption. Samples of written feedback given to School Improvement Teams were provided to the MGT site team.

Attendance is an area that is addressed in all the school improvement plans submitted to MGT consultants. Building principals would ask teachers for weekly reports on each classroom's attendance rate. This would be compiled into a building attendance rate, benchmarked against a pre-determined standard. A more in-depth analysis of the attendance data ("drill downs") would be conducted to determine the reasons for absences. Strategies would then be adjusted based on specific information derived from the drill down of the data. This information would then be reported to the Executive Director for Teaching and Learning during the S2S meeting for that month. This is a simple process that yields significant results.

#### **COMMENDATION**

**The division is to be commended for using a process that gives specific direction to the building school improvement teams.**

#### **RECOMMENDATION**

##### **Recommendation 5-9:**

**Conduct monthly "System to System" meetings with building principals to determine progress being made based on the data sets for each major area of improvement.**

System to System (S2S) conversations conducted by the Executive Director for Teaching and Learning with building principals is an important step in monitoring results. To move from a good to a great organization, this step is necessary. Many of the divisions who have adopted the Baldrige Model for Continuous Improvement use this strategy effectively. The process will allow for the examination of the critical success indicators as "leading indicators" rather than wait until the results cannot be changed. S2S is deployed in the following manner.

S2S meetings are monthly meetings between the Executive Director for Teaching and Learning and each building principal. A yearly calendar of meetings for S2S is published in advance of the school year. The specific monthly topics for discussion are then determined, based on the school improvement plans. "Evidences of Success" have already been articulated in IWCS plans. The yearly calendar, with a pre-determined

agenda, facilitates each building principal's efforts to monitor results against the stated outcomes. This will also have the added benefit of giving building principals the opportunity to discuss those measurements with his/her school improvement team in advance of the monthly meeting. This ripple effect causes schools to focus its energies on the right measurements at exactly the right time.

The standard set by the division was to move from "good to great." Strategies such as this one will facilitate that journey. The return on investment will far outweigh the investment in time. It's a technique that really can make a difference.

## **FISCAL IMPACT**

Implementation of this recommendation can be accomplished with existing resources

### **5.5 Instructional Professional Development**

Professional development is the key to implementing key programs and initiatives aimed at achieving high academic success for every student. The implementation of a new strategy must be followed by deployment of the initiative on a divisionwide basis by those most directly responsible for its success. Staff development makes the difference between success or failure.

Joyce and Showers have long been recognized as leaders in the field of Instructional Professional Development. They have published their key findings in numerous articles and publications (Joyce & Showers, 1998), concluding the following.

Professional training models must contain these components:

- Allow people to learn how to be more effective learners;
- Contain the component of developing knowledge to understand the concepts behind a skill or strategy;
- Modeling of the skill; and
- Practice of skill through peer coaching

## **FINDING**

At every level of the site visit, frustration was expressed pertaining to staff development. Central office leadership, principals, teachers, and aides all expressed a desire to see IWCS's instructional professional development model improved. Exhibit 5-16 demonstrates the level of frustration. On the question pertaining to teacher and staff development opportunities, 50 percent of teachers and 47 percent of principals rated these opportunities as Fair/Poor. On the question pertaining to staff development opportunities for principals, 59 percent of principals responded with a Fair/Poor rating.

**EXHIBIT 5-16  
COMPARISON SURVEY RESPONSES  
WITHIN ISLE OF WIGHT COUNTY SCHOOL DIVISION**

STAFF DEVELOPMENT SURVEY QUESTIONS	(%G + E) / (%F + P) <sup>1</sup>		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
Staff development opportunities provided by Isle of Wight county School Division for teachers.	58/37	53/47	48/50
Staff development opportunities provided by Isle of Wight County School Division for school administrators.	53/42	41/59	24/20

Source: Isle of Wight County Schools, MGT Survey Results, 2006.

The division has an additional ten days of teacher contract time prior to the start of each school year devoted to professional growth. Recently, the decision was made to use only two of these days for division training and then assign the remainder of the days to the buildings. This pattern will be repeated for the 2006-07 school year. Principals were given total authority to make staff development decisions for his/her building. At the division level a Staff Development Committee was created to solicit teacher input on division staff development decisions. Teachers reported that this committee was ineffective.

**RECOMMENDATIONS**

**Recommendation 5-10**

**Formalize the division’s approach to instructional professional development related to curriculum with the division resuming control over all staff development offerings.**

The time to change the delivery model for professional development is now. Comments made about the present system included, “pointless,” “ineffective,” “poorly organized,” and “redundant.” Universally, the faculty and staff of IWCS are ready for a change. It is imperative that these activities all be focused on common themes, decided by a broad-based group of people who understand exactly what the needs are and how best to address them. The Executive Director for Teaching and Learning must exert a strong leadership role in this process if the division is to increase its pace towards achieving high academic success for all students. Building principals should not be given authority to select these opportunities. The division should be encouraged to explore joint professional development opportunities with surrounding school divisions in order to reduce costs.

**FISCAL IMPACT**

Implementation of this recommendation can be accomplished with existing resources.

## **RECOMMENDATION**

### **Recommendation 5-11:**

**Engage the Staff Development Committee in meaningful conversations about the staff development offerings.**

The Staff Development Committee, under the proposed leadership of the Executive Director for Teaching and Learning, must base their new model on research and best practice. Successful staff development programs abound across the country; research for the model that best meets professional development needs is available. The collective body of work by Joyce and Showers has proven to be an effective approach to delivering effective training and growth opportunities and should be reviewed. The committee needs to develop criteria for which programs will be approved and the reasons for doing so. These criteria must be communicated to all employees within the division to achieve an understanding of the rationale for staff development decisions. This should be one of the primary functions of the committee. Further, support staff must be included in these opportunities for professional growth. Creative ways to engage them can be explored without affecting overtime pay or violating the Fair Wage and Labor standards.

## **FISCAL IMPACT**

Implementation of this recommendation can be accomplished with existing resources.

## **6.0 FACILITY USE AND MANAGEMENT**

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## **6.0 FACILITY USE AND MANAGEMENT**

This chapter presents the results of the review of facility use and management and related policies and procedures in Isle of Wight County Schools (IWCS). The four sections in this chapter are:

- 6.1 Organizational Structure
- 6.2 Capital Planning and Construction
- 6.3 Maintenance, Operations, and Custodial Services
- 6.4 Energy Management

A comprehensive facilities management program coordinates all the physical resources of a school system to ensure the most efficient and economical operation. The administration of the program must effectively integrate facilities planning with the other aspects of institutional planning including identified instructional priorities. To be effective, facility planners and managers need to be involved in the school system's strategic planning activities.

Well-planned facilities are based on the educational program and on accurate enrollment projections. The design process should have input from all stakeholders, including administrators, teachers, security specialists, parents, students and the maintenance and operations staff. The maintenance and operation of the facilities must be accomplished in an efficient and effective manner in order to provide a safe and secure environment that supports the educational program, and efficiently utilizes the school system's resource, efficiencies and economy of management and operation are critical to ensuring that resources for direct instruction are maximized.

### **CHAPTER SUMMARY**

Facilities management falls primarily under the auspice of the Assistant Superintendent for Administration and Educational Services; however, the superintendent is actively engaged in assisting with new construction and major renovation issues.

Contained within this chapter are commendations for actions and activity including the following:

- Isle of Wight Administration and School Board are jointly developing and implementing comprehensive maintenance and facilities sections of the Six-Year Strategic Plan;
- Isle of Wight County Schools principals and custodial personnel maintain clean and attractive facilities and grounds; and
- custodial staffing ratios per square feet of buildings are in compliance with the American School and University standards.

Recommendations contained in this chapter are focused on facilities planning and development, custodial services, and energy management program development. Among these recommendations are the following key suggestions that should assist the

superintendent and School Board as they continue to consider all aspects of improving the school division:

- reorganize the Administrative and Educational Services Department to include responsibility for custodial services, fully implementing the organizational recommendations provided in Chapter 2.0 of this report;
- develop and implement an orientation program for new custodial and maintenance personnel and ensure that an on-going training program is provided;
- conduct a detailed facilities conditions' study, identify facility replacement and expansion needs, and update the Capital Improvement Plan (CIP) accordingly;
- develop comprehensive student enrollment projections for 2007-08 through 2011-12 and incorporate the projections in the CIP;
- the division should develop and implement a minor maintenance and preventative maintenance program; and
- review, adopt, and implement a divisionwide energy management program including incorporating energy management information and assignments in the new employee orientation program.

### **6.1 Organizational Structure**

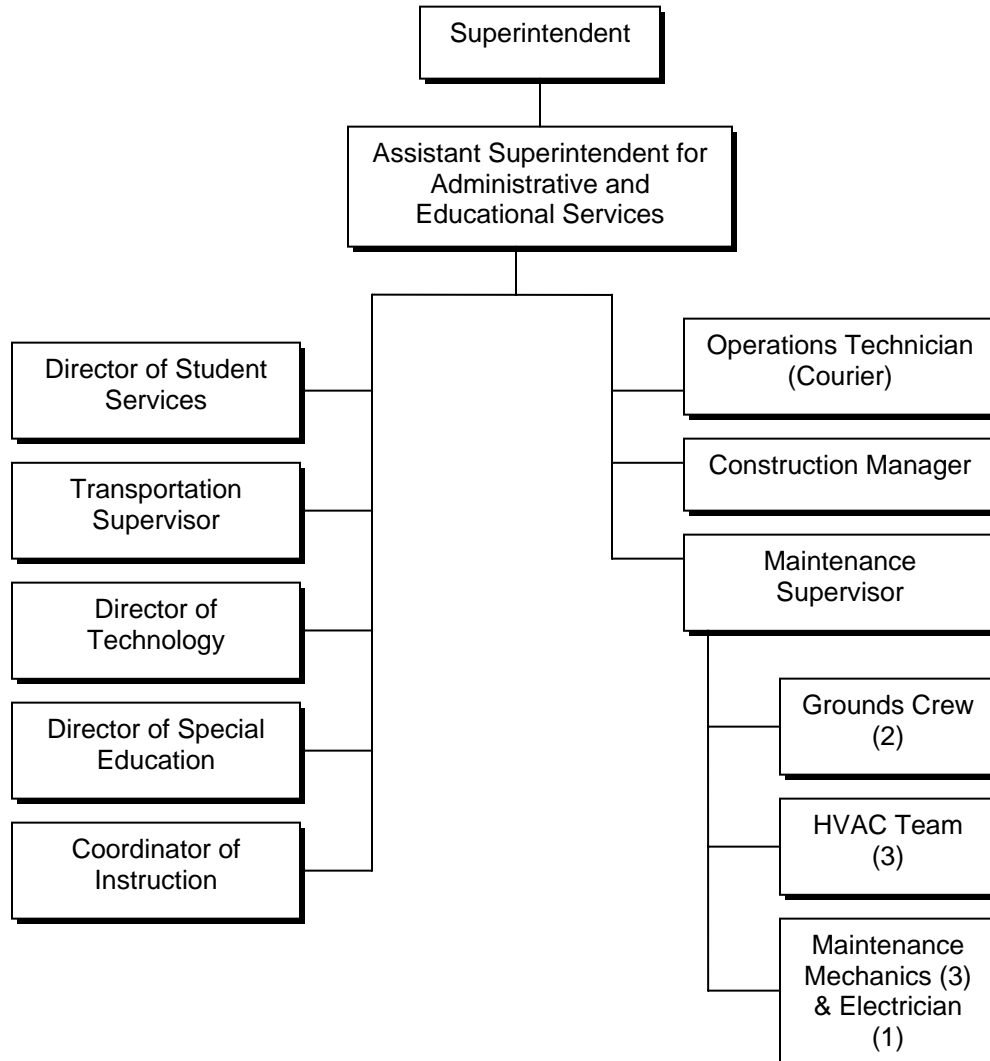
Facilities use and management is organized within the Administrative and Educational Services Department and is led by an assistant superintendent. The Administrative and Educational Services Department is organized into six departments or units with one related to facilities use and management. As shown in Exhibit 6-1, direct report facilities personnel include three positions with a total of 12 facilities related employees. The three employees are:

- operations technician (courier);
- construction manager; and
- maintenance supervisor.

### **FINDING**

The Assistant Superintendent for Administrative and Educational Services, in addition to the three direct reports in the facilities section of his department has five other major direct reports representing five areas of the divisions (see Exhibit 6-1). Of the five areas, four are primarily unrelated to the auxiliary services mission of the department and, instead, are direct instruction support services. Notably missing from the assigned responsibilities are the custodial services rendered schools and other division facilities.

**EXHIBIT 6-1  
ADMINISTRATIVE AND EDUCATIONAL SERVICES  
ORGANIZATIONAL CHART  
MARCH 2006**



Source: Prepared by MGT of America from IWCS records, 2006.

Principals are assigned primary responsibility for employment, placement, and supervision of custodial personnel. Interviews with principals reveal that some are satisfied with the present arrangement while others believe it could be organized to permit the principal to more fully focus on instructional-related issues.

An examination of the custodial services situation reveals the following:

- principals are responsible for the employment, placement (scheduling), and evaluation of custodial personnel;
- principals provide some training;



- principals or designees order supplies from the central office maintenance location that houses an inadequate storage facility;
- most custodial supplies are delivered by the operations person; however, sometimes supplies are inadequate to meet demand and the principals must locate needed goods; and
- facilities are not routinely inspected by central office personnel to ensure a standard of cleanliness and sanitation among all schools.

Recommendations in Chapter 2.0 propose a reorganization of the central office services and recommends realignment of services between the two assistant superintendent positions.

## **RECOMMENDATION**

### **Recommendation 6-1:**

**Reorganize the Administrative and Educational Services Department to include responsibility for custodial services, fully implementing the organizational recommendations located in Chapter 2.0 of this report.**

Implementation of this recommendation should result in the redefining of principals' custodial services responsibilities, assignment of primary custodial services coordination and oversight to the Administrative and Educational Services Department, and the employment of a supervisor of custodial and grounds services responsible for both custodial and grounds services.

The proposed supervisor should be assigned the following responsibilities:

- employment and placement of custodial personnel after consulting with individual principals;
- training of all custodial and other assigned personnel;
- performance review of all assigned personnel;
- ensure that all appropriate supplies and materials are available and dispatched to faculties as needed;
- assume responsibility for the grounds crews and assisting with the moving of furniture and other equipment as needed; and
- coordinate, in collaboration with the Supervisor of Maintenance, energy management and preventative maintenance programs (see Recommendation 6-10).

This recommendation should be implemented as soon as funds are made available for the proposed position and no later than the 2007-08 school year.

**FISCAL IMPACT**

This recommendation could cost the division a total of \$58,425 per year. This is based on supervisory pay grade 16 of \$33,926 to 50,380 midpoint of \$42,900 plus 25 percent fringe benefits of \$10,725 and travel allowance of \$400 per month (\$4,800 per year) for a grand total cost of \$58,425. The four-year cost would be \$233,700.

The cost to the division could be reduced if a shared services agreement with the Board of Supervisors was developed and implemented, assigning coordination of all county custodial services to the division. However, the saving or cost offset cannot be calculated with out data related to the cost of all county custodial, grounds, and energy management services, which was not available for this review.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Employee a Supervisor of Custodial and Grounds Services	\$0	(\$53,625)	(\$53,625)	(\$53,625)	(\$53,625)
Travel Expenses for Coordinator	\$0	(4,800)	(4,800)	(4,800)	(4,800)
<b>Total</b>	<b>\$0</b>	<b>(\$58,425)</b>	<b>(\$58,425)</b>	<b>(\$58,425)</b>	<b>(\$58,425)</b>

**FINDING**

The Isle of Wight School Board does not have a policy or procedures for the selection of school sites.

While IWCS has selected school sites in past years, it has been a very infrequent occurrence and there appeared to be no need for such a policy or related procedures. However, if student enrollment begins to soar and the planning for new schools becomes an issue within each five-year period, such a policy and procedures could be very useful and prevent misunderstandings.

School systems experiencing growth have typically adopted policies to guide the selection of school sites.

**RECOMMENDATION**

**Recommendation 6-2:**

**Develop a policy and related procedures for new school site selection.**

Implementation of this recommendation should constitute a major action designed to prevent misunderstandings in the community over the location of new schools when student enrollment growth dictates such construction.

Exhibit 6-2 presents such a policy that may be used to guide the development of this recommended policy.

## **FISCAL IMPACT**

This recommendation can be accomplished at no additional cost and with existing resources.

## **FINDING**

There is no institutionalized orientation program for new custodial and maintenance personnel. Training for custodial personnel, when it occurs, is provided primarily by supply vendors; however, training for maintenance personnel is better organized.

Consequently, principals must provide training for custodial personnel as they deem needed and no overall staff development program tied to identified division needs has been developed and implemented.

Maintenance personnel training currently involves the following:

- HVAC mechanics are scheduled for training with Trane as programs become available;
- all Isle of Wight County Schools HVAC have received training in the new Trane Summit DDC system;
- one maintenance department staff member is receiving training in project management and two are scheduled for a class in *Strengthening Your People Skills in the Workplace*;
- two staff members have completed classes in pesticide management and other seminars provided by the Virginia Horticultural Association; and
- all maintenance staff are encouraged to attend classes that will increase skills including those in areas of management.

## **RECOMMENDATION**

### **Recommendation 6-3:**

**Develop and implement an orientation program for new custodial and maintenance personnel and ensure that an on-going training program is provided.**

The implementation of this recommendation should result in a carefully developed orientation program for all newly employed custodial and maintenance personnel. Such a program should focus on employee benefits, safety requirements, various general work rules and requirements include payroll, workers' compensation, uniforms, department on and off school campuses, use of equipment, vehicles, and tools, and their role in energy management and conservation of resources.

On-going training should be developed and provided to the custodial staff and should include the use of new materials, products, and chemicals, updated safety information, and other useful information

**EXHIBIT 6-2  
SCHOOL SITE SELECTION POLICY**

**SCHOOL SITE SELECTION**

The Superintendent is authorized to establish procedures for the location and acquisition of sites for the construction of new schools or expansion of existing school sites. Subsequent procedures proposed by the division are to be submitted to the School Board for review, revision, and approval for implementation. The following policy provisions shall govern the establishment of site selection procedures:

- I. Procedures shall ensure the involvement of the community to be served by the proposed school or facility.
- II. Specific considerations shall be given to projected population growth and housing location.
- III. Matters related to safe, cost-effective student transportation from and to the site shall be of primary importance.
- IV. Efforts shall be made to locate sites that are remote from industrial areas, areas known to have a high incidence of crime, and areas adjacent to the sale of alcoholic beverages.
- V. Efforts shall be made to ensure locations appropriate to feeder schools or to schools into which students will matriculate.
- VI. Each site search shall be based upon specific standards developed by the administration and approved by the School Board and designed to address specific issues related to the proposed school or facility (such as grade-level or special program requirements, and others).

**STATUTORY AUTHORITY:**

**LAW(S) IMPLEMENTED:**

**STATE BOARD OF EDUCATION RULE(S):**

**HISTORY:**

**ADOPTED:**

**REVISION DATE(S):**

**FORMERLY:**

Source: Developed by MGT of America, 2006.

## **FISCAL IMPACT**

The cost of this recommendation cannot be determined until an orientation program is developed and ready for implementation. However, most school divisions are able to provide an orientation program to new personnel at little or no cost by using existing personnel and readily available information. Such information would include employee handbooks, procedural documents, and similar matters. Also, vendors of supplies typically can offer assistance at no cost to the division. Consequently, the orientation portion of this recommendation could be accomplished at no additional cost and with existing resources.

Other ongoing training is expected to have a cost. Currently, the division does budget staff training funds that could be used for this purpose. But, the actual cost cannot be determined until training needs are assessed and programs developed to meet the determined assessed needs are identified.

## **6.2 Capital Planning and Construction**

Engaging in planning for facilities represents one of the most important planning activities (other than curriculum and instruction) of a school board and administration. A series of essential activities must be included in this process. Some of these activities are:

- the development of facilities specifications designed to be responsive to the educational needs of the students and related instructional programs;
- designs that permit routine maintenance of equipment and buildings with minimal interruption of ongoing programs;
- accurate student demographic information that assures that new facilities are located in appropriate areas of the school system and are designed to the optimum capacity; and
- a clear understanding of the safety and security needs of the contemporary educational setting.

## **FINDING**

Policy AF, *Six-Year Plan*, requires the development of a long-range comprehensive plan including facilities and plant maintenance. Additionally, policies FA, *Facilities Development*, FB, *Facilities Planning*, FEA, *Educational Facilities Specifications*, FEG, *Supervision of Construction*, and FECBA, *Energy- Conserving Construction* provide essential guidance to support comprehensive planning.

The *Strategic Plan for 2004-2010* contains both maintenance and facilities sections. In March 2006, the superintendent reported that the Maintenance Section (VII) 13 strategies are on schedule for completion and, similarly, Section X, Facilities, with 15 strategies, also is on schedule.

The overall maintenance and facilities sections were updated in October 2005.

## **COMMENDATION**

**Isle of Wight Administration and School Board are commended for developing and implementing comprehensive maintenance and facilities sections of the Six-Year Strategic Plan.**

## **FINDING**

The FY 2007-11 Capital Improvement Plan (CIP) reports needs through FY 2012-16 including a new elementary school for 2013-14 and a series of facilities improvements including an estimated \$5.1 million for Windsor Middle School.

The CIP projects a total proposed need of \$6.9 million through 2007-11 and an additional \$31.4 million for the period 2011-16.

MGT consultants believe that a careful examination of Windsor Middle School would reveal that the useful life of this facility is nearly realized. Previous floor, ceiling, wall, lighting, and other renovations have simply extended the life of a building that was poorly designed and built. The expenditure of large quantity of future funds will not materially improve the quality of the facility nor contribute to modifying classroom spaces to accommodate new and changing technologies.

Additionally, interviews with personnel and further on-site observations suggest that the CIP should specifically address other needs including the expansion of Windsor High School (perhaps an addition of updated science suites), create fire rated records storage, and classroom additions at Smithfield High School and Carrollton Elementary School.

## **RECOMMENDATIONS**

### **Recommendation 6-4:**

**Conduct a detailed facilities' condition study, identify facility replacement and expansion needs, and update the CIP accordingly.**

Implementation of this proposed recommendation should result in a detailed evaluation of all school facilities, revision of the CIP, and a clear understanding of all facility needs in IWCS. Final recommendations should also be based on information developed as a result of implementation of Recommendation 6-5.

The School Board should direct the superintendent and staff to complete the proposed study and incorporate the findings into the division's CIP.

## **FISCAL IMPACT**

This recommendation could be accomplished by existing division personnel.

**FINDING**

The Capital Improvement Plan (CIP) addresses projected school construction and remodeling needs including a need for an additional north county elementary school in 2013-14, but does not contain updated enrollment projections.

An on-site review by MGT consultants of facilities suggests that significant future needs exist. However, the only enrollment projection figures available from the facilities department were compiled by Planning Advocates, Inc. of Delaware, Ohio in December 2001 and for the period 2001-2006.

Exhibit 6-3 shows those projections and actual enrollment of the period 2001-06.

**EXHIBIT 6-3  
ISLE OF WIGHT COUNTY SCHOOLS  
PROJECTED AND ACTUAL STUDENT ENROLLMENT  
2001-06 SCHOOL YEARS**

<b>ENROLLMENT</b>	<b>2001-02</b>	<b>2002-03</b>	<b>2003-04</b>	<b>2004-05</b>	<b>2005-06</b>
Projected	5,034	5,043	5,059	5,125	5,259
Actual	4,980	5,014	5,013	5,049	5,231

Source: IWCS Administrative and Instructional Services, 2006.

Exhibit 6-4 shows a straight-line 3.8 percent annual student growth projection based on the increased enrollment of 2004-05 to 2005-06 shown in Exhibit 6-3.

As can be seen, base on an annual 3.8 percent growth rate IWCS could expect to add an estimated 884 new students with enrollment growing to a projected 6,324.

**EXHIBIT 6-4  
ISLE OF WIGHT COUNTY SCHOOLS  
PROJECTED ENROLLMENT  
2006-11 SCHOOL YEARS**

<b>ENROLLMENT</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Projected Enrollment based on 3.8 percent growth.	5,440	5,646	5,870	6,093	6,324

Source: Created by MGT of America, 2006.

The problem with this technique is that it does not contain factors based on changing population demographics, north county population growth, and other data that MGT consultants believe will inflate the projections. As a consequence, the flat percent projection techniques may be seriously flawed and the division is in need of an independent study.

## **RECOMMENDATION**

### **Recommendation 6-5:**

#### **Develop comprehensive student enrollment projections for 2007-08 through 2011-12 and incorporate the projections in the CIP.**

Implementation of this recommendation should result in developing student enrollment projections based on multiple factors including live birth rates, student mobility data, population egress, building permits, and other data. The projections should be developed for each grade level and applied both divisionwide as well as school-by-school.

An RFP should be developed and sent to potential service providers upon the receipt and acceptance of this recommendation.

Assuming that the projection work can be contracted and completed by spring 2007, the superintendent and School Board should develop an updated CIP by June 2007.

## **FISCAL IMPACT**

The cost of the enrollment projections work cannot be determined until the responses to the RFP are received and a contract is awarded.

## **FINDING**

MGT consultants were unable to identify policies or written administrative procedures regulating change orders. Interviews with Isle of Wight County Schools and personnel reflected that change order procedures are really a matter of past practice.

When a situation arises that reduces or increases the project cost or scope of work, a changes order is prepared by construction management personnel. The construction management representative, architect, and administration must authorize change orders up to \$50,000 without prior Isle of Wight County Schools Board of Commissioner's approval since the Board has previously set a contingency budget for each project. Should the order be between \$50,000 and \$100,000 (as reported by personnel interviewed), then approval must be obtained from the school system executive administration, but again without Board of Commissioner's approval unless the contingency budget allocation has been exceeded. Change orders exceeding \$100,000 must receive prior approval from the Board of Commissioners.

An examination of one change order showed a receipt date in Facilities Planning of September 19, 2002 with architect approval September 9<sup>th</sup>, contractor approval September 18<sup>th</sup>, and administration approval on October 2<sup>nd</sup>. A review of other change orders showed construction changes that appeared to have been made prior to approval. The MGT consultants recognize that this situation will occur on occasion, but question the practice of bundling numerous and sometimes unrelated activities within a single change order.



## **RECOMMENDATION**

### **Recommendation 6-6:**

#### **Develop and adopt policy and administrative procedures governing construction change orders.**

Exhibit 6-5, Sample Construction Change Order Policy, contains provisions often incorporated in Board policy. This sample places emphasis upon the following conditions:

- establishes an administratively-approved cap of \$25,000 on each change order submitted subsequent to prior approval contract amount;
- prohibits splitting of change orders to avoid the administrative dollar limit;
- provides that only the superintendent or his administrative designee may approve change orders administratively;
- requires that copies of change orders be submitted to the School Board on a timely basis; and
- does not provide for contingency budget provisions against which change orders may be drawn.

The division reports that the conditions reflected in MGT's proposed change order are actually being followed, yet documentation was not provided for this process.

The implementation of this recommendation should result in institutionalizing the process so that misunderstandings will not occur and ensure effective School Board administrative control over construction change orders. This recommendation should result in provisions that minimize opportunities for abuse of change orders.

## **FISCAL IMPACT**

The implementation of this recommendation can be accomplished with existing resources and at no additional cost to the division.

**EXHIBIT 6-5  
SAMPLE  
CONSTRUCTION CHANGE ORDER POLICY**

The superintendent or administrative designee is authorized to approve construction change orders which will not increase the contract amount more than \$25,000 over the original contract amount or the last contract amount (increase or decrease) approved by the Board of Commissioners and recorded in the board's minutes.

The following provisions will be included:

- all requested change orders must be in writing and must be approved in writing before the work is done;
- requested change orders concerning the same subject shall not be split in the event that the sum total of the initial requested change order increases the contract amount by more than \$25,000;
- under no circumstances shall the construction management firm or personnel approve construction change orders; and
- copies of all approved change orders shall be provided to the Board of Commissioners at its first regular or special meeting following the approval date of the change order.

Source: Created by MGT of America, 2006.

**6.3 Maintenance, Operations, and Custodial Services**

The proper maintenance and custodial/grounds services of facilities is critical to ensuring support for an effective instructional program. Research has shown that appropriate heating and cooling levels, building and room appearances, condition of rest rooms and other facilities, as well as safety concerns, all impact how students and faculty/staff are able to carry out their respective responsibilities. Ineffective or inadequate maintenance and cleaning provisions have proven to lead to increased costs of facility operations by shortening the useful life span of equipment and buildings.

Many school systems have adopted rigorous preventive maintenance programs and maintain a record of the performance of equipment and the costs of regular maintenance against which they measure the effectiveness of programs.

**FINDING**

MGT consultants visited all Isle of Wight County schools and other facilities. Without exception grounds were well kept and grass areas mowed, floors were clean and appropriately finished, and there was clear evidence of efforts to minimize graffiti and other signs of vandalism. Restrooms were sanitized, founts clean, and there was evidence of annual cleaning of hard-to-reach areas.

When visited during the evening work hours, custodial personnel were courteous and helpful to the MGT consultants and readily made all closets, storage areas, and classroom available for inspection.

### **COMMENDATION**

**Isle of Wight County Schools principals and custodial personnel are commended for maintaining clean and attractive facilities and grounds.**

### **FINDING**

The Administrative and Educational Services Department prepares custodial staffing recommendations based upon a number of criteria including:

- square footage of facility;
- number of permanent classrooms;
- cafeteria size;
- existence of gymnasium and/or other multi-purpose areas;
- library or media center space and configuration;
- restrooms; and
- other considerations affecting custodial labor requirements.

Exhibit 6-6, Isle of Wight County Schools Custodial Worker Per Facility, shows that:

- custodial employees are employed for either 12 months or ten months of the year, and either eight hours or five hours daily;
- twenty-nine custodial employees are eight-hour, 12-month employees, while 14 are eight hour, ten-month employees;
- one employee is a five-hour, 12-month employee, while four are five-hour, ten-month employees; and
- a total of 48 custodial positions staff all Isle of Wight County Schools.

American School and University standards are based on 21,520 square feet to each custodial full-time equivalent (FTE). While IWCS staffed with 48 custodial positions, 16 are less than full-time positions.

IWCS compared staffing with the American School and University standards for assigning custodians to facilities. Based on that review and MGT consultants' activity that verified the results, consultants believe that the April 2004 data reporting that, by American School and University standards, IWCS are overstaffed by 5.5 FTE is in error and the divisions is actually fully compliant because they employ 16 positions for less than full-time status.

### **COMMENDATION**

**IWCS is commended for custodial staffing ratios per square feet of buildings that are in compliance with the American School and University standards.**

**EXHIBIT 6-6  
ISLE OF WIGHT COUNTY SCHOOLS  
CUSTODIAL WORKERS PER FACILITY  
MARCH 2006**

<b>FACILITY</b>	<b>SQUARE FOOTAGE</b>	<b>12 MONTH (FULL-TIME)</b>	<b>12 MONTH (PART-TIME)</b>	<b>10 MONTH (FULL-TIME)</b>	<b>10 MONTH (PART-TIME)</b>
Carrollton Elementary	107,125	3	0	2	0
Carrsville Elementary	42,375	2	0	0	0
Hardy Elementary	68,520	2	0	0	2
Westside Elementary	117,531	3	0	2	1
Windsor Elementary	86,736	4	0	1	1
Smithfield Middle	160,000	3	0	3	0
Windsor Middle	52,668	3	1	0	0
Smithfield High	182,804	4	0	4	0
Windsor High	105,000	5	0	2	0
<b>Totals</b>	<b>922,759</b>	<b>29</b>	<b>1</b>	<b>14</b>	<b>4</b>

Source: Isle of Wight County Schools, 2006.

**FINDING**

Isle of Wight County Schools has no overall divisionwide organized preventative maintenance (PM) or minor maintenance program.

The IWCS Maintenance Office managed by a Maintenance Supervisor, has an HVAC team with three employees, three maintenance mechanics, and one electrician, plus a two-man grounds crew.

Every three months all air filters in active air handlers (or will be during the upcoming season) are replaced. During each filter change the units are given a cursory check for belt wear, bearing wear, and any other unusual conditions. During the summer school break all units have their filters changed, are vacuumed out, and again thoroughly checked for belt, and bearing wear and any other unusual conditions. All discrepancies are corrected at that time.

During the summer break all boilers and hot water pumps are checked. The boilers are examined by a boiler contractor who checks and repairs the refractory as required and then tunes the boiler for efficient operation.

Each spring the chillers, cooling towers and associated pumps are checked. The chillers are checked by a contractor; cooling towers cleaned, and associated pumps checked by in house staff.

However, other systems such as electrical, plumbing, roofing, foundation, windows, doors, locks, etc. are not included in a routine review and servicing.

## **RECOMMENDATION**

### **Recommendation 6-7:**

#### **Develop and implement a minor maintenance and preventative maintenance (PM) program.**

Implementation of a minor maintenance and PM program should reduce the need for regular maintenance personnel to respond to minor repair needs. The PM program should permit the more effective utilization of division-level maintenance personnel by involving trained school-level personnel in preventative measures. Such a program could be established by training and involving other building assigned personnel in specific, routine PM and minor maintenance activity.

Some school divisions have trained selected building custodians in minor maintenance repairs and PM activity such as replacing light ballasts, tighten bolts and screws on furniture, doors, and other equipment, servicing air conditioning and heating equipment filters, and other minor maintenance/PM tasks. The division typically provides each trained employee the necessary tools and a secured location for storing tools and necessary parts and filters. One such school division is Marion County Public Schools, Ocala Florida.

The program should include the identification of up to three pilot schools to be involved; one high school, one middle school, and one elementary school.

The Assistant Superintendent for Administration and Educational Services and Maintenance Supervisor should identify potential custodial and/or maintenance personnel to be trained in specific, routine PM and minor maintenance activity such as replacing light ballasts, tighten bolts and screws on furniture, doors, and other equipment, servicing air conditioning and heating equipment filters, and other related tasks. The division should provide each trained employee the necessary tools and a secured location for storing tools and necessary parts and filters. Specific indicator of program success/value should be included in the proposal and a timeline for program evaluation. Each six months, the Assistant Superintendent for Administration and Educational Services and Maintenance Supervisor should present a progress report to the Superintendent and Cabinet. If at the conclusion of two years the program is evaluated as successful, then it should be expanded to all IWCS schools and facilities.

Exhibit 6-7, A Sample Preventive Maintenance Program, provides suggested information related to tasks that can be incorporated into the program.

## **FISCAL IMPACT**

This recommendation can be implemented at a first-year estimated cost of \$250 for each employee trained and assigned minor maintenance/PM responsibilities. This cost is based on an estimated \$250 for tools. Training can be completed on-the-job by the current maintenance staff.

Purchasing tools for three employees can total \$750. A total cost for tools can be \$2,500 if the program is successful and expanded in the third year to an additional seven schools (seven times \$250 equals \$1,750 plus the original \$750).

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Purchase Preventative Maintenance Tools	\$0	(\$750)	(\$750)	(\$2,500)	(\$2,500)

**EXHIBIT 6-7  
A SAMPLE PREVENTIVE MAINTENANCE PROGRAM**

<b>AREA</b>	<b>COMPONENT</b>	<b>INSPECTION AND REPAIR (3 – 6 MONTH INTERVALS)</b>	<b>INSPECTION AND REPAIR (ANNUALLY)</b>	<b>INSPECTION AND REPAIR (2 – 5 YEAR INTERVALS)</b>	<b>INSPECTION AND REPLACEMENT (7 – 10 YEAR INTERVALS)</b>	<b>INSPECTION AND REPLACEMENT (12 – 15 YEARS)</b>
<b>Exterior</b>	Roof		X	X		X
	Roof Drainage		X	X		
	Windows and Glass		X	X	X	
	Masonry		X	X		
	Foundations		X			X
	Joints and Sealants		X		X	
<b>Equipment</b>	Belts and Filters	X				
	Motors and Fans	X		X		X
	Pipes and Fittings	X			X	
	Ductwork		X		X	
	Electrical Controls		X		X	
	Heating Equipment	X			X	
	Air Conditioning Equipment	X			X	
<b>Interior</b>	Doors and Hardware		X			X
	Wall Finishes		X			X
	Floor Finishes		X		X	
<b>Site</b>	Parking and Walks		X	X		
	Drainage		X	X		
	Landscaping	X			X	
	Play Equipment		X		X	

Source: Developed by MJLM, 2004.

## **FINDING**

MGT consultant interviews with personnel, visits to schools, and other facilities resulted in an earlier commendation for custodial and grounds services. Additionally, MGT, in the previous finding noted that the school system's custodial services were staffed at clearly acceptable levels.

MGT consultants are aware of available technologies that can further increase labor efficiency. A program, Floor Care 2000, shows promise for reducing labor hours in hard floor care in larger spaces. Such spaces might include large cafeterias/cafetoriums, inside corridors, large "mall-like" areas, and other spaces.

## **RECOMMENDATION**

### **Recommendation 6-8:**

**Survey schools and other facilities to determine if additional labor saving technologies could be employed in Isle of Wight County Schools.**

The implementation of this recommendation should result in determining if current new/additional cleaning technologies could benefit Isle of Wight County Schools and result in greater operating efficiencies and further cost reduction.

## **FISCAL IMPACT**

The implementation of this recommendation could result in savings to the school system; however, such savings cannot be projected until the recommended survey is completed and new technology adaptations are made.

## **FINDING**

IWCS does not use a standardized facilities inspection checklist to determine maintenance needs and a status of custodial services.

While on-site visits revealed very good findings regarding school cleanliness and the status of major maintenances needs, there was no evidence that a systematic review of facilities conditions is utilized in IWCS.

Typically, best practices suggest the periodic inspection of school facilities guided by a standardized checklist. This process is usually implemented by a division-level person who then has an understanding of divisionwide levels of service and facility conditions.

## **RECOMMENDATION**

### **Recommendation 6-9:**

**Conduct periodic facility inspections or walk-throughs using a standardized checklist to guide a review of maintenance needs and custodial service levels and safety measures.**

Implementation of this recommendation should result in the development and implementation of a inspection checklist to be used for all schools. Such a check list should cause the following deficiencies to be identified:

- exposed electrical wiring;
- loose stairway handrails;
- broken windows;
- lighting problems;
- damaged ceiling tiles;
- bathroom privacy dividers damaged;
- leaking bathroom pipes and facets;
- improper storage of flammable and caustic materials;
- posting of evacuation routes;
- broken playground equipment; and
- graffiti.

Monthly facilities checklists and schedules can assist the division as a guide for requesting maintenance and improved custodial services and provide information on the quality of services and data that can be used to determine priorities for planning and budget development.

Exhibit 6-8 presents the topical arrangement of a checklist.

**FISCAL IMPACT**

Modifications can be accomplished at no cost and should include specific subsections for floors, lighting, water fountains, restrooms, hallways, ceilings, classrooms including trash receptacles and white or chalk boards, and grounds. Inspections should be scheduled on a monthly basis thus providing routine feedback to custodial staff and the principals as well as information for maintenance services.

**EXHIBIT 6-8  
FACILITIES WALKABOUT CHECKLIST**

FACILITY	ITEM	PROBLEM YES/NO/NA	COMMENT
INTERIOR - General	Electrical Ceiling Flooring Walls Windows Passageways/Halls Stairs Handrails Lighting Doors/doorways Bathrooms Storage Areas Chemicals First Aid Supplies # of Certified CPR Personnel Fire Extinguishers Exit Markings Emergency Lighting Emergency Evacuation Plans		



**EXHIBIT 6-8 (CONTINUED)  
FACILITIES WALKABOUT CHECKLIST**

<b>FACILITY</b>	<b>ITEM</b>	<b>PROBLEM YES/NO/NA</b>	<b>COMMENT</b>
Cafeteria	Electrical Gas Water Refrigeration		
Library	Lighting Electrical		
Science Laboratory	Eyewash Body Wash Master Shut Off – water, electricity & gas Fire Blanket Fire Extinguisher Second Exit		
EXTERIOR	Entryways Lighting Plants/Shrubs Barriers Windows Locks Roof Foundation Out-buildings Trash Areas Lawn Hazards Siding Parking ADA Compliant Sidewalks Condition Playground & Equipment		
CRITICAL DOCUMENTS	Student Code of Conduct Crisis Plan Campus Plan Campus Map		
FACULTY /STUDENT COMMENTS	Concerns How would you make your school safer?		

Source: MGT of America, 2006.

**6.4 Energy Management**

With the advent of increased costs for fuel to provide energy for HVAC systems, transportation vehicles, food service operations, and other related activities, school systems have established numerous and varied policies, procedures, and methods for increasing efficiencies in energy consumption and reducing operating costs. Policies typically describe the board’s specific desire to ensure that maximum resources are available for instructional purposes and charge the administration with developing related procedures.

Procedures generally prescribe a range of measures and activities to be implemented and a specific means for computing the results. Some boards develop incentive systems to reward employees for actions or recommendations that have resulted in substantial savings or improvement in the performance of energy consuming equipment.

Energy management methods range from sophisticated, centralized, computer controls over HVAC systems and other energy consumption devices to simple manual procedures for turning thermostats down and lights off during periods of minimal building or room utilization.

## **FINDING**

The division has not conducted energy audits or developed a divisionwide energy management program.

The concept of performance contracting is being explored by the division to reduce energy costs. The superintendent reports that an RFP has been developed but has not been released due to availability of funds; however the RFP was not available nor mentioned at the time of the on-site review.

School Board policy FECBA, Energy-Conserving Construction, promotes studying energy problems as a high priority and energy conservation measures are to be incorporated in new construction. Several of the division's school buildings have either a Trane or a Siemens building control system and have the capability of controlling HVAC units by time of day scheduling. However, the division does not routinely monitor buildings; rather, they are checked on a random basis or as problems occur. The division has incorporated energy management specifications into new construction plans.

No other proactive energy management strategies are employed. No evidence was identified that shows that each new employee is provided an orientation to a energy management program nor training provided related to assigned responsibilities. The division has not conducted an energy audit. As a result the division does not have base-line or other data for comparison purposes to use in planning and preparing energy management initiatives. Base-line data could easily be assembled from existing and historical utility records and preliminary energy audits are typically a service rendered by public and cooperative utilities companies.

Resources to guide planning for energy conservation are available from a variety of sources. Some of these sources include the following:

[http://www.lbb.state.tx.us/TSPRP/Other/Energy\\_Efficient/Energy\\_Efficient.pdf](http://www.lbb.state.tx.us/TSPRP/Other/Energy_Efficient/Energy_Efficient.pdf), provides ten ways to cut energy costs and a list of effective energy management programs used by Texas school districts can be obtained through this medium.

Energy Education, Inc., an energy management consulting firm, has received significant testimonials from clients. Information related to this company and their client base can be obtained by going to their Web site at

[http://www.energyeducation.com/energy\\_education\\_conservation\\_school\\_funding\\_results](http://www.energyeducation.com/energy_education_conservation_school_funding_results).

An example of another resource is Ponca City School District in Ponca City, Oklahoma. Members of the review team conducted a review of Ponca City School District (PCSD) in 2002. The PCSD, composed of 12 schools enrolling approximately 5,500 students is comparable to IWCS in many respects and operates a two-part plan of energy management. The first part includes controls from Trane and KMC (and could be

procured from other manufacturers). These controls permit monitoring temperatures in rooms, and walk-in freezers and coolers. The controls equipment permits the logging and charting of information, setting of start and stop times, temperature setbacks, temperature ranges, and an emergency stop system. The systems can deliver alarms if a machine fails or a temperature sensor is too high or low. The second part of the energy management program involves a people-based program that was brought to the district by Energy Education, Inc. in 1996. The program is designed to conserve energy in the off-hours. To accomplish this, the program analyzes and monitors lighting, heating, cooling, humidity control, mechanical and appliance systems, and utility cost tracking, analysis and reporting. Savings in energy are accrued through the use of a program that trains personnel to set thermostats back to 55 degrees during times that buildings are unoccupied, and then are returned to normal settings by personnel returning to buildings. Building inspections are routinely made to ensure compliance. The second part of the energy management program is managed by a teacher receiving a monthly stipend and reporting to the Director of Maintenance and Risk Management.

The PCSD has saved approximately \$1.2 million in documented expenditures for energy from 1997 through 2002 through the energy management program. Information presented to their board of education by the energy manager shows savings as averaging approximately \$192,000 per year. The development of this effective energy management program with documented savings in a small school district is particularly noteworthy.

Since the division has some of the systems (Trane and Siemens) used in Ponca City School District, this may be a valuable resource for IWCS.

## **RECOMMENDATION**

### **Recommendation 6-10:**

**Review, adopt, and implement a divisionwide energy management program including incorporating energy management information and assignments in the new employee orientation program.**

The School Board should instruct the superintendent to develop a divisionwide energy management program and present it to the board for review, revision, and approval and subsequent implementation. The program should include the development of base-line data that should easily be assembled from existing and historical utility records. Preliminary energy audits are typically a service rendered by public and cooperative utilities companies. IWCS should develop and incorporate in the employee orientation program energy management information including specific assigned responsibilities. These actions should result in reducing IWCS expenditures for energy and permit the savings to be used to fund instructional and other priorities and focus employees' attention on energy management initiatives and their role in the process.

All of this information should be incorporated into a new employee orientation program that is carried out by the Human Resources Department. New substitute teachers should receive this information through orientation and training sessions. A video tape of the regular orientation program should be prepared for new personnel employed but not involved in any regularly scheduled orientation programs so that whenever a new employee is placed on-the-job they can receive this information. Once the orientation

information is developed each building administrator should be provided a presentation and briefed on their respective responsibilities related to oversight. The final approved energy management plan should be implemented by the maintenance and custodial personnel with progress reports prepared and presented to the superintendent and School Board annually. A teacher with significant interest in the area of energy conservation or another employee should be supplemented to oversee the entire program if Recommendation 6-1 is not fully implemented and a Supervisor of Custodial and Grounds services is not employed.

**FISCAL IMPACT**

If Recommendation 6-1 (including the employment of a custodial supervisor) is fully implemented then there would be no cost associated with this recommendation; only the projected savings of \$47,000 annually.

This fiscal impact is based upon the total annual cost which is estimated to be \$7,400 composed of a \$5,000 supplement plus the travel allowance of \$2,400 (\$200 times 12 months). The five-year cost is estimated at \$37,000. This fiscal impact is based upon providing a \$5,000 annual supplement plus a monthly allowance travel of an estimated \$200 to a division employee for coordinating the energy management program. The preparation of the information video can be accomplished by video taping orientation session(s), editing, and making copies for the Human Resources Department to use and distribute to each school and employment site. Video equipment, tapes, and skilled personnel are already available. Since the division has some control systems in place and other control systems are specified for all new construction/renovation, no cost estimates are included for this portion of the recommendation; however, if the Ponca City School division's experience is used as a guide, IWCS may be expected to develop savings by the 2007–08 school year.

The fiscal impact savings estimates are based upon at least 25 percent of the Ponca School District figures of \$192,000 per year or a conservative \$47,000 annually beginning in 2007–08 for a four-year total net savings of \$158,400 (\$47,000 less \$7,400 equals \$39,600 times four years).

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Employee Supplement for Energy Management Coordination	\$0	(\$5,000)	(\$5,000)	(\$5,000)	(\$5,000)
Travel Expenses for Coordinator	\$0	(2,400)	(2,400)	(2,400)	(2,400)
Estimated Energy Management Savings	\$0	47,000	47,000	47,000	47,000
<b>Total</b>	<b>\$0</b>	<b>\$39,600</b>	<b>\$39,600</b>	<b>\$39,600</b>	<b>\$39,600</b>

## **7.0 TRANSPORTATION**

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## **7.0 TRANSPORTATION**

This chapter presents findings and recommendations relating to transportation use and management in Isle of Wight County Schools (IWCS). The major sections of this chapter are as follows:

- 7.1 Introduction and Division Comparisons
- 7.2 Organization and Staffing
- 7.3 Routing and Scheduling
- 7.4 Vehicle Maintenance
- 7.5 Spare Bus and Bus Replacement Policy
- 7.6 Training and Safety
- 7.7 Planning, Policies, and Procedures

### **CHAPTER SUMMARY**

Isle of Wight County Public Schools Transportation Department is providing reliable student transportation services for its students. It is in compliance with Commonwealth of Virginia policies and procedures and exceeds some functional area expectations. The Transportation Department competently delivers students to and from their destinations and performs satisfactory maintenance on buses, other vehicles and equipment in a responsive manner.

Commendable accomplishments of the Transportation Department are:

- Implementation of a supplemental compensation system that reduces the impact of unavailable substitute drivers and an incentive for drivers to fill vacancies.
- The transportation operations specialists who coordinate and implement in a commendable manner routing and scheduling of student transportation services in Isle of Wight County Schools.

The onsite MGT team found that the division should improve in the areas of its organizational structure, optimizing student bus capacity, maintenance workload for mechanics, automotive service excellence, and driver performance evaluations. Many of the problems in the Isle of Wight County Schools Transportation Department are exacerbated by having bus drivers and aides supervised and controlled by the school principals vice the transportation supervisor. This situation places a supervision burden on principals who are not by training or disposition capable of executing this important function adequately. The following is a brief summary of selected areas needing improvement (other areas are discussed in the subsequent sections of this chapter):

- **Organizational Structure.** The organizational structure shows 80 bus drivers and 13 bus aides in the Transportation Department. Though shown as part of the organizational structure, they in fact work under supervision of school principals. This unsatisfactory arrangement is inefficient and counterproductive to effective transportation operations.

- Failure to optimize student bus capacity. Bus capacity in IWCS is not adequately optimized. A significant contribution to this condition is the lack of time and effort school principals can devote to transportation operations. As educators they seemingly have a significant responsibility to education programs and optimizing bus capacity is an added responsibility that they should not be burdened.
- Automotive Service Excellence (ASE). IWCS pays for mechanics to be tested but does not have an effective training program nor does it require Automotive Service Excellence certification as a condition of employment.
- Spare bus policy. The IWCS spare bus policy should be reviewed and adjusted. Normally, a 10 per cent bus policy is considered adequate for school buses. BCPS spare bus policy of 27 percent is considered excessive and could be reduced.

Isle of Wight County Schools can do more to make its Transportation operations more efficient and cost effective. This chapter presents observations and recommendations that if implemented could result in more efficient and effective transportation operations.

There is no more important transportation responsibility than transporting students safely to and from school, special events and extra-curricular activities. This is a major function accomplished by thousands of school systems throughout the United States of America. It is a tribute to the leaders of our nation's school systems that they provide the safest mode of transport in comparison with any other form of transit (air, surface, water) in the world.

Isle of Wight County Schools, covering 319 square miles, located in the Hampton Roads area of coastal Virginia is one of many public educational systems performing this service. The county's geographic configuration is urban-rural with a slow-paced level of growth and development. During the 2005-06 school year, Isle of Wight County Schools Division (IWCS) provides regular and exclusive school bus service to 4,321 students throughout the county. Among those served are 98 alternative/special students, who, because of their varying disabilities or special needs, require special arrangements to school sites throughout the county and in some instances outside IWCS boundaries.

## **7.1 Introduction and Division Comparisons**

The Code of Virginia, Section 22.1-176 states, in part, "County School Boards may provide transportation of pupils, but nothing herein contained shall be construed as requiring such transportation." IWCS provides bus transportation to and from school within the student's attendance area free of charge. Transportation is also provided between the home or school and other educational facilities operated by IWCS in which the student is enrolled. Additionally, students may be required to meet a bus at an assigned stop a distance up to one-half mile from his/her residence on a state maintained road. IWCS policy stipulates that students will not be required to walk more than two-tenths (.2) of a mile of a designated transportation stop. (This restriction may

not apply when safety issues or dead-end roads with inadequate turnaround areas extend beyond the above stated limits).

Isle of Wight County Schools is substantially in compliance with Virginia’s Department of Education policies and procedures. Overall, IWCS provides efficient student transportation services and performs this responsibility in a safe manner. However, MGT of America found several issues that should be corrected or improved as they relate to the transportation function in IWCS. The recommended improvements outlined in this section will have fiscal impacts and increase efficiency, personnel retention, and operational integrity.

This chapter presents the major findings, commendations, and recommendations for the transportation function in Isle of Wight County Schools. The six major sections in this chapter are:

A survey of IWCS administrators, principals, and teachers, was conducted as part of this efficiency review. They were asked two questions related to transportation. One of these questions asked respondents to rate various parts and functions of the school system, including transportation, and to determine whether the function *needs major improvement, needs some improvement, is adequate, or is outstanding*. In rating transportation in Isle of Wight County Schools, 26 percent of central office administrators stated the transportation function *needs some improvements* and 58 percent state *it needs major improvements*. Conversely, 83 percent of principals and 39 percent of teachers state the transportation function needs improvement and 18 percent of principals and 44 percent of teachers stated it needs major improvements.

Exhibit 7-1 benchmarks these survey ratings against administrators in other school systems across the country. As the exhibit shows, administrators in IWCS rated higher indicating the transportation function needs improvement than administrators in other school systems whereas they have equal percentages on whether the transportation function needs major improvement.

**EXHIBIT 7-1  
TRANSPORTATION COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT ADMINISTRATORS WITH ADMINISTRATORS IN OTHER SYSTEMS**

RESPONDENT GROUP	% INDICATING NEEDS IMPROVEMENT	% INDICATING NEEDS MAJOR IMPROVEMENT
<i>Isle of Wight County Schools Administrators</i>	26%	58%
<i>Administrators in Other Schools Systems</i>	21%	58%

Source: MGT Surveys of School Systems, 2006.

Exhibit 7-2 benchmarks these survey ratings against principals and teachers in other school systems across the country. As the exhibit shows, IWCS principals show 83 percent *indicating adequate* and principals of other school systems rate at 54 percent. The IWCS Principals rate *indicating outstanding* at 18 percent whereas their peer principals rate at 43 percent. Conversely, IWCS teachers rated at 39 percent *indicating adequate* as opposed to 46 percent for teachers in other school systems and rated at 44



percent *indicating outstanding* as opposed to 32 percent for teachers in other school systems.

**EXHIBIT 7-2  
TRANSPORTATION COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT PRINCIPALS AND TEACHERS COMPARED TO  
PRINCIPALS AND TEACHERS IN OTHER SCHOOL SYSTEMS**

RESPONDENT GROUP	% INDICATING ADEQUATE	% INDICATING OUTSTANDING
<i>Isle of Wight County Schools Principals</i>	83%	18%
<i>Principals in Other School Systems</i>	54%	43%
<i>Isle of Wight County Schools Teachers</i>	39%	44%
<i>Teachers in Other School Systems</i>	46%	32%

Source: MGT Surveys of School Systems, 2006.

Throughout this chapter, Isle of Wight County Schools is compared to four school divisions in the Commonwealth of Virginia. They are:

- Culpeper County Public Schools Division, VA
- Gloucester County Public Schools Division, VA
- Prince George County Public Schools Division, VA
- Pulaski County Public Schools Division, VA

To provide some basis for this comparison, a series of exhibits provide data on these selected school divisions and Isle of Wight. The four school divisions selected are relevant in that they are urban-rural and with comparable student populations. Exhibits in this introductory section chapter unless otherwise noted, examine five-year trends, number of students transported, compare regular, exclusive, regular and exclusive, deadhead miles, yearly mileage and total transportation costs. In other sections of this chapter comparison of other variables are accomplished and are so noted at the heading of each exhibit.

School transportation data and information for year 2003-04 is the most recent provided by the Virginia Department of Education for comparisons. More recent data were not available or approved for public release at the time this report was prepared. Therefore, comparative analysis of IWCS with the four school divisions cited above in this introductory section will use five-year reports from 1999-2000 to 2003-04 and other information provided by Department of Education. As indicated earlier, other information including more recent reports or exhibits in this chapter are for the respective year or time and is cited with year identifier at the beginning of the exhibit.

Exhibit 7-3 provides a five-year overview of how many students each school division identified were transported during a five-year period. Virginia's Department of Education reports that 4,586 students were provided daily transportation services in IWCS for the 2003-04 school year. IWCS reports that for this period that it had a student population of 5,167 students. Therefore, student transportation services were provided for 4,586

students of the total enrollment of 5,167 or approximately 89 percent of enrolled students.

Exhibit 7-3 the school division average shows that student riders declined in the comparison divisions in number of student riders from a high of 5,077 in 1999-2000 school year to 4,990 in the 2003-04 school year. The comparison shows that while the peer divisions overall experienced a decline in student riders, IWCS has shown a gradual increase over the five-year period.

**EXHIBIT 7-3  
FIVE-YEAR TOTAL OF STUDENTS TRANSPORTED  
AMONG COMPARISON DIVISIONS  
1999–2000 THROUGH 2003–04 SCHOOL YEARS**

SCHOOL DIVISION	1999-00	2000-01	2001-02	2002-03	2003-04
<b>Isle of Wight County Schools Division VA</b>	<b>4,138</b>	<b>4,214</b>	<b>4,233</b>	<b>4,586</b>	<b>4,586</b>
Culpeper County Schools Division, VA	4,130	4,130	4,221	4,281	4,465
Gloucester County Schools Division, VA	6,712	6,535	6,457	6,346	6,012
Prince George County Schools Division, VA	5,869	5,883	4,807	4,916	5,716
Pulaski County Schools Division, VA	3,597	3,747	3,803	3,793	3,767
<b>SCHOOL DIVISION AVERAGE</b>	<b>5,077</b>	<b>5,074</b>	<b>4,919</b>	<b>4,834</b>	<b>4,990</b>

Source: of Virginia Department of Education, 2006.

\*Note: Numerical entries are totals for students transported morning and afternoon runs.

Exhibit 7-4 below shows that total transportation costs in IWCS increased from \$2,321,747 in the 1999-2000 school year to \$2,537,241 for the 2003-04 school year for a nine percent increase. Conversely, the comparison school division average shows that total transportation costs among that group was \$2,162,464 in the 1999-2000 school year and increased to \$2,870,951 in the 2003-04 school year for a 33 percent increase. The data show that IWCS though having a slight student rider increase as shown in Exhibit 7-3 also had a slight increase in total yearly transportation costs. It should be noted that the comparison to peer divisions is remarkable since it shows that the peer divisions decreased student riders yet had maintained high yearly transportation costs. The data reflect that IWCS is more effective in reducing total transportation costs.

**EXHIBIT 7-4  
TOTAL YEARLY TRANSPORTATION COSTS  
ISLE OF WIGHT COUNTY SCHOOLS DIVISION  
COMPARED TO PEER DIVISIONS  
1999-2000 THROUGH 2003-04 SCHOOL YEARS**

SCHOOL DIVISION	1999-00	2000-01	2001-02	2002-03	2003-04
<b>Isle of Wight County Schools Division VA</b>	<b>\$2,321,747</b>	<b>\$2,076,497</b>	<b>\$2,170,304</b>	<b>\$2,733,766</b>	<b>\$2,537,241</b>
Culpeper County Schools Division, VA	\$1,995,621	\$2,001,119	\$2,123,835	\$2,109,132	\$2,979,699
Gloucester County Schools Division, VA	\$2,942,778	\$3,165,800	\$3,241,671	\$3,516,926	\$4,584,662
Prince George County Schools Division, VA	\$2,216,758	\$2,903,166	\$2,871,674	\$3,234,451	\$3,429,062
Pulaski County Schools Division, VA	\$1,494,700	\$1,650,803	\$1,629,460	\$1,385,951	\$1,490,382
<b>SCHOOL DIVISION AVERAGE</b>	<b>\$2,162,464</b>	<b>\$2,430,222</b>	<b>\$2,466,660</b>	<b>\$2,561,615</b>	<b>\$2,870,951</b>

Source: Virginia Department of Education, 2006.

\*Note: Numerical entries are totals for students transported morning and afternoon runs.

Exhibit 7-5 is designed to capture the number of regular students transported, the number of miles to transport them, cost to transport them, and the cost per mile. The data show that IWCS spends more cost per mile to transport its students when compared to the school division average. However, IWCS is third overall (Culpepper and Pulaski School Divisions are higher in cost per mile) among its peers. In view of circumstances that the school division average for cost per mile is \$1.78 vice \$1.92 for IWCS, the data do not provide any significant observation. There are initiatives and cost savings covered in other sections of this chapter that could have favorable impact to reduce the IWCS cost per mile. In summary, IWCS compares favorably with its peers on cost per mile in providing student transportation services.

**EXHIBIT 7-5  
NUMBER OF REGULAR STUDENTS TRANSPORTED,  
MILES, COST & COST PER MILE  
ISLE OF WIGHT COUNTY SCHOOLS DIVISION  
COMPARED TO PEER DIVISIONS  
2004-05 SCHOOL YEAR**

SCHOOL DIVISION	REGULAR STUDENTS TRANSPORTED	REGULAR MILES	COST	COST PER MILE
<b>Isle of Wight County Schools Division VA</b>	<b>4,486</b>	<b>765,252</b>	<b>\$1,472,376</b>	<b>\$1.92</b>
Culpeper County Schools Division, VA	4,331	605,360	\$1,584,713	\$2.62
Gloucester County Schools Division, VA	6,009	1,313,400	\$2,400,397	\$1.83
Prince George County Schools Division, VA	5,543	1,476,613	\$2,033,224	\$1.38
Pulaski County Schools Division, VA	3,672	569,933	\$1,145,706	\$2.01
<b>SCHOOL DIVISION AVERAGE</b>	<b>4,889</b>	<b>991,326</b>	<b>\$1,791,010</b>	<b>\$1.78</b>

Source: Virginia Department of Education, 2006.

Note: Numerical entries are totals for students transported morning and afternoon runs.

Exhibit 7-6 shows the 2003-04 overview for exclusive/special education students provided transportation services. The data provided by the Commonwealth of Virginia Department of Education are for the 2003-04 school year. It allows for comparison of IWCS with its peer divisions. IWCS transported 100 exclusive or special education students 136,416 miles at a cost of \$2.41 per student. The peer school division average transported 151 students 232,442 miles at a cost per mile of \$2.33.

It should be understood that the cost to transport the exclusive or special education school population is more expensive than regular students. Requirements to include special seating, lift capability on school buses, requirement for school bus aides, and special equipment all contribute to a significant cost per mile for the special education population. School administrators must be mindful of these costs and should enforce where practical transporting exclusive students with the regular student population and taking additional measure to make education more assessable to the exclusive/special student population.

As shown in Exhibit 7-6, the cost to transport a special education or exclusive student in IWCS is \$2.41 as opposed to \$2.33 as shown for the school division average. This cost differential of \$.08 cents under the circumstances is not deemed significant for comparison. In other words, the data do not reflect that IWCS is doing any better or worse than its peer comparisons providing exclusive student transportation services. IWCS compares favorably with its peers in expenditures to transport the exclusive/special education student population.

**EXHIBIT 7-6  
EXCLUSIVE STUDENTS TRANSPORTED IN  
ISLE OF WIGHT COUNTY SCHOOLS DIVISION  
COMPARED TO PEER DIVISIONS  
2003-04 SCHOOL YEAR**

SCHOOL DIVISION	EXCLUSIVE STUDENTS TRANSPORTED	EXCLUSIVE MILES TRAVELED	COST	COST PER MILE
<b>Isle of Wight County Schools Division VA</b>	<b>100</b>	<b>136,416</b>	<b>\$329,339</b>	<b>\$2.41</b>
Culpeper County Schools Division, VA	134	71,820	\$188,011	\$2.62
Gloucester County Schools Division, VA	209	318,360	\$779,474	\$2.45
Prince George County Schools Division, VA	173	430,625	\$719,380	\$1.67
Pulaski County Schools Division, VA	88	108,962	\$283,778	\$2.60
<b>SCHOOL DIVISION AVERAGE</b>	<b>151</b>	<b>232,442</b>	<b>\$492,661</b>	<b>\$2.33</b>

Source: Virginia Department of Education, 2006.

Exhibit 7-7 shows the 2003-04 overview for regular and exclusive/special education students provided transportation services in Isle of Wight County Schools. The data provided by the Commonwealth of Virginia Department of Education is for the 2003-04 school years. It shows that IWCS transported 4,586 regular and exclusive/special education students in 2003-04 school years. A total of 901,167 miles were covered at a cost of \$1,801,715 to transport both categories of students. This was accomplished at a cost per mile of \$1.99.

The peer school division average show 1,159,248 miles covered at an average cost of \$2,100,159. This was accomplished at an average cost per mile of \$1.97 IWCS is transporting its student population at a cost of \$1.99 cost per mile and the peer division average is \$1.97. It is apparent that IWCS is not as efficient overall when compared to the peer division average. The differential of \$0.02 cents is significant and means that IWCS could take more proactive measures to reduce the cost per mile to transit its student population.

**EXHIBIT 7-7  
REGULAR AND EXCLUSIVE STUDENTS TRANSPORTED IN  
ISLE OF WIGHT COUNTY SCHOOLS DIVISION  
COMPARED TO PEER DIVISIONS  
2003-04 SCHOOL YEAR**

SCHOOL DIVISION	REGULAR AND EXCLUSIVE STUDENTS TRANSPORTED	REGULAR AND EXCLUSIVE MILES TRAVELED	COST	COST PER MILE
<b>Isle of Wight County Schools Division VA</b>	4,586	901,167	\$1,801,715	\$1.99
Culpeper County Schools Division, VA	4,465	677,180	\$1,772,724	\$2.61
Gloucester County Schools Division, VA	6,218	1,631,760	\$3,179,871	\$1.95
Prince George County Schools Division, VA	5,716	1,907,238	\$2,317,002	\$1.21
Pulaski County Schools Division, VA	3,760	678,895	\$1,429,484	\$2.10
<b>SCHOOL DIVISION AVERAGE</b>	<b>5,039</b>	<b>1,159,248</b>	<b>\$2,100,159</b>	<b>\$1.97</b>

Source: Virginia Department of Education, 2006.

Exhibit 7-8 shows deadhead miles for IWCS compared to its peers. Deadhead miles are defined as mileage spent moving to begin a route or spent going to pickup a student prior to commencing transportation service. Deadhead miles can be considerable and they add significantly to student transportation costs. As the exhibit shows, IWCS is third highest among its peer comparison group in deadhead miles. Exhibit 7-8 shows that IWCS traveled 220,511 deadhead miles in the 2003-04 school year at a cost of \$400,725. IWCS should reduce the number of deadhead miles and associated costs.

Overall, IWCS compares favorably with the four-peer group school divisions. The IWCS Transportation Unit is transporting more students than the comparison average. The transportation budget and operational efficiencies are in line when comparing how well IWCS performs its' core mission to transport students safely to and from school, special events, and extra-curricular activities with other divisions in the Commonwealth of Virginia.

**EXHIBIT 7-8  
DEADHEAD MILES  
ISLE OF WIGHT COUNTY PUBLIC SCHOOLS DIVISION  
COMPARED TO PEER DIVISIONS  
2003-04 SCHOOL YEAR**

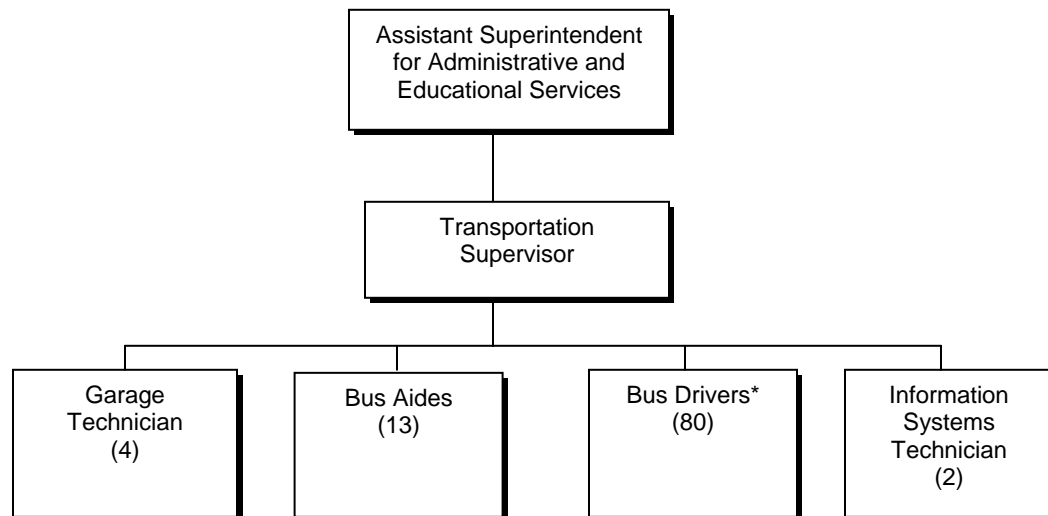
SCHOOL DIVISION	MILES	COST
<b>Isle of Wight County Schools Division VA</b>	220,511	\$400,725
Culpeper County Schools Division, VA	190,540	\$498,796
Gloucester County Schools Division, VA	369,720	\$602,275
Prince George County Schools Division, VA	486,276	\$638,695
Pulaski County Schools Division, VA	72,486	\$137,405
<b>SCHOOL DIVISION AVERAGE</b>	<b>279,755</b>	<b>\$469,293</b>

Source: Virginia Department of Education, 2006.

**7.2 Organization and Staffing**

Exhibit 7-9 reflects the organization as provided by the transportation supervisor prior to the MGT team's onsite review plus the results of interviews with the supervisor and the director of human resources. The transportation supervisor has been in the position for approximately 18-months.

**EXHIBIT 7-9  
ISLE OF WIGHT COUNTY SCHOOLS  
ORGANIZATION CHART FOR TRANSPORTATION  
SCHOOL YEAR 2005-06**



Source: IWCS Human Resources Department, 2006.

Bus drivers include 61 regular bus drivers, 13 special needs drivers and seven drivers for cars/vans. The asterisk for bus drivers reflects a note on the chart provided to the MGT team indicating that the “primary contact” for bus drivers is “the building principal”. This arrangement will be discussed subsequently in this chapter.

As can be seen, the transportation supervisor is essentially the maintenance foreman for the mechanics and manager of transportation operations. Thus it would appear that the transportation supervisor has 99 employees reporting directly to him. The appearance is not the reality in that “building principals” are currently the “primary contact” for drivers. While this would seem to resolve span of control problems, the arrangement is problematic in other significant ways.

The transportation supervisor’s job description includes responsibilities that are common among Transportation Directors/Supervisors, for example:

- supervises the school transportation program;
- supervises and evaluates bus drivers and bus aides;
- supervises activities of workers engaged in repairing, servicing, inspecting, and cleaning vehicles;
- oversees all training and staff development;
- supervises and monitors drug testing program;
- approves transportation for field trips and activity events;
- works collaboratively with school administrators to meet transportation needs; and
- supervises and ensures the securing of substitute bus drivers.

The MGT onsite team conducted a driver and aide focus group, discussed transportation with three principals, interviewed the transportation supervisor and reviewed documents associated with transportation personnel employed by IWCS. There are disconnects in the implementation of several of the functions described above include:

- The transportation supervisor does not evaluate drivers or aides. Review of human resources (HR) personnel files indicate that school principals both evaluate drivers and sign the annual renewal of the driver’s contract; however, a random check of drivers’ files revealed that some had not received an evaluation by the principal since 2003, although the contract was renewed for the current year.
- Bus aides do not have a job description; applicants are interviewed and hired by HR, but there is no formal training for the aides. The three aides in the focus group confirmed that they had no training and the supervisor concurred. However, the transportation supervisor recognized the problem and purchased a 15-hour training package, but the training has yet to be provided.

- The bus driver job description includes requirements to perform pre- and post operations inspections of their vehicle each day to ensure the bus is safe to transport the students. This is a norm in all school transportation systems the MGT team has reviewed. In the discussion with the principals, none indicated that they did not know of this requirement, nor did they have a process for checking whether drivers performed this important function. In the focus group, the drivers indicated that they performed the inspections and submit a monthly report to the school secretary. The drivers did not know what happened to their report after submission. The transportation supervisor indicated that the school secretary sends the report to Transportation Department where it is filed and the MGT team confirmed the records were there.
- IWCS has a desirable practice that each driver should receive a “ride-along” check. The principals and the bus drivers know of this practice. The transportation supervisor knows of this expectation, but asserts that the bus drivers are under control of the schools. Principals in the discussion indicated that they had not yet ensured that the “ride-along” had occurred. The “ride-along” is desirable early in the school year to check the driver’s knowledge of the route, safe driving practices, and verification that student pickup points are safe, etc. During the driver focus group, drivers were asked if they had received a “ride- along” check. Of the 10 drivers present, nine had not received a ride along check as of March this school year; one stated that there had been only one such check in six years; another said only one check in five years; and one said they had not had a check in the past nine years.
- The drivers and aides during the focus group and in their responses to the questionnaire indicate that there are communication problems. Drivers are sometimes told to see the transportation supervisor where they might be told that the issue is a principal or HR matter.
- The transportation supervisor’s job description says the position supervises and ensures the securing of substitute drivers. One principal in the discussion group stated having her own substitute drivers.

## **FINDING**

The arrangement wherein school principals have primary control of bus drivers does not ensure adequate management control for the safe operations of the school transportation system.

While some principals might prefer the control they have over drivers and buses serving their school, as very busy education administrators they do not have the time or expertise to address other aspects of transportation operations management, and the evidence indicates they may not be aware of certain activities that are essential to safe operations.



The poorly defined responsibilities among the nine schools and the transportation supervisor contributes to confusion as to who does what, less than high morale among drivers, communications problems, and reduces the ability of the transportation supervisor to effectively “work collaboratively with school administrators to meet all transportation needs,” which is in his job description as an essential duty.

## **RECOMMENDATION**

### **Recommendation 7-1:**

**Reorganize transportation operations to place buses, drivers, aides and function responsibilities fully under the control of the transportation supervisor.**

IWCS should use the expertise of the current transportation supervisor to oversee all transportation staff. The current arrangement of primary control of bus drivers by principals may be convenient for the schools, but the division needs one position with the responsibility for all of the requirements associated with what could be a well run and safe student transportation system.

There was concern expressed by the transportation supervisor and Assistant Superintendent for Administrative Services how the function of payroll for bus drivers would be handled once it is moved from the schools to the Office of Transportation. Payroll function for bus drivers and bus driver aides is currently done by the respective administrative sections in the schools. The transportation supervisor espouses that he may need additional personnel assigned to the Office of Transportation to handle payroll for bus drivers and bus driver aides. MGT of America is reluctant to add additional personnel for this function to the Office of Transportation because the School Board is not receptive to such a recommendation. More importantly, this function can be supported with slight modification of existing resources.

It was discussed with the transportation supervisor that IWCS could take initiative and implement a program being done in several school divisions in the Commonwealth of Virginia to handle payroll functions in the Office of Transportation. It is suggested that a minimum of six “lead bus drivers” are selected from the bus driver pool. These should be highly selected individuals who would serve as “lead bus drivers” in addition to their bus driving responsibilities. They are to assist the transportation supervisor to accomplish his transportation functions to include payroll. For example, a “lead bus driver” would supervise 16 bus drivers. Responsibilities would include (1) ensuring required check rides of bus drivers is accomplished; (2) ensuring bus driver maintenance responsibilities are accomplished; (3) rating bus annual driver performance; and (4) performing payroll responsibilities. Additional compensation for “lead bus drivers” would be determined by the transportation supervisor and Assistant Superintendent for Administrative and Educational Services. It is important to point out that this initiative does not add additional personnel and associated costs (administrative to include retirement benefits) and provides significant control to the transportation supervisor of this critical function. The criticality is that control over payroll for personnel working for the Office of Transportation would be under the transportation supervisor. Additionally, if the transportation supervisor exercises financial responsibility for bus drivers and aides, it gives him “value added” supervision and control over these personnel working in the Office of Transportation.

## **FISCAL IMPACT**

This recommendation can be implemented with implementation of “lead bus driver positions” and utilization of existing transportation staff supported by the Assistant Superintendent for Administrative Services of IWCS.

## **FINDING**

IWCS does not have job descriptions for the bus aide positions in the division. The transportation supervisor needs to collaborate with HR and develop a job description for Bus Aides that will facilitate selection of applicants who understand the demands of this position. As soon as possible, the transportation supervisor needs to implement the training package for aides that he has already procured and maintain records showing that training was completed for those currently in the position and any new hires.

## **RECOMMENDATION**

### **Recommendation 7-2:**

**Develop a job description for bus aides, and require the supervisor to train all bus aides as soon as possible.**

Bus aides assist the driver with special needs students. They must know how to properly install any special needs equipment on the bus, and should gain some insights on special needs students’ behaviors. Failure to implement a training program can be high risk for the students and IWCS. York County Schools Division in Virginia has an effective training program that could inform the program in IWCS.

## **FISCAL IMPACT**

There is no fiscal impact. This recommendation can be accomplished within existing resources.

## **FINDING**

There are fuel pumping stations at several schools where buses are parked and this facilitates ensuring buses are fueled for timely start of bus runs. One bus driver has the responsibility to ensure spare buses are fueled.

During the focus group and the discussion with school principals, the review team asked if there were fuel spills at these sites. In both groups, the response was “yes”. When asked how such spills were handled and cleaned-up, there was a variety of responses as to who did what and how. The transportation supervisor gave a different answer that demonstrated his understanding of how fuel spills should be handled.

## **RECOMMENDATION**

### **Recommendation 7-3:**

**Incorporate Environmental Protection Agency and Occupational Safety and Health Organization instruction during the in-service driver training program to include hands-on training, and ensure the proper clean-up materials are located at all fuel sites.**

Protection of the environment and safety of personnel are necessary components of an effective school transportation system. IWCS should incorporate all available safety training on fuel spill clean-ups to protect all staff. This recommendation should be implemented as soon as possible.

## **FISCAL IMPACT**

There is no fiscal impact associated with this recommendation since clean-up materials are already owned by the division.

## **FINDING**

The fuel stations account for consumption using a manual system wherein the bus driver completes a form indicating what has been pumped. In contrast, the so-called “white fleet” cars use an automated system that records fuel consumption. Isle of Wight County Schools spent a total of \$58,000 on unleaded fuel from two (2) manual and one (1) automated “key” fuel stations. The manual fuel stations are not supervised and are essentially on an honor system.

The current manual system may present a financial risk to the school division. Most of the fuel used in FY2004-05 was recorded through the automated system. The manual system, however, could expose the school system to unnecessary loss. Though MGT could not determine a documented dollar figure during the onsite visit, there are loss indications. To correct the situation, during the current school year one (1) manual fuel station has been shut down by the transportation supervisor.

The transportation supervisor indicated that Isle of Wight County Public Works uses the automated Phoenix “key” system to control and account for fuel consumption. He also thinks Public Works would be amenable to IWCS Transportation being incorporated or linked to this fuel control system.

## **RECOMMENDATION**

### **Recommendation 7-4:**

**Coordinate with IWC Public Works for use of their automated fuel control system.**

With the cost of fuel remaining high, every reasonable effort should be made to maximize accountability for fuel usage. The current manual system does not control errors or potential losses. An automated key system at all locations would be effective in minimizing errors and losses.

## **FISCAL IMPACT**

The physical impact could be significant would IWCS not take advantage of linking with the IWC Public Works automated system. The MGT on-site team could not determine (due to time constraints and other variables) how much the \$58,000 could be attributed to unnecessary loss.

## **FINDING**

The IWCS has a supplemental compensation system that can reduce the impact of unavailable substitute drivers, but is also an incentive for substitutes to drive. The supplement adds \$10.50 per hour for handicapped runs in excess of 5-hours and \$28.40 daily to drivers for evening activity bus runs. The supplement is in addition to the daily rate paid to the driver on that day.

Retention of regular driver and managing the substitute driver problem experienced by most school transportation systems are enhanced by innovative approaches to compensation.

## **COMMENDATION**

**IWCS is commended for an innovative and responsive compensation program to enhance driver availability to support school programs.**

## **FINDING**

The number of employees directly supervised by the transportation supervisor results in an extraordinary span of control and impacts how information is disseminated, obtained by subordinates, and how performance is observed and evaluated.

The driver and aide focus group questionnaire revealed that in many policy areas there is not a shared understanding of basic policies such as, overtime, incentives for performance, (which has the authority to deny a student bus privilege), and improper use of the bus radio. The Assistant Superintendent for Administration and Educational Services (ASA&ES) should review the current and prospective reorganized structure with a view towards strengthening it by reducing the span of control and improving the two-way flow of communication in daily operations. Lead or senior drivers could be a means of augmenting the information flow up and down in support of performance evaluation and the communication of key policies and practices. The lead drivers could enhance the flow of information on a daily basis.

## **RECOMMENDATION**

### **Recommendation 7-5:**

**Review the supervision and span of control situation.**

The ASA&ES with the transportation supervisor and bus drivers should determine how best to reduce the span of control and resolve problems as perceived by management and the drivers in the geographic areas supporting the nine schools. Designating a lead or senior driver for each area can enhance communications, improve input for evaluations, and assist the transportation supervisor in managing daily operations. Four lead or senior drivers would reduce the span of control to 1:25 drivers. Persons chosen for this responsibility should receive an annual bonus up to \$1,000.

**FISCAL IMPACT**

The implementation of this recommendation will cost the division \$20,000 over five years.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Review the Supervision and Span of Control Situation	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)

**7.3 Routing and Scheduling**

**FINDING**

The routing and scheduling of students by Isle of Wight County Schools Transportation Department is commendable. The department is in its fourth year using EDULOG NT software technology to route and schedule student transportation services. The review team examined the use and implementation of routing and scheduling and found:

- The two transportation operations specialists coordinate and implement in a most exceptional manner routing and scheduling of student transportation requirements. Both are well trained and fully knowledgeable of their duties and responsibilities.
- The transportation supervisor supports and ensures that the routing and scheduling technicians receive training as required to remain proficient on the EDULOG NT system.
- The Assistant Superintendent for Administrative and Educational Services encourages and supports maximum use of computer technology to improve operations and reduce operating costs.
- The Transportation Department's routing and scheduling program is efficient and effective in scheduling regular and exclusive/special education student transportation services.

Routing and scheduling of student transportation services is one of the most important functions performed by the Isle of Wight County Schools Division's Transportation Department. Commonwealth of Virginia Review Procedures as part of the Governor's initiative for school efficiency reviews state that "an effective routing and scheduling system not only will help the division control costs, but can maximize the state's reimbursement for miles driven." Having an effective routing and scheduling program

improves efficiency, transports students more effectively, and reduces costs and waste. Through effective and efficient use of technology for routing and scheduling, Isle of Wight exceeds expectations of the Governor's initiative.

Isle of Wight County Schools Division's Transportation Department is commended for the implementation and use of an effective routing and scheduling program for student transportation services.

### **COMMENDATION**

**Special recognition is given to the information systems technicians for commendable accomplishments coordinating and implementing routing and scheduling requirements for Isle of Wight County Schools Division.**

### **FINDING**

The Isle of Wight County Schools school start time is not efficient and could be improved.

The school start times are staggered and driven by the availability of bus transportation assets to ensure transportation of students to and from school to meet opening and closing times. In Isle of Wight County Schools a most unusual situation exists in which the school principals manage the bus drivers since the bus drivers report to them. As a result, school principals have a significant amount of control over bell schedules and this results in their individual concerns dictating what they consider to be in the best interest of their school on the start and ending times for the school day. Consequently, this does not result in what is best for the school division resulting in bell schedule school start and dismissal times that are inefficient. In other words, school bell schedules are dependent on the efficacy of the school principals to route and schedule its transportation that in turn drive school bell schedules. This is most unusual and not the normal condition found in most school divisions throughout Virginia.

Focus group meetings with school principals concluded the following:

- School principals are not actively supervising bus drivers. For example, a majority of school principals do not perform mandatory inspection rides to evaluate their assigned drivers or ascertain bus drivers are performing operation maintenance and safety checks.
- School principals for the most part solicit bus drivers input to the bell schedule for their particular school; however, it has little if any relationship with other school bell schedules in the division.
- Bell schedules are finalized by school principals with little or no consideration from the transportation supervisor.

In summary, the review team found that though there was high praise for the services rendered by bus drivers serving their respective schools, there was also universal consensus among principals that bell schedules and support of student activities requiring transportation assets could be improved. The MGT team also observed bus

operations and determined that buses are generally achieving on-time delivery of students.

Exhibit 7-10 shows the bell schedule for high school, middle, elementary and other educational centers in IWCS. Although the current bell schedule works, it could be improved by better planning and improved integration of school principals, administrators and transportation supervisor into the overall process.

**EXHIBIT 7-10  
BELL SCHEDULE  
SCHOOL START AND DISMISSAL TIMES  
ISLE OF WIGHT PUBLIC SCHOOLS DIVISION  
2005-06 SCHOOL YEAR**

<b>GRADE LEVEL</b>	<b>SCHEDULE</b>
Carrsville Elementary School	9:05 a.m.- 3:40 p.m.
Carrollton Elementary School	8:45 a.m.- 3:20 p.m.
Hardy Elementary School	8:45 a.m.- 3:20 p.m.
Westside Elementary School	9:25 a.m.- 4:00 p.m.
Windsor Elementary School	9:05 a.m.- 3:40 p.m.
Smithfield Middle School	7:45 a.m.- 2:25 p.m.
Windsor Middle School	7:45 a.m.- 2:25 p.m.
Windsor High School	7:30 a.m.- 2:41 p.m.
Smithfield High School	7:30 a.m.- 2:41 p.m.

Source: IWCS Transportation Supervisor, 2006.

**RECOMMENDATION**

**Recommendation 7-6:**

**Ensure full integration of school principals, school administrators and the transportation supervisor into the bell planning and implementation process.**

The superintendent should begin initiation of a plan that outlines his conceptual framework for a bell schedule for the 2006-07 school year. This draft plan should be presented to school principals and administrators for their comments and recommendations. The transportation supervisor should incorporate their comments and recommendations and prepare a draft final not later than May 2006 for subsequent review. The Food services supervisor should also be involved for adequate breakfast time.

The significance of this issue places it in a special category for implementation action as soon as the next school year. The current bell schedule creates unwarranted anxiety among staff, teachers and transportation personnel. It adversely impacts students who participate in the free breakfast program because in many instances they are not arriving at their schools. This condition is unacceptable considering IWCS has the expertise, competency and resources to remedy the situation. Therefore, this recommendation should be implemented at the start of the 2006-07 school year.

Achieving efficiency in IWCS by improving the bell schedule could result in a minimum reduction of at least one bus driver or more. Once implemented, the transportation

supervisor could determine any additional cost savings to the minimum estimated by MGT of America and capture those savings as appropriate. Implementing this recommendation could result in a minimum costs savings of \$163,953.

**FISCAL IMPACT**

The bell planning portion of this recommendation can be implemented with existing resources. The salary plus benefits of one bus driver is computed at \$32,191 (\$25,753 salary and a 25 percent benefits package of \$6,438) and the salvage cost of selling one bus could realize a minimum of \$3,000. The result in cost savings over the five-year budget cycle are \$163,953.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Eliminate One Bus Driver Position	\$32,191	\$32,191	\$32,191	\$32,191	\$32,191
Sell One Excess Bus	\$3,000	\$0	\$0	\$0	\$0
<b>TOTAL</b>	<b>\$35,191</b>	<b>\$32,191</b>	<b>\$32,191</b>	<b>\$32,191</b>	<b>\$32,191</b>

**FINDING**

Isle of Wight County Schools is not optimizing bus capacity to transport its student population.

During the on-site visit, MGT found that IWCS does not optimize its bus passenger capacity. As a result, buses are not maximizing their capacity, space is wasted and additional bus resources are being used that are not needed. This situation in IWCS is exacerbated by the condition whereby bus drivers are under control and supervision of the school principals as opposed to the transportation supervisor. As a result, there is no centralized authority or manager to discipline the system. Consequently, buses do not have a sufficient number of students to justify operational efficiency and achieve cost savings. Exhibit 7-11 depicts number of buses, average daily riders and bus capacity.

**EXHIBIT 7-11  
ISLE OF WIGHT PUBLIC SCHOOLS DIVISION  
BUS ROUTES, AVERAGE DAILY  
RIDERSHIP AND MILES DRIVEN\*  
2005-06 SCHOOL YEAR**

<b>NUMBER OF BUSES USED DAILY</b>	<b>AVERAGE DAILY RIDERSHIP</b>	<b>AVERAGE DAILY BUS CAPACITY</b>
79	4,601	7,680

Source: Transportation Department, 2006.

\*Of this number, 60 are for regular students, 12 for special and 7 are cars or vans.

It is noted that IWCS uses the EDULOG NT system as a management tool for routing and scheduling and is commended earlier in this chapter for this initiative; however, according to the transportation supervisor the routing of buses are done manually on EDULOG and then that information is given to the bus drivers, school principals and administrators. The review team found that there is significant discord existing between



school principals and transportation supervisor on use of school buses. The MGT review team also observed that the present structure is so clouded that it was not possible to determine exactly what formulas were being used by school principals to determine bus capacity use.

MGT of America concedes the point that for high school and some middle school students (8<sup>th</sup> and 9<sup>th</sup> graders) the manufacturer's stated bus capacity for buses may be problematic. Difficulties are encountered trying to place 78 high school or some middle school students (8<sup>th</sup> and 9<sup>th</sup> graders) on such a bus to maximize its manufacturers seating capacity. Considering the size of students at the high school and some middle school students, it is prudent to modify bus capacity when transporting that student population.

However, IWCS has instituted in place a situation that uses its 64-passenger buses at whatever capacity principals think are necessary and results in inefficient of bus capacity.

The transportation supervisor provided a listing of buses and their capacity to MGT of America. The data show the bus number, manufacturers recommended bus capacity, and other information. Though the transportation supervisor is involved to a degree, it is apparent with the significant role played by school principals placing students on buses, the principals are not ideally disposed to ensure that bus capacity is maximized.

From interviews with principals, examination of IWCS records, focus group interviews with bus drivers, and interviews with the transportation supervisor it is concluded that IWCS is using approximately 62 percent of its daily bus capacity (it is emphasized this is 62 percent is a conservative figure and if a more empirical study is conducted, the figure could be anticipated to be much higher) to transport its student population. This conclusion is bolstered by circumstances that principals and the transportation supervisor are not in synchronization on bus capacity utilization. Though the situation has not deteriorated to an adversarial relationship between school principals and the Department of Transportation (it is not the best) and it contributes significantly in this chapter to MGT strongly recommending that the transportation supervisor be in charge of transportation functions to include optimizing bus capacity. The division at present is not effectively using daily seats that comprise bus capacity.

## **RECOMMENDATION**

### **Recommendation 7-7:**

**Optimize IWCS' bus capacity by assigning this process as the sole responsibility of the transportation supervisor.**

IWCS is currently losing approximately 2,903 seats daily on buses because it is not optimizing bus capacity. The division should review its current practice of splitting the optimization of this function between the transportation supervisor and principals. This function should be the responsibility of the transportation supervisor. Implementation of this recommendation could result in reduction of two buses and two bus drivers for a total cost savings of \$327,910.

**FISCAL IMPACT**

This recommendation can be implemented with existing resources and should result in cost savings of \$252,007.

The salary plus benefits of a bus driver are computed at \$32,191 (\$25,753 salary and a 25% benefits package of \$6,438) and the salvage cost from selling oldest buses in the fleet realizes a minimum of \$3,000 per bus. This results in a cost savings of \$327,910 over the five-year budget cycle.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Reduce Two Regular Bus Drivers.	\$64,382	\$64,382	\$64,382	\$64,382	\$64,382
Remove Three Oldest Buses from Inventory and Sell Them.	\$6,000	\$0	\$0	\$0	\$0
<b>Total</b>	<b>\$70,382</b>	<b>\$64,382</b>	<b>\$64,382</b>	<b>\$64,382</b>	<b>\$64,382</b>

**7.4 Vehicle Maintenance**

**FINDING**

The maintenance workload for mechanics in IWCS is excessive and precludes accomplishment of optimum maintenance support for the assigned number of vehicles and equipment.

The current fleet maintenance inventory consists of 98 school buses and 45 trucks, vans and cars. In addition, there are 88 other types of miscellaneous equipment (lawnmowers, trimmers, trailers, generators, etc.) that the maintenance section has responsibility. The total of all items that the maintenance section has responsibility is 231 pieces of equipment. There are four garage technicians in the maintenance section with three of them being full-time mechanics and one a technician in the maintenance section as explained by the transportation supervisor. The technician is full-time and performs only limited maintenance duties and responsibilities. Though capable of performing duties as a mechanic, the transportation supervisor performs other additional responsibilities as parts specialist clerk, maintenance clerk, records preparation, department supervisor, trainer, and supervisor of mechanics. These multiple demands preclude him from performing any full-time mechanic duties. For mechanic workload accountability purposes, only three mechanics are counted as being effective. Therefore, by clarifying actual mechanic employment, it is determined that IWCS has a mechanic to vehicle ratio (determined by the number of vehicles and equipment of 231 divided by three mechanics) of 1:77.

The transportation industry and majority of school divisions/systems nationwide have a common ratio of one mechanic per 20 to 30 vehicles and equipment with the average ratio being approximately 1:25. The IWCS mechanic to vehicle and equipment ratio of 1:77 is higher than the national average of 1:25.

The ratio of mechanics to vehicles in IWCS is a reflection of their actual workload that is excessive. Only a very small percentage (less than five percent annually) of any maintenance work is outsourced to local vendors for repairs or maintenance beyond the capabilities of IWCS mechanics. All other vehicle maintenance is performed by IWCS mechanics.

The major issue is that IWCS maintenance responsibilities have increased significantly over the last ten years. As the student population of Isle of Wight increased so did the number of school buses and support equipment required for student transportation; however, the number of mechanics providing maintenance support for the vehicles remained constant.

**RECOMMENDATION**

**Recommendation 7-8:**

**Hire two additional full-time mechanics.**

Hiring two additional mechanics would improve the mechanic to vehicle ratio from the current 1:77 to a more acceptable 1:46 in IWCS. The implementation of this recommendation will provide Isle of Wight Public Schools more competencies to perform better maintenance and achieve greater safety for its vehicles and equipment.

**FISCAL IMPACT**

According to information provided by the transportation supervisor, the cost to hire an entry level mechanic requires an annual salary of \$24,500 plus a benefits package of 25 percent or \$6,125. To implement this recommendation for one mechanic is \$30,625. Implementation for the recommended two mechanics would cost \$61,250 annually and \$306,250 over the next five school years.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Annual Salaries for Four Mechanics	(\$49,000)	(\$49,000)	(\$49,000)	(\$49,000)	(\$49,000)
Annual Benefits Package of 25 percent for Four Mechanics	(\$12,250)	(\$12,250)	(\$12,250)	(\$12,250)	(\$12,250)
<b>TOTAL</b>	<b>(\$61,250)</b>	<b>(\$61,250)</b>	<b>(\$61,250)</b>	<b>(\$61,250)</b>	<b>(\$61,250)</b>

**FINDING**

IWCS does not have a comprehensive Automotive Service Excellence (ASE) training and certification program for its mechanics. The Transportation Department does have a recent invoice paying for certification testing for a mechanic.

During the on-site review, MGT found IWCS mechanics have high regard and appreciation for ASE certification. During focus group meetings, mechanics made it clear that ASE certification is desirable and aware that ASE certification helps them to become better mechanics.

It is recognized throughout the transportation community that ASE certified mechanics provide more accurate fault diagnosis, which allows for more effective trouble-shooting and subsequent first-time correct repairs of defective equipment.

A well-trained mechanic can have a significant impact on the parts replacement and equipment repair program of any maintenance operation.

ASE training and certification is an important management tool that ensures mechanics are highly skilled and trained. ASE certification demands preparation. Mechanics who are ASE certified are considered superior in their profession. The transportation supervisor is aware of this and is recognized for his efforts to have ASE testing certification costs paid by IWCS as such payments are done for other professional and staff testing in the division. He informed the MGT onsite team that he is implementing a comprehensive ASE training and certification initiative for mechanics.

Qualified mechanics are needed to maintain school buses and a host of other equipment in IWCS. ASE certification is an excellent way of determining mechanic qualifications. The training of mechanics is one of the important cornerstones of an effective maintenance organization. Continuing efforts by the transportation supervisor developing the ASE training and certification program is a prudent measure. The ASE certification training is a comparable professional development activity to those provided at no cost to teachers and other IWCS staff. MGT strongly suggests that costs associated with ASE certification testing are included in the five-year budget cycle.

## **RECOMMENDATION**

### **Recommendation 7-9:**

**Develop a structured professional ASE training and certification program for mechanics and ensure costs associated with ASE testing are in the five-year budget cycle.**

The Superintendent, Isle of Wight School Board should task the Transportation Director to develop an ASE training and certification program for its mechanics. ASE training and certification should be stressed continuously covering all major areas of maintenance in the Transportation Department's Maintenance Section. IWCS should consider making certification a condition of initial employment for future hires.

This program should have yearly continuous funding beginning with the 2006-07 school years.

## **FISCAL IMPACT**

Current ASE registration fee per mechanic is \$50 and the test fee is \$35. The cost is \$85 per mechanic for testing. An additional cost of approximately \$25 per person is recommended for travel expense to the test site and related expenses. Cost per mechanic is anticipated at \$110. Yearly funding for five mechanics is \$550 each year. This is a cost of \$2,750 over the five year budget cycle.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Provide ASE Certification for Mechanics	(\$550)	(\$550)	(\$550)	(\$550)	(\$550)

**FINDING**

The Isle of Wight County Schools Transportation Maintenance does not have an effective vehicle maintenance information system (VMIS).

The fleet-mix of vehicles assigned to the maintenance area of IWCS is shown in Exhibit 7-12. The exhibit shows that IWCS has a wide range and types of vehicles for maintenance support.

**EXHIBIT 7-12  
ISLE OF WIGHT CENTRAL MAINTENANCE  
FLEET MIX OF VEHICLES AND EQUIPMENT  
2005-06 SCHOOL YEAR**

<b>VEHICLE TYPES MAINTAINED BY TRANSPORTATION</b>	<b>NUMBER OF VEHICLES</b>
School Buses	98
Trucks	9
Vans	17
Automobiles (mixed models)	19
Trailers	7
Tractor Attachments	11
Other Equipment	70
<b>TOTAL</b>	<b>231</b>

Source: IWCS Transportation Department, 2006.

In view of the above circumstances, IWCS should have a diversified vehicle management information system (VMIS) to help manage its fleet. Implementation and use of a VMIS allows among other advantages for the user to manage more effectively scheduled maintenance, determine effective vehicle life cycle, provide life history of vehicles, and determine parts replacement and other critical historical data relating to maintenance. Under current practices in Isle of Wight this is not being done. Maintenance and cost management practices could be improved significantly through implementation of an effective VMIS.

Though mileage and age information can be extrapolated from records and reports, the IWCS does not have an effective VMIS fleet management system to determine which vehicles are over mileage, not cost effective and should be prime candidates for consideration for removal from fleet inventories. Effective VMIS Fleet management allow maintenance departments to track service quality, cost to maintain vehicles, excessive

maintenance repairs, vehicle down time, high mileage, turnover time per vehicle repair and other key fleet management variables.

The transportation supervisor has a computer-generated flow chart to capture some useful data about vehicle fleets. Compiling and keeping records of important vehicle data is an effective tool that captures information important for the maintenance shop, and with improvement, could provide the basics for an effective VMIS.

A variety of automated fleet information management systems are currently available from a wide number of vendors. MGT of America does not endorse nor recommend a particular software system or vendor. Three types of systems are currently available: a wide area network, local area network, or a world-wide-web system. IWCS must consider the capability of its existing hardware, availability of communications lines, and cost implications in determining which technical approach best meets the needs of the IWCS maintenance department.

Three automated systems on the market today for managing large fleets, which may be considered by IWCS are: Dossier 32 Fleet Management System by Arsenault Associates (800-525-5256), Fleetmaint 2000 by DP Solutions (800-897-7233), and FleetPro for Windows by EDULOG (406-728-0893).

One alternative to the wide area network would be an information system on the Internet that charges a monthly fee. The Internet approach uses existing compatible hardware and existing communication lines. System integration would not be an issue using the Internet approach and there is no annual fee for software upgrades.

## **RECOMMENDATION**

### **Recommendation 7-10:**

**Develop fleet management vehicle maintenance information system from available internet resources to more effectively and efficiently manage the fleet.**

MGT of America does not believe that at this time IWCS needs to invest resources in any of the automated systems mentioned above for a VMIS at this time. They are brought to the attention of IWCS to alert management of the technical approaches currently available. The alternative to use the wide area Internet network to implement VMIS should be considered first, and, if not proven satisfactory, selection and purchase of a commercial system should be deemed appropriate.

## **FISCAL IMPACT**

There are no fiscal impacts associated with this recommendation.

## **7.5 Spare Bus and Bus Replacement Policy**

### **FINDING**

The number of spare buses is excessive and could be reduced.

The transportation supervisor reports that there are 98 school buses used for student transportation service in IWCS. Of this number, 60 are used to transport regular students and 12 are used for exclusive or exceptional student riders. Information provided by the Transportation Department to MGT of America shows that the Transportation Department maintains 25 spare buses. These figures are inconsistent because if 72 buses are used for daily transportation services and there are 98 buses in the fleet, then the remaining number of spare buses is 26. This translates to IWCS having 36 percent of its bus fleet as spares.

Most school divisions in Virginia and throughout the nation maintain a spare bus policy of 10 percent unless there are unusual circumstances to keep a higher percentage. Spare bus determinants include normal life expectancy of school buses, average wear and tear, maintenance, and number of diesel vice gas-powered vehicles. Exhibit 7-13 shows the school bus spares and percent of the fleet in IWCS.

**EXHIBIT 7-13  
ISLE OF WIGHT COUNTY SCHOOLS  
SCHOOL BUS SPARES AND PERCENT  
2005-06 SCHOOL YEAR**

<b>CAPACITY BUS UTILIZATION</b>	<b>NUMBER OF BUSES</b>	<b>NUMBER OF SPARES</b>	<b>PERCENT OF SPARES</b>
Exclusive Education 34 capacity buses	13	3	23
Exclusive Education 64 capacity bus	1	1	100
Exclusive Education 52 capacity buses	2	1	50
Regular 64 capacity buses	80	20	25
Regular 84 capacity buses	2	1	50
<b>Total</b>	<b>98</b>	<b>26</b>	<b>27</b>

Source: IWCS Transportation Department, 2006.

The transportation supervisor submits that there are no 84 passenger or 52 passenger buses in IWCS. The documented bus inventory provided initially by IWCS to MGT and subsequent data provided May 26, 2006 to MGT of America by IWCS shows 84 passenger bus number 19 with vehicle ID number 1T7YT3C2541143585 and 84 passenger bus number 20 with vehicle ID number 1TYT3C2741143586 and 52 passenger bus number 125 with vehicle ID number 4UZAALDC64CM48879, bus number 126 vehicle ID number 4UZAALDC24CM48880 and 52 passenger bus number 127 vehicle ID number 4UZAAXDG35CU43469. Though bus numbers 125, 126 and 127 may be used for special education purposes, they are carried on the IWCS inventory as 52 passenger buses. Information in Exhibit 7-13 which is compiled from information and data provided by the Office of Transportation, IWCS. How can IWCS provide the same data on two different occasions and insist it does not have 84 and 52 passenger buses? Perhaps on the 52-passenger buses, the transportation supervisor may want to point out

that though listed as 52-passenger buses, they are used principally to transit special needs students. However, the 84-passenger buses are listed on the official inventory for regular students. MGT stands on the finding and recommendation for this section.

All transportation operations require substitute vehicles to cover for units experiencing breakdowns or scheduled preventive maintenance. The generally accepted range for school bus fleet spares is 10 to 20 percent of the regularly scheduled peak bus usage. The factors affecting the spare bus ratio are fleet age, effectiveness of the maintenance program, climatic and operating environment, fleet mix, and training program.

The peak bus requirement per day for IWCS is 72 buses. The school division's total bus fleet is 98. Considering that a ten-percent spare bus policy should be sufficient, IWCS may not be adhering to an effective spare bus policy.

School divisions throughout the country and particularly those that MGT of America have evaluated over the past several years (e.g., York County (VA), Williamsburg County (VA) Hillsborough County (FL), Fairfax County (VA), San Antonio Independent Schools (TX), Prince George's County (MD), Broward County (FL)) maintain a spare bus policy of 10-12 percent.

Though it is the prerogative of IWCS to maintain a 27 percent spares bus policy, it may not be necessary and is not supported by the MGT onsite team as a continuing IWCS course of action. A 10 percent spare bus policy for IWCS is considered appropriate.

A 10 percent spare bus policy considering the current number of buses (98) used for student transportation purposes would equate to ten buses. Since there are 26 spare buses currently in use, IWCS could eliminate 16 buses from its spare bus inventory. This means that IWCS could reduce its inventory of spares from 26 to 10.

## **RECOMMENDATION**

### **Recommendation 7-11:**

**Implement spare bus policy mandating 10 percent of the peak use bus fleet as spares.**

The IWCS bus fleet age is within the boundaries of other divisions in the Commonwealth of Virginia and school systems nationally. The IWCS fleet buses are diesel power driven.

A reduction to ten spares and other initiatives in this chapter could result in a fleet of 82 buses. This could reduce the current bus fleet from 98 to 82. Under the circumstances, a ten percent spare bus policy is achievable.

## **FISCAL IMPACT**

The transportation supervisor states that he can only expect to receive approximately \$1,500 from the sale of a excess bus vice \$3,000 projected by MGT. Through aggressive sales a higher return is possible. However, MGT has recomputed at the \$1,500 for disposition of excess buses; and the computations are reflected below.



The transportation supervisor could be more aggressive in the sale and disposition of school buses. Acceptance by IWCS of the local market average sale price of \$1,500 should return \$24,000 to the school division.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Sell 16 Excess Buses	\$24,000	\$0	\$0	\$0	\$0

**FINDING**

Isle of Wight County Schools does not have a comprehensive school bus replacement plan.

The review team was provided an extract from the Strategic Plan for 2004-2010 indicating that the Transportation Department is to develop and implement planning to replace automobiles every 8-10 years; maintenance vehicles every 6-8 years; and school buses every 12-14 years; however, this practice has not been realized and there is no school bus replacement plan in IWCS.

The IWCS Transportation Unit maintains 231 different kinds of equipment and vehicles consisting buses, vans automobile and other type of vehicles. Of these vehicles the 98 buses qualify for bus replacement. The typical useful life of school buses is between ten and 15-years old. The Commonwealth of Virginia Department of Education recommends a 10-year depreciation cycle for 64 passenger buses and a 12-year replacement cycle for 78 passenger buses. A significant number of divisions in The Commonwealth of Virginia have adopted a 12-year replacement cycle.

Exhibit 7-14 shows the Isle of Wight County Schools bus replacement history since 1991 for the past 15 years. It reflects that there is not a consistent pattern to bus replacement strategy. It is noted that in some years only two buses were replaced where other years 11 or 12 buses were replaced. It is an erratic pattern and this lack of consistency requires IWCS to purchase a large number of buses in any given year to keep the fleet running. Developing and implementing a school bus replacement plan could result in IWCS having a more consistent process and procedure.

Exhibit 7-14 shows that over a 14 year period from 1991 to 2005 that IWCS replaced 118 buses for a yearly average replacement of 8.4 buses each year. Considering the reduction in the spare bus policy to 10 percent in recommendation 7-11 and optimizing bus capacity in recommendation 7-7 of this chapter a 10 year bus replacement cycle is achievable in IWCS.

**EXHIBIT 7-14  
ISLE OF WIGHT COUNTY SCHOOLS  
IWCS BUS REPLACEMENT HISTORY  
2005-06 SCHOOL YEAR**

<b>YEAR PURCHASED</b>	<b>NUMBER OF BUSES</b>	<b>FUEL USE TYPE</b>
1991	7	Diesel
1992	5	Diesel
1993	4	Diesel
1995	12	Diesel
1996	6	Diesel
1997	3	Diesel
1998	12	Diesel
1999	10	Diesel
2000	2	Diesel
2001	3	Diesel
2002	5	Diesel
2003	11	Diesel
2004	6	Diesel
2005	2	Diesel
<b>Total Buses</b>	<b>118</b>	<b>Diesel</b>

Source: MGT of America from IWCS data and information, 2006.

**RECOMMENDATION**

**Recommendation 7-12:**

**Establish a 10-year bus replacement cycle replacing ten percent of the bus fleet yearly.**

IWCS has averaged replacement of 8.4 buses over a fifteen year period. In addition, efficiencies and actions recommended in this chapter strongly indicate that a bus fleet of 82 buses is sufficient to support student transportation services in IWCS. Replacing eight buses annually will improve transportation service and provide safe and dependable buses to transit IWCS students.

**FISCAL IMPACT**

The average cost of a regular bus is approximately \$65,000 and the average cost of a special education (with special equipment) bus is approximately \$68,000. The eight replacement buses should be seven regular buses and not less than one special

education bus. The buses would cost approximately \$523,000 annually and \$2,615,000 over the five-year budget cycle.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Establish a Bus Replacement Cycle	(\$523,000)	(\$523,000)	(\$523,000)	(\$523,000)	(\$523,000)

**7.6 Training and Safety**

**FINDING**

IWCS transportation training and safety programs are the responsibility of the transportation supervisor. The stated objectives are to train employees to provide safe and effective student transportation; monitor all safety issues related to pupil transportation; investigate all accidents, and file accident reports with VDOE.

The transportation supervisor uses the Virginia Department of Education guide for the training of new drivers. The training is supplemented by Department of Motor Vehicles for Commercial Driver License requirements, as well as training videos, handouts, sample tests, and hands on training.

The special education students receive the standard DOE course plus training on the three types of buses in the IWCS fleet. The department has purchased a special needs curriculum package that will be used to augment training for special needs drivers and bus aides.

Currently the department has six certified bus driver trainers.

Regarding safety, guidance for accident reporting is provided in the Pupil Transportation Hand Book. Exhibit 7-15 shows the accident history and rate for the past three years.

**EXHIBIT 7-15  
ISLE OF WIGHT COUNTY SCHOOLS TRANSPORTATION  
BUS ACCIDENT RATE  
2002-03 THROUGH 2004-05**

<b>SCHOOL YEAR</b>	<b>NUMBER OF ACCIDENTS</b>	<b>NUMBER OF FATALATIES</b>	<b>MILES DRIVEN</b>	<b>NUMBER OF STUDENTS</b>
2002-03	4	0	1,157,438	5,040
2003-04	9	0	1,202,180	5,048
2004-05	12	0	1,372,560	5,162
<b>Average</b>	<b>8.3</b>	<b>0</b>	<b>1,244,059</b>	<b>.002</b>

Source: IWCS Transportation Department, 2006.

While the accident rate is low, the number of accidents increased each year. The transportation supervisor should conduct an analysis to determine patterns and causes.

**RECOMMENDATION**

**Recommendation 7-13:**

**Analyze all 25 accidents to identify patterns and present the results and recommended action to the Superintendent.**

The above Exhibit 7-15 shows a trend that needs attention. During the driver and aide focus group, there were responses to the questionnaire indicating that drivers do not respect school buses, pass across double lines, and as a consequence there needs to be more law enforcement presence during the rush period for transporting students.

Therefore, the number of accidents from 2002-03 to 2004-05 is a 200 percent increase and must not be ignored. There were four accidents reported in 2002-03 and 12 accidents reported 2004-05 according to statistical data provided by IWCS Department of Transportation. Regardless as to who was at fault, as reportable accidents involving Isle of Wight transportation vehicles, this is a 200 percent increase.

**FISCAL IMPACT**

There are no fiscal impacts associated with this recommendation.

Training, safety, and accident performance indicators are important management tools. The MGT team has observed practices that could be used to strengthen training, safety and accident performance indicators. Exhibit 7-16 is provided to incorporate these variables and may be considered for use by the IWCS Transportation Department as a safety and accident management tool.

**EXHIBIT 7-16  
TRAINING, SAFETY, AND ACCIDENT  
PERFORMANCE INDICATORS**

PERFORMANCE AREA	PERFORMANCE INDICATOR
Safety	<ul style="list-style-type: none"> <li>■ Accidents per 100,000 miles</li> <li>■ Incidents per 100,000 miles</li> <li>■ Pre-performance checks</li> <li>■ Safety Orientations</li> </ul>
Cost-Effectiveness	<ul style="list-style-type: none"> <li>■ Average rider trip time in minutes</li> <li>■ Driver absentee rate</li> <li>■ On-time performance</li> <li>■ Open routes due to unfilled positions</li> </ul>
Training	<ul style="list-style-type: none"> <li>■ Driver Training</li> <li>■ Safety Training</li> <li>■ Student Discipline Training</li> </ul>

Source: Created by MGT of America, 2006.

**7.7 Planning, Policies, and Procedures**

The IWCS Transportation Department has a small number but experienced staff that work effectively as a team. During the past five years the Transportation Department has planned in a way to keep transportation costs in line. According to the supervisor, the

planning thrust has been to keep additional bus runs to a minimum while the student population has been growing. Examples of planning actions taken are:

- 2002-03 – Elimination of all Carrsville Elementary single runs and the total re-routing of all runs in the Windsor area.
- 2002-03 – Elimination of house to house stops unless students lived in a community complex (apartments or trailer park), or if they lived on a private road.
- 2003-04 – Elimination of Windsor Single runs and rerouting all runs in the Smithfield area.
- 2005-06 – Adding third tier transportation to Smithfield area due to grade realignment and addition of new middle school on the site of a current high school.

These examples reflect good use of data to positively affect the planning and budget process. There are no findings or recommendations related to planning. It should be noted that if there is the reorganization as recommended previously, the transportation supervisor and staff should be freer to further improve planning.

The MGT onsite team reviewed the policies governing student transportation. Policies included: The Student Handbook, Accident Reporting, Student Transportation Services, Bus Scheduling and Routing, School Bus Safety Program, Bus/Vehicle Accident Procedure, Student Conduct on School Buses, and Special Use of School Buses. The basic policies are complete and current and there are no findings or recommendations related to policies.

A fundamental procedure in any school transportation operation is how management ensures the buses are safe to transport students. IWCS Transportation follows the VA DOE regulations and inspects buses every 30 days. The review team checked the records of inspection, the inspection form, and the bus maintenance schedule for the period September 2005-July 2006.

The onsite team also examined the 2005 Pupil Transportation Hand Book. The document covers procedures, restates relevant School Board policies and includes forms the driver would need in routine operations. The handbook also includes information related to weapons and hijacking situations.

The director of special education is responsible for preparing, maintaining and submitting reports pertaining to special needs students. Unlike some school divisions, IWCS has had success in obtaining funding from the Virginia Basic Aid Program and Medicaid reimbursements.

## **FINDING**

MGT reviewed certification records for drivers, criminal record checks, random substance abuse testing files, and the performance evaluation records and found that some driver contracts were renewed without submission of a performance evaluation. A

recent procedure change has human resources maintaining the drug/alcohol testing records with the Transportation Department continuing the scheduling of the random testing.

Record keeping by the human resources staff is excellent. A random sample of records was evaluated. Records were found to be complete, except for the previously cited issues regarding the absence of a job description for bus aides and the fact that some principals had renewed driver contracts without having submitted a performance evaluation.

**RECOMMENDATION**

**Recommendation 7-14:**

**Require current and satisfactory performance evaluation prior to driver contract renewals.**

Before a contract is renewed there should be a performance evaluation confirming that renewal is justified.

Maintaining accurate files on personnel involved in bus operations cannot be overemphasized. Individuals operating buses transporting the young people of our nation must stand and pass the rigid scrutiny required to be a bus driver or bus driver assistant. The program in IWSC helps to ensure that every effort is made to hire only those individuals who can be trusted with the important responsibility to transport school children.

**FISCAL IMPACT**

There is no fiscal impact in implementing this recommendation.

**8.0 TECHNOLOGY  
MANAGEMENT**

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## **8.0 TECHNOLOGY MANAGEMENT**

This chapter provides a summary of technology management in the Isle of Wight County School Division (IWCS). The five major sections of this chapter are:

- 8.1 Technology Planning
- 8.2 Organization and Staffing
- 8.3 Infrastructure
- 8.4 Software and Hardware
- 8.5 Staff Development

When reviewing the technology resources of a school district, MGT examines the host computer system that supports applications, the applications themselves and the degree to which they satisfy user needs, the manner in which the infrastructure supports the overall operations of the school system, and the organizational structure within which the administrative and instructional technology support personnel operate.

According to the technology plan, the goals of the Department of Technology evolve around accountability, educational applications, technology integration, professional development and support programs, and connectivity implementation.

### **CHAPTER SUMMARY**

The MGT consulting team reviewed the planning documents, the organizational structure, the current infrastructure, software and hardware, as well as staff development for the Technology Department of IWCS. As a result of our findings, we have provided several commendations and recommendations for the department, including:

- develop and implement a Disaster Recovery Plan for IWCS;
- IWCS has implemented resource teachers to assist in the integration of technology;
- reorganize the Department of Technology and provide resource teachers with clear and concise job descriptions, as well as proper evaluation forms;
- coordinate a review process to determine a plan for moving towards one environment for the infrastructure that also allows for adequate distance learning options;
- commendation for the updated Web site with a user-friendly content management application;
- commendation for implementing an effective work order system and training all staff on the use of the system;
- capture additional fields for reporting on the work order system and generating emails to technicians for each time the work order has been updated or assigned;



- implement the automatic capture of knowledge base data from help desk resolutions;
- the Technology Department captures customer satisfaction through the use of surveys;
- create a plan to increase customer satisfaction based on survey feedback;
- establish the number of computers that are for student use;
- IWCS has incorporated appropriate filters on servers to screen Web sites;
- conduct a formal cost-benefit analysis for migrating the division's telephone system;
- provide basic software training for users and develop an accountability process for training;
- IWCS collects survey data for training offered to staff; and
- create a plan to increase customer satisfaction for training based on survey data.

### **8.1 Technology Planning**

Successful technology planning is the foundation for successful technology implementation and development. School district technology is not just a stand alone, long-term, ongoing project; it affects every aspect of school district operations. There are many factors to consider when planning around technology for any school division.

#### **FINDING**

Disaster recovery plans are a necessity in school divisions due to federal and state requirements of collecting and retaining data on students, financial data, and day-to-day operations. It is also a way for central office and school administrators, teachers, students, and parents to be reassured that recovery plans are available, and that IWCS will not be asked to recreate an entire school year's worth of data in the event of a problem or disaster.

According to information gathered during on-site visit, the division has not created a full plan nor budgeted for a disaster recovery plan. There are backups on-site, but a specific plan has yet to be developed.

**RECOMMENDATION**

**Recommendation 8-1:**

**Develop and implement a Disaster Recovery Plan for Isle of Wight County Schools.**

Disaster Recovery Plans provide reassurance that if data are lost or destroyed due to a natural or manmade disaster, data can be recovered quickly and reduce a lapse in operation of a school division. The recovery plan should encompass all division data and provide for periodic testing.

One particular approach that should be researched is to partner with another school division to share in the costs to implement the plan. The Technology Director and the Technology Coordinator should subsequently seek another school division with adequate infrastructure to handle IWCS needs. Universities or community colleges should also be researched for this recommendation.

**FISCAL IMPACT**

Minimal disaster recovery plans and tests should cost in the range of \$40,000 to \$80,000 annually.

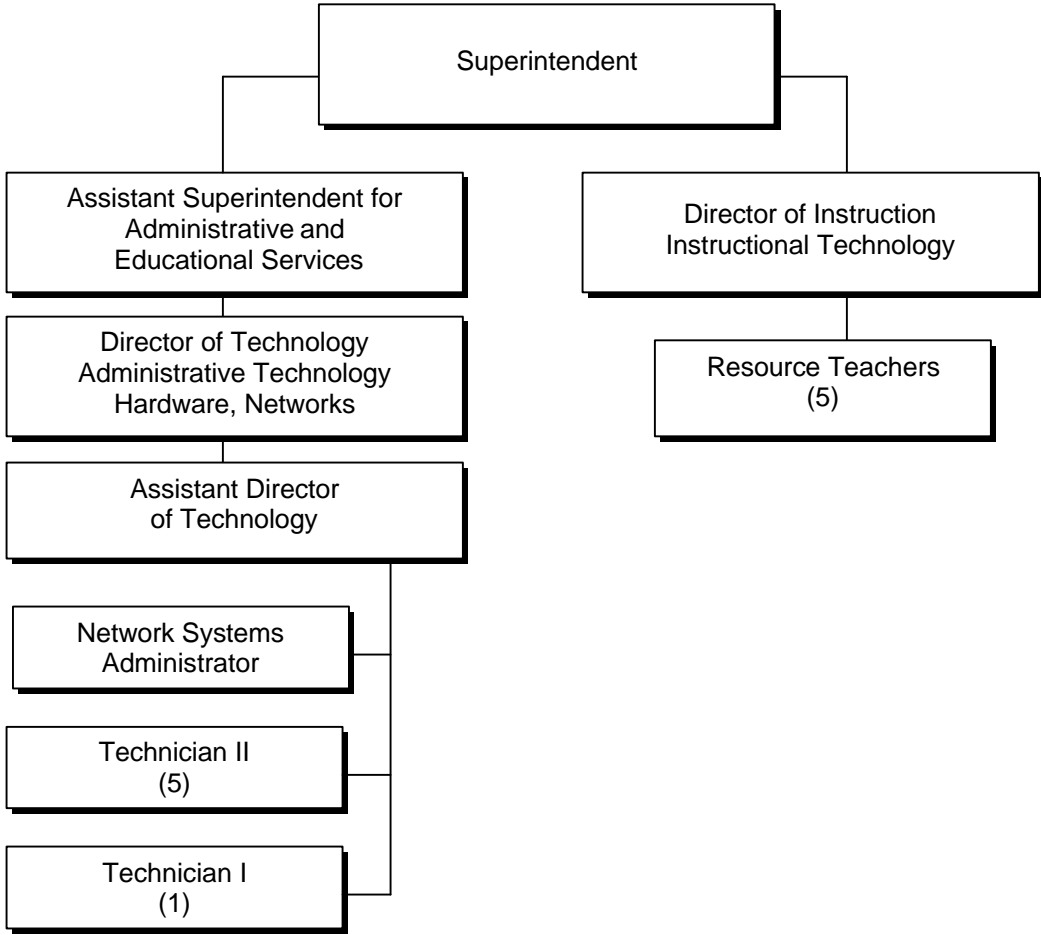
<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Implement a Disaster Recovery Plan	\$0	(\$60,000)	(\$60,000)	(\$60,000)	(\$60,000)

**8.2 Organization and Staffing**

Ideally, technology is one area of a school district that supports all administrative and instructional personnel in a positive manner. Organizing technology resources to effectively achieve this outcome can be challenging.

The International Society for Technology in Education (ISTE) has developed a Technology Support Index rubric to assist school divisions in determining their needs in a variety of technology support areas. The ISTE Technology Support Index identifies integrated school divisions as having an organization structure where the technical support functions and instructional technology functions may report differently, but each unit is cohesively organized, and there is communication between units. Higher-functioning school divisions (i.e., those functioning at an exemplary level) instead have an organizational structure where all of the technology functions report through the same unit in the organization, providing for a logical chain of command and communication structures.

**EXHIBIT 8-1  
CURRENT ORGANIZATIONAL STRUCTURE RELATED TO TECHNOLOGY  
2005-06 SCHOOL YEAR**



Source: IWCS Technology Department, 2006.

**FINDING**

As shown in Exhibit 8-1, in 2005-06, Isle of Wight County Schools had nine FTEs in the Department of Technology, including a Director of Technology. Also shown in this exhibit are the five resource teachers who report directly to the Director of Instruction/ Instructional Technology, new to the division, for a combined total of 15 technology-related staff, excluding the Director of Instruction position.

Resource teachers support technology integration initiatives for all eight schools located in the division. One teacher supports two elementary schools; one teacher supports a high school; one teacher supports a lower level elementary K-3 along with a grades 4-6 elementary school; another teacher supports a K-3 elementary and a upper middle school (grades 7-8); and one resource teacher supports a middle and high school.

According to interviews with staff, there is very little communication between the Technology Department and the resource teachers supporting the school instructional staff. These positions do not have clear responsibilities to most staff throughout the division, which can lead to misalignment of duties and unclear expectations.

The resource teachers know that their responsibilities include troubleshooting teacher issues concerning technology, yet they have not been provided with troubleshooting documents or other manuals to assist in this effort.

The current organizational structure does not allow for the best way to effectively communicate and integrate technology within the school division.

### **COMMENDATION**

**IWCS has implemented resource teachers to assist in the integration of technology for the division.**

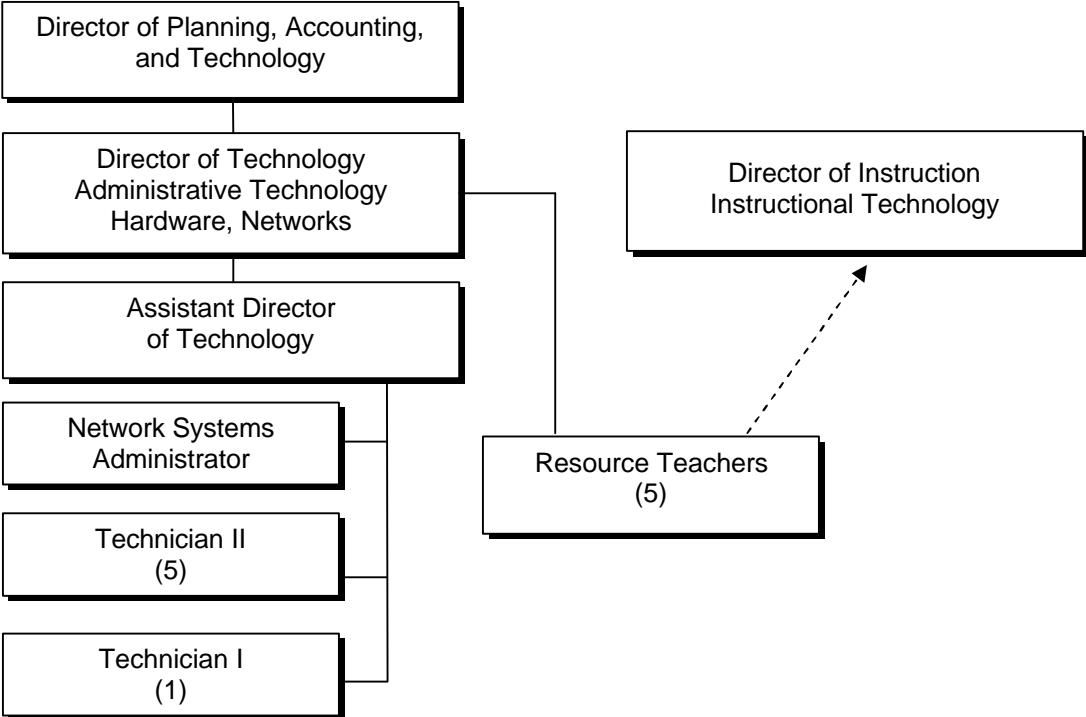
### **RECOMMENDATION**

#### **Recommendation 8-2:**

**Reorganize the Department of Technology and provide resource teachers with clear and concise job descriptions, as well as proper evaluation forms.**

The proposed organizational chart shown in Exhibit 8-2 allows for more direct communication between administrative and instructional technology staff, which should improve efficiency on technology issues. As previously mentioned, exemplary organizational structures have all technology functions reporting to the same unit in the organization to provide for a logical chain of command and communication structures according to a study by ISTE and the Gates Foundation on organizational structure of technology departments within school systems. Thus allowing school systems to identify technology structures according to the Technology Support Index rubric mentioned earlier in this chapter.

**EXHIBIT 8-2  
TECHNOLOGY DEPARTMENT  
PROPOSED ORGANIZATIONAL STRUCTURE**



Source: Created by MGT of America, 2006.

Exhibit 8-3 shows a sample of job duties and responsibilities incorporated in Dinwiddie County Public Schools that allows for more structured expectations regarding the resource teacher roles and responsibilities. IWCS should have the Director of Human Resources develop an employee evaluation form that coincides with the newly created roles for the resource teacher positions.

**EXHIBIT 8-3  
SAMPLE JOB DUTIES AND RESPONSIBILITIES  
RESOURCE TEACHERS**

**Essential Duties:**

1. Direct and oversee the planning and implementation of technology integration across the curriculum: to assist school-based technology instructors, principals, and central office staff in development program planning in co-operation with the curriculum specialists and technology department.
2. Oversee the development of model strategies for technology integration by educational personnel.
3. Collect information on technology integration for distribution to media outlets and school newsletters.
4. Develop and maintain online resources for staff development and technology integration.
5. Work with schools to disseminate information and coordinate the participation of staff in technology integration.
6. Emphasize development of young people in terms of teamwork, leadership, character, and wholesome attitudes.
7. Maintain an accurate inventory of all instructional technology supplies, instructional material and equipment.
8. Evaluate and make recommendations regarding new software and instructional technology materials to support instructional needs of division.
9. Submit promptly and accurately all reports required by the Assistant Superintendent for Instruction and Finance, the superintendent, and the Virginia Department of Education.
10. Assist in gathering and analyzing student achievement data as required by No Child Left Behind.
11. Perform other duties as assigned by the Assistant Superintendent of Instruction.

Source: Dinwiddie Public Schools, 2005.

**FISCAL IMPACT**

This recommendation can be implemented using existing resources within Human Resources and the Technology Department.

**8.3 Infrastructure**

Infrastructure is the underlying system of cabling, phone lines, hubs, switches, and routers that connects the various parts of a computer network. It is similar in nature to a human skeleton or a country's road network—it accomplishes no work on its own, but rather enables other systems to perform their functions.

Of all technology resources, infrastructure is probably 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.

**FINDING**

In ICWS, the Technology Department hosts divisionwide services including but not limited to email, the ICWS Web site, and the student database system. A primary router

directs traffic between the schools, the county government offices, and the school division administrative offices.

The school division uses an email tool that runs on a Mac X-Server while the County uses a different email tool on a Dell server with Windows 2003. Proxy servers are used to filter mail for viruses and spam.

The central office administrative offices and the school administrative offices, like the County, use Microsoft Windows while school classrooms and teachers are in a Mac environment. Thus, the division needs two types of technical skills for infrastructure support.

Schools are linked to the central office with T1 lines using a VPN connection as a live back up for communication between them.

Staff interviews also indicated that when Mac computers need repair, the division must send the computers to an authorized dealer located in another county in Virginia. This practice is costly since technicians are not able to troubleshoot or correct the problem and must find a replacement or worse, staff must wait for their Mac to be repaired.

The current infrastructure is rather disjointed since each teacher and classroom is on one platform while school administration, central office administration, and the County offices are on another platform. Best practices indicate that one environment provides the most effective and efficient infrastructure due to lower purchasing and maintenance costs.

IWCS is struggling with distance learning programs between the two high schools located at each end of the county. The reception is spotty and not conducive to successful classroom instruction. The Department of Technology has proposed a couple of options that involve site towers to allow wireless connectivity in previous years, but the County denied permission for school site towers and also denied a request for an additional tower for the central office to use as a link. The division also wanted to resell space on these towers to recoup some of the expense yet due to non-competition clauses with various telecommunication companies, this was prohibited.

The Technology Department is trying to upgrade to dual T-1 lines to address the distance learning issue.

## **RECOMMENDATION**

### **Recommendation 8-3:**

**Coordinate a review process to determine a plan for moving towards one environment for the infrastructure that also allows for adequate distance learning options.**

According to ISTE, the current infrastructure is at a satisfactory level. For the division to move into a high efficiency level, a single operating system should be used with all computers migrated to that operating system.

Furthermore, a cohesive technology infrastructure environment should provide for more flexibility of support staff. Currently, staff must know both Mac and Windows or a third party vendor must be called in to assist the division.

The distance learning should be working between the two high schools in order for increased equity in classroom instruction.

The Technology Director should coordinate with the newly recommended Technology Planning Committee to create a process for planning these issues, complete with the financial impacts on the school division for such a move for greater efficiencies.

### **FISCAL IMPACT**

The review process and plan can be accomplished with the newly created Technology Planning Committee at no cost to IWCS. The cost for moving to one platform and resolving the distance learning issue would be subject to the resulting decision by this committee.

### **FINDING**

IWCS has developed a robust Web site that provides a wealth of information to the public.

The IWCS Web site contains information on almost all aspects of the division including:

- Board member profiles;
- Board minutes and agendas;
- division and school news;
- division mission and vision;
- strategic and technology plans;
- links to administration offices;
- budget information;
- parent admission information including street names for school zones;
- division and school directories;
- lunch menus;
- staff and student assistance links;
- employment opportunities and applications; and
- school links.

While many school divisions now include such information on Web sites, the Isle of Wight County Schools' site is extremely well-organized, attractive, and easy to navigate.

Additionally, IWCS has opted for a user-friendly content management system for users to easily create and post a variety of content to Web sites without having to purchase and learn more complicated software applications.

### **COMMENDATION**

**The Web site for IWCS is updated with a user-friendly content management application that allows a wealth of division information for parents, students, and other stakeholders.**



#### **8.4 Software and Hardware**

School divisions must select and employ software and hardware to meet both instructional and administrative objectives. While computers in the classroom are primarily an instructional resource, they serve an administrative function, as well, in most divisions. Moreover, adequate administrative technology must be present to support schools in meeting instructional goals. One of the primary tenets of *No Child Left Behind* is that school divisions will make data-driven decisions. The data to make those decisions can only come from sufficient administrative software and hardware.

In software, one of the most important aspects of the technology revolution is the advent of email. Email allows district personnel to communicate quickly with another individual or with the entire district. Central office administrators can use email to communicate important news across the division. Principals can use email to communicate with their entire school in an instant. Teachers can use email to share information with other teachers across the building, across the division, or across the world.

Hardware costs have been declining over the past decade, due to greater mass production of computers and peripherals. However, while the price of hardware is generally declining, the cost of software is increasing. This increase in cost 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 salaries). As a result, the task of selecting software for use in any organization is becoming more difficult. This difficulty is particularly true of an educational system because the types of software used are more diverse than those found in most other organizations.

#### **FINDING**

The division currently uses an in-house help desk system to request assistance for technology-related issues. The entire division was trained to use the system so all staff are able to enter requests for hardware and software assistance. Work orders are entered for simple requests such as display setting changes needed to complex requests for distance learning transmission errors.

While reviewing the open work order list, the following observations were made:

- the number of requests were not recorded by date to allow for aging reports;
- requests were given a numeric priority ranking;
- requests were not given a complexity level;
- requests were assigned a numeric identification;
- status of each request was captured and updated as warranted;
- type of request was provided, such as hardware, software, one computer issue or several computers were impacted;

- the description of the request;
- the user involved, if appropriate;
- the assigned technician; and
- the location of the computer or server needing attention.

The current report is a great start for the division and only minor changes are needed to capture additional data for a best practice in this area.

Furthermore, the responses from surveys that MGT conducted with division staff indicate that the majority of teachers, principals, and administrators agree or strongly agree that adequate technical support is provided. Exhibit 8-4 shows survey results regarding technology support.

**EXHIBIT 8-4  
ISLE OF WIGHT COUNTY SCHOOLS  
SURVEY RESULTS RELATED TO TECHNOLOGY**

PART B	(%A + SA) / (%D + SD)		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. The school division provides adequate technology-related staff development	42/43	53/29	62/24
2. The school division provides adequate technical support.	69/26	53/29	60/26

Source: MGT of America, 2006.

**COMMENDATION**

**The technology coordinator has implemented an effective work order system, and all staff have been trained to use the system.**

**RECOMMENDATION**

**Recommendation 8-4:**

**Capture additional fields in the work order system and generate an email to the technician for each time the work order has been updated or assigned for more effective managerial reports.**

The technology coordinator should capture additional fields for more effective reports on the help desk/work order system. The date field should be captured in order to create aging reports. A complexity level should be created and implemented in order to show why one technician may have completed 10 work orders in a week while another technician may have only completed one; thus, providing better insight to staff reviewing reports.

The technology coordinator should create a program that automatically sends an email to technicians when a work order request has been assigned to them. This would enable

a more proactive approach for technicians since they must currently keep checking the system to see if a work order has been assigned to them. Another similar approach would be to send the user requesting assistance an email stating that the work order has been received. A final email could then be sent to allow the user to provide feedback once the work order has been completed.

The implementation of this recommendation would allow for another best practice within the ISCS Technology Department.

### **FISCAL IMPACT**

The implementation of this recommendation can be accomplished by using the skill set of the Technology Coordinator who created the program. This recommendation could be implemented in phases throughout the next school year.

### **FINDING**

The help desk software has a knowledge-based component; however, the work order resolutions are not automatically captured to update the knowledge base. Knowledge bases provide for an additional help tool that users can look up to see if answers are present to a recurring issue. The division staff stated in interviews, that they are planning to automatically capture data to update the knowledge base within the next school year.

### **RECOMMENDATION**

#### **Recommendation 8-5:**

**Implement the automatic capture of knowledge base data from the help desk request resolution.**

While the division is planning to automate this process, it is important to implement within the next school year to increase efficiencies among the technicians. This tool may also assist the resource teachers when help is requested from instructional staff within each school. These tools allow greater efficiency for technicians since they can alleviate research time to resolve and close a help desk request.

### **FISCAL IMPACT**

The Assistant Technology Director implemented the help desk system and can write the additional code to implement this recommendation without additional funding needs.

### **FINDING**

IWCS has implemented a survey related to customer satisfaction for technical support offered within the Department of Technology. The department sends out surveys to staff in order to evaluate how the technicians are responding to their requests for assistance with hardware and software issues. These surveys also capture customer perception on how notifications on outages are handled, the timeliness of responses as well as how courteous the technicians were while assisting them.

Exhibit 8-5 shows the results of the most recent survey sent to IWCS staff. As shown in this exhibit, out of a scale from 1-4, the Department of Technology scored 2.72 overall.

**EXHIBIT 8-5  
ISLE OF WIGHT COUNTY SCHOOLS  
TECHNOLOGY DEPARTMENT INTERNAL SURVEY RESULTS**

<b>HAVE A HOME COMPUTER 105</b>	<b>Number of respondents used in this calculation 165</b>		
<b>PHONE SERVICE</b>	<b>Scale 1-4</b>	<b>Never Used</b>	<b>Don't Know</b>
Reliability of classroom phone service.		2	
Voicemail setup and assistance.	2.49	13	11
Phone maintenance and repairs.	2.78	14	28
Ability to contact CO personnel including Technology staff.	2.5	7	5
Training on use of phones and voicemail.	2.52	4	12
<b>Phone Service</b>	<b>2.59</b>		
<b>HARDWARE</b>	<b>Scale 1-4</b>	<b>Never Used</b>	<b>Don't Know</b>
Computers in the classroom for students.	2.15	8	11
Computers in the classroom for teacher management.	3.04	1	5
Computer labs for class access.	2.61	11	13
Computers in office.	2.89	34	64
Routine replacement of obsolete computers.	2.46	4	14
Digital cameras for instructional use.	2.51	36	32
Video cameras for instructional use.	2.45	42	31
Media retrieval devices in the classroom (video, television).	2.69	8	11
Projection devices for displaying lessons from computers.	2.26	32	23
Training on use of computers, cameras, projection devices, media retrieval systems.	2.36	6	13
<b>Hardware</b>	<b>2.54</b>		
<b>NETWORK</b>	<b>Scale 1-4</b>	<b>Never Used</b>	<b>Don't Know</b>
Ability to logon to the network with your login and password.	3.15	1	
Network connections in the classroom.	2.92	3	2
Availability of printers.	2.58	1	1
Reliability of Internet connection.	2.84	1	1
Speed of Internet connection	2.73	1	
Access to division email through intranet of internet.	2.84	7	7
Access to division email through Firstclass	3.18	1	
Availability of needed software installers on the Instructional Server	2.77	10	14
Ability to connect to the network data for instructional software.	2.79	7	6
Ability to access information at other schools.	2.73	29	27
Training on use of email, intranet, internet....	2.66	5	2
<b>Network</b>	<b>2.85</b>		
<b>APPLICATIONS</b>	<b>Scale 1-4</b>	<b>Never Used</b>	<b>Don't Know</b>
Availability of Student Information System.	2.91	4	3
Intergrade Electronic Gradebook.	2.89	24	23
Library Online Catalog (Researcher).			
Reliability of information in SASI	2.96	5	3
MS Office Applications	3.17	6	6
On-Line Research services (Grolier, Proquest)	3.02	30	28
Access to electronic media (streaming Video, books.	2.71	32	27

**EXHIBIT 8-5 (Continued)  
ISLE OF WIGHT COUNTY SCHOOLS  
TECHNOLOGY DEPARTMENT INTERNAL SURVEY RESULTS**

<b>APPLICATIONS (continued)</b>	<b>Scale 1-4</b>	<b>Never Used</b>	<b>Don't Know</b>
School Division Website links and information.	2.93	8	5
School Website.	2.91	6	2
Training on instructional software.	2.69	4	2
<b>Applications</b>	<b>2.63</b>		

Source: IWCS Technology Department, 2006.

**COMMENDATION**

**The Technology Department captures customer satisfaction through surveys.**

**RECOMMENDATION**

**Recommendation 8-6:**

**Create a plan to increase customer satisfaction based on survey feedback.**

While IWCS is commended for capturing survey data related to technology-related services provided throughout the division, follow-up plans are needed to ensure that customers are satisfied with these services. By establishing a process to find ways in increasing the satisfaction, the division would be providing a best practice in the Technology Department.

**FISCAL IMPACT**

The division can implement this recommendation with existing resources.

**FINDING**

Currently, IWCS does not know how many computers are used by students. A comprehensive list of computers was provided, but no one has researched how many of these computers are for student use.

The current technology plan states Connectivity Implementation as an area for the division to work on for technology. Goal 1 under this area is:

**Ensure that all county public schools have access to integrated instructional and administrative services across interoperable high-speed networks.**

Objective A for this goal is as follows:

**To ensure that every instructional and administrative are in each building has a sufficient number of network connections to support the high bandwidth requirements of current and future instructional and administrative applications.**

Strategy 2 for this objective and goal states:

**Establish a ratio of computers to students of 1:3 in Grades K-12.**

This strategy could be misleading since there is no mention of the current ratio of computers to students in the plan and as previously mentioned, the division was not able to provide the number of computers for student use.

Student enrollment for the 2004-05 school year was 5,167 for IWCS. Using this enrollment figure, the division should strive for 1,722 computers for student use.

**RECOMMENDATION**

**Recommendation 8-7:**

**Establish the number of computers that are for student use within IWCS.**

According to ISTE, one computer for every four students is considered a best practice among school divisions in the country. While the division is striving for a better than best practice ratio of computers per student, it is equally important to know the starting point of how many current computers are available for student use. The division can add a counter on the fixed asset reports to determine the number of computers available. Subsequent to this process, the technology staff should visit each room location on the report to determine if computers are for staff or for student use.

**FISCAL IMPACT**

The implementation of this recommendation can be accomplished with existing resources within the division.

**FINDING**

Comments from parents provided during the on-site visit included concerns on Web filters. A couple of parents stated that their child was able to see sites that were not consistent with education. MGT's review team tried to hit questionable sites as well as searched for sites with questionable content. The review team used computers at several schools and was unable to pull up any Web pages that contained graphic language or sexual content.

The Technology Department has installed several filters on each server to prevent these types of Web sites from popping up on computer screens. In fact, there are some sites that contain scientific information that teachers must request in writing on why they need to have these sites available for student research. Most of these sites may contain one or two suspect words but deal with biology-related subject matter. While it is possible for a Web site to pop up from time-to-time, the review team was not able to identify any such sites.

**COMMENDATION**

**IWCS has incorporated appropriate filters on servers to carefully screen Web sites by staff and students.**

**FINDING**

The division's phone system is considered not owned by IWCS. Three vendors are used to service the phones for division administration, each school, along with the county offices. The combined total for service calls on the phone system is shown in Exhibit 8-6 for the total 2005 fiscal year and for six months of the 2006 fiscal year.

As shown in this exhibit, a total of \$252,295 was spent on phone service and repair calls for 18 months to three different vendors. Moreover, the current telecommunication vendors prohibit IWCS staff from repairing or servicing the phone system so calls must be made to these vendors. Therefore, the division should be anticipating a cost of over \$357,000 per this fiscal year to have the three current vendors continue to service phones for IWCS. This figure is based on the 2006 year-to-date expenses as shown in the exhibit.

**EXHIBIT 8-6  
TELEPHONE SERVICE CALLS  
2005 AND 2006\* FISCAL YEARS**

TELECOMMUNICATIONS VENDOR	FISCAL YEARS	
	2005	2006
Ambassador	\$47,164	\$25,398
Connecting Point	\$12,982	\$89,416
Lee Telecom, Inc.	\$13,646	\$63,689
<b>TOTALS</b>	<b>\$73,792</b>	<b>\$178,503</b>

\*Six months

Source: IWCS Finance Department, 2006.

There is more of a trend for school systems to move towards owning phone systems and repairing internally. Furthermore, some school systems have started implementing phone systems through their Wide Area Network to further reduce costs. These types of phone systems are referred to as "Voice over IP".

**RECOMMENDATION**

**Recommendation 8-8:**

**Conduct a formal cost-benefit analysis for migrating the division's telephone system to operate over the WAN, and present a recommended approach to the board.**

Public and private organizations have been moving in the direction of placing phone systems on their WAN. IWCS should evaluate the cost of a Voice over IP system to ensure that they are receiving the best possible telecommunication system for these expenses.

**FISCAL IMPACT**

The formal analysis can be conducted with current Department of Technology staff with no additional funding needs.

## **8.5 Staff Development**

Training in the use of technology is the most critical factor in determining whether that technology is used effectively or even used at all. Administrative and instructional staff must be able to use effectively the technology available to them. Training must be ongoing; the technology environment is continuously evolving, and districts must keep pace with the evolution.

As previously mentioned, ISTE has created a Technology Support Index, and this index identifies exemplary districts as having these staff development practices:

- a comprehensive staff development program is in place that impacts all staff and is progressive in nature to balance incentive, accountability, and diverse learning opportunities;
- on-line training opportunities are provided for staff both on-site and remotely that represents a diversity of skill sets;
- expectations for all staff are clearly articulated and are broad in scope, with performance expectations built into work functions, and a part of the organizational culture;
- technical staff receive ample training as a normal part of their employment, including training towards certification; and
- basic troubleshooting is built into the professional development program, and is used as a first line of defense in conjunction with technical support.

### **FINDING**

Training has been offered to Isle of Wight resource teachers during the current school year. Training included the following areas:

- QTL Summer Session;
- Virginia ITRT Academy;
- United Streaming;
- Marco Polo;
- Educational Technology Leadership;
- Virginia Society for Technology in Education;
- SIRS Database;
- Blackboard System Administration;
- ARDT;
- River Deep;
- Dream Weaver; and
- Mambo.

During interviews, staff indicated that training was provided internally through the Technology Department. Training included the following areas:

- computer use;
- camera and projection devices;



- media retrieval systems;
- internet and Intranet; and
- email.

As indicated, training for staff did not include software application use. Training for software applications is a necessity in order for true technology integration into the classroom, especially in the delivery of instruction.

IWCS did not have a tracking system to ensure staff is continually trained based on their skill level in technology. The only exception was a spreadsheet developed for this review that provided the resource teacher training.

The CEO Forum on Education and Technology was founded in 1996 to help ensure schools effectively prepare all students to be contributing citizens in the 21<sup>st</sup> Century. A main objective of this goal to integrate technology and classroom. The CEO Forum, as recommended by the International Society for Technology in Education, has designed a self-assessment tool to provide schools with the information need to better integrate technology into their educational process. This tool is known as the interactive STaR Chart which is a School Technology and Readiness Chart.

The STaR Chart identifies and defines four school profiles ranging from the “Early Tech” school with little or no technology to the “Target Tech” school that provides a model for the integration and innovative use of education technology. The STaR Chart is not intended to be a measure of any particular school’s technology and readiness, but rather to serve a benchmark against which every school can assess and track its own progress.

The STaR Chart can ensure that:

- a school is using technology effectively to ensure the best possible teaching and learning;
- the type and level of training needed by school is appropriate;
- the current education technology profile is adequate; and
- the areas the school needs to focus on to improve the level of technology integration are addressed.

Additional information and an implementation plan can be found on the International Society for Technology in Education’s Web site [www.iste.org](http://www.iste.org).

## **RECOMMENDATION**

### **Recommendation 8-9:**

**Provide basic software training for users and develop an accountability process like that of the STaR Chart to ensure teachers are receiving training and providing technology integration in each school and classroom.**

In order for school divisions to incorporate technology into the classroom, an active approach is needed to ensure staff understand and use technology in lesson plans. Basic computer training should be included as an option for staff. School principals

should include technology as a component of teacher observations to reinforce the importance of technology integration on their respective campuses. A tool like the STaR Chart will assist in this effort.

**FISCAL IMPACT**

The implementation of this recommendation can be accomplished with existing resources by using the resource teachers, labs, and technology staff for the division. This training and accountability process can be slowly implemented with predetermined schedules.

**FINDING**

As previously mentioned, the Technology Department provides training to staff on computer use, camera and projection devices, internet and intranet, as well as email. As a follow-up to this training, the Technology Department conducts a survey with staff on the satisfaction of this training.

Exhibit 8-7 shows some results of the 2005 survey provided by 165 respondents. As shown in this exhibit, the range of satisfaction if from 2.36 to 2.69 on a 4.0 scale.

**EXHIBIT 8-7  
ISLE OF WIGHT TECHNOLOGY SURVEY RESULTS  
2005**

<b>TECHNOLOGY SATISFACTION SURVEY SUMMARY RESULTS</b>			
	<b>Scale 1-4</b>	<b>Never Used</b>	<b>Don't Know</b>
Ease of Submitting work orders via Intranet	2.41	16	9
Overall experience with Tech support from Department	2.81	11	6
Overall experience with Instructional Software Support	2.72	13	10
FAQ's and Help Desk on Intranet	2.44	35	26
Notification of building outages	2.36	3	4
Knowledge and ability of Tech Support Staff	3.04	4	3
Response time of Tech Support Staff	2.75	9	6
Problems resolved in a timely manner	2.65	7	5
Permanent solutions to technical problems	2.67	7	7
Technical Staff was courteous	3.40	6	4
Help menus inside applications	2.66	21	15
<b>Technical Support</b>	<b>2.72</b>		

Source: IWCS Technology Department, 2006.

**COMMENDATION**

**IWCS Technology Department collects survey data from staff regarding training offered.**

**RECOMMENDATION**

**Recommendation 8-10:**

**Create a plan to increase customer satisfaction for training based on survey feedback.**

While IWCS is commended for capturing survey data related to training offered to staff throughout the division. Survey data is a great feedback tool to gauge how effective services are to customers; however, follow-up plans are needed to ensure that customers are satisfied with these services. By establishing a process to find ways in increasing the satisfaction, the division would be providing a best practice in the Technology Department.

**FISCAL IMPACT**

The division can implement this recommendation with existing resources.

## **9.0 FOOD SERVICE**

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## **9.0 FOOD SERVICES**

This chapter provides findings, commendations, and recommendations regarding operations of the Food Service Department for Isle of Wight County Schools (IWCS). The four major sections in this chapter are:

- 9.1 Organizational Structure
- 9.2 Policies and Procedures
- 9.3 Financial Performance
- 9.4 Student Meal Participation

### **CHAPTER SUMMARY**

The Food Service Department for IWCS offers breakfast, lunch, and snacks to over 5,000 students and adults at nine campuses within Isle of Wight County. The school division receives reimbursement income on free, reduced, and paid breakfast and lunch meals served. In addition to meal reimbursement income, the school division also receives USDA food commodities.

MGT reviewed the operations for food services within IWCS and have the following commendations and recommendations based on our findings:

- restructure the food service operations;
- cafeteria managers provide clear and orderly instructions for food service staff by their specific role in each school kitchen in order to ensure all duties are completed;
- staff are cross-trained on all food-service related duties within their respective school kitchens and cafeterias;
- shift food service staff to ensure Meals Per Labor Hour are all at benchmark levels;
- IWCS has drafted a student wellness policy and anticipated implementation during the next school year;
- finalize and implement the student wellness policy;
- the Food Service Department is commended for maintaining clean facilities;
- contact the point-of-sale vendor to have them correct the program to avoid an added step;
- establish and enforce a policy to lock all areas where food is stored after cafeteria staff leave each day;
- continue to strive for positive Food Service Fund Balance figures annually;
- IWCS produces monthly profit and loss statements by each school for food service operations;

- the division uses dual control methods for daily cash collection regarding food service operations;
- establish a policy to create appropriate reports for reviewing food and labor costs on a monthly basis to ensure these costs are in line with best practices;
- the division provides several options for parents and students to attain the cafeteria menus; and
- implement strategies designed to raise participation to 25 percent for breakfast.

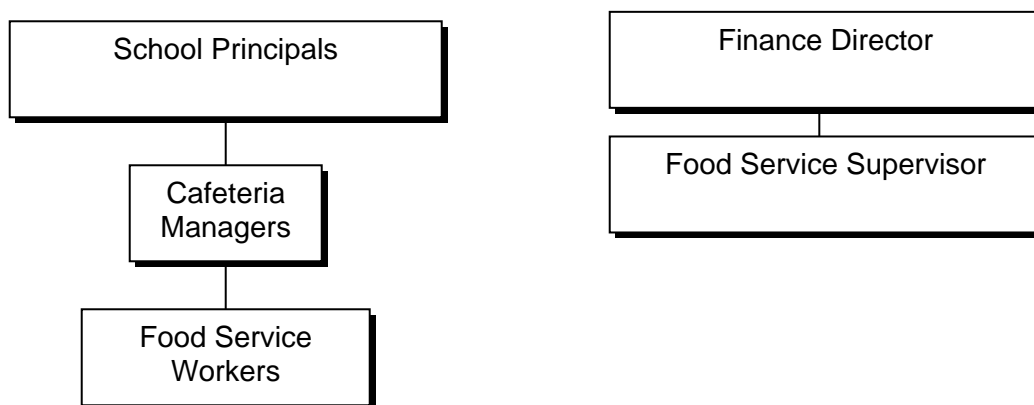
**9.1 Organizational Structure**

Organization and management of food service operations is essential to the effectiveness of the program. Leadership is needed to coordinate planning, implement policies, and ensure proper procedures are followed by cafeteria staff while ensuring students receive nutritious meals on a daily basis.

**FINDING**

As illustrated in the department’s organizational structure in Exhibit 9-1, the Food Service Supervisor is not responsible for the any food service staff. Rather, each high school principal oversees the management of food service personnel. Additionally, the current title of Food Service Supervisor is not appropriate for positions without staff reporting to them.

**EXHIBIT 9-1  
ISLE OF WIGHT COUNTY SCHOOLS  
FOOD SERVICE DEPARTMENT ORGANIZATIONAL STRUCTURE**



Source: IWCS, Food Service Department, 2006.

Exhibit 9-2 shows the general responsibilities and essential duties for the Food Service Supervisor in IWCS. As shown in this exhibit, supervision of food service personnel is stated as a general responsibility. Furthermore, terms such as oversees, directs, assigns, coordinates, and trains are used in the essential duties yet this position currently is not supervising or managing any staff.

**EXHIBIT 9-2  
ISLE OF WIGHT COUNTY SCHOOLS  
FOOD SERVICE SUPERVISOR  
GENERAL RESPONSIBILITIES AND ESSENTIAL DUTIES**

**GENERAL RESPONSIBILITIES**

Responsible for the food service breakfast and lunch program of the division. Supervision is exercised over all food service personnel.

**ESSENTIAL DUTIES**

(These are intended only as illustrations of the various types of work performed. The omission of specific duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.)

Plans, coordinates, assigns, and oversees the preparation, cooking, and serving of food; preparing and maintaining necessary records and files; preparing reports;  
Plans, organizes, and directs the food service program for the school system;  
Reviews and visits school cafeterias to ensure compliance with local, state, and federal standards for food preparation and service;  
Ensures all health and sanitation standards are met;  
Assigns percentage, delivery, and receiving of all USDA donated foods; maintains records of all received foods and billings of processed foods;  
Plans and/or reviews monthly breakfast and lunch menus, distributes menus to students, staff, and parents;  
Handles cafeteria related problems such as food shortages, equipment malfunctions, personnel problems, etc.;  
Coordinates state and federal audits;  
Prepares bids for foods, snacks, beverages, and milk and ice cream;  
Plans and supervises in-school catering functions;  
Trains Food Service Managers and food service staff;  
Performs related work as required.

Source: IWCS Human Resources Department, 2006.

Each school cafeteria manager is responsible for food service workers within their school. The school cafeteria manager reports directly to their respective school principal. Currently, all principals report directly to the Finance Director for food service operations.

School principals have enough responsibility with carrying out their core mission of educating students without having to manage food service staff, especially when a position is already staffed and able to take on these responsibilities.

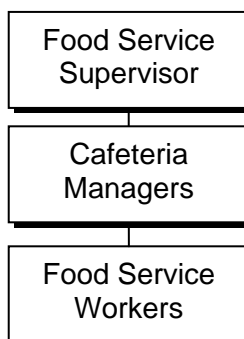
**RECOMMENDATION 9-1:**

**Restructure the food service operations.**

With the implementation of this recommendation, IWCS should create a more efficient organizational structure for Food Services in the school division. The current structure requires school principals to handle responsibilities of daily, campus-level kitchen operations. Exhibit 9-3 shows the recommended organizational structure that should be implemented for the division. As shown in this exhibit, all cafeteria managers would now report to the Food Services Supervisor, which is also consistent with the job description on file with IWCS.

Additionally, this structure will allow for school administrators to place more focus on educating the students of IWCS.

**EXHIBIT 9-3  
ISLE OF WIGHT COUNTY SCHOOLS  
PROPOSED FOOD SERVICE DEPARTMENT ORGANIZATIONAL STRUCTURE**



Source: Created by MGT of America, 2006.

**FISCAL IMPACT**

Since the division already employs a full-time food service supervisor, no additional cost would be necessary to implement this recommendation.

**FINDING**

The cafeteria managers at each school post a detailed list of job duties by position for each food service worker. Staff are able to quickly look at the color coded sheet to determine each specific duty to be performed and in the order of performance. These job duty lists are clearly labeled and posted in locations that are accessible for all staff to see and read.

Furthermore, staff indicated during several focus groups, that these sheets are rather helpful for new employees as well as substitutes since they are easy to read and understand while listing the specific duties in performance order.



**COMMENDATION**

**Cafeteria managers provide clear and orderly instructions for food service staff by their specific role in each school kitchen in order to ensure all duties are completed.**

**FINDING**

IWCS food service staff are cross-trained for food service operations. According to staff interviews, focus groups, and observations, cafeteria workers were able to step in where needed to keep consistency in serving meals to students.

As previously mentioned, the cards on staff roles, coupled with cross-training keep the efficiencies of running and serving students two meals per day at a high level. This is a best practice among school divisions in the country.

It is clear that other employees of the school division notice these efforts since survey data collected show that a majority of administrators (53 percent) and principals (36 percent) *agree or strongly agree* that the Food Service Department provides nutritious and appealing meals.

**COMMENDATION**

**Staff are cross-trained on all food-service related duties within their respective school kitchens and cafeterias.**

**FINDING**

The school division uses a staffing plan for food service operations and also captures the Meals Per Labor Hour (MPLH) on a monthly basis by school. MPLH measures the average number of full meals and meal equivalents served divided by the number of employee hours worked. Benchmark levels were used to compare with the data provided by the school division.

Exhibit 9-4 shows the MPLH analysis for October 2005. This analysis shows the MPLH calculation as provided by IWCS and compares them to benchmark levels. The benchmark MPLH is per the publication *Controlling Costs for School Food Services*.

**EXHIBIT 9-4  
ISLE OF WIGHT COUNTY SCHOOLS  
MEALS PER LABOR HOUR COMPARED TO BENCHMARK LEVELS  
OCTOBER 2005**

SCHOOLS	MEALS PER LABOR HOUR	BENCHMARK MEALS PER LABOR HOUR	STAFF HOURS OVER/UNDER BENCHMARK LEVELS
Carrsville Elementary	13.6	12.0	1.6
Carrollton Elementary	16.9	16.0	0.9
Hardy Elementary	17.6	16.0	1.6
Windsor Elementary	20.1	17.0	3.1
Westside Elementary	18.2	18.0	0.2
Smithfield Middle	12.5	16.0	(3.5)
Windsor Middle	17.1	16.0	1.1
Smithfield High	16.2	18.0	(1.8)
Windsor High	14.7	16.0	(1.3)

Sources: Created by MGT of America based on data provided by IWCS and Carrsville; Costs for School Food Services, Third Edition, 2000.

As shown in the exhibit, the division is above benchmark levels for MPLH in Carrsville, Carrollton, Hardy, Windsor, and Westside Elementary Schools as well as Windsor Middle School. IWCS is below benchmark MPLH for Smithfield Middle School and both high schools.

**RECOMMENDATION**

**Recommendation 9-2:**

**Shift food service staff to ensure most, if not all, Meals Per Labor Hour are at benchmark levels.**

While the division has successful MPLH levels at many of the schools, staffing levels should be more consistent throughout the division. The implementation of this recommendation should ensure appropriate staffing levels at each school, and should be considered for the next school year.

**FISCAL IMPACT**

The division can accomplish this recommendation by shifting staff from one school to another in order to reach benchmark levels at all schools. Therefore, additional funding is not necessary for this recommendation. However, if the division should choose, cafeterias performing above benchmark levels could remain at current levels while reducing staff hours at other schools, which would result in a cost savings of \$9,837 per year or \$49,185 over a 5-year period.

These savings are based on \$8.40 average hourly rate at Smithfield Middle x 3.5 hours which equals \$29.40. \$29.40 x 20 days equals \$588 per month net savings. For Smithfield High, an average of \$8.66 per hour x 1.8 hours x 20 days equals \$312, and \$7.43 per hour at Windsor High x 1.3 hours x 20 days equals \$193 per month. The total of each school x 9 months equals \$9,837.

<b>Recommendation</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>
Shift Food Service to Ensure Meals Per Labor Hour are at Benchmark Levels	\$9,837	\$9,837	\$9,837	\$9,837	\$9,837

**9.2 Policies and Procedures**

Food Service policies and procedures provide important information to drive internal operations, but are also important in the overall communication to stakeholders. An absence of formal policies and procedures creates the potential for misinterpretations and omissions within food service operations.

Policies and procedures also provide the basis for staff to understand the necessity of compliance with federal, state, and local regulations and are a necessity for efficient food

**FINDING**

Food service operations in Isle of Wight County Schools is currently working on a Wellness Program policy for students and staff. Staff further indicated that this well ness plan will be implemented during the next school year. Currently, the draft policy includes, but is not limited to, the following information:

**Physical Activity** – This area states students should be receiving the nationally-recommended minimum amount of physical activity during the school day (sixty minutes).

**Other School-Based Activities** – This area includes competitive food bans, health screenings, and support enrollment actions for eligible students in health insurance programs.

**Nutrition Guidelines** – The division would meet or exceed state and federal standards for Child Nutrition.

This draft wellness plan further provides for how school nutrition education will be provided to staff and students within the division and how the plan is to be implemented.

**COMMENDATION**

**IWCS has drafted a student wellness policy and anticipated implementation during the next school year.**

## **RECOMMENDATION**

### **Recommendation 9-3:**

#### **Finalize and implement the student wellness policy for IWCS.**

Throughout the country, education administrators are leaning more towards healthy meals for students. Data suggests that if students are provided healthy meals at school, they are more likely to work effectively in the classroom. Some states have even charged all school divisions with incorporating such a program since child obesity rates have increased so dramatically in recent years. Rules regarding baking instead of frying, especially deep frying are being implemented in states like Texas to ensure a more healthy meal for students.

## **FISCAL IMPACT**

The implementation of this recommendation can be accomplished using existing food service staff within the division.

## **FINDING**

The cleanliness of facilities can impact student participation since student consumers will not purchase food cooked or served from a dirty kitchen or what may be perceived by students as unclean. The schools visited were found to be rather clean. The equipment, floors, freezers, coolers, areas under the sinks, offices, cafeteria walls, and the cafeteria tables and chairs were all free of debris and very clean. Health reports viewed were in good standing as well.

Having clean kitchens help for the provision of safe food preparation, as well as meal distribution to school consumers—students, and staff.

## **COMMENDATION**

**The Food Service Department is commended for maintaining clean facilities.**

## **FINDING**

IWCS implemented a point-of-sale program during the beginning of this school year. MGT found that food service staff must touch the point-of-sale screen after every student has entered their personal identification number, which slows down the process of moving students through the line.

During the review team's observations, interviews, and focus groups, this practice was verified as a necessity. Staff were not able to validate a reason for this instruction, just that it was part of the training for the equipment.

## **RECOMMENDATION**

### **Recommendation 9-4:**

**Contact the point-of-sale vendor to have them correct the program to avoid the added step.**

MGT has reviewed food service operations in many educational divisions throughout the country and has not seen this extra step for a point-of-sale system. This additional step may continually delay each student's payment by a few seconds, but these few seconds add up to several minutes when compounded by the number of meals served; thus, making the practice inefficient.

## **FISCAL IMPACT**

The point-of-sale vendor should provide the correction free to the division since IWCS is still in its first year of implementation.

## **FINDING**

During the charrette at Windsor High School, MGT's review team found that the kitchen door was left unlocked for the soccer team to fill ice coolers; however, the review team also found several refrigerators and freezers also unlocked.

While it is common for some schools to leave a cooler unlocked for early milk deliveries, this is when the cooler is empty. The review team found meat boxes, trays of food, salad preparation among the food in the unlocked refrigerators and freezers.

Should the current practice continue, the school is at risk for theft or potential harmful contamination of food.

## **RECOMMENDATION**

### **Recommendation 9-5:**

**Establish and enforce a policy to lock all areas where food is stored after cafeteria staff leave each day.**

The current practice can lead to possible theft, especially when the school is left open for any type of community or school function. This practice can also comprise safety since staff would not be able to know if food had been touched or tampered with during overnight hours.

## **FISCAL IMPACT**

This recommendation can be accomplished with existing resources and should be implemented immediately.

### **9.3 Financial Performance**

Financial performance is important to any school business operation. School divisions must adhere to proper financial practices related to food service operations as well, since there are implications from a local, state, and federal perspective due to funding sources associated with school nutrition.

As shown in Exhibit 4-5, IWCS has been lowest in food service disbursement among the comparison divisions.

**EXHIBIT 9-5  
FOOD SERVICE DISBURSEMENTS AMONG COMPARISON SCHOOL DIVISIONS  
2003-04 AND 2004-05 YEARS**

<b>SCHOOL DIVISION</b>	<b>2003-04</b>	<b>2004-05</b>
<b>Isle of Wight</b>	1,427,915	1,566,948
<b>Culpeper</b>	1,938,147	2,265,464
<b>Gloucester</b>	1,724,925	1,822,524
<b>Prince George</b>	1,732,352	1,922,839
<b>Polaski</b>	1,954,485	1,933,176
<b>School Division Average:</b>	<b>\$1,755,565</b>	<b>\$1,902,190</b>

Source: Virginia Department of Education, Superintendent's Annual Report, 2004 and 2005.

#### **FINDING**

IWCS produces a monthly report summarizing profit and loss by each school. The report further states year-to-date totals so each school is informed of their financial status for food service operations.

Monthly profit and loss statements provide management with information to properly evaluate the financial position of each cafeteria. This is considered a best practice among school systems.

#### **COMMENDATION**

**IWCS produces monthly profit and loss statements by each school for food service operations.**

#### **FINDING**

IWCS has a written process for cash collection at the end of each day, including a dual control component.

Each school cafeteria manager prints two copies of the daily report from the point-of-sale program, counts the cash in each drawer, and then completes a preprinted sheet that compares the cash collected to the point-of-sale report. The manager then signs both copies of the report and takes one copy with the cash to the school bookkeeper. The school bookkeeper then counts the cash and verifies the balance provided on the sheet. A deposit slip is created with the stated amount.

This process allows for dual control on the cash collected and deposited in the division.

### **COMMENDATION**

**The division is commended for using dual control methods for daily cash collection regarding food service operations.**

### **FINDING**

Reports were not available to determine food or labor costs as compared to revenue. The financial reports provided to the review team grouped all of school food services into one line item.

Best practices state that school divisions should keep food costs at or below 36 percent of revenue. Food costs are defined as the actual cost to buy consumable provisions. Best practices further state that labor costs should be kept at or below 40 percent of revenue.

The review team was not able to determine if IWCS is within best practices since reports were not available from the division. Subsequent to the on-site visit, the division provided MGT with reports stating that these reports were sent out monthly; however, MGT was unable to validate this practice with school cafeteria staff.

### **RECOMMENDATION**

#### **Recommendation 9-6:**

**Establish a policy to create appropriate reports for reviewing food and labor costs on a monthly basis to ensure these costs are in line with best practices.**

Food costs are usually second to labor costs for a school division. IWCS should establish a policy to ensure that the division is measuring current practices against best practices. If the division is not at best practice levels, then the Food Service Supervisor should develop and implement corrective plans. This recommendation should allow for a more positive financial position for the school division.

### **FISCAL IMPACT**

Reports on food costs were not available by the division; therefore, the savings cannot be determined. However, MGT knows from previous studies that the savings can be substantial.

## **9.4 Student Participation**

Maximizing student meal participation has two important benefits to school divisions:

- First, students who eat nutritious meals each day can learn more effectively because they are more receptive to learning.

- Second, cash sales of food and federal reimbursements for meals served are two significant sources of revenue for school divisions.

**FINDING**

A major component of student participation is for parents and students to know what is being served that day or week. IWCS has developed a process to post monthly menus on the division's Web site. This practice allows both parents and students to view and/or print the menu by each school and by the school's calendar. These menu calendars are available at each school, posted in the cafeteria, and sent home with students.

**COMMENDATION**

**IWCS is commended for providing several options for parents and students to attain the cafeteria menus.**

**FINDING**

IWCS student participation rates are inconsistent among the schools for both breakfast and lunch. Exhibit 9-6 shows the average daily student participation rate for October 2005. As shown on the exhibit, the division has a monthly student participation average of 15.86 percent for breakfast and 50.56 percent for lunch.

**EXHIBIT 9-6  
ISLE OF WIGHT COUNTY SCHOOLS  
STUDENT PARTICIPATION RATES  
OCTOBER 2005**

<b>School/Meal Type</b>	<b>Paid ADP as Percentage of Paid Eligibility</b>	<b>Reduced ADP as Percentage of Reduced Eligibility</b>	<b>Free ADP as Percentage of Free Eligibility</b>	<b>Total ADP as Percentage of Total Eligibility</b>
<b>Smithfield High</b>				
Breakfast	0.55%	6.98%	18.92%	3.76%
Lunch	33.70%	74.42%	75.68%	42.10%
<b>Smithfield Middle</b>				
Breakfast	4.29%	15.79%	35.04%	11.30%
Lunch	42.38%	73.68%	81.20%	52.35%
<b>Windsor Elementary</b>				
Breakfast	13.25%	29.09%	60.66%	31.43%
Lunch	43.38%	56.36%	81.97%	58.33%
<b>Windsor High</b>				
Breakfast	1.45%	5.00%	22.22%	5.06%
Lunch	44.79%	50.00%	81.48%	50.78%
<b>Carrsville Elementary</b>				
Breakfast	12.64%	21.43%	58.33%	22.46%
Lunch	44.83%	85.71%	81.25%	55.08%
<b>Hardy Elementary</b>				
Breakfast	14.07%	29.55%	50.34%	25.52%
Lunch	39.52%	59.09%	73.47%	50.48%



**EXHIBIT 9-7 (CONTINUED)  
ISLE OF WIGHT COUNTY SCHOOLS  
STUDENT PARTICIPATION RATES  
OCTOBER 2005**

<b>School/Meal Type</b>	<b>Paid ADP as Percentage of Paid Eligibility</b>	<b>Reduced ADP as Percentage of Reduced Eligibility</b>	<b>Free ADP as Percentage of Free Eligibility</b>	<b>Total ADP as Percentage of Total Eligibility</b>
<b>Carrollton Elementary</b>				
Breakfast	15.33%	40.91%	21.93%	17.68%
Lunch	37.97%	72.73%	80.70%	48.04%
<b>Windsor Middle</b>				
Breakfast	10.08%	31.25%	36.36%	17.72%
Lunch	55.04%	71.88%	81.82%	62.70%
<b>Westside Elementary</b>				
Breakfast	7.15%	35.85%	64.67%	19.56%
Lunch	37.72%	77.36%	87.33%	49.39%
<b>Total Breakfast</b>	<b>7.21%</b>	<b>24.30%</b>	<b>42.50%</b>	<b>15.86%</b>
<b>Total Lunch</b>	<b>40.20%</b>	<b>68.22%</b>	<b>80.41%</b>	<b>50.56%</b>

Source: Isle of Wight County Schools, Food Service Department, 2006.

**RECOMMENDATION**

**Recommendation 9-7:**

**Implement strategies designed to raise participation to 25 percent for breakfast.**

If IWCS Food Services can meet targeted goal of 25 percent for breakfast, the reimbursement from the federal government will increase as well. This should be an ongoing process for IWCS. If a school is not meeting the targeted participation goals, then the Food Services Supervisor can meet with the cafeteria manager to help implement corrective action plans to increase student participation.

**FISCAL IMPACT**

MGT is not able to determine the additional revenue for IWCS to implement this recommendation since meal reimbursements were not available by meal.

**10.0 SUMMARY OF POTENTIAL  
SAVINGS AND COSTS**

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## **10.0 SUMMARY OF POTENTIAL SAVINGS AND COSTS**

Based on the analyses of data obtained from interviews, surveys, community input, state and division documents, and first-hand observations in Isle of Wight County Schools (IWCS), the MGT team developed 42 commendations and 97 recommendations in this report. Twenty-three (23) recommendations have fiscal implications.

As shown below in Exhibit 10-1, full implementation of the recommendations in this report would generate a gross savings of over \$1.2 million over five years, with a net cost of approximately \$2.1 million. It is important to note that many of the recommendations MGT made without specific fiscal impacts are expected to result in a net cost savings to the division, depending on how the division elects to implement them. It is also important to note that costs and savings presented in this report are in 2005-06 dollars and do not reflect increases due to salary or inflation adjustments.

Exhibit 10-1 shows the total costs and savings for all recommendations.

### **EXHIBIT 10-1 SUMMARY OF ANNUAL SAVINGS AND COSTS**

CATEGORY	YEARS					TOTAL FIVE-YEAR SAVINGS (COSTS)
	2006-07	2007-08	2008-09	2009-10	2010-11	
<b>TOTAL SAVINGS</b>	<b>\$166,807</b>	<b>\$266,003</b>	<b>\$266,003</b>	<b>\$266,003</b>	<b>\$266,003</b>	<b>\$1,230,819</b>
<b>TOTAL (COSTS)</b>	<b>(\$634,271)</b>	<b>(\$694,742)</b>	<b>(\$694,742)</b>	<b>(\$696,492)</b>	<b>(\$696,492)</b>	<b>(\$3,416,739)</b>
<b>TOTAL NET SAVINGS (COSTS)</b>	<b>(\$467,464)</b>	<b>(\$428,739)</b>	<b>(\$428,739)</b>	<b>(\$430,489)</b>	<b>(\$430,489)</b>	<b>(\$2,185,920)</b>
<b>ONE-TIME SAVINGS (COSTS)</b>						<b>\$23,466</b>
<b>TOTAL FIVE-YEAR NET SAVINGS (COSTS) INCLUDING ONE-TIME SAVINGS (COSTS)</b>						<b>(\$2,162,454)</b>

Exhibit 10-2 provides a chapter by chapter summary for all costs and savings. Exhibit 10-3 and Exhibit 10-4 provide costs and savings by operating and capital funds.

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 of Isle of Wight County Schools are contained in Chapters 2 through 9.

MGT recommends that IWCS give each of these recommendations serious consideration, develop a plan to proceed with implementation, and a system to monitor subsequent progress.

**EXHIBIT 10-2  
CHAPTER-BY-CHAPTER SUMMARY OF POTENTIAL SAVINGS (COSTS)**

CHAPTER REFERENCE		ANNUAL SAVINGS (COSTS)					TOTAL FIVE YEAR SAVINGS (COSTS)	ONE-TIME SAVINGS (COSTS)
		2006-07	2007-08	2008-09	2009-10	2010-11		
<b>CHAPTER 2: DIVISION ADMINISTRATION</b>								
2-1	Purchase six laptop computers, a projector, and a scanner. (p. 2-6)	\$0	\$0	\$0	\$0	\$0	\$0	(\$2,850)
2-2	Provide fire-rate storage for valuable Board of Education meeting records. (p. 2-7)	\$0	\$0	\$0	\$0	\$0	\$0	(\$1,370)
2-6	Expand student representation to the School Board to two members, one from each of the two high schools and provide an orientation and training to ensure that they understand their assigned roles. (p. 2-15)	(\$152)	(\$152)	(\$152)	(\$152)	(\$152)	(\$760)	\$0
2-11	Reorganize Isle of Wight County Schools central office administration. (p. 2-35)	\$58,833	\$58,833	\$58,833	\$58,833	\$58,833	\$294,165	\$0
2-12	Reorganize the Superintendent's Administrative Cabinet to include the following seven positions: Director of Planning, Accountability, and Technology, Executive Director for Administrative Services, Executive Director for Teaching and Learning, Director of Finance, Executive Assistant/ Communications Officer, and three principal representatives; and institute a new agenda that focuses on organizational development and climate and other matters as noted in statements to follow. (p. 2-40)	\$0	\$0	\$0	\$0	\$0	\$0	(\$5,000)
2-14	Employ one teacher to assume the current Windsor High School Activity/Athletic Director's teaching assignments. (p. 2-45)	(\$45,000)	(\$45,000)	(\$45,000)	(\$45,000)	(\$45,000)	(\$225,000)	\$0
<b>CHAPTER 2 SUBTOTAL SAVINGS (COSTS)</b>		<b>\$13,681</b>	<b>\$13,681</b>	<b>\$13,681</b>	<b>\$13,681</b>	<b>\$13,681</b>	<b>\$68,405</b>	<b>(\$9,220)</b>
<b>CHAPTER 3: PERSONNEL AND HUMAN RESOURCES</b>								
3-4	Ensure that all medical information is filed in folders exclusively for health information and stored in locked cabinets within a secured area with limited access. (p. 3-5)	(\$319)	(\$40)	(\$40)	(\$40)	(\$40)	(\$479)	\$0
3-7	Require the position Director of Human Resources to have and maintain at least the Professional in Human Resources (PHR) certification in conjunction with the accepted degrees and experience outside the field of human resources if the director does not have a degree in human resources or related field. (p. 3-8)	\$0	\$0	\$0	\$0	\$0	\$0	(\$314)
3-17	Require all new employees in the local area to meet with a representative of the Department of Human Resources to complete all paperwork within one week of hire. (p. 3-26)	\$393	\$393	\$393	\$393	\$393	\$1,965	\$0
<b>CHAPTER 3 SUBTOTAL SAVINGS (COSTS)</b>		<b>\$74</b>	<b>\$353</b>	<b>\$353</b>	<b>\$353</b>	<b>\$353</b>	<b>\$1,486</b>	<b>(\$314)</b>

**EXHIBIT 10-2 (Continued)**  
**CHAPTER-BY-CHAPTER SUMMARY OF POTENTIAL SAVINGS (COSTS)**

CHAPTER REFERENCE		ANNUAL SAVINGS (COSTS)					TOTAL FIVE YEAR SAVINGS (COSTS)	ONE-TIME SAVINGS (COSTS)
		2006-07	2007-08	2008-09	2009-10	2010-11		
<b>CHAPTER 4: FINANCIAL MANAGEMENT</b>								
4-10	Develop a comprehensive employee safety training program. (p. 4-22)	\$1,171	\$2,342	\$2,342	\$2,342	\$2,342	\$10,539	\$0
<b>CHAPTER 4 SUBTOTAL SAVINGS (COSTS)</b>		<b>\$1,171</b>	<b>\$2,342</b>	<b>\$2,342</b>	<b>\$2,342</b>	<b>\$2,342</b>	<b>\$10,539</b>	<b>\$0</b>
<b>CHAPTER 6: FACILITY USE AND MANAGEMENT</b>								
6-1	Reorganize the Administrative and Educational Services Department to include responsibility for custodial services, fully implementing the organizational recommendations located in Chapter 2.0 of this report. (p. 6-5)	\$0	\$58,425	\$58,425	\$58,425	\$58,425	\$233,700	\$0
6-7	Develop and implement a minor maintenance and preventative maintenance (PM) program. (p. 6-16)	\$0	(\$750)	(\$750)	(\$2,500)	(\$2,500)	(\$6,500)	\$0
6-10	Review, adopt, and implement a division-wide energy management program including incorporating energy management information and assignments in the new employee orientation program. (p. 6-23)	\$0	\$39,600	\$39,600	\$39,600	\$39,600	\$158,400	\$0
<b>CHAPTER 6 SUBTOTAL SAVINGS (COSTS)</b>		<b>\$0</b>	<b>\$97,275</b>	<b>\$97,275</b>	<b>\$95,525</b>	<b>\$95,525</b>	<b>\$227,200</b>	<b>\$0</b>
<b>CHAPTER 7: TRANSPORTATION</b>								
7-5	Review the supervision and span of control situation. (p. 7-16)	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)	(\$20,000)	\$0
7-6	Ensure full integration of school principals, school administrators and the Transportation Supervisor into the bell planning and implementation process. (p. 7-19)	\$32,191	\$32,191	\$32,191	\$32,191	\$32,191	\$160,955	\$3,000
7-7	Optimize bus capacity and give total control of bus drivers and buses to the Transportation Supervisor. (p. 7-21)	\$64,382	\$64,382	\$64,382	\$64,382	\$64,382	\$321,910	\$6,000
7-8	Hire two additional full-time mechanics. (p. 7-22)	(\$61,250)	(\$61,250)	(\$61,250)	(\$61,250)	(\$61,250)	(\$306,250)	\$0
7-9	Budget and fund ASE certification testing for mechanics. (p. 7-24)	(\$550)	(\$550)	(\$550)	(\$550)	(\$550)	(\$2,750)	\$0
7-11	Implement spare bus policy mandating 10 percent of the peak use bus fleet as spares. (p. 7-28)	\$0	\$0	\$0	\$0	\$0	\$0	\$24,000
7-12	Establish a 10-year bus replacement cycle replacing ten percent of the bus fleet yearly. (p. 7-30)	(\$523,000)	(\$523,000)	(\$523,000)	(\$523,000)	(\$523,000)	(\$2,615,000)	\$0
<b>CHAPTER 7 SUBTOTAL SAVINGS (COSTS)</b>		<b>(\$492,227)</b>	<b>(\$492,227)</b>	<b>(\$492,227)</b>	<b>(\$492,227)</b>	<b>(\$492,227)</b>	<b>(\$2,461,135)</b>	<b>\$33,000</b>
<b>CHAPTER 8: TECHNOLOGY MANAGEMENT</b>								
8-1	Develop and implement a Disaster Recovery Plan for Isle of Wight County Schools. (p. 8-3)	\$0	(\$60,000)	(\$60,000)	(\$60,000)	(\$60,000)	(\$240,000)	\$0
<b>CHAPTER 8 SUBTOTAL SAVINGS (COSTS)</b>		<b>\$0</b>	<b>(\$60,000)</b>	<b>(\$60,000)</b>	<b>(\$60,000)</b>	<b>(\$60,000)</b>	<b>(\$240,000)</b>	<b>\$0</b>

**EXHIBIT 10-2 (Continued)**  
**CHAPTER-BY-CHAPTER SUMMARY OF POTENTIAL SAVINGS (COSTS)**

CHAPTER REFERENCE		ANNUAL SAVINGS (COSTS)					TOTAL FIVE YEAR SAVINGS (COSTS)	ONE-TIME SAVINGS (COSTS)
		2006-07	2007-08	2008-09	2009-10	2010-11		
<b>CHAPTER 9: FOOD SERVICE</b>								
9-2	Shift food service staff to ensure most, if not all Meals Per Labor Hour are at benchmark levels. (p. 9-7)	\$9,837	\$9,837	\$9,837	\$9,837	\$9,837	\$49,185	\$0
<b>CHAPTER 9 SUBTOTAL SAVINGS (COSTS)</b>		<b>\$9,837</b>	<b>\$9,837</b>	<b>\$9,837</b>	<b>\$9,837</b>	<b>\$9,837</b>	<b>\$49,185</b>	<b>\$0</b>
<b>TOTAL SAVINGS</b>		<b>\$166,807</b>	<b>\$266,003</b>	<b>\$266,003</b>	<b>\$266,003</b>	<b>\$266,003</b>	<b>\$1,230,819</b>	<b>\$33,000</b>
<b>TOTAL (COSTS)</b>		<b>(\$634,271)</b>	<b>(\$694,742)</b>	<b>(\$694,742)</b>	<b>(\$696,492)</b>	<b>(\$696,492)</b>	<b>(\$3,416,739)</b>	<b>(\$9,534)</b>
<b>TOTAL NET SAVINGS (COSTS)</b>		<b>(\$467,464)</b>	<b>(\$428,739)</b>	<b>(\$428,739)</b>	<b>(\$430,489)</b>	<b>(\$430,489)</b>	<b>(\$2,185,920)</b>	<b>\$23,466</b>
<b>TOTAL FIVE-YEAR NET SAVINGS (COSTS) INCLUDING ONE-TIME SAVINGS (COSTS)</b>							<b>(\$2,162,454)</b>	

**EXHIBIT 10-3  
SUMMARY OF POTENTIAL OPERATING FUND SAVINGS (COSTS)**

CHAPTER REFERENCE		ANNUAL SAVINGS (COSTS)					TOTAL FIVE YEAR SAVINGS (COSTS)	ONE-TIME SAVINGS (COSTS)
		2007-08	2008-09	2009-10	2010-11	2011-12		
<b>CHAPTER 2: DIVISION ADMINISTRATION</b>								
2-1	Purchase six laptop computers, a projector, and a scanner. (p. 2-6)	\$0	\$0	\$0	\$0	\$0	\$0	(\$2,850)
2-2	Provide fire-rate storage for valuable Board of Education meeting records. (p. 2-7)	\$0	\$0	\$0	\$0	\$0	\$0	(\$1,370)
2-6	Expand student representation to the School Board to two members, one from each of the two high schools and provide an orientation and training to ensure that they understand their assigned roles. (p. 2-15)	(\$152)	(\$152)	(\$152)	(\$152)	(\$152)	(\$760)	\$0
2-11	Reorganize Isle of Wight County Schools central office administration. (p. 2-35)	\$58,833	\$58,833	\$58,833	\$58,833	\$58,833	\$294,165	\$0
2-12	Reorganize the Superintendent's Administrative Cabinet to include the following seven positions: Director of Planning, Accountability, and Technology, Executive Director for Administrative Services, Executive Director for Teaching and Learning, Director of Finance, Executive Assistant/Communications Officer, and three principal representatives; and institute a new agenda that focuses on organizational development and climate and other matters as noted in statements to follow. (p. 2-40)	\$0	\$0	\$0	\$0	\$0	\$0	(\$5,000)
2-14	Employ one teacher to assume the current Windsor High School Activity/Athletic Director's teaching assignments. (p. 2-45)	(\$45,000)	(\$45,000)	(\$45,000)	(\$45,000)	(\$45,000)	(\$225,000)	\$0
<b>CHAPTER 2 SUBTOTAL SAVINGS (COSTS)</b>		<b>\$13,681</b>	<b>\$13,681</b>	<b>\$13,681</b>	<b>\$13,681</b>	<b>\$13,681</b>	<b>\$68,405</b>	<b>(\$9,220)</b>
<b>CHAPTER 3: PERSONNEL AND HUMAN RESOURCES</b>								
3-4	Ensure that all medical information is filed in folders exclusively for health information and stored in locked cabinets within a secured area with limited access. (p. 3-5)	(\$319)	(\$40)	(\$40)	(\$40)	(\$40)	(\$479)	\$0
3-7	Require the position Director of Human Resources to have and maintain at least the Professional in Human Resources (PHR) certification in conjunction with the accepted degrees and experience outside the field of human resources if the director does not have a degree in human resources or related field. (p. 3-8)	\$0	\$0	\$0	\$0	\$0	\$0	(\$314)
3-17	Require all new employees in the local area to meet with a representative of the Department of Human Resources to complete all paperwork within one week of hire. (p. 3-25)	\$393	\$393	\$393	\$393	\$393	\$1,965	\$0
<b>CHAPTER 3 SUBTOTAL SAVINGS (COSTS)</b>		<b>\$74</b>	<b>\$353</b>	<b>\$353</b>	<b>\$353</b>	<b>\$353</b>	<b>\$1,486</b>	<b>(\$314)</b>

**EXHIBIT 10-3 (Continued)**  
**SUMMARY OF POTENTIAL OPERATING FUND SAVINGS (COSTS)**

CHAPTER REFERENCE		ANNUAL SAVINGS (COSTS)					TOTAL FIVE YEAR SAVINGS (COSTS)	ONE-TIME SAVINGS (COSTS)
		2007-08	2008-09	2009-10	2010-11	2011-12		
<b>CHAPTER 4: FINANCIAL MANAGEMENT</b>								
4-10	Develop a comprehensive employee safety training program. (p. 4-22)	\$1,171	\$2,342	\$2,342	\$2,342	\$2,342	\$10,539	\$0
<b>CHAPTER 4 SUBTOTAL SAVINGS (COSTS)</b>		<b>\$1,171</b>	<b>\$2,342</b>	<b>\$2,342</b>	<b>\$2,342</b>	<b>\$2,342</b>	<b>\$10,539</b>	<b>\$0</b>
<b>CHAPTER 6: FACILITY USE AND MANAGEMENT</b>								
6-1	Reorganize the Administrative and Educational Services Department to include responsibility for custodial services, fully implementing the organizational recommendations located in Chapter 2.0 of this report. (p. 6-5)	\$0	\$58,425	\$58,425	\$58,425	\$58,425	\$233,700	\$0
6-7	Develop and implement a minor maintenance and preventative maintenance (PM) program. (p. 6-16)	\$0	(\$750)	(\$750)	(\$2,500)	(\$2,500)	(\$6,500)	\$0
6-10	Review, adopt, and implement a division-wide energy management program including incorporating energy management information and assignments in the new employee orientation program. (p. 6-23)	\$0	\$39,600	\$39,600	\$39,600	\$39,600	\$158,400	\$0
<b>CHAPTER 6 SUBTOTAL SAVINGS (COSTS)</b>		<b>\$0</b>	<b>\$97,275</b>	<b>\$97,275</b>	<b>\$95,525</b>	<b>\$95,525</b>	<b>\$227,200</b>	<b>\$0</b>
<b>CHAPTER 7: TRANSPORTATION</b>								
7-5	Review the supervision and span of control situation. (p. 7-14)	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)	(\$20,000)	\$0
7-6	Ensure full integration of school principals, school administrators and the Transportation Supervisor into the bell planning and implementation process. (p. 7-16)	\$32,191	\$32,191	\$32,191	\$32,191	\$32,191	\$160,955	\$0
7-7	Optimize bus capacity and give total control of bus drivers and buses to the Transportation Supervisor. (p. 7-18)	\$64,382	\$64,382	\$64,382	\$64,382	\$64,382	\$321,910	\$0
7-8	Hire two additional full-time mechanics. (p. 7-20)	(\$61,250)	(\$61,250)	(\$61,250)	(\$61,250)	(\$61,250)	(\$306,250)	\$0
7-9	Budget and fund ASE certification testing for mechanics. (p. 7-24)	(\$550)	(\$550)	(\$550)	(\$550)	(\$550)	(\$2,750)	\$0
<b>CHAPTER 7 SUBTOTAL SAVINGS (COSTS)</b>		<b>\$30,773</b>	<b>\$30,773</b>	<b>\$30,773</b>	<b>\$30,773</b>	<b>\$30,773</b>	<b>\$153,865</b>	<b>\$0</b>
<b>CHAPTER 8: TECHNOLOGY MANAGEMENT</b>								
8-1	Develop and implement a Disaster Recovery Plan for Isle of Wight County Schools. (p. 8-3)	\$0	(\$60,000)	(\$60,000)	(\$60,000)	(\$60,000)	(\$240,000)	\$0
<b>CHAPTER 8 SUBTOTAL SAVINGS (COSTS)</b>		<b>\$0</b>	<b>(\$60,000)</b>	<b>(\$60,000)</b>	<b>(\$60,000)</b>	<b>(\$60,000)</b>	<b>(\$240,000)</b>	<b>\$0</b>



**EXHIBIT 10-3 (Continued)  
SUMMARY OF POTENTIAL OPERATING FUND SAVINGS (COSTS)**

CHAPTER REFERENCE	ANNUAL SAVINGS (COSTS)					TOTAL FIVE YEAR SAVINGS (COSTS)	ONE-TIME SAVINGS (COSTS)	
	2007-08	2008-09	2009-10	2010-11	2011-12			
<b>CHAPTER 9: FOOD SERVICE</b>								
9-2	Shift food service staff to ensure most, if not all Meals Per Labor Hour are at benchmark levels.* (p. 9-6)	\$9,837	\$9,837	\$9,837	\$9,837	\$9,837	\$49,185	\$0
<b>CHAPTER 9 SUBTOTAL SAVINGS (COSTS)</b>		<b>\$9,837</b>	<b>\$9,837</b>	<b>\$9,837</b>	<b>\$9,837</b>	<b>\$9,837</b>	<b>\$49,185</b>	<b>\$0</b>
<b>TOTAL SAVINGS</b>		<b>\$166,807</b>	<b>\$266,003</b>	<b>\$266,003</b>	<b>\$266,003</b>	<b>\$266,003</b>	<b>\$1,230,819</b>	<b>\$0</b>
<b>TOTAL (COSTS)</b>		<b>(\$111,271)</b>	<b>(\$171,742)</b>	<b>(\$171,742)</b>	<b>(\$173,492)</b>	<b>(\$173,492)</b>	<b>(\$801,739)</b>	<b>(\$9,534)</b>
<b>TOTAL NET SAVINGS (COSTS)</b>		<b>\$55,536</b>	<b>\$94,261</b>	<b>\$94,261</b>	<b>\$92,511</b>	<b>\$92,511</b>	<b>\$429,080</b>	<b>(\$9,534)</b>
<b>TOTAL FIVE-YEAR NET SAVINGS (COSTS) INCLUDING ONE-TIME SAVINGS (COSTS)</b>							<b>\$419,546</b>	

\* Reserve Fund for Food Service

**EXHIBIT 10-4  
SUMMARY OF POTENTIAL CAPITAL FUND SAVINGS (COSTS)**

CHAPTER REFERENCE		ANNUAL SAVINGS (COSTS)					TOTAL FIVE YEAR SAVINGS (COSTS)	ONE-TIME SAVINGS (COSTS)
		2006-07	2007-08	2008-09	2009-10	2010-11		
<b>CHAPTER 7: TRANSPORTATION</b>								
7-6	Sell one excess bus. (p. 7-16)	\$0	\$0	\$0	\$0	\$0	\$0	\$3,000
7-7	Remove three oldest buses from Inventory and sell them.(p.7-19)	\$0	\$0	\$0	\$0	\$0	\$0	\$6,000
7-11	Sell 16 excess buses. (p. 7-25)	\$0	\$0	\$0	\$0	\$0	\$0	\$24,000
7-12	Establish a bus replacement policy. (p. 7-26)	(\$523,000)	(\$523,000)	(\$523,000)	(\$523,000)	(\$523,000)	(\$2,615,000)	\$0
<b>CHAPTER 7 SUBTOTAL SAVINGS (COSTS)</b>		<b>(\$523,000)</b>	<b>(\$523,000)</b>	<b>(\$523,000)</b>	<b>(\$523,000)</b>	<b>(\$523,000)</b>	<b>(\$2,615,000)</b>	<b>\$33,000</b>
<b>TOTAL SAVINGS</b>		<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$33,000</b>
<b>TOTAL (COSTS)</b>		<b>(\$523,000)</b>	<b>(\$523,000)</b>	<b>(\$523,000)</b>	<b>(\$523,000)</b>	<b>(\$523,000)</b>	<b>(\$2,615,000)</b>	<b>\$0</b>
<b>TOTAL NET SAVINGS (COSTS)</b>		<b>(\$523,000)</b>	<b>(\$523,000)</b>	<b>(\$523,000)</b>	<b>(\$523,000)</b>	<b>(\$523,000)</b>	<b>(\$2,615,000)</b>	<b>\$33,000</b>
<b>TOTAL FIVE-YEAR NET SAVINGS (COSTS) INCLUDING ONE-TIME SAVINGS (COSTS)</b>							<b>(\$2,582,000)</b>	

***APPENDIX A:  
SURVEY RESULTS***

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**APPENDIX A**  
**SURVEY RESULTS**

**EXHIBIT A-1**  
**COMPARISON SURVEY RESPONSES**  
**WITHIN ISLE OF WIGHT COUNTY SCHOOL DIVISION**

<b>PART A OF SURVEY</b>	<b>ADMINISTRATOR RESPONSES (%)</b>	<b>PRINCIPAL RESPONSES (%)</b>	<b>TEACHER RESPONSES (%)</b>
1. Overall quality of public education in the Isle of Wight County School Division is:  Good or Excellent Fair or Poor	95 0	100 0	85 15
2. Overall quality of education in the Isle of Wight County School Division is:  Improving Staying the Same Getting Worse Don't Know	74 16 0 11	94 6 0 0	66 19 8 6
3. Grade given to the Isle of Wight County School Division teachers:  Above Average (A or B) Below Average (D or F)	94 0	88 0	83 1
4. Grade given to the Isle of Wight County School Division school level administrators:  Above Average (A or B) Below Average (D or F)	58 0	94 0	55 16
5. Grade given to the Isle of Wight County School Division central office administrators:  Above Average (A or B) Below Average (D or F)	64 16	47 29	31 28

**EXHIBIT A-2  
COMPARISON SURVEY RESPONSES  
WITHIN ISLE OF WIGHT COUNTY SCHOOL DIVISION**

PART B	(%A + SA) / (%D + SD) <sup>1</sup>		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. The emphasis on learning in this school division has increased in recent years.	68/16	100/0	71/12
2. Our schools are safe and secure from crime.	74/11	94/0	73/13
3. Our schools effectively handle misbehavior problems.	74/11	94/0	46/40
4. Our schools have sufficient space and facilities to support the instructional programs.	43/37	65/29	43/49
5. Our schools have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	79/10	100/0	56/29
6. Our schools can be described as "good places to learn."	90/5	100/0	82/7
7. There is administrative support for controlling student behavior in our schools.	85/5	88/0	55/33
8. Most students in our schools are motivated to learn.	90/0	95/0	60/23
9. Lessons are organized to meet students' needs.	69/5	77/12	80/9
10. The curriculum is broad and challenging for most students.	68/5	83/12	70/18
11. There is little a teacher can do to overcome education problems due to a student's home life.	5/79	0/76	25/50
12. Teachers in our schools know the material they teach.	85/0	95/0	91/5
13. Teachers in our schools care about students' needs.	85/5	89/6	91/3
14. Teachers expect students to do their very best.	90/0	89/0	92/2
15. The school division provides adequate technology-related staff development.	42/43	53/29	62/24
16. Principals and assistant principals in our schools care about students' needs.	95/0	94/6	79/10
17. In general, parents take responsibility for their children's behavior in our schools.	52/16	82/12	35/45
18. Parents in this school division are satisfied with the education their children are receiving.	84/5	83/0	61/7
19. Most parents seem to know what goes on in our schools.	53/21	77/18	45/32
20. Parents play an active role in decision-making in our schools.	37/37	59/24	37/31
21. This community really cares about its children's education.	68/16	71/6	59/15
22. The food services department encourages student participation through customer satisfaction surveys.	5/37	24/47	7/49
23. The school division requests input on the long range technology plan.	32/37	41/24	24/40
24. Funds are managed wisely to support education in this school division.	52/43	30/29	24/42
25. Sufficient student services are provided in this school division (e.g., counseling, speech therapy, health).	58/27	59/24	58/26
26. School-based personnel play an important role in making decisions that affect schools in this school division.	43/37	53/24	33/43
27. The school division provides adequate technical support.	69/26	53/29	60/26
28. Students are often late arriving to and/or departing from school because the buses do not arrive to school on time.	0/69	12/70	15/71
29. The food services department provides nutritious and appealing meals and snacks.	53/11	36/18	34/44

<sup>1</sup>Percent responding Agree or Strongly Agree/Percent responding Disagree or Strongly Disagree. The neutral and don't know responses are omitted.

**EXHIBIT A-3  
COMPARISON SURVEY RESPONSES  
WITHIN ISLE OF WIGHT COUNTY SCHOOL DIVISION**

PART C	(%G + E) / (%F + P) <sup>1</sup>		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. Board of Education members' knowledge of the educational needs of students in Isle of Wight County School Division.	58/37	41/53	35/47
2. Board of Education members' knowledge of operations in Isle of Wight County School Division.	63/32	30/59	38/45
3. Board of Education members' work at setting or revising policies for Isle of Wight County School Division.	69/27	59/35	40/44
4. The School District Superintendent's work as the educational leader of Isle of Wight County School Division.	48/52	71/30	34/60
5. The School District Superintendent's work as the chief administrator (manager) of Isle of Wight County School Division.	48/53	88/12	36/60
6. Principals' work as the instructional leaders of their schools.	68/32	94/6	59/40
7. Principals' work as the managers of the staff and teachers.	74/26	100/0	63/36
8. Teachers' work in meeting students' individual learning needs.	79/16	77/24	85/14
9. Teachers' work in communicating with parents.	68/11	77/24	82/16
10. Teachers' attitudes about their jobs.	52/37	65/36	59/40
11. Students' ability to learn.	90/0	94/0	78/21
12. The amount of time students spend on task learning in the classroom.	73/11	94/6	75/23
13. Parents' efforts in helping their children to do better in school.	47/26	59/41	27/68
14. Parents' participation in school activities and organizations.	37/42	65/36	31/65
15. How well students' test results are explained to parents.	42/42	59/41	46/42
16. The cleanliness and maintenance of facilities in Isle of Wight County School Division.	79/21	88/12	65/35
17. How well relations are maintained with various groups in the community.	27/58	65/35	47/38
18. Staff development opportunities provided by Isle of Wight County School Division for teachers.	58/37	53/47	48/50
19. Staff development opportunities provided by Isle of Wight County School Division for school administrators.	53/42	41/59	24/20
20. The school district's job of providing adequate instructional technology.	42/48	59/41	58/42
21. The school district's use of technology for administrative purposes.	53/48	59/41	55/23

<sup>1</sup>Percent responding *Good* or *Excellent* / Percent responding *Fair* or *Poor*. The *don't know* responses are omitted.

**EXHIBIT A-4  
COMPARISON SURVEY RESPONSES  
WITHIN ISLE OF WIGHT COUNTY SCHOOL DIVISION**

PART D: WORK ENVIRONMENT	(% A + SA) / (% D + SD) <sup>1</sup>		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. I find Isle of Wight County School Division to be an exciting, challenging place to work.	58/32	94/6	67/13
2. The work standards and expectations in Isle of Wight County School Division are equal to or above those of most other school districts.	64/27	95/0	66/15
3. Isle of Wight County School Division officials enforce high work standards.	43/31	95/6	74/12
4. Most Isle of Wight County School Division teachers enforce high student learning standards.	85/0	89/6	86/6
5. Isle of Wight County School Division teachers and administrators have excellent working relationships.	26/22	83/6	44/36
6. <u>Teachers</u> who do not meet expected work standards are disciplined.	42/21	71/12	30/34
7. <u>Staff</u> who do not meet expected work standards are disciplined.	47/27	77/12	27/30
8. I feel that I have the authority to adequately perform my job responsibilities.	48/42	89/0	77/15
9. I have adequate facilities in which to conduct my work.	52/42	89/6	74/16
10. I have adequate equipment and computer support to conduct my work.	85/11	71/24	69/21
11. The workloads are equitably distributed among teachers and among staff members.	21/42	53/18	38/43
12. No one knows or cares about the amount or quality of work that I perform.	16/69	18/59	34/51
13. Workload is evenly distributed.	26/52	30/35	31/44
14. If there were an emergency in the schools, I would know how to respond appropriately.	53/26	88/6	87/8
15. I often observe other teachers and/or staff socializing rather than working while on the job.	5/68	30/64	13/71

<sup>1</sup>Percent responding Agree or Strongly Agree/Percent responding Disagree or Strongly Disagree. The neutral and don't know responses are omitted.

**EXHIBIT A-5  
COMPARISON SURVEY RESPONSES  
WITHIN ISLE OF WIGHT COUNTY SCHOOL DIVISION**

PART E: JOB SATISFACTION	(%A + SA) / (% D + SD) <sup>1</sup>		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. I am very satisfied with my job in Isle of Wight County School Division.	58/21	88/6	69/17
2. I plan to continue my career in Isle of Wight County School Division.	68/16	88/0	70/11
3. I am actively looking for a job outside of Isle of Wight County School Division.	5/74	18/70	18/65
4. Salary levels in Isle of Wight County School Division are competitive.	32/58	65/29	39/43
5. I feel that my work is appreciated by my supervisor(s).	63/32	76/18	61/28
6. I feel that I am an integral part of Isle of Wight County School Division team.	63/32	88/6	58/24
7. I feel that there is no future for me in Isle of Wight County School Division.	11/58	12/70	11/67
8. My salary level is adequate for my level of work and experience.	26/47	53/41	24/64

<sup>1</sup>Percent responding *Agree* or *Strongly Agree*/Percent responding *Disagree* or *Strongly Disagree*. The *neutral* and *don't know* responses are omitted.



**EXHIBIT A-6  
COMPARISON SURVEY RESPONSES  
WITHIN ISLE OF WIGHT COUNTY SCHOOL DIVISION**

PART F: ADMINISTRATIVE STRUCTURE/PRACTICES	(% A + SA) / (% D + SD) <sup>1</sup>		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. Most administrative practices in Isle of Wight County School Division are highly effective and efficient.	16/42	59/24	36/41
2. Administrative decisions are made promptly and decisively.	10/64	47/41	37/45
3. Isle of Wight County School Division administrators are easily accessible and open to input.	42/31	59/18	44/42
4. Authority for administrative decisions is delegated to the lowest possible level.	16/64	18/36	15/38
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	37/27	88/6	57/29
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	63/16	53/18	43/25
7. The extensive committee structure in Isle of Wight County School Division ensures adequate input from teachers and staff on most important decisions.	42/32	53/35	30/39
8. Isle of Wight County School Division has too many committees.	0/84	18/35	26/23
9. Isle of Wight County School Division has too many layers of administrators.	10/74	29/59	49/20
10. Most of Isle of Wight County School Division administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	31/43	41/41	37/35
11. Central office administrators are responsive to school needs.	69/16	53/35	33/38
12. Central office administrators provide quality service to schools.	58/16	53/41	32/35

<sup>1</sup>Percent responding *Agree* or *Strongly Agree*/Percent responding *Disagree* or *Strongly Disagree*. The *neutral* and *don't know* responses are omitted.

**EXHIBIT A-7  
COMPARISON SURVEY RESPONSES  
WITHIN ISLE OF WIGHT COUNTY SCHOOL DIVISION**

PART G: SCHOOL DISTRICT/PROGRAM FUNCTION	% NEEDS SOME IMPROVEMENT + NEEDS MAJOR IMPROVEMENT / % ADEQUATE <sup>1</sup> + OUTSTANDING		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
a. Budgeting	69/31	71/24	65/21
b. Strategic planning	68/21	53/47	53/29
c. Curriculum planning	58/31	59/41	47/49
d. Financial management and accounting	74/26	59/41	47/29
e. Community relations	69/26	53/47	51/39
f. Program evaluation, research, and assessment	53/37	59/41	45/41
g. Instructional technology	53/42	42/59	39/59
h. Pupil accounting	5/68	12/77	24/54
i. Instructional coordination/supervision	47/42	53/47	43/49
j. Instructional support	43/43	53/47	49/48
k. Federal Programs (e.g., Title I, Special Education) coordination	16/79	53/47	48/42
l. Personnel recruitment	63/31	88/12	45/37
m. Personnel selection	47/47	59/41	41/46
n. Personnel evaluation	52/37	65/35	42/53
o. Staff development	58/42	58/41	55/42
p. Data processing	31/43	30/59	26/38
q. Purchasing	58/32	65/12	32/35
r. Plant maintenance	0/74	41/53	29/40
s. Facilities planning	32/48	65/29	37/32
t. Transportation	26/58	83/18	39/44
u. Food service	21/68	76/24	56/34
v. Custodial services	31/52	47/53	35/57
w. Risk management	31/37	41/41	23/37
x. Administrative technology	31/63	42/53	20/44
y. Grants administration	43/42	53/35	25/31

<sup>1</sup>Percent responding *Needs Some Improvement* or *Needs Major Improvement* / Percent responding *Adequate* or *Outstanding*. The *should be eliminated* and *don't know* responses are omitted.

**EXHIBIT A-8  
COMPARISON SURVEY RESPONSES  
WITHIN ISLE OF WIGHT COUNTY SCHOOL DIVISION**

<b>PART H: OPERATIONS</b>	<b>ADMINISTRATORS (%)</b>	<b>PRINCIPALS (%)</b>	<b>TEACHERS (%)</b>
1. The overall operation of Isle of Wight County School Division is:			
Highly efficient	11	0	5
Above average in efficiency	11	29	29
Average in efficiency	53	59	47
Less efficient than most other school districts	21	12	16
Don't know	5	0	3
2. The operational efficiency of Isle of Wight County School Division could be improved by:			
Outsourcing some support services	26	47	14
Offering more programs	53	35	43
Offering fewer programs	0	0	3
Increasing the number of administrators	32	35	14
Reducing the number of administrators	5	12	33
Increasing the number of teachers	53	88	81
Reducing the number of teachers	0	0	0
Increasing the number of support staff	68	77	68
Reducing the number of support staff	0	0	3
Increasing the number of facilities	26	35	43
Reducing the number of facilities	0	6	0
Rezoning schools	11	6	10
Other	16	18	14

\*Percentages may add up to over 100 percent due to rounding.

**EXHIBIT A-9  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS AND  
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

PART A OF SURVEY	ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS (%)	OTHER SCHOOL DISTRICT ADMINISTRATORS (%)
1. Overall quality of public education in the school district is:  Good or Excellent Fair or Poor	95 0	85 14
2. Overall quality of education in the school district is:  Improving Staying the Same Getting Worse Don't Know	74 16 0 11	69 20 2 3
3. Grade given to teachers:  Above Average (A or B) Below Average (D or F)	94 0	78 1
4. Grade given to school administrators:  Above Average (A or B) Below Average (D or F)	58 0	77 3
5. Grade given to school district administrators:  Above Average (A or B) Below Average (D or F)	64 16	77 5

**EXHIBIT A-10  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS AND  
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

PART B	(% A + SA) / (% D + SD) <sup>1</sup>	
	ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS	OTHER SCHOOL DISTRICT ADMINISTRATORS
1. The emphasis on learning in this school division has increased in recent years.	68/16	83/6
2. Our schools are safe and secure from crime.	74/11	65/16
3. Our schools effectively handle misbehavior problems.	74/11	54/24
4. Our schools have sufficient space and facilities to support the instructional programs.	43/37	26/62
5. Our schools have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	79/10	63/17
6. Our schools can be described as "good places to learn."	90/5	84/5
7. There is administrative support for controlling student behavior in our schools.	85/5	68/12
8. Most students in our schools are motivated to learn.	90/0	65/12
9. Lessons are organized to meet students' needs.	69/5	56/10
10. The curriculum is broad and challenging for most students.	68/5	70/8
11. There is little a teacher can do to overcome education problems due to a student's home life.	5/79	20/58
12. Teachers in our schools know the material they teach.	85/0	69/6
13. Teachers in our schools care about students' needs.	85/5	80/4
14. Teachers expect students to do their very best.	90/0	74/7
15. The school division provides adequate technology-related staff development.	42/43	n/a
16. Principals and assistant principals in our schools care about students' needs.	95/0	84/4
17. In general, parents take responsibility for their children's behavior in our schools.	52/16	42/34
18. Parents in this school division are satisfied with the education their children are receiving.	84/5	57/16
19. Most parents seem to know what goes on in our schools.	53/21	36/39
20. Parents play an active role in decision-making in our schools.	37/37	35/24
21. This community really cares about its children's education.	68/16	63/15
22. The food services department encourages student participation through customer satisfaction surveys.	5/37	n/a
23. The school division requests input on the long range technology plan.	32/37	n/a
24. Funds are managed wisely to support education in this school division.	52/43	67/18
25. Sufficient student services are provided in this school division (e.g., counseling, speech therapy, health).	58/27	57/26
26. School-based personnel play an important role in making decisions that affect schools in this school division.	43/37	48/24
27. The school division provides adequate technical support.	69/26	n/a
28. Students are often late arriving to and/or departing from school because the buses do not arrive to school on time.	0/69	8/56
29. The food services department provides nutritious and appealing meals and snacks.	53/11	62/14

<sup>1</sup> Percent responding *Agree* or *Strongly Agree*/Percent responding *Disagree* or *Strongly Disagree*. The *neutral* and *don't know* responses are omitted.

**EXHIBIT A-11  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS AND  
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

PART C	(% G+ E) / (% F + P) <sup>1</sup>	
	ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS	OTHER SCHOOL DISTRICT ADMINISTRATORS
1. Board of Education members' knowledge of the educational needs of students in the school district.	58/37	40/51
2. Board of Education members' knowledge of operations in Isle of Wight County School Division.	63/32	36/58
3. Board of Education members' work at setting or revising policies for the school district.	69/27	44/48
4. The school district Superintendent's work as the educational leader of the school district.	48/52	78/18
5. The school district Superintendent's work as the chief administrator (manager) of the school district.	48/53	77/20
6. Principals' work as the instructional leaders of their schools.	68/32	70/29
7. Principals' work as the managers of the staff and teachers.	74/26	74/25
8. Teachers' work in meeting students' individual learning needs.	79/16	62/32
9. Teachers' work in communicating with parents.	68/11	49/41
10. Teachers' attitudes about their jobs.	52/37	44/47
11. Students' ability to learn.	90/0	74/20
12. The amount of time students spend on task learning in the classroom.	73/11	49/34
13. Parents' efforts in helping their children to do better in school.	47/26	29/56
14. Parents' participation in school activities and organizations.	37/42	27/59
15. How well students' test results are explained to parents.	42/42	36/44
16. The cleanliness and maintenance of facilities in the school district.	79/21	70/30
17. How well relations are maintained with various groups in the community.	27/58	60/35
18. Staff development opportunities provided by the school district for teachers.	58/37	63/32
19. Staff development opportunities provided by the school district for school administrators.	53/42	53/43
20. The school district's job of providing adequate instructional technology.	42/48	54/43
21. The school district's use of technology for administrative purposes.	53/48	53/46

<sup>1</sup> Percent responding *Good* or *Excellent* / Percent responding *Fair* or *Poor*. The *don't know* responses are omitted.

**EXHIBIT A-12  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS AND  
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

<b>PART D: WORK ENVIRONMENT</b>	(% A + SA) / (% D + SD) <sup>1</sup>	
	<b>ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS</b>	<b>OTHER SCHOOL DISTRICT ADMINISTRATORS</b>
1. I find the school district to be an exciting, challenging place to work.	58/32	81/8
2. The work standards and expectations in the school district are equal to or above those of most other school districts.	64/27	75/7
3. School district officials enforce high work standards.	43/31	73/12
4. Most school district teachers enforce high student learning standards.	85/0	62/8
5. School district teachers and administrators have excellent working relationships.	26/22	54/14
6. Teachers who do not meet expected work standards are disciplined.	42/21	26/33
7. Staff who do not meet expected work standards are disciplined.	47/27	37/34
8. I feel that I have the authority to adequately perform my job responsibilities.	48/42	79/15
9. I have adequate facilities in which to do my work.	52/42	71/21
10. I have adequate equipment and computer support to do my work.	85/11	70/22
11. The workloads are equitably distributed among teachers and among staff members.	21/42	29/28
12. No one knows or cares about the amount or quality of work that I perform.	16/69	16/70
13. Workload is evenly distributed.	26/52	32/46
14. The failure of school district officials to enforce high work standards results in poor quality work.	53/26	78/7
15. I often observe other teachers and/or staff socializing rather than working while on the job.	5/68	16/58

<sup>1</sup> Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*. The *neutral* and *don't know* responses are omitted.

**EXHIBIT A-13  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS AND  
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

PART E: JOB SATISFACTION	(% A + SA) / (% D + SD) <sup>1</sup>	
	ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS	OTHER SCHOOL DISTRICT ADMINISTRATORS
1. I am very satisfied with my job in the school district.	58/21	77/12
2. I plan to continue my career in the school district.	68/16	83/6
3. I am actively looking for a job outside of the school district.	5/74	8/78
4. Salary levels in the school district are competitive (with other school districts).	32/58	45/40
5. I feel that my work is appreciated by my supervisor(s).	63/32	75/13
6. I feel that I am an integral part of the school district.	63/32	74/11
7. I feel that there is no future for me in the school district.	11/58	10/77
8. My salary level is adequate for my level of work and experience.	26/47	42/45

<sup>1</sup> Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*. The *neutral* and *don't know* responses are omitted.



**EXHIBIT A-14  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS AND  
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

PART F: ADMINISTRATIVE STRUCTURE/PRACTICES	(% A + SA) / (% D + SD) <sup>1</sup>	
	ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS	OTHER SCHOOL DISTRICT ADMINISTRATORS
1. Most administrative practices in the school district are highly effective and efficient.	16/42	54/23
2. Administrative decisions are made promptly and decisively.	10/64	44/33
3. School district administrators are easily accessible and open to input.	42/31	65/18
4. Authority for administrative decisions is delegated to the lowest possible level.	16/64	28/44
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	37/27	52/18
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	63/16	40/37
7. The extensive committee structure in the school district ensures adequate input from teachers and staff on most important decisions.	42/32	50/20
8. The school district has too many committees.	0/84	37/32
9. The school district has too many layers of administrators.	10/74	19/64
10. Most administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	31/43	54/25
11. Central office administrators are responsive to school needs.	69/16	76/8
12. Central office administrators provide quality service to schools.	58/16	77/6

<sup>1</sup> Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*. The *neutral* and *don't know* responses are omitted.

**EXHIBIT A-15  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS AND  
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

PART G:  SCHOOL DISTRICT/PROGRAM FUNCTION	% NEEDS SOME IMPROVEMENT + NEEDS MAJOR IMPROVEMENT	/ % ADEQUATE + OUTSTANDING <sup>1</sup>
	ISLE OF WIGHT COUNTY SCHOOL DIVISION ADMINISTRATORS	OTHER SCHOOL DISTRICTS ADMINISTRATORS
a. Budgeting	69/31	47/45
b. Strategic planning	68/21	44/42
c. Curriculum planning	58/31	30/50
d. Financial management and accounting	74/26	36/53
e. Community relations	69/26	39/53
f. Program evaluation, research, and assessment	53/37	34/50
g. Instructional technology	53/42	48/41
h. Pupil accounting	5/68	25/48
i. Instructional coordination/supervision	47/42	30/50
j. Instructional support	43/43	32/51
k. Federal Programs (e.g., Title I, Special Education) coordination	16/79	24/52
l. Personnel recruitment	63/31	47/42
m. Personnel selection	47/47	46/48
n. Personnel evaluation	52/37	47/49
o. Staff development	58/42	48/49
p. Data processing	31/43	38/45
q. Purchasing	58/32	34/53
r. Plant maintenance	0/74	43/48
s. Facilities planning	32/48	38/48
t. Transportation	26/58	21/65
u. Food service	21/68	18/67
v. Custodial services	31/52	37/54
w. Risk management	31/37	20/54
x. Administrative technology	31/63	42/49
y. Grants administration	43/42	24/49

<sup>1</sup> Percent responding *Needs Some Improvement* or *Needs Major Improvement* / Percent responding *Adequate* or *Outstanding*.

**EXHIBIT A-16  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION PRINCIPALS AND  
PRINCIPALS IN OTHER SCHOOL DISTRICTS**

<b>PART A OF SURVEY</b>	<b>ISLE OF WIGHT COUNTY SCHOOL DIVISION (%)</b>	<b>OTHER SCHOOL DISTRICTS (%)</b>
1. Overall quality of public education in the school district is:  Good or Excellent Fair or Poor	100 0	89 11
2. Overall quality of education in the school district is:  Improving Staying the Same Getting Worse Don't Know	94 6 0 0	78 15 7 1
3. Grade given to teachers:  Above Average (A or B) Below Average (D or F)	88 0	85 1
4. Grade given to school administrators:  Above Average (A or B) Below Average (D or F)	94 0	91 1
5. Grade given to school district administrators:  Above Average (A or B) Below Average (D or F)	47 29	73 7

**EXHIBIT A-17  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION PRINCIPALS AND  
PRINCIPALS IN OTHER SCHOOL DISTRICTS**

PART B	(% A + SA) / (% D + SD) <sup>1</sup>	
	ISLE OF WIGHT COUNTY SCHOOL DIVISION	OTHER SCHOOL DISTRICTS
1. The emphasis on learning in this school division has increased in recent years.	100/0	89/4
2. Our schools are safe and secure from crime.	94/0	81/9
3. Our schools effectively handle misbehavior problems.	94/0	74/14
4. Our schools have sufficient space and facilities to support the instructional programs.	65/29	30/59
5. Our schools have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	100/0	75/14
6. Our schools can be described as "good places to learn."	100/0	92/3
7. There is administrative support for controlling student behavior in our schools.	88/0	89/6
8. Most students in our schools are motivated to learn.	95/0	77/12
9. Lessons are organized to meet students' needs.	77/12	86/6
10. The curriculum is broad and challenging for most students.	83/12	86/7
11. There is little a teacher can do to overcome education problems due to a student's home life.	0/76	19/69
12. Teachers in our schools know the material they teach.	95/0	90/4
13. Teachers in our schools care about students' needs.	89/6	92/3
14. Teachers expect students to do their very best.	89/0	89/4
15. The school division provides adequate technology-related staff development.	53/29	n/a
16. Principals and assistant principals in our schools care about students' needs.	94/6	98/1
17. In general, parents take responsibility for their children's behavior in our schools.	82/12	51/31
18. Parents in this school division are satisfied with the education their children are receiving.	83/0	73/9
19. Most parents seem to know what goes on in our schools.	77/18	43/36
20. Parents play an active role in decision-making in our schools.	59/24	60/20
21. This community really cares about its children's education.	71/6	72/14
22. The food services department encourages student participation through customer satisfaction surveys.	24/47	n/a
23. The school division requests input on the long range technology plan.	41/24	n/a
24. Funds are managed wisely to support education in this school division.	30/29	67/19
25. Sufficient student services are provided in this school division (e.g., counseling, speech therapy, health).	59/24	56/36
26. School-based personnel play an important role in making decisions that affect schools in this school division.	53/24	61/24
27. The school division provides adequate technical support.	53/29	n/a
28. Students are often late arriving to and/or departing from school because the buses do not arrive to school on time.	12/70	18/68
29. The food services department provides nutritious and appealing meals and snacks.	36/18	58/26

<sup>1</sup> Percent responding Agree or Strongly Agree / Percent responding Disagree or Strongly Disagree. The neutral and don't know responses are omitted.

**EXHIBIT A-18  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION PRINCIPALS AND  
PRINCIPALS IN OTHER SCHOOL DISTRICTS**

PART C	(%G+ E) / (%F + P) <sup>1</sup>	
	ISLE OF WIGHT COUNTY SCHOOL DIVISION	OTHER SCHOOL DISTRICTS
1. Board of Education members' knowledge of the educational needs of students in the school district.	41/53	39/57
2. Board of Education members' knowledge of operations in the school district.	30/59	41/56
3. Board of Education members' work at setting or revising policies for the school district.	59/35	50/47
4. The school district Superintendent's work as the educational leader of the school district.	71/30	81/17
5. The school district Superintendent's work as the chief administrator (manager) of the school district.	88/12	81/17
6. Principals' work as the instructional leaders of their schools.	94/6	89/11
7. Principals' work as the managers of the staff and teachers.	100/0	94/6
8. Teachers' work in meeting students' individual learning needs.	77/24	80/20
9. Teachers' work in communicating with parents.	77/24	68/32
10. Teachers' attitudes about their jobs.	65/36	64/36
11. Students' ability to learn.	94/0	84/16
12. The amount of time students spend on task learning in the classroom.	94/6	72/27
13. Parents' efforts in helping their children to do better in school.	59/41	35/64
14. Parents' participation in school activities and organizations.	65/36	33/66
15. How well students' test results are explained to parents.	59/41	51/47
16. The cleanliness and maintenance of facilities in the school district.	88/12	65/34
17. How well relations are maintained with various groups in the community.	65/35	66/32
18. Staff development opportunities provided by the school district for teachers.	53/47	68/31
19. Staff development opportunities provided by the school district for school administrators.	41/59	63/37
20. The school district's job of providing adequate instructional technology.	59/41	46/52
21. The school district's use of technology for administrative purposes.	59/41	54/45

<sup>1</sup>Percent responding *Good* or *Excellent* / Percent responding *Fair* or *Poor*. The *don't know* responses are omitted.

**EXHIBIT A-19  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION PRINCIPALS AND  
PRINCIPALS IN OTHER SCHOOL DISTRICTS**

PART D: WORK ENVIRONMENT	(% A + SA) / (% D + SD) <sup>1</sup>	
	ISLE OF WIGHT COUNTY SCHOOL DIVISION	OTHER SCHOOL DISTRICTS
1. I find the school district to be an exciting, challenging place to work.	94/6	88/5
2. The work standards and expectations in the school district are equal to or above those of most other school districts.	95/0	83/6
3. School district officials enforce high work standards.	95/6	81/9
4. Most school district teachers enforce high student learning standards.	89/6	81/7
5. School district teachers and administrators have excellent working relationships.	83/6	76/7
6. Teachers who do not meet expected work standards are disciplined.	71/12	48/31
7. Staff who do not meet expected work standards are disciplined.	77/12	54/25
8. I feel that I have the authority to adequately perform my job responsibilities.	89/0	80/13
9. I have adequate facilities in which to do my work.	89/6	74/19
10. I have adequate equipment and computer support to do my work.	71/24	65/27
11. The workloads are equitably distributed among teachers and among staff members.	53/18	68/21
12. No one knows or cares about the amount or quality of work that I perform.	18/59	19/68
13. Workload is evenly distributed.	30/35	45/35
14. The failure of school district officials to enforce high work standards results in poor quality work.	88/6	96/2
15. I often observe other teachers and/or staff socializing rather than working while on the job.	30/64	12/77

<sup>1</sup> Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*. The *neutral* and *don't know* responses are omitted.

**EXHIBIT A-20  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION PRINCIPALS AND  
PRINCIPALS IN OTHER SCHOOL DISTRICTS**

PART E: JOB SATISFACTION	(% A + SA) / (% D + SD) <sup>1</sup>	
	ISLE OF WIGHT COUNTY SCHOOL DIVISION	OTHER SCHOOL DISTRICTS
1. I am very satisfied with my job in the school district.	88/6	83/8
2. I plan to continue my career in the school district.	88/0	88/4
3. I am actively looking for a job outside of the school district.	18/70	8/78
4. Salary levels in the school district are competitive (with other school districts).	65/29	40/48
5. I feel that my work is appreciated by my supervisor(s).	76/18	74/15
6. I feel that I am an integral part of the school district.	88/6	74/12
7. I feel that there is no future for me in the school district.	12/70	8/81
8. My salary level is adequate for my level of work and experience.	53/41	32/58

<sup>1</sup> Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*. The *neutral* and *don't know* responses are omitted.

**EXHIBIT A-21  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION PRINCIPALS AND  
PRINCIPALS IN OTHER SCHOOL DISTRICTS**

PART F: ADMINISTRATIVE STRUCTURE/PRACTICES	(% A + SA) / (% D + SD) <sup>1</sup>	
	ISLE OF WIGHT COUNTY SCHOOL DIVISION	OTHER SCHOOL DISTRICTS
1. Most administrative practices in the school district are highly effective and efficient.	59/24	69/18
2. Administrative decisions are made promptly and decisively.	47/41	62/21
3. School district administrators are easily accessible and open to input.	59/18	71/15
4. Authority for administrative decisions is delegated to the lowest possible level.	18/36	36/38
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	88/6	77/12
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	53/18	40/39
7. The extensive committee structure in the school district ensures adequate input from teachers and staff on most important decisions.	53/35	60/21
8. The school district has too many committees.	18/35	35/34
9. The school district has too many layers of administrators.	29/59	27/57
10. Most administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	41/41	57/26
11. Central office administrators are responsive to school needs.	53/35	65/20
12. Central office administrators provide quality service to schools.	53/41	63/18

<sup>1</sup> Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*. The *neutral* and *don't know* responses are omitted.



**EXHIBIT A-22  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION PRINCIPALS AND  
PRINCIPALS IN OTHER SCHOOL DISTRICTS**

PART G:  SCHOOL DISTRICT/PROGRAM FUNCTION	% NEEDS SOME IMPROVEMENT + NEEDS MAJOR IMPROVEMENT / % ADEQUATE <sup>1</sup> + OUTSTANDING	
	ISLE OF WIGHT COUNTY SCHOOL DIVISION	OTHER SCHOOL DISTRICTS
a. Budgeting	71/24	49/48
b. Strategic planning	53/47	38/53
c. Curriculum planning	59/41	40/59
d. Financial management and accounting	59/41	35/60
e. Community relations	53/47	37/61
f. Program evaluation, research, and assessment	59/41	32/65
g. Instructional technology	42/59	60/39
h. Pupil accounting	12/77	27/66
i. Instructional coordination/supervision	53/47	40/58
j. Instructional support	53/47	44/55
k. Federal Programs (e.g., Title I, Special Education) coordination	53/47	32/57
l. Personnel recruitment	88/12	47/48
m. Personnel selection	59/41	41/57
n. Personnel evaluation	65/35	40/58
o. Staff development	58/41	43/57
p. Data processing	30/59	39/51
q. Purchasing	65/12	37/58
r. Plant maintenance	41/53	55/43
s. Facilities planning	65/29	51/43
t. Transportation	83/18	43/54
u. Food service	76/24	35/65
v. Custodial services	47/53	47/52
w. Risk management	41/41	23/63
x. Administrative technology	42/53	48/49
y. Grants administration	53/35	34/49

<sup>1</sup> Percent responding *Needs Some Improvement* or *Needs Major Improvement* / Percent responding *Adequate* or *Outstanding*. The *should be eliminated* and *don't know* responses are omitted.

**EXHIBIT A-23  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION TEACHERS AND  
TEACHERS IN OTHER SCHOOL DISTRICTS**

<b>PART A OF SURVEY</b>	<b>ISLE OF WIGHT COUNTY SCHOOL DIVISION (%)</b>	<b>OTHER SCHOOL DISTRICTS (%)</b>
1. Overall quality of public education in the school district is:  Good or Excellent Fair or Poor	85 15	74 25
2. Overall quality of education in the school district is:  Improving Staying the Same Getting Worse Don't Know	66 19 8 6	53 27 16 4
3. Grade given to teachers:  Above Average (A or B) Below Average (D or F)	83 1	83 1
4. Grade given to school administrators:  Above Average (A or B) Below Average (D or F)	55 16	59 11
5. Grade given to school district administrators:  Above Average (A or B) Below Average (D or F)	31 28	38 21

**EXHIBIT A-24  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION TEACHERS AND  
TEACHERS IN OTHER SCHOOL DISTRICTS**

PART B	(% A + SA) / (% D + SD) <sup>1</sup>	
	ISLE OF WIGHT COUNTY SCHOOL DIVISION	OTHER SCHOOL DISTRICTS
1. The emphasis on learning in this school division has increased in recent years.	71/12	71/13
2. Our schools are safe and secure from crime.	73/13	53/28
3. Our schools effectively handle misbehavior problems.	46/40	37/48
4. Our schools have sufficient space and facilities to support the instructional programs.	43/49	28/62
5. Our schools have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	56/29	54/31
6. Our schools can be described as "good places to learn."	82/7	74/11
7. There is administrative support for controlling student behavior in our schools.	55/33	55/29
8. Most students in our schools are motivated to learn.	60/23	55/29
9. Lessons are organized to meet students' needs.	80/9	79/9
10. The curriculum is broad and challenging for most students.	70/18	77/11
11. There is little a teacher can do to overcome education problems due to a student's home life.	25/50	35/46
12. Teachers in our schools know the material they teach.	91/5	88/4
13. Teachers in our schools care about students' needs.	91/3	91/3
14. Teachers expect students to do their very best.	92/2	88/4
15. The school division provides adequate technology-related staff development.	62/24	n/a
16. Principals and assistant principals in our schools care about students' needs.	79/10	83/7
17. In general, parents take responsibility for their children's behavior in our schools.	35/45	27/53
18. Parents in this school division are satisfied with the education their children are receiving.	61/7	53/14
19. Most parents seem to know what goes on in our schools.	45/32	29/50
20. Parents play an active role in decision-making in our schools.	37/31	36/38
21. This community really cares about its children's education.	59/15	49/27
22. The food services department encourages student participation through customer satisfaction surveys.	7/49	n/a
23. The school division requests input on the long range technology plan.	24/40	n/a
24. Funds are managed wisely to support education in this school division.	24/42	28/46
25. Sufficient student services are provided in this school division (e.g., counseling, speech therapy, health).	58/26	53/34
26. School-based personnel play an important role in making decisions that affect schools in this school division.	33/43	35/33
27. The school division provides adequate technical support.	60/26	n/a
28. Students are often late arriving to and/or departing from school because the buses do not arrive to school on time.	15/71	17/60
29. The food services department provides nutritious and appealing meals and snacks.	34/44	43/34

<sup>1</sup> Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*. The *neutral* and *don't know* responses are omitted.

**EXHIBIT A-25  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION TEACHERS AND  
TEACHERS IN OTHER SCHOOL DISTRICTS**

<b>PART C</b>	<b>(%G+ E) / (%F + P)<sup>1</sup></b>	
	<b>ISLE OF WIGHT COUNTY SCHOOL DIVISION</b>	<b>OTHER SCHOOL DISTRICTS</b>
1. Board of Education members' knowledge of the educational needs of students in the school district.	35/47	24/64
2. Board of Education members' knowledge of operations in the school district.	38/45	29/55
3. Board of Education members' work at setting or revising policies for the school district.	40/44	27/58
4. The school district Superintendent's work as the educational leader of the school district.	34/60	49/40
5. The school district Superintendent's work as the chief administrator (manager) of the school district.	36/60	50/38
6. Principals' work as the instructional leaders of their schools.	59/40	63/36
7. Principals' work as the managers of the staff and teachers.	63/36	67/32
8. Teachers' work in meeting students' individual learning needs.	85/14	79/20
9. Teachers' work in communicating with parents.	82/16	75/24
10. Teachers' attitudes about their jobs.	59/40	50/49
11. Students' ability to learn.	78/21	64/35
12. The amount of time students spend on task learning in the classroom.	75/23	60/37
13. Parents' efforts in helping their children to do better in school.	27/68	21/76
14. Parents' participation in school activities and organizations.	31/65	23/75
15. How well students' test results are explained to parents.	46/42	38/52
16. The cleanliness and maintenance of facilities in the school district.	65/35	52/47
17. How well relations are maintained with various groups in the community.	47/38	43/44
18. Staff development opportunities provided by the school district for teachers.	48/50	61/38
19. Staff development opportunities provided by the school district for school administrators.	24/20	32/22
20. The school district's job of providing adequate instructional technology.	58/42	47/51
21. The school district's use of technology for administrative purposes.	55/23	45/31

<sup>1</sup>Percent responding *Good* or *Excellent* / Percent responding *Fair* or *Poor*. The *don't know* responses are omitted.

**EXHIBIT A-26  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION TEACHERS AND  
TEACHERS IN OTHER SCHOOL DISTRICTS**

<b>PART D: WORK ENVIRONMENT</b>	<b>(% A + SA) / (% D + SD)<sup>1</sup></b>	
	<b>ISLE OF WIGHT COUNTY SCHOOL DIVISION</b>	<b>OTHER SCHOOL DISTRICTS</b>
1. I find the school district to be an exciting, challenging place to work.	67/13	69/12
2. The work standards and expectations in the school district are equal to or above those of most other school districts.	66/15	63/14
3. School district officials enforce high work standards.	74/12	63/15
4. Most school district teachers enforce high student learning standards.	86/6	78/8
5. School district teachers and administrators have excellent working relationships.	44/36	45/26
6. Teachers who do not meet expected work standards are disciplined.	30/34	25/39
7. Staff who do not meet expected work standards are disciplined.	27/30	23/36
8. I feel that I have the authority to adequately perform my job responsibilities.	77/15	81/12
9. I have adequate facilities in which to do my work.	74/16	69/23
10. I have adequate equipment and computer support to do my work.	69/21	54/36
11. The workloads are equitably distributed among teachers and among staff members.	38/43	40/43
12. No one knows or cares about the amount or quality of work that I perform.	34/51	24/58
13. Workload is evenly distributed.	31/44	36/43
14. The failure of school district officials to enforce high work standards results in poor quality work.	87/8	87/7
15. I often observe other teachers and/or staff socializing rather than working while on the job.	13/71	18/66

<sup>1</sup> Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*. The *neutral* and *don't know* responses are omitted.

**EXHIBIT A-27  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION TEACHERS  
AND TEACHERS IN OTHER SCHOOL DISTRICTS**

<b>PART E: JOB SATISFACTION</b>	<b>(% A + SA) / (% D + SD)<sup>1</sup></b>	
	<b>ISLE OF WIGHT COUNTY SCHOOL DIVISION</b>	<b>OTHER SCHOOL DISTRICTS</b>
1. I am very satisfied with my job in the school district.	69/17	70/15
2. I plan to continue my career in the school district.	70/11	76/8
3. I am actively looking for a job outside of the school district.	18/65	11/74
4. Salary levels in the school district are competitive (with other school districts).	39/43	33/53
5. I feel that my work is appreciated by my supervisor(s).	61/28	65/21
6. I feel that I am an integral part of the school district.	58/24	59/20
7. I feel that there is no future for me in the school district.	11/67	12/73
8. My salary level is adequate for my level of work and experience.	24/64	20/69

<sup>1</sup> Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*. The *neutral* and *don't know* responses are omitted.

**EXHIBIT A-28  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION TEACHERS AND  
TEACHERS IN OTHER SCHOOL DISTRICTS**

PART F: ADMINISTRATIVE STRUCTURE/PRACTICES	(% A + SA) / (% D + SD) <sup>1</sup>	
	ISLE OF WIGHT COUNTY SCHOOL DIVISION	OTHER SCHOOL DISTRICTS
1. Most administrative practices in the school district are highly effective and efficient.	36/41	34/36
2. Administrative decisions are made promptly and decisively.	37/45	36/36
3. School district administrators are easily accessible and open to input.	44/42	39/35
4. Authority for administrative decisions is delegated to the lowest possible level.	15/38	15/29
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	57/29	55/27
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	43/25	45/19
7. The extensive committee structure in the school district ensures adequate input from teachers and staff on most important decisions.	30/39	29/39
8. The school district has too many committees.	26/23	43/13
9. The school district has too many layers of administrators.	49/20	53/15
10. Most administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	37/35	35/28
11. Central office administrators are responsive to school needs.	33/38	27/34
12. Central office administrators provide quality service to schools.	32/35	27/31

<sup>1</sup> Percent responding *Agree* or *Strongly Agree* / Percent responding *Disagree* or *Strongly Disagree*. The *neutral* and *don't know* responses are omitted.

**EXHIBIT A-29  
COMPARISON SURVEY RESPONSES  
ISLE OF WIGHT COUNTY SCHOOL DIVISION TEACHERS AND  
TEACHERS IN OTHER SCHOOL DISTRICTS**

PART G:  SCHOOL DISTRICT/PROGRAM FUNCTION	% NEEDS SOME IMPROVEMENT + NEEDS MAJOR IMPROVEMENT / % ADEQUATE <sup>1</sup> + OUTSTANDING	
	ISLE OF WIGHT COUNTY SCHOOL DIVISION	OTHER SCHOOL DISTRICTS
a. Budgeting	65/21	65/16
b. Strategic planning	53/29	47/24
c. Curriculum planning	47/49	52/41
d. Financial management and accounting	47/29	49/23
e. Community relations	51/39	53/38
f. Program evaluation, research, and assessment	45/41	42/38
g. Instructional technology	39/59	53/40
h. Pupil accounting	24/54	29/39
i. Instructional coordination/supervision	43/49	38/48
j. Instructional support	49/48	48/45
k. Federal Programs (e.g., Title I, Special Education) coordination	48/42	36/40
l. Personnel recruitment	45/37	40/35
m. Personnel selection	41/46	42/37
n. Personnel evaluation	42/53	41/48
o. Staff development	55/42	42/52
p. Data processing	26/38	21/34
q. Purchasing	32/35	33/30
r. Plant maintenance	29/40	41/37
s. Facilities planning	37/32	41/28
t. Transportation	39/44	32/46
u. Food service	56/34	41/47
v. Custodial services	35/57	44/49
w. Risk management	23/37	22/32
x. Administrative technology	20/44	24/34
y. Grants administration	25/31	21/32

<sup>1</sup> Percent responding *Needs Some Improvement* or *Needs Major Improvement* / Percent responding *Adequate* or *Outstanding*. The *neutral* and *don't know* responses are omitted.