EFFICIENCY REVIEW OF LOUDOUN COUNTY PUBLIC SCHOOLS

Final Report

Submitted to:

"A Climate For Success"
LOUDOUN COUNTY
Public Schools

Submitted by:

MGT
OF AMERICA, INC.

EFFICIENCY REVIEW OF LOUDOUN COUNTY PUBLIC SCHOOLS

Final Report

Submitted to:

Dr. Hatrick
Superintendent
Loudoun County Public Schools
21000 Education Court
Ashburn, Virginia 20148
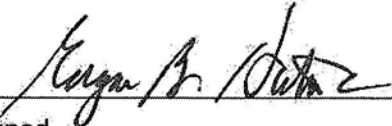
Submitted by:

MGT
OF AMERICA, INC.

2123 Centre Pointe Boulevard
Tallahassee, Florida 32308

MGT'S FINAL REPORT REVIEW

FOR LOUDOUN COUNTY PUBLIC SCHOOLS

This document serves to verify that Loudoun County Public Schools staff and Superintendent Hatrick have read the draft report submitted by MGT of America, that all factual errors have been corrected, and that to our knowledge, the report contains no factual errors.

_____
Signed

_____
Title

_____
Date

Superintendent

6-2-08

MGT
OF AMERICA, INC.

TABLE OF CONTENTS

PAGE

TABLE OF CONTENTS (Continued)

PAGE

APPENDICES

    Appendix A: Survey Results
    Appendix B: Peer Comparison Data

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

The Commonwealth of Virginia inaugurated the school efficiency review program in the 2004-05 school year as the governor's *Education for a Lifetime* initiative. The program involves contracting with outside educational experts to perform efficiency reviews for school divisions within the Commonwealth. School divisions must volunteer to participate. The results of the reviews provide guidance in determining whether educational dollars are being utilized to the fullest extent possible.

In September 2007, MGT of America, Inc., was awarded a contract to conduct an efficiency review of Loudoun County Public Schools (LCPS). As stated in the Request for Proposal, the purpose of the study was to conduct an external review of the efficiency of various offices and operations within LCPS and to present a final report of the findings, recommendations, and projected costs and/or savings associated with the recommendations. The object of the review was to identify ways in which LCPS could realize cost savings in non-instructional areas in order to redirect those funds towards classroom activities.

Overview of Loudoun Public Schools

The Loudoun County Public School (LCPS) Division, one of the largest and fastest growing in Virginia, is located in Ashburn, Virginia, an unincorporated area 30 miles from Washington, D.C., situated between Washington Dulles International Airport and Leesburg, the county seat. Ashburn is part of the Washington Metropolitan Area.

LCPS serves a diverse population of over 54,000 students. The division consists of 47 elementary schools, 12 middle schools, one intermediate school, 10 high schools, and two instructional centers. The division has an operating budget of $691 million for the 2007-08 school year, with at least 79 percent dedicated to direct instruction, which shows the commitment to student needs.

According to the LCPS Web site, the division's mission statement is:

> *The mission of the Loudoun County Public Schools is to work closely with students, families, and the community to provide a superior education, safe schools, and a climate for success. The educational programs of Loudoun County Public Schools will strive to meet or exceed federal, state, and local requirements for assessment of achievement and to promote intellectual growth, individual initiative, mutual respect, and personal responsibility for productive citizenship.*

To support the mission statement, LCPS has published goals for student achievement, curriculum development, class size, compensation, recruitment, and retention of staff, growth and resource parity, community relations, and health, safety, and wellness.

Review Methodology

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

- Be based upon a very detailed work plan and time schedule.

- Take into account the unique environment within which the school division operates and the specific student body involved.

- 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 exemplary programs and practices as well as needed improvements.

- Document all findings.

- 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 review 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 the beginning of our onsite 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 LCPS.

MGT requested more than 100 documents from LCPS, including, but 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.
- Personnel handbooks.

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

Diagnostic Review

MGT conducted a diagnostic review of LCPS on October 29-31, 2007. An MGT consultant interviewed central office administrators, community leaders, and school board members concerning the management and operations of the division.

Employee Surveys

To secure the involvement of central office administrators, principals/assistant principals, and teachers in the focus and scope of the LCPS Efficiency Review, three online surveys were prepared and disseminated. These anonymous surveys gave division administrators and teachers the opportunity to express their views about the management and operations of the division. The 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.

In addition to comparing the survey responses of the three groups within the division, we also compared the LCPS responses to those of their counterparts in the more than 40 school systems where we had conducted similar surveys.

The survey results may be found in **Appendix A**. Specific survey items pertinent to findings in the functional areas MGT reviewed appear within each chapter.

Conducting the Formal Onsite Review

A team of consultants conducted the formal onsite review of LCPS from December 17-21, 2007. The onsite review included interviews with all division administrators at the school and central office; focus groups with all classifications of employees including elementary principals, secondary principals, instructional assistants, and food service, transportation, maintenance, technology, and custodial employees; and individual interviews with board members and student services personnel. The central office staff had compiled all available documentation in response to our data request list, and we collected additional information on policies, procedures, and division practices in all operational areas. During our onsite review, we examined the following LCPS systems and operations:

- Division administration
- Financial management and purchasing
- Cost of educational service delivery

- Personnel services
- Facility use and management
- Transportation
- Technology management
- Food services

Prior to the onsite review, each team member received an extensive set of information about LCPS operations. During the onsite work, team members conducted detailed reviews of the structure and operations of LCPS in their assigned functional areas. Consultants visited over 30 schools and division facilities while onsite to assess business operations at the school level.

MGT hosted a community open house at the LCPS Central Office located in Ashburn, to allow an opportunity for parents, students, school staff, division staff, and business and community members to contribute to the process. In addition, MGT provided a Web site address for public participation. Numerous comments were provided through this additional forum.

Comparison Summary

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.

LCPS is one of 11 school divisions in the Commonwealth of Virginia identified in Cluster 3, and is one of the largest divisions in the cluster. The Virginia school divisions chosen for a sample comparison to LCPS were:

- Chesterfield County Public Schools.
- Henrico County Public Schools.
- Prince William County Public Schools.
- Virginia Beach Public Schools.

Extensive exhibits illustrating how the peer school divisions compare to LCPS in terms of enrollment, demographics, funding, and student achievement for the most current school year for which data were available from the Virginia Department of Education Web site may be found in **Appendix B**. Specific comparisons pertinent to findings in the functional areas MGT reviewed are presented within each chapter. In reviewing these comparisons, the reader must remember that school divisions may have different operational definitions, and data self-reported by peer school divisions can be subjective.

Overview of Final Report

MGT's final report is organized into nine chapters. **Appendix A** presents the results of the MGT-administered surveys of central office administrators, principals/assistant principals, and teachers. **Appendix B** presents a comparison of LCPS with the selected Virginia peer divisions. Chapters **1.0** through **8.0** present the results of the LCPS School Efficiency Review. Findings, commendations, and recommendations are presented for

each operational area reviewed. Each chapter analyzes a specific function within the school division based on the current organizational structure. The following data on each function are included:

- Description of the current situation in LCPS.

- A summary of the study's findings.

- MGT's commendations and recommendations for each finding.

- A five-year fiscal impact statement detailing recommended costs or cost savings, which are stated in 2008-09 dollars.

The report concludes with a summary of the fiscal impact of the review recommendations in **Chapter 9.0**.

Key Commendations

Detailed findings for each commendation for exemplary practices appear in the full report in **Chapters 1.0** through **8.0**. The following are the major commendations for which LCPS is recognized.

- The LCPS board and administration are commended for containing legal services expenses (**Commendation 1-A**).

- The LCPS board and administration are commended for the school division's commitment to placing the division's first priority for funding and staffing within the division's schools (**Commendation 1-B**).

- LCPS is commended for developing and implementing a comprehensive School Improvement Planning (SIP) process, which is directly correlated to the school board's goals (**Commendation 1-C**).

- LCPS board and administration are commended for proactively forming the Minority Student Achievement Advisory Committee (MSAAC) and the initial implementation of processes recommended by the committee for the division's students (**Commendation 1-E**).

- Developing and implementing an effective process for data collection in conjunction with development of the annual budget (**Commendation 2-B**).

- Establishing well-designed procedures and an annual audit process for student activity funds that assures proper accountability for these funds (**Commendation 2-C**).

- Establishing and maintaining excellent procedures and communication mechanisms to effectively manage the risk management functions of LCPS (**Commendation 2-F**).

- Participation in numerous purchasing cooperatives and establishing standard contracts with vendors to provide an easy process for schools and departments to obtain necessary goods and services (**Commendation 2-I**).

- Effectively implementing the use of purchase cards (**Commendation 2-J**).

- Providing financial support for teachers obtaining certification in instructional technology integration to enhance their instructional expertise (**Commendation 3-B**).

- Creating the MyLearning Plan Program as a portal for online registration with courses leading to the renewal of professional licenses for certified personnel (**Commendation 3-C**).

- Providing a comprehensive program of training and orientation to new teachers. Program processes and content are in keeping with best practices (**Commendation 3-D**).

- The division has a recognition program for substitute teachers that rewards outstanding job performance (**Commendation 4-B**).

- Through efforts such as Candidate Care, and the Visiting International Faculty programs, the department of personnel services is commended for its persistence in meeting minority recruitment goals (**Commendation 4-C**).

- LCPS planners are effectively using technology to study the effects of attendance boundary changes (**Commendation 5-B**).

- LCPS has developed a "best practice" system for calculating the capacities of schools (**Commendation 5-C**).

- Construction is using a project management software application that is Web-based and, therefore, accessible to the division's architects and contractors (**Commendation 5-D**).

- The transportation department has an exceptional training program (**Commendation 6-E**).

- The transportation department has excellent accident prevention and reporting programs and is in compliance with VDOE requirements regarding submission of bus accident reports (**Commendation 6-F**).

- The Consolidated Vehicle Services (CVS) operations provide exceptional vehicle maintenance for LCPS and the County of Loudoun and are implemented and managed by the transportation department fleet manager. The transportation department vehicle maintenance information system (VMIS) program is commendable (**Commendation 6-G**).

- LCPS has implemented a user-friendly and cost-effective help desk system for administrative technology (**Commendation 7-A**).

- LCPS has a four-to-one student to computer ratio, which is a desirable level for attaining true technology integration in the classroom (**Commendation 7-B**).

- LCPS food services department is commended for instituting a system of cross-training that provides for continuous coverage of all essential job functions (**Commendation 8-A**).

- LCPS food service department is commended for encouraging the sharing of best practices across the school division (**Commendation 8-B**).

Key Recommendations

This executive summary briefly highlights key efficiency issues in LCPS. More detailed recommendations for improving operations may be found throughout the main body of the full report. Key recommendations for improvement include the following:

- Restructure the board committees and establish a well defined purpose, meeting time requirements, a set monthly meeting date, and reporting structure for each committee (**Recommendation 1-3**).

- Develop and implement a school board member professional development program with annual training for the entire board to attend as a corporate board (**Recommendation 1-4)**.

- Review and revise Board Policy 2-3, Board Code of Conduct, with an annual review by the entire board of the content (**Recommendation 1-5**).

- Develop and implement an annual school board self-assessment system (**Recommendation 1-6**).

- Employ one additional director of elementary education (**Recommendation 1-8**).

- Develop and approve seven board goals utilizing a format similar to the SMART criteria (**Recommendation 1-10**).

- Develop and implement a comprehensive succession plan for LCPS (**Recommendation 1-12**).

- Review the materials located on the Government Finance Officers Association (GFOA) Web site at www.gfoa.org/services/nacslb to gain an understanding of the best practices in public budgeting that serve as a foundation for a revision of the document that will lead to consistent scores of outstanding for the LCPS budget in the future (**Recommendation 2-1**).

- Restructure the budget into a program format within the various organizational units that provides information on those specific services that can be evaluated in more detail (**Recommendation 2-3**).

- Cease the practice of budgeting partial positions as a budget balancing tool. If this practice is to occur in the future, the financial impact of these positions on the future years' budget should be disclosed (**Recommendation 2-5**).

- Work with the auditing firm to establish a process for publishing a Comprehensive Annual Financial Report (CAFR) for LCPS (**Recommendation 2-8**).

- Establish multiple salary schedules relating to the individual calendars and assess the current calendars to determine if those with minimal numbers of employees can be consolidated (**Recommendation 2-11**).

- Convert the insurance coverage portion of existing policy §4-6 to a regulation and establish a new policy entitled "risk management" that defines the purpose of the risk management program, spells out the responsibilities to be assigned to the program, and identifies the related responsibilities of the schools and departments (**Recommendation 2-12**).

- Establish a policy addressing the use of purchasing cards for LCPS to include the authorized spending limits (**Recommendation 2-13**).

- Transfer management of the warehouse activities from the department of the assistant superintendent for support services and facilities services to the department of business and financial services (**Recommendation 2-15**).

- Expand the Instructional Coach Program to all LCPS schools (**Recommendation 3-1**).

- Incorporate the strategies gained through previous cultural competency inservice activities with research-based, effective, instructional strategies (**Recommendation 3-2**).

- Create a school improvement plan checklist to guide the development of plans and to ensure the uniformity of plan components across the division (**Recommendation 3-4**).

- Modify the current LCPS school board policy to discourage the use of overtime by limiting overtime to 20 percent of overall salary, and to employ the use of non-monetary compensation for overtime (**Recommendation 4-1**).

- Develop a process to gather more accurate information on the reason behind employee attrition (**Recommendation 4-5**).

- Hold a public hearing to review the specific attendance boundary change that the board is going to vote on, prior to the vote (**Recommendation 5-1**).

- Lobby the county government to simplify the school site acquisition process (**Recommendation 5-2**).

- Reorganize the maintenance crews more effectively, such as the "roving crew" approach (**Recommendation 5-5**).

- Increase the number of lead custodians (supervisors) by one position (**Recommendation 5-6**).

- Create an energy coordinator position to oversee and coordinate all energy management programs in the division (**Recommendation 5-9**).

- The spare bus policy should be reviewed and adjusted. A 10 to 15 percent spare bus policy should be considered (**Recommendation 6-3**).

- Encourage mechanics to achieve Automotive Service Excellence (ASE) certification and make ASE certification a condition for mechanics seeking employment (**Recommendation 6-4**).

- Create a comprehensive long-term technology plan that incorporates both administrative and instructional technology as well as the financial needs associated with implementing the goals and strategies within the plan (**Recommendation 7-2**).

- Ensure basic software training for users and develop an accountability process like that of the School Technology and Readiness (STaR) Chart to ensure teachers are receiving training and providing technology integration in each school and classroom (**Recommendation 7-6**).

- Explore additional training opportunities/topics for all staff using the media center to download presentations designed for distance learning (**Recommendation 8-1**).

- Revise the Blind Close policy from "signatures are recommended to verify a Blind Close was performed" to "signatures are required to verify a Blind Close was performed" (**Recommendation 8-2**).

- LCPS food service develop and implement an aggressive Marketing Plan to attract more customers by involving students, teachers, administrators, parents, and community partners in the development stages and redefine the department mission (**Recommendation 8-4**).

Fiscal Impact

Based on the analyses of data obtained from interviews with LCPS personnel, parents, and the community at large; LCPS surveys; state and school division documents; and first-hand observations during the review, the MGT developed 41 commendations and 60 recommendations, 16 which have fiscal implications.

As shown in **Exhibit 1**, full implementation of the recommendations in this report would generate gross savings of more than $5.7 million over a five-year period. Net costs over the same period (including one-time savings/costs) are approximately $3.5 million, for a **net savings of $2.2 million** over a five-year period. It is important to note that many of the recommendations MGT made without specifying a fiscal impact are expected to result in a net cost savings to LCPS, 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 2008-09 dollars and do not reflect increases due to salary or inflation adjustments.

EXHIBIT 1
SUMMARY OF ANNUAL SAVINGS (COSTS)

CATEGORY	YEARS					TOTAL FIVE-YEAR SAVINGS
	2008-09	2009-10	2010-11	2011-12	2012-13	
TOTAL SAVINGS	$1,042,815	$1,179,615	$1,179,615	$1,179,615	$1,179,615	$5,761,275
TOTAL (COSTS)	($441,453)	($784,733)	($784,733)	($784,733)	($784,733)	($3,580,385)
TOTAL NET SAVINGS (COSTS)	$601,362	$394,882	$394,882	$394,882	$394,882	$2,180,890
ONE-TIME SAVINGS(COSTS)						$57,500
TOTAL FIVE-YEAR NET SAVINGS (COSTS) INCLUDING ONE-TIME SAVINGS (COSTS)						$2,238,390

1.0 DIVISION ADMINISTRATION

1.0 DIVISION ADMINISTRATION

In this chapter the major findings and recommendations for the overall organization of Loudoun County Public Schools (LCPS) are presented. The major sections of the chapter include:

1.1 School Board Governance
1.2 Policies and Procedures
1.3 Legal Services
1.4 Organization and Management

CHAPTER SUMMARY

Contained within the chapter are key commendations for the division management, that include:

■ The LCPS board and administration are commended for containing legal services expenses.

■ The LCPS board and administration are commended for the school division's commitment to placing the division's first priority for funding and staffing within the division's schools.

■ LCPS is commended for developing and implementing a comprehensive School Improvement Planning (SIP) process, which is directly correlated to the school division's board goals.

■ LCPS board and administration are commended for proactively forming the Minority Student Achievement Advisory Committee (MSAAC) and the initial implementation of processes recommended by the committee for the division's students.

The following key recommendations are included in the chapter:

■ Restructure the board committees and establish a well defined purpose, meeting time requirements, a set monthly meeting date, and reporting structure for each committee.

■ Develop and implement a school board member professional development program with annual training for the entire board to attend as a corporate board.

■ Review and revise Board Policy 2-3, Board Code of Conduct, with an annual review by the entire board of the content.

■ Develop and implement an annual school board self-assessment system.

■ Employ one additional director of elementary education.

■ Develop and approve seven board goals utilizing a format similar to the SMART criteria.

■ Develop and implement a comprehensive succession plan for LCPS.

Conditions in LCPS of importance to this review include:

■ A superintendent of schools for 17 years and with a total of 42 years of service with LCPS.

■ Continued rapid increases in student enrollment, one of the fastest growing areas in the country.

■ A growing population of non-English speaking students coupled with a shortage of English as a Second Language (ESL) personnel.

■ Continuing difficulties securing adequate resources to meet the current demands for facilities and funding to educate an increasingly diverse student population.

■ Received numerous awards that include:

  – Selection as one of three demonstration school systems by the National School Boards Association (NSBA) as a Technology Host Site.

  – LCPS was honored as a 2006 NSBA Technology Salute District during the NSBA 2006 Technology and Learning Conference. LCPS was one of only three school divisions from across the nation to be selected for the honor.

  – Named the 2007 Annual School System "What Parents Want" Award presented by School Match.

  – Awarded two middle schools as "School to Watch" by the National Forum to Accelerate Middle-Grades Reform. Only two schools in Virginia received the award in 2007.

  – Named by Forbes.com as the 11th ranked school division in a nationwide survey of school systems that deliver high performance at low costs during 2007.

  – Received several elementary commendations from the Governor's Best Practices in Nutrition and Physical Activity Award.

  – Awarded one elementary school first place honors in the National Geography Challenge in 2007.

  – Awarded two schools the United States Department of Education No Child Left Behind Blue Ribbon Schools Award.

The LCPS superintendent is serving in his seventeenth year as the school division's chief executive officer. Each of the 72 school principals were appointed by the

superintendent. The superintendent provides leadership for the division, with input from his senior staff team that includes the deputy superintendent, five assistant superintendents, one executive director, and the public information officer. The superintendent and senior staff members have regularly scheduled meetings each Monday. All meetings are guided by prepared agendas and notes are subsequently distributed.

LCPS has 72 schools that serve 54,047 students at a per pupil cost of $12,751. Staffing and per pupil expenditures are in line with nine other school divisions that serve the Washington D.C. area communities and counties.

Exhibit 1-**1** lists the 2007-08 average class size for nine Washington D.C. suburban community and county school divisions.

EXHIBIT 1-1
AVERAGE CLASS SIZE - NINE COMMUNITY AND
COUNTY SCHOOL DIVISIONS NEAR WASHINGTON D.C.

FY 2008 Average Class Size

School Division	Students per Classroom Teacher			Students per Teacher-Scale Position		
	Elementary	Middle / Intermediate	Secondary / High	Elementary	Middle / Intermediate	Secondary / High
Alexandria City	16.8	22.2	19.4	8.9	16.1	13.5
Arlington County	19.2	19.4	18.8	10.3	15.3	15.2
Fairfax County	20.7	23.0	24.1	12.8	17.2	18.4
Falls Church City	21.9	20.6	19.7	11.3	15.2	14.9
Loudoun County	21.2	19.9	23.6	13.5	15.0	17.3
Manassas City	21.8	19.7	20.1	11.2	18.4	18.9
Montgomery County	19.5	25.3	24.8	13.5	20.6	22.0
Prince George's County	19.3	21.6	27.6	16.9	19.1	23.9
Prince William County	21.9	19.8	24.1	17.2	16.5	17.7

Note: Classroom teachers are positions used to determine class size.

Students per teacher-scale positions include classroom teachers and other teachers such as ESOL/ESL, librarians, reading, coaches, mentors, music, art, PE, etc.

Excludes teachers and students in pre-K, kindergarten, and self-contained special education

WABE 2008

28

Source: Washington Area Boards of Education Document (WABE), 2007-08.

EXHIBIT 1-2 lists the cost per student for the nine Washington D.C. area school divisions.

EXHIBIT 1-2
COST PER PUPIL - NINE COMMUNITY AND
COUNTY SCHOOL DIVISIONS NEAR WASHINGTON D.C.

FY 2008 Cost Per Pupil

	Alexandria City	Arlington County	Falls Church City	Montgomery County	Fairfax County	Loudoun County	Prince George's County	Manassas City	Prince William County
FY 2008	$19,341	$18,563	$18,474	$14,705	$13,407	$12,751	$12,107	$12,067	$10,429
FY 2007	$18,232	$17,958	$17,700	$13,448	$12,853	$12,023	$10,332	$12,036	$10,378

WABE 2008

31
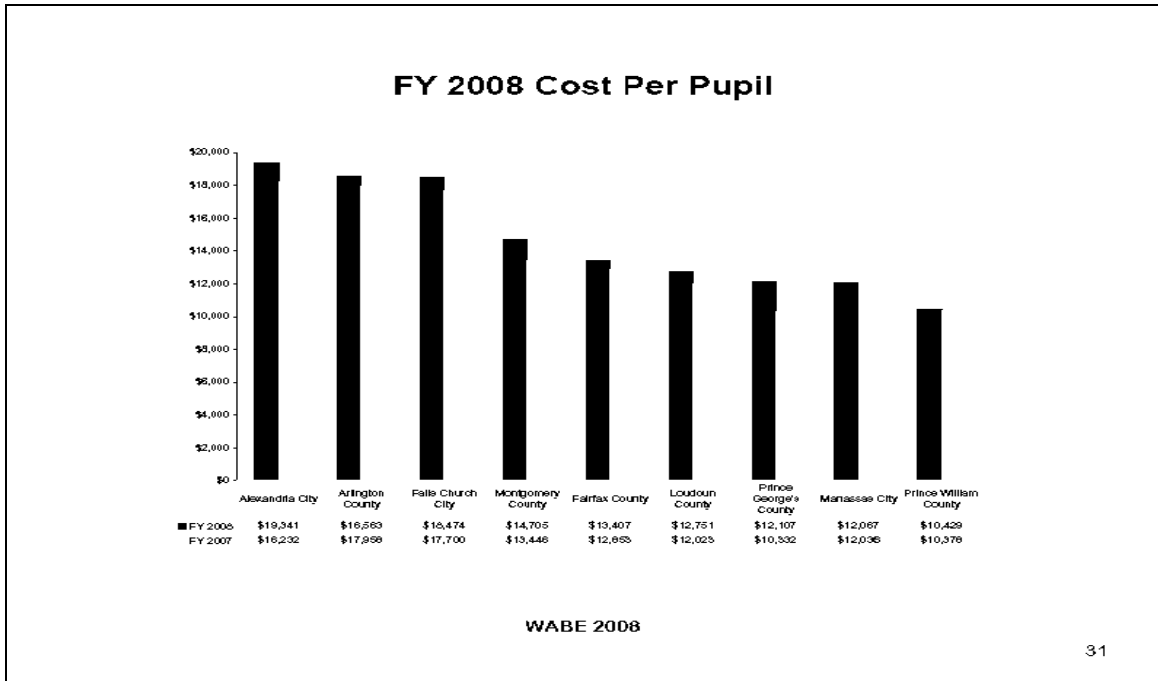
Source: Washington Area Boards of Education Document (WABE), 2007-08.

The superintendent and board members, as well as other personnel, emphasized the challenges associated with previously mentioned conditions during interviews with the performance review team. The same groups indicated that the school division maintained high academic standards and their students and schools experienced many successes.

MGT collects survey responses from central office administrators, principals/assistant principals, and teachers.

Exhibits 1-3 and **1-4** show survey results that relate to decision-making and management of the LCPS Division.

EXHIBIT 1-3
LCPS COMPARISON SURVEY RESPONSES
OVERALL QUALITY

MGT uses a statistical formula to set an acceptable return rate in order to declare that survey results are "representative" of the population surveyed. In the case of Loudoun County Public Schools, response rates for central office administrators and teachers exceeded the standard, and the response rate for principals was slightly (one percentage point) below the standard.

STATEMENT	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
Overall quality of public education in our school division is:			
Good or Excellent	98	100	96
Fair or Poor	0	0	3
Overall quality of education in our school division is:			
Improving	78	88	65
Staying the Same	16	9	23
Getting Worse	2	0	8
Grade given to our school division teachers:			
Above Average (A or B)	83	100	93
Below Average (D or F)	0	0	0
Grade given to our school division school level administrators:			
Above Average (A or B)	91	99	77
Below Average (D or F)	0	0	5
Grade given to our school division central office administrators:			
Above Average (A or B)	87	91	56
Below Average (D or F)	1	0	9

Source: MGT of America, 2007.

EXHIBIT 1-4
COMPARISON OF RESPONSES WITHIN THE DISTRICT
SCHOOL/DISTRICT CLIMATE

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
I feel that I have the authority to adequately perform my job responsibilities.	70/21	96/1	86/7
I am actively looking for a job outside of this school division.	6/80	2/90	6/82
I am very satisfied with my job in this school division.	74/8	90/3	80/10
The work standards and expectations in this school district are equal to or above those of most other school districts.	76/6	90/5	81/6
This school district's officials enforce high work standards.	81/10	93/0	84/5
Workload is evenly distributed.	40/34	59/25	46/41
I feel that my work is appreciated by my supervisor(s).	77/9	78/11	71/17
Teachers who do not meet expected work standards are disciplined.	26/20	61/16	28/32
Staff (excluding teachers) who do not meet expected work standards are disciplined.	41/22	63/15	22/26
I feel that I am an integral part of this school division team.	82/5	90/1	74/12

Source: MGT of America, 2007.
[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

LCPS has a high percentage of central office administrators, principals/assistant principals, and teachers who are in agreement that LCPS provides a conducive working environment. **Exhibit 1-4** statement one, related to work authority, shows 70 percent of administrators agree to strongly agree that they have the authority to perform their job responsibilities. MGT has found that in survey data with other school divisions that the average ratio is 54 percent in agree/strongly agree and 23 percent in disagree/strongly disagree. MGT's data indicates that LCPS central office administrator survey results report a positive culture, which is higher than administrators in other school divisions.

1.1 *School Board Governance*

The education system in LCPS is the result of Commonwealth of Virginia legislation authorizing the establishment of city and county school divisions. Eight of the nine board members are elected from resident districts with one member elected at-large and all serving concurrent four-year terms. The chairman and vice chairman are elected by the school board.

Exhibit 1-5 provides an overview of the LCPS school board members.

EXHIBIT 1-5
LOUDOUN COUNTY PUBLIC SCHOOLS
SCHOOL BOARD MEMBERS
DECEMBER 2007

NAME	TITLE	TERM EXPIRES	YEARS OF SERVICE AS OF END OF 12/31/07	DISTRICT
Robert F. Dupree, Jr.	Chair	12/31/11	4	Dulles
Thomas E. Reed	Vice Chair	12/31/11	8	At Large
Priscilla B. Godfrey	Member	12/31/11	4	Blue Ridge
Bob Ohneiser	Member	12/31/11	4	Broad Run
Mark J. Nuzzaco*	Member	12/31/07	4	Catoctin
Sarah B. Smith**	Member	12/31/07	4	Leesburg
John Stevens	Member	12/31/11	1	Potomac
J. Warren Geurin	Member	12/31/11	8	Sterling
Dr. Joseph M. Guzman	Member	12/31/11	4	Sugarland Run

Source: LCPS Superintendent's Office, 2007.
*Jennifer Bergel begins a four-term as of 1/1/08 serving the Catoctin district.
** Tom Marshall begins a four year term as of 1/1/08 serving the Leesburg district.

Regular school board meetings are held on the second and fourth Tuesdays of each month in the board meeting room. The public is invited to attend and participate in school board meetings held monthly in open session at LCPS administrative offices. Second Tuesday meetings convene at 4 p.m. and 6:30 p.m. with the fourth Tuesday meetings beginning at 6:30 p.m. In July, August, and December no fourth Tuesday meetings are scheduled. Any individual who wishes to address the board may first call the superintendent's office before the meeting or sign up at the meeting. Meeting agendas are available in all schools and from the public information office. Channels 23 and 24 telecast school board meetings live and at 12 noon on Wednesday. School board reports are given on WAGE Radio, AM-1200. Electronic board agendas are available online prior to board meetings and paper copies are also available.

Closed session meetings are held prior to the regular meeting unless otherwise noted.

Closed meetings may include:

- Discussion of individual personnel.

- Student issues.

- Negotiations of material terms for purchase of property or a specific contract for employment.

- Attorney-client privilege relating to litigation preparation and execution.

- Other matters as permitted under Commonwealth of Virginia law.

The meeting agenda is comprehensive and provides for public, administrative, and board member input. The board meeting agenda and approved meeting minutes are posted on the division's Web site, which allows the public to access and view topics for consideration by the school board. Board meetings are televised and archived for

review. The board agenda is provided in electronic and paper formats to the school board and related documents are in a paper format.

FINDING

LCPS board agenda items and related documents are developed by staff using word processing software and are printed for distribution.   Interviews with board members and staff indicated that redundancy does exist in the division's practice of printing agendas and related documents. Printed copies are provided to board members, senior and key central staff, and made available for the public. Several board members indicated a preference of moving their board agendas and related documents to what is termed an electronic board book. **Exhibit 1-6** provides information from the Virginia School Board Association (VSBA) related to electronic BoardDocs.

EXHIBIT 1-6
BOARD BOOK INFORMATION

About BoardDocs

BoardDocs has been developed for school boards, local governments, private and public boards to help alleviate the enormous task of assembling, printing, distributing and revising agenda items and policies.

With BoardDocs you not only have the ability to process agenda items, supporting documents, policies and procedures, but you also determine who has access to each document - such as board members and staff, or the general public. Plus, you can make last minute revisions, and redistribute your materials – in mere minutes.

Virginia School Board Association Partners with BoardDocs

Virginia State School Board Association

Gina Patterson, Virginia State School Board Association's (VSBA) assistant executive Director, said that BoardDocs was introduced to the VSBA about three years ago. "We really weren't looking for paperless board meeting systems, but we got a phone call from one of our internal people who said that we should take a look at BoardDocs. We set up a meeting with Ari Loannides, the president of BoardDocs and sat down for an onsite demo. "

"Once he showed us what we could do, we were convinced that this paperless board meeting service would be a benefit to our school districts," Patterson said. "We were able to provide our boards a way to eliminate paper – a big complaint – at a good cost. Our partnership with BoardDocs allows us to provide that service to school districts."

"Patterson said that they also looked at what else was out there and BoardDocs was the most user friendly. "Now, people that we thought would never use computers are using them and would never think about going back."

The feedback to the VSBA has been positive. School boards are praising the lack of paper and they also like the ability to go back and reference something online. Currently, more than 14 school districts in Virginia have joined the paperless revolution with BoardDocs. Patterson said that more are joining. "It's coming, there are many more in the works. We wouldn't put our name behind anything that would be good for our membership."

Source: VSBA and BoardDocs.com, March 2008.

Electronic board book formats such as the model described in **Exhibit 1-6** are becoming very common in large and small school divisions throughout the country.

RECOMMENDATION 1-1:

Provide the board agenda and related documents to the school board and administrative staff in an electronic format.

The implementation of this recommendation should reduce the amount of paper utilized for board agendas and related information. Further, the documents provided are often developed electronically and then printed for distribution. Automation of the board agenda with an electronic board book concept should increase ease of access for the school board and administration. Laptop computers will also assist the board with electronic communication with their constituency. Each board member indicated that email was becoming a primary method of communication within the system.

FISCAL IMPACT

This recommendation could be accomplished by purchasing electronic board book software and laptop computers for the school board. This recommendation can be accomplished with a one time expenditure of $25,000. Note: Several school board members indicated they had access to a laptop computer, which may reduce this cost.

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Purchase Board Book Software and Laptops for School Board Members	($25,000)	$0	$0	$0	$0

Reduction of paper copies is estimated to save $1,575.00 per year. The board has on average twenty regularly scheduled board meetings per year. Each agenda is approximately 50 pages times seven cents per page which equals $3.50 per board agenda. 20 board meetings times $3.50 times nine board members equals an estimated savings of $1,575.00 per year.

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Purchase Board Book Software and Laptops for School Board Members Reduce Printing Costs	$1,575	$1,575	$1,575	$1,575	$1,575

FINDING

Board Policy 2-23 Agenda, School Board Bylaws – Meetings, lists the process utilized by the school board and administration to develop the board meeting agenda. Interviews of board members and administration indicated that the agendas are well developed, but too often the actual board meetings did not progress in a smooth fashion. Two agenda items that were cited in interviews as needing time management assistance were Board Member's Comments and Board Committee Reports. The Round Rock Independent School District (RRISD) in Round Rock, Texas has developed a similar policy that is coded BE (Local). RRISD has included timing agenda items as part of the policy. **Exhibit 1-7** provides an excerpt of RRISD Board Policy BE (Local).

EXHIBIT 1-7
ROUND ROCK I.S.D. BOARD POLICY BE (LOCAL) EXCERPT

REGULAR BOARD MEETINGS

1. The presiding officer shall announce the item to be considered.

2. The Superintendent, another administrator, or a Board member may make a presentation of the item to the Board and the public.

3. A motion and a second may be taken to place the item on the floor for discussion.

4. Board members may ask clarifying questions.

5. The members of the Board may discuss the item under consideration. Other motions by the Board shall be appropriate at any time.

6. Public participation shall be invited. Public participation shall be governed by a separate procedure for public comments.

7. At the conclusion of discussion by the members of the Board, the presiding officer shall call for a vote on the motion.

8. No item will be acted upon by the Board at any meeting unless the item is listed on the agenda as an action item for that meeting and posted in time and a place specified by law.

9. Public participation on agenda items on regular Board meetings:

In order to give the public an opportunity to appear before the Board and state their views, public participation on items for action by the Board is encouraged. Each member of the public wishing to speak to the Board at a regular meeting shall sign up on a form provided by the Board. This form must be completed and submitted on the day of the meeting, within one and one-half hours before the scheduled time listed in the agenda for the Pledge of Allegiance. Each person shall be permitted to make up to a three-minute presentation to the Board. This limitation is necessary in order to give all interested members of the public an opportunity to be heard. A member of the public who is speaking for groups or several persons is encouraged to act as a spokesperson and during the spokesperson's presentation, give credit to others in the audience who may hold the same or similar views. A spokesperson shall be given up to five minutes to make the group's presentation. No person may exchange his or her time with another person. The time period may be altered by the Board under special circumstances.

10**.** <u>At the time the agenda for a regular meeting is published, the President and Superintendent shall establish a time for commencement and ending of the meeting and shall designate approximate times for all action items listed on the agenda. In order to give the public an opportunity to be present and participate, the Board shall attempt to follow the approximate time schedule as closely as possible.</u>

11. The Board shall follow the current edition of Robert's Rules of Order, Newly Revised, except as otherwise provided in these rules and regulations or by statute. The Board may appoint a parliamentarian who shall advise the presiding officer of the Board on proper procedure and the method of following these rules and regulations and applicable state law.

VOTING

Voting shall be by voice vote or show of hands, as directed by the President. Any member may abstain from voting, and a member's vote or failure to vote shall be recorded upon that member's request. [See BDAA (LOCAL) for the Board President's voting rights]

DATE ISSUED: 5/9/2007   LDU 2007.02   RRISD BE(LOCAL)-X

Source: Round Rock Independent School District Web site, Policy online, 2007.

Exhibit 1-7 item 10 (underlined) provides a procedure that has provided assistance to RRISD for effective board meetings.

RECOMMENDATION 1-2:

Develop and implement a time requirement for each school board agenda item that includes Board Member Comments and Board Committee Reports.

The board chairman should instruct the legislative/policy committee to develop an addendum to LCPS Board Policy 2-23. The addendum should include time requirements for each agenda item with proposed starting and ending times for each. The committee should then present the revised Board Policy 2-23 to the board for ratification and implementation. RRISD Board Policy BE (Local) would serve as model that may assist the board in amending the division's policy. The board vice chairman or a staff member could assist with the timing of items during school board meetings.

FISCAL IMPACT

This recommendation could be accomplished by the board clerk copying LCPS Board Policy 2-23 and RRISD Board Policy BE (Local). It is estimated that this will take less than one hour for the clerk to complete this recommendation. The estimated first year cost is $50 with no additional expense after the 2008-09 school year.

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Copy and Distribute LCPS Board Policy 2-23 and RRISD Board Policy BE (Local)	($50)	$0	$0	$0	$0

FINDING

Board Policy 2-16 Committees, School Board Bylaws – Internal Operations, lists the process utilized by the school board related to special and standing committees. The division currently has five standing and ten other committees and organizations.

Exhibit 1-8 lists the standing and other committees including school board and central administration membership.

EXHIBIT 1-8
LCPS STANDING AND SPECIAL COMMITTEES, 2007

STANDING COMMITTEES		
1. LIAISON WITH THE BOARD OF SUPERVISORS		
Robert DuPree, Chair		**Staff:**
Tom Reed	Mark Nuzzaco	Dr. Hatrick
Priscilla Godfrey		
Warren Geurin		
2. FINANCE, CONSTRUCTION & SITE ACQUISITION		
Priscilla Godfrey, Chair		**Staff:**
Warren Geurin	Bob Ohneiser	Ms. Burden
Robert DuPree	John Stevens	Mr. Platenberg
		Dr. Adamo
3. PERSONNEL SERVICES		
Tom Reed, Chair		**Staff:**
Sarah Smith	John Stevens	Mr. Britt
Dr. Joseph Guzman		
4. LEGISLATIVE/POLICY		
Mark Nuzzaco, Chair		**Staff:**
Tom Reed	Robert DuPree	Mr. Waterhouse
Bob Ohneiser	Warren Geurin	
5. CURRICULUM & INSTRUCTION		
Warren Geurin, Chair		**Staff:**
Priscilla Godfrey	Mark Nuzzaco	Mrs. Ackerman
Sarah Smith	Dr. Joseph Guzman	
OTHER COMMITTEES & ORGANIZATIONS		
1. CAREER AND TECHNICAL EDUCATION FOUNDATION		
Mark Nuzzaco		**Staff:**
		Mr. Grier
2. DISCIPLINE COMMITTEE		
Robert DuPree, Chair		**Staff:**
Mark Nuzzaco	Priscilla Godfrey	Mr. Waterhouse
3. ECONOMIC DEVELOPMENT COMMISSION		
Robert DuPree		**Staff:**
		Dr. Hatrick
		Mr. Waterhouse

EXHIBIT 1-8 (Continued)
LCPS STANDING AND SPECIAL COMMITTEES 2007

4. HEALTH, SAFETY & WELLNESS COMMITTEE		
Dr. Joseph Guzman, Chair		**Staff:**
Bob Ohneiser	Robert DuPree	Dr. Kealy
Priscilla Godfrey	John Stevens	
5. LOUDOUN EDUCATION FOUNDATION		
Tom Reed		**Staff:**
		Dr. Hatrick
		Mr. Waterhouse
		Mrs. Bazdar
		Mr. Byard
6. MINORITY STUDENT ACHIEVEMENT ADVISORY COMMITTEE (MSAAC)		
Warren Geurin	Dr. Joseph Guzman	**Staff:**
		Mrs. Ackerman
		Mr. Hughes
7. SCHOOL BUSINESS PARTNERSHIP EXECUTIVE COUNCIL		
Robert DuPree	Priscilla Godfrey	**Staff:**
		Dr. Hatrick
		Mr. Byard
		Mrs. Bazdar
8. SPECIAL EDUCATION ADVISORY COMMITTEE		
Warren Geurin		**Staff:**
		Mrs. Kearney
9.TECHNOLOGY STEERING COMMITTEE		
Tom Reed	John Stevens	Staff:
		Mr. Coppels
		Mr. Larson
10. VIRGINIA SCHOOL BOARDS ASSOCIATION DELEGATE AND ALTERNATE		
Tom Reed	Priscilla Godfrey (Alternate)	

Source: LCPS Web site, 2007.

Interviews of school board members and administration indicated that the committee structure is preferred by the board. A major issue discussed by both the board and administration is the amount of time required to meet with so many committees. The number of standing and special committees that the board has in place is greater than what is found in most school divisions. For instance, a majority of the Washington D.C. area school boards utilizing a committee format have five or six committees and try to limit committee meetings to no more than once monthly.

RECOMMENDATION 1-3:

Restructure the board committees and establish a well defined purpose, meeting time requirements, a set monthly meeting date, and reporting structure for each committee.

The board chairman should post an item on the school board agenda to discuss the purpose, number, and scope of each committee meeting. In addition, guidelines for canceling meetings, additional meetings (which should be rare), the use of timed agendas, and a reporting structure for each committee to inform the entire board membership also needs to be included in LCPS Board Policy 2-16.

The board should decide on the number of committees and set a date that each committee will meet per month. For example, the legislative/policy committee could meet on the first Monday of each month with a set meeting time from 6:30 p.m. to 9:00 p.m. Agendas should be posted with recommended times per agenda item such as the proposed **Recommendation 1-2.** If the committee does not have any action items, then the committee chairperson could cancel the meeting following guidelines established by policy.

Once the board reaches a decision related to board committees then the chairman should instruct the legislative/policy committee and administration to modify policy LCPS Board Policy 2-16.

Quarterly, the chairman should review the number of board members attending committee meetings. Several board members mentioned during interviews that a majority of the board often attended some of the same committee meetings. The committee structure process should be utilized to ensure that the entire board is not attending the same committee meetings. If this is the case, then the chairman should consider dissolving or restructuring the committee and having the committee's items placed on a regularly scheduled school board meeting agenda.

FISCAL IMPACT

This recommendation could be accomplished by the board clerk copying LCPS Board Policy 2-16. It is estimated that this will take less than one hour for the clerk to complete this recommendation. It is further estimated that the board will need two to three meetings to complete this recommendation. The estimated first year cost is $50 with no additional expense after the 2008-09 school year.

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Copy and Distribute Board Policy 2-16	($50)	$0	$0	$0	$0

FINDING

Board Policy 2-10, Professional Development, School Board Bylaws, Members states that "The school board shall require its members to participate annually in in-service programs on personnel, curriculum, and current issues in education as part of their service on the board." School board members and administrative staff indicated that the board has not attended board training as a corporate board. The LCPS School Board will have seven members as of January 2008 with zero to four years of experience on the board. Board members and the superintendent indicated that training was needed and should be conducted annually. The Virginia School Board Association (VSBA) records indicate that the Prince William County Schools (PWCS) School Board has had continued involvement in state-level training and other meetings. All board members and

the superintendent are involved in training and conferences offered by the VSBA. The newest members have been involved in the VSBA orientation for board members. LCPS should consider adopting a similar model to the one being utilized by PWCS.

The superintendent has scheduled training in January 2008 for the school board offered by the Virginia School Board Association (VSBA) related to boardmanship. Individual board members have attended various trainings, but not the entire board as a corporate board over the past three to four years.

RECOMMENDATION 1-4:

Develop and implement a school board member professional development program with annual training for the entire board to attend as a corporate board.

Implementation of this recommendation should result in the creation of a school board member development program that 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 board goals, planning documents, and related processes for their development/updating.

- A review of the division's budget and associated development and adoption time-lines.

- Other local items that are deemed important.

A board development program can be created in conjunction with the VSBA. An additional resource for board development can be secured from NSBA. The VSBA Center for School Board Development offers individualized team-building activities designed for school boards in a professional environment. The VSBA Center for School Board Development benefits participating members by:

- Providing opportunities for school board members to distance themselves from everyday concerns in order to concentrate on the content of the center program.

- ■ Emphasizing the importance of team- and trust- building.

- ■ Defining the appropriate roles and responsibilities of school board members, superintendents, and administrative staffs.

- ■ Offering opportunities for strategic planning, goal setting, evaluation of the superintendent, and self-evaluation of the school board.

FISCAL IMPACT

This recommendation can be implemented for an annual expenditure of $5,000 if conducted by an outside consultant such as VSBA or another consultant with a five-year cost of $25,000. VSBA's Web site indicates $170 per person registration, $170 x 10 participants equals $1,700. It is estimated that expenses for travel, meals, and lodging equals $4,300 for a total annual expenditure of $5,000.

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Develop and Implement Annual School Board Development Training	($5,000)	($5,000)	($5,000)	($5,000)	($5,000)

FINDING

The LCPS Board has an approved Board Code of Conduct, Board Policy 2-3. The policy was last reviewed in 2001 and evidence was not available to indicate that the board had reviewed the policy since this date. School board interviews indicated that the board needed to address the conduct of the board and to discuss how the board should function as a corporate body. LCPS subscribes to the VSBA policy service and may wish to seek VSBA's assistance in reviewing and amending Board Policy 2-3.

The Virginia Beach Public Schools has a well defined board code of conduct which is listed in **Exhibit 1-9**. The board may wish to consider utilizing **Exhibit 1-9** as an amendment to the current policy.

EXHIBIT 1-9
VIRGINIA BEACH CITY PUBLIC SCHOOLS
SCHOOL BOARD CODE OF CONDUCT

Code of Ethics: A Guide of Conduct for School Board Members of the City of Virginia Beach

This Code of Ethics signifies the strong commitment on the part of the School Board to base our decisions and actions on ethical standards. It recognizes the role and defines professional behavior needed in order to fulfill our obligations of being effective and responsible Board Members. This Code reflects the deeper sense of purpose and direction which governs our work. Our ethical behavior "speaks" loudly as an example to the young people we serve. It is, in fact, one of the wisest lessons in teaching and learning we can offer.
While serving as a member of the Virginia Beach School Board, I will accept the responsibility to improve education, and I will:

1. Remember that my first and greatest concern must be the educational welfare of all students attending Virginia Beach public schools;

2. Obey the laws of Virginia and the United States;

3. Respect the confidentiality of privileged information;

4. Recognize that as an individual Board Member I have no authority to speak or act for the Board;

5. Respect the right of other Board Members to have and express ideas that differ;

6. Work collaboratively with other Members to establish effective Board policies;

7. Delegate authority for the administration of the schools to the Superintendent and staff;

8. Encourage ongoing communications among Board Members, students, staff, and the community;

9. Be open, fair and honest;

10. Render all of my decisions based on available facts, appropriate public input and my independent judgment;

11. Make every effort to attend all Board meetings;

12. Come to Board meetings informed concerning the issues under consideration;

13. Give staff members the respect and consideration due skilled professional employees;

14. Improve my ability to serve as a School Board Member by studying educational issues and participating in appropriate professional development;

15. Support the employment of staff members based on qualifications;

16. Cooperate with other Board Members and Administrators to establish a system of regular and impartial evaluations of all staff;

17. Avoid conflicts of interest or the appearance thereof;

18. Refrain from using my Board position for benefit of myself, family, or other business associates;

19. Express my personal opinions, but once the Board has acted, accept the will of the majority; and

20. Maintain professional decorum when discussing school matters.

I acknowledge that the following are unethical behaviors and will refrain from such actions:

1. Seek personal advantage from membership on the Virginia Beach School Board;

2. Make disparaging remarks about other Board Members;

3. Discuss confidential business in public or to anyone not privy to such information;

4. Place the interests of individuals or groups ahead of the interests of the district and all students in the Virginia Beach City Public Schools; and

5. Conduct unauthorized activity on the Board's behalf away from the School Board meetings.
Adopted by the School Board of the City of Virginia Beach this 19th day of September 2006

Source: Virginia Beach Public Schools Board Policy Web site, 2007.

RECOMMENDATION 1-5:

Review and revise Board Policy 2-3, Board Code of Conduct, with an annual review by the entire board of the contents.

The policy should be reviewed by the board chairman annually with the entire board to insure that all members are following the approved Code of Conduct. **Exhibit 1-9** provides a sample policy, which may be reviewed by the board.

The board chairman should instruct the legislative/policy committee to review and update LCPS Board Policy 2-3. The committee would then present the revised Board Policy 2-3 to the school board for ratification and implementation. The chairman should review the content and purpose of Board Policy 2-3 annually with the entire school board.

FISCAL IMPACT

This recommendation can be implemented with current staff. Time for accomplishing this recommendation could involve an estimated four hours of administrative time, less than one hour clerical time, and board discussion and approval at a minimum of two meetings.

FINDING

The school board does not engage in a formal self-assessment process. Various tools and instruments have been employed in the discussion but no official regular self-assessment process has been adopted and employed. Best practices suggest that completion of self-assessment instrument(s) can lead to more effective boardmanship. Patrick J. Renihan has conducted research in Canada related to school board self-assessments and how boards function. Renihan's research has relevance for public school boards in the United States.   His research article <u>School Board Self Assessment: Principles and Processes</u> states the following:

> *Self assessment, whether formal or informal, externally guided or internally conducted, annual or biannual, represents one such alternative, an alternative which has come to be urgently needed. Aside from the shortcomings of "traditional" methods of assessment, several forces have increased the demand for self-assessment by boards of education. School reform, drastic changes in curriculum and instructional strategies, and the increased sophistication of communities in regard to educational matters, have heightened the demand that boards be accountable for their trusteeship and that they continually strive for new and better ways of fulfilling their mandate.*
>
> *Self-assessment brings with it some substantial payoffs. A well thought-out policy and set of procedures for self-assessment can assist the board in fulfilling its responsibilities by improving communication among board members, fostering reflection, making the board more sensitive to ideas and suggestions. It can serve as a useful orientation for new trustees; increasing role-understanding and enhancing appreciation for the directions taken by the board in the long and short term. However, the*

ultimate advantage of school-board self-assessment can be simply stated in terms of the student: if it provides for increased efficiency, improved communication, greater understanding of board strengths and improvement needs, it cannot help but be reflected in the improved quality of learning opportunities provided for students in the system it serves.

RECOMMENDATION 1-6:

Develop and implement an annual school board self-assessment system.

Providing feedback, both formally and informally, is fundamental to any improvement process. School division boards are able to improve their performance through a formal self-evaluation in addition to an informal feedback process. Implementing this recommendation can assist in supporting board accountability, providing a medium for reporting governance activity, and setting governance improvement goals.

Exhibit 1-10 includes a Sample Board Self-Assessment Instrument, which is one example used by boards of some private corporations.

**EXHIBIT 1-10
SAMPLE BOARD SELF-ASSESSMENT INSTRUMENT**

Meeting Evaluation

DIRECTIONS: By evaluating our past meeting performance, we can discover ways to make future meetings shorter and more productive. Check each item "Adequate" or "Needs Improvement." If you check "Needs Improvement," include suggestions for improvement.

Adequate   Needs Improvement

_____ _____ Our meeting was businesslike, results-oriented and we functioned like a team.
_____ _____ Our discussion was cordial and well balanced (not dominated by just a few members).
_____ _____ We confined our discussion to agenda items only.
_____ _____ Our agenda included positive issues as well as problems.
_____ _____ We discussed policy issues rather than day-to-day management issues.
_____ _____ We followed parliamentary rules and consulted legal or professional counsel when needed.
_____ _____ The chairperson controlled and guided the meeting.
_____ _____ We dealt successfully with controversial items and attempted to develop solutions acceptable to all members.
_____ _____ Everyone contributed to the meeting.
_____ _____ All members were prepared to discuss material that was sent to them in advance.
_____ _____ Reports were clear, well prepared and provided adequate information for decision making.
_____ _____ Printed materials given to us were easy to understand and use.
_____ _____ Our meeting room was comfortable and conducive to discussion and decision making.
_____ _____ All members were in attendance and on-time—and the meeting began and concluded on time.
_____ _____ For committees and ad hoc groups: There was adequate reason for us to meet.

My best suggestion for improving our next meeting is...

Source: Created by MGT of America, 2005.

VSBA may have additional sample self-assessment documents that LCPS may wish to review.

FISCAL IMPACT

This recommendation can be implemented with current staff. Time for accomplishing this recommendation could involve an estimated six hours of administrative time, two hours clerical time, and board discussion and approval at a minimum of two meetings.

1.2   *Policies and Procedures*

Policy and administrative regulation development constitutes the means by which an organization can communicate expectations to its constituents, ensure internal consistency of practice, and establish limits for executive authority as provided by law. Policy and procedures, therefore, reveal the philosophy and position of the school board and should be stated clearly 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 and LCPS Board Policy 2-31 requires that policies be up-to-date and reviewed at least every five years by division staff and revised as needed by the division's school board.

Board 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.

- Grievance, dismissal procedures, and other procedures as prescribed by the General Assembly and school board.

The official hard copy is located in the superintendent's office and a copy has been placed online.

The policies have been codified using a numeric system as reflected in **Exhibit 1-11**. Board policies and regulations include dates for issue, revision, and current revision.

Exhibit 1-11 presents the LCPS policy manual chapters, titles, and policy codes.

**EXHIBIT 1-11
LOUDOUN COUNTY PUBLIC SCHOOLS
SCHOOL BOARD POLICY HANDBOOK ORGANIZATION**

CHAPTER	SECTION TITLES	POLICY CODES
	Overview	
2	School Board Bylaws	2-1 thru 2-33
3	Administration	3-1 thru 3-13
4	Business	4-1 thru 4-38
5	Instruction	5-1 thru 5-64
6	Support Services	6-1 thru 6-29
7	Personnel	7-1 thru 7-74
8	Students	8-1 thru 8-74
	Index	

Source: LCPS School Board Policy Manual, 2007.

FINDING

Exhibit 1-12 shows the revision status of LCPS school board policies and regulations. Staff interviews indicate that policies are reviewed on a continual basis by the division's senior staff. Each senior staff member is responsible for the review of a section or sections of the policy manual. Staff indicated that a written process for recording their review of board policies has not been created. Interviews of the senior staff did verify that the work was being completed, but the division needed a process established to document their work.

**EXHIBIT 1-12
LOUDOUN COUNTY PUBLIC SCHOOLS
SCHOOL BOARD POLICIES/REGULATIONS REVISION STATUS
DECEMBER 2007**

CHAPTER	TITLE	NUMBER OF POLICIES & REGULATIONS EXAMINED	NUMBER OF POLICIES ADOPTED/UPDATED/RESTATED IN:			
			PRIOR to 2001	2001-02	2003-04	2005-07
2	School Board Bylaws	30	22	4	2	2
3	Administration	13	11	1		1
4	Business	16	16			
5	Instruction	38	33	4	1	
6	Support Services	21	17		1	3
7	Personnel	76	44	10	14	8
8	Students	72	41	9	6	16
TOTALS		**266**	**184**	**28**	**24**	**30**

Source: LCPS Board Policy Manual, 2007.

School board policies are codified in a numerical system as previously noted in **Exhibit 1-11**. 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 1-13** lists state

provisions that are addressed in the current policy manual and the Commonwealth of Virginia specific code. LCPS does have policies in place for each of the required Commonwealth of Virginia requirements.

EXHIBIT 1-13
VIRGINIA REQUIRED POLICY TOPICS AND RELATED
LOUDOUN COUNTY PUBLIC SCHOOL BOARD POLICIES

VIRGINIA REQUIRED TOPIC	LCPS APPLICABLE POLICY
Selection and evaluation of all instructional materials	4-13, 5-7
Process for parents to address concerns related to the division	2-22, 2-23, 2-27, 2-32, 5-7
System of two-way communication between employees and School Board	2-22, 2-23, 2-30
Cooperatively developed personnel evaluation procedures	7-21, 7-53
Grievance, dismissal, and other procedures	7-2, 7-3, 7-4, 7-16, 7-18
Standards of student conduct and attendance	2-27, 8-26, 8-27, 2-28, 8-29, 8-30, 8,31, 8-32, 8-33, 8-34, 8-35, 8-36, 8-37, 8-38, 8-30
School-community communications and involvement	2-28, 2-29
Guidelines encouraging parents to provide instructional assistance to their children	8-73
Procedures for handling challenged and controversial materials	5-7

Source: LCPS School Board Policy Manual, 2007.

RECOMMENDATION 1-7:

Develop and implement a process to record that each policy is reviewed by the appropriate senior staff member within a five-year cycle.

Implementation of this recommendation should be accomplished over a five-year period to ensure that all policy provisions are consistent with Virginia Code and other controlling regulations. The administration should develop a senior staff five-year policy review schedule and record system beginning with the 2008-09 school year.

The deputy superintendent should be assigned coordination responsibilities and ensure that the schedule is established. Further, this office should house the records that document that the reviews have occurred. In addition, in-house counsel should assist in reviewing policies.

FISCAL IMPACT

Implementation of this recommendation can be accomplished by utilizing the senior staff members and their clerical staff. Staff time for accomplishing this recommendation cannot be accurately estimated until a plan for coordination of implementation is established.

1.3 Legal Services

Legal service expenses for school divisions have risen over the last several years due to a number of factors. These factors include due process activity associated with disciplinary proceedings, issues related to special education students, risk management matters, land acquisition, facility construction problems, and a variety of other issues.

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

LCPS Board Policy 2-15 establishes the right of the school board to employ or retain an attorney or attorneys in compliance with Virginia Code (22.1-82). LCPS has employed an in-house counsel with considerable school law experience. On occasion, the board has hired additional firms for specific legal issues that require specialized expertise. Interviews with the board and administrative staff have indicated a very high level of satisfaction with the legal services process that is in place in the school division.

Expenditures have been kept at a consistent level over the past three years due to use of in-house counsel and with careful management of student hearings, special education protocols, and human resources.

Exhibit 1-14 lists the LCPS legal expenses as reported to the performance review team for years 2005-07.

EXHIBIT 1-14
LOUDOUN COUNTY PUBLIC SCHOOLS
LEGAL EXPENSES
2005-2007

SCHOOL YEAR	STUDENT ENROLLMENT	LEGAL EXPENSES	AMOUNT OF SPENDING PER STUDENT
2005	47,051	$760,442	$16.16
2006	50,740	$670,402	$13.21
2007	54,047	$717,284	$13.27

Source: LCPS Office of the Superintendent, 2007.

End of year expenses for 2006 and 2007 are lower than expenses for 2005. The performance review team's database shows that legal services nationally in other divisions typically range from a low of $3.70 to over $14.92 with some as high as $60 on a per student basis.

With an enrollment of 54,047, LCPS is spending approximately $13.27 per student for external legal representation. The LCPS Fiscal Year 07 budget was $629,762,387 with actual external legal expenses of $717,284, which represents .001 percent of the total budget. This calculation includes the legal expenditures for several substantial capital projects.

COMMENDATION 1-A:

The LCPS Board and administration are commended for containing legal services expenses.

1.4   *Organization and Management*

The organizational structure and management system of a large public school division are key factors in determining the system's ability to meet its goals and to operate in an effective and efficient manner. An effective organizational structure systematically arranges the functional areas of the system in a manner that supports the system's mission and related goals. A successful school division has the capacity to alter its structure to meet the changing needs of its customers. The extent to which the culture of the organization restricts this response, the less likely the organization will meet client requirements, and experience success.

Section 1.5 reviews the LCPS organization, decision making, management, planning and accountability, public information, and school organization and management functions.

1.4.1   *Division Organization*

The development and maintenance of an effective organizational structure for a large school division is a formidable task. Fundamentally, an organizational structure is a support system designed to facilitate the primary mission of the agency and sustain efforts to accomplish its goals. To the extent that the mission of the school division does not drive its organizational structure, the support system is weakened and consequently the organization's ability to accomplish the primary mission is compromised.

Large school divisions, like any big organizations, are often bureaucratic and subject to the inertia created by tradition and size. In many instances, the organizational structure of a school division evolves based more upon tradition and through special interests rather than being developed systematically. Little organizational analysis is done and the school division continues, in large part, to resemble its predecessors. To maintain effectiveness, large school divisions must continue to focus their energies on the needs of their students and constantly adapt the organization to serve student needs.

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

As shown in **Exhibit 1-15**, LCPS is a relatively traditional organization. The organization includes the superintendent, a deputy superintendent, five assistant superintendents, one executive director, a series of directors and supervisors, and the principals. For a school system with an increasing enrollment of over 54,000 students, this represents, in the performance review team's experience, a conservatively structured organization.

Exhibit 1-15 displays the 2007-08 LCPS organizational chart.

**EXHIBIT 1-15
LOUDOUN COUNTY PUBLIC SCHOOL
ORGANIZATION CHART 2007-08**

School Board

Public Information Officer | Superintendent | Deputy Superintendent | Administration Building Coordinator

Assistant Superintendent Pupil Services
- Director of Special Education
  - Coordinator of Special Education Programs
  - Special Education Supervisor Elementary
  - Special Education Supervisor Secondary
  - Special Education Supervisor Program & Related Services
- Director of Student Services
  - Diagnostic Services Supervisor
  - Student Information System Supervisor
  - Student Support Services Supervisor
  - Eligibility Coordinators
  - Guidance & Health Services Supervisor
  - Attendance & Homebound Coordinator

Assistant Superintendent Instruction
- Academy Director
- Director of Curriculum & Instruction
  - Art Supervisor
  - English Supervisor
  - ESL Supervisor
  - Foreign Language Supervisor
  - Gifted Education Supervisor
  - Athletics Supervisor
  - Health & PE Supervisor
  - Kindergarten/ Reading/ STEP Supervisor
  - Math Supervisor
  - Music Supervisor
  - Science Supervisor
  - Social Sciences Supervisor
- Director of Career, Technology & Adult Education
- Director of Elementary Education
  - Elementary Principals
  - Summer School
- Director of Middle School Education
  - Middle School Principals
  - Summer School
- Director of High School Education
  - High School Principals
  - Summer School
- Director of Inst. Svcs
  - Federal Programs Supervisor
  - Instructional Technology
  - Library/Media Services
  - Staff Development
  - Outreach Programs Supervisor
  - Research Supervisor
  - Testing Supervisor

Assistant Superintendent Support Services
- Director of Construction Svcs
  - Construction Supervisor
  - Site & Building Plan Supervisor
- Director of Facilities Services
- Food Services Supervisor
- Director of Transportation Svcs
  - Safety & Security

Assistant Superintendent Business & Financial Services
- Director of Financial Services
  - Accounting Supervisor
  - Employee Benefits Supervisor
  - Payroll Supervisor
- Administrative Information Technology Supervisor
- Budget Supervisor
- Purchasing Supervisor
- Risk Management Supervisor

Director Planning & Legislative
- Land Management Supervisor
- Planning Supervisor
- GIS Planning Supervisor
- Land Acquisition Supervisor

Assistant Superintendent Personnel
- Director of Employee Relations
- Employee Relations Specialist
- Director of Recruitment & Employment Services Relations
- Staffing and Recruiting Specialist

Source: LCPS Superintendent's Office, 2007.
Note: LCPS Superintendent has chosen to change the Director of Planning and Legislative to the new title of Executive Director of Planning and Legislative.

FINDING

LCPS 2007-08 Operating Budget has a total approved amount of $690,564,208. Of this amount $548,639,944 is dedicated to instruction. This represents over 79 percent of the budget and is the largest line item in the LCPS budget. **Exhibit 1-16** lists the LCPS 2007-08 operating budget by area, budget amount and percent of the budget.

EXHIBIT 1-16
LCPS OPERATING BUDGET INFORMATION
2007-08

LCPS SCHOOL OPERATING BUDGET 2007-08		
AREA	**AMOUNT**	**PERCENT OF BUDGET**
INSTRUCTION	$548,639,944	79.4%
ADMINISTRATION, ATTENDANCE, & HEALTH	$29,453,110	4.3%
PUPIL TRANSPORTATION	$47,073,195	6.8%
FACILITIES	$3,258,927	0.5%
OPERATION & MAINTENANCE	$62,139,032	9.0%
TOTAL:	**$690,564,208**	**100%**

Source: LCPS Fact Sheet 2007-08.

COMMENDATION 1-B:

The LCPS board and administration are commended for the school division's commitment to placing the division's first priority for funding and staffing within the division's schools.

FINDING

Growth in both student population and the number of schools has resulted in the need for modifications to the current LCPS organization chart previously shown in **Exhibit 1-15**.

The school division has assigned the supervision of 72 schools to three directors. The three directors will supervise 75 schools during the 2008-09 school year, with the opening of three new elementary schools. Each school director is responsible for the day to day supervision of the school principals, which includes their evaluations. In addition, the directors are actively engaged in staffing and budget decisions for the schools along with planning and staffing of new schools. Student and parent concerns are often referred to the directors for their assistance in resolving concerns or issues.

Selection of new principals is facilitated by the three directors who establish committees that include central office staff, principals, teachers, and parents. The committee then provides recommendations to the superintendent for final interviews and principal selection. The committee recommendations are brought to the superintendent through the assistant superintendent of instruction and the appropriate school director.

As previously shown in **Exhibit 1-15**, LCPS current organizational chart illustrates that the three directors report to the assistant superintendent of instruction, but have dotted

lines demonstrating that the they also report directly to the LCPS superintendent. The current assignment of the school directors to the assistant superintendent for instruction has created a strong connection between the staff who are responsible for the division's curriculum and instruction and the school staff members. The three school directors each indicated that their primary focus for their schools is the quality of instruction for the students attending LCPS. Principal interviews also affirmed quality instruction of students as their primary focus along with their staff members.

Exhibit 1-17 reflects the current assignments of schools per director.

EXHIBIT 1-17
DIRECTOR ASSIGNMENTS BY
NUMBER OF SCHOOLS 2007-08

DIRECTOR	NUMBER OF SCHOOLS
ELEMENTARY SCHOOLS	47
MIDDLE SCHOOLS	13*
HIGH SCHOOLS	12**

Source: LCPS Public Information Office Fact Sheet 2007-08.
*12 Middle Schools and 1 Intermediate School
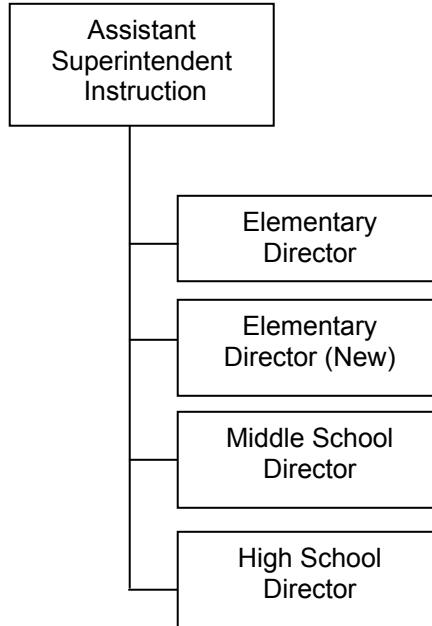**10 High Schools and 2 Instructional Centers

RECOMMENDATION 1-8:

Employ one additional director of elementary education.

In 2008-09 the current director of elementary education will supervise 50 elementary schools. The requirements for supervising 50 schools and the interviews of LCPS board members and administrative staff confirm the need for an additional central staff position. The additional school director position would enable LCPS to assign 25 schools to each director, which should prove to be a more manageable assignment for both administrators.

Exhibit 1-18 reflects the proposed organization chart.

EXHIBIT 1-18
PROPOSED ORGANIZATIONAL CHART
ASSISTANT SUPERINTENDENT FOR INSTRUCTION

SCHOOL DIRECTOR DEPARTMENT

```
              ┌─────────────────┐
              │   Assistant     │
              │ Superintendent  │
              │  Instruction    │
              └────────┬────────┘
                       │
                       │      ┌──────────────────┐
                       ├──────│   Elementary     │
                       │      │    Director      │
                       │      └──────────────────┘
                       │      ┌──────────────────┐
                       ├──────│   Elementary     │
                       │      │ Director (New)   │
                       │      └──────────────────┘
                       │      ┌──────────────────┐
                       ├──────│  Middle School   │
                       │      │    Director      │
                       │      └──────────────────┘
                       │      ┌──────────────────┐
                       └──────│   High School    │
                              │    Director      │
                              └──────────────────┘
```

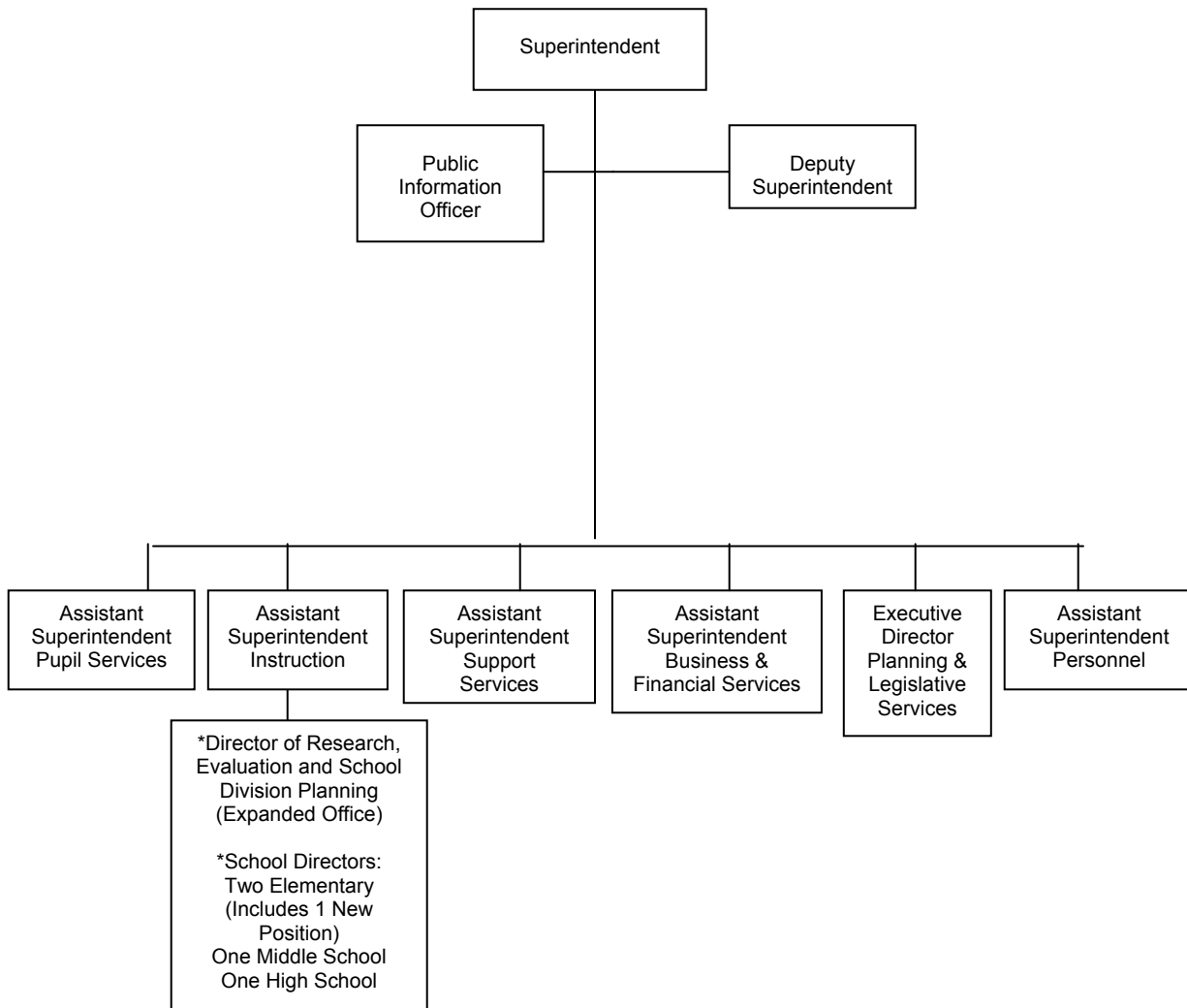Source: Created by MGT of America, 2007.

FISCAL IMPACT

This recommendation could be accomplished with the employment of one additional director of elementary education for the 2008-09 school year. The LCPS administrator salary scale for directors is Level 5. If hired at Step 4, the annual salary would be $97,264 plus fringe benefits of $32,097 for a total cost of $129,361.

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Employ a Director of Elementary Education	($129,361)	($129,361)	($129,361)	($129,361)	($129,361)

Exhibit 1-19 provides an overview of the proposed LCPS central office organizational changes discussed in this chapter.

EXHIBIT 1-19
PROPOSED LCPS SUPERINTENDENT AND SENIOR STAFF
ORGANIZATION CHART

```
                            ┌──────────────────┐
                            │  Superintendent  │
                            └──────────────────┘
        ┌──────────────┐            │           ┌──────────────┐
        │   Public     │            │           │   Deputy     │
        │ Information  │────────────┼───────────│Superintendent│
        │   Officer    │            │           └──────────────┘
        └──────────────┘            │
```

Assistant Superintendent Pupil Services	Assistant Superintendent Instruction	Assistant Superintendent Support Services	Assistant Superintendent Business & Financial Services	Executive Director Planning & Legislative Services	Assistant Superintendent Personnel

*Director of Research, Evaluation and School Division Planning (Expanded Office)

*School Directors:
Two Elementary (Includes 1 New Position)
One Middle School
One High School

Source: Created by MGT of America, 2007.

1.4.2   *Planning and Accountability*

Among the characteristics that define effective organizations is the ability to not simply do things right, but to do the right things. How to determine the right things is a product of effective planning. A good planning process needs to be embedded in the operation of the organization and understood by all employees.

Strategic planning is a proactive process of envisioning the future and developing the necessary strategic actions to bring that vision to fruition. In essence, a good strategic plan serves as a map for an organization's members to guide actions towards meeting organizational goals. In addition, planning moves organizations from reactionary to proactive modes by connecting goals, strategies, performance measures, and action plans to an overall resource allocation process. Organizations that link these elements

through the planning process are more likely to achieve identified goals and enhance their overall organizational effectiveness.

Exhibit 1-20 references the work by Locke and Latham, two of the top researchers in the area of goal setting and the motivation of staff to accomplish goals.

EXHIBIT 1-20
LOCKE AND LATHAM GOAL SETTING

Dr. Edwin Locke's pioneered research on goal setting and motivation in the late 1960s. In his 1968 article "Toward a Theory of Task Motivation and Incentives," he stated that employees were motivated by clear goals and appropriate feedback. Locke went on to say that working toward a goal provided a major source of motivation to actually reach the goal – which, in turn, improved performance. Locke's research showed that there was a relationship between how difficult and specific a goal was and people's performance of a task. He found that specific and difficult goals led to better task performance than vague or easy goals.

SMART Goals:
A useful way of making goals more powerful is to use the SMART mnemonic. While there are plenty of variants, SMART usually stands for:

 S Specific, **M** Measurable, **A** Attainable, **R** Relevant, and **T** Time-bound   **SMART**

Telling someone to "Try hard" or "Do your best" is less effective than "Try to get more than 80% correct" or "Concentrate on beating your best time." Likewise, having a goal that's too easy is not a motivating force. Hard goals are more motivating than easy goals, because it's much more of an accomplishment to achieve something that you have to work for. A few years after Locke published his article, another researcher, Dr Gary Latham, studied the effect of goal setting in the workplace. His results supported exactly what Locke had found, and the inseparable link between goal setting and workplace performance was formed.

In 1990, Locke and Latham published their seminal work, "A Theory of Goal Setting and Task Performance." In this book, they reinforced the need to set specific and difficult goals, and they outlined three other characteristics of successful goal setting.

Five Principles of Goal Setting

To motivate, goals must take into consideration the degree to which each of the following exists:

1. Clarity.
2. Challenge.
3. Commitment.
4. Feedback.
5. Task complexity.

Source: Mindtool.com Web site, Locke's Goal Setting Theory.

Organizational accountability is the means by which an organization assesses its performance. The accountability of a public school division is not defined by a single program, but should be imbedded in the organization as a part of its culture. Typically, the accountability system for a school division is included as an integral part of the organization's strategic plan.

To be effective, an accountability system should not be simply imposed upon the organization. Staff must be knowledgeable about the goals of the organization and plans to achieve these goals. Staff should be informed that the objective of organizational accountability is to improve the performance of the school division and not to conduct individual performance appraisals.

An effective, comprehensive accountability plan will assist the school division in determining who its customers are, how best to serve them, and how well these customers are satisfied with the school division's services.

FINDING

The instruction department has developed a systematic model for school improvement. The model that is utilized by LCPS is a structured School Improvement Planning (SIP) process. Measurable school and student improvement goals are established in the SIP document for each LCPS school. Board goals are an integral part of each school SIP document. Stake-holders are involved in the development and implementation of each school's SIP document, which include principals, teachers, other school staff members, parents, and central office staff. Interviews of central office and school staff members indicated that the SIP's goals for student and school improvement are the primary areas of emphasis of each LCPS school.

The document review and interviews indicated that the SMART Goal areas that are specific, measurable, attainable, relevant and time-bound are present in the LCPS SIP process. The instruction division has developed a school improvement planning model that reflects "best practice" standards for goal development.

Ongoing monitoring of the SIP process and implementation is a key component of the model. Each school director indicated that they are consistently meeting with principals and other key staff within each school to evaluate the progress on the SIP goals. An example that was provided is that two of the LCPS middle schools were named in 2007 as "Schools to Watch" by the National Forum to Accelerate Middle-Grades Reform and were the only two schools named in Virginia. The SIP process was cited as a primary driver in assisting the two campuses in achieving this national award.

COMMENDATION 1-C:

LCPS is commended for developing and implementing a comprehensive School Improvement Planning (SIP) process, which is directly correlated to the school board goals.

FINDING

LCPS does not have a staff member who has divisional oversight for school division planning. However, the assistant superintendent for instruction collects information related to the SIP and departmental plans in order to develop the School Board Goals Status Report. Interviews with key staff members indicated that LCPS needs to utilize a strategic planning process.

LCPS has a research supervisor position within the instruction department. Research related to the instructional aspects of the division is conducted by this area. Interviews with administrative staff confirmed that the research and evaluation department needs to include school division planning.

RECOMMENDATION 1-9:

Expand the office for research and evaluation to include school division planning with a reclassification from research supervisor to director.

The director of research, evaluation and school division planning and assigned staff should add additional value to LCPS by:

- Implementing a school division strategic planning process that correlates to the school board's goals.

- Broadening research efforts to other departments and services within the school division.

- Developing and conducting systemic evaluations of programs and services within the instruction department.

The research, evaluation, and school division planning area should continue to be assigned to the instruction department. Interviews with school board and several senior administrative staff indicate that the assistant superintendent for instruction has a clear understanding of the needs for LCPS and should provide excellent guidance for the newly formed office.

Exhibit 1-21 reflects the proposed reclassification of the research supervisor to the director of research, evaluation, and school division planning within the instruction department.

EXHIBIT 1-21
PROPOSED ORGANIZATIONAL CHART
RESEARCH, EVALUATION AND SCHOOL IMPROVEMENT OFFICE
WITHIN THE INSTRUCTION DEPARTMENT
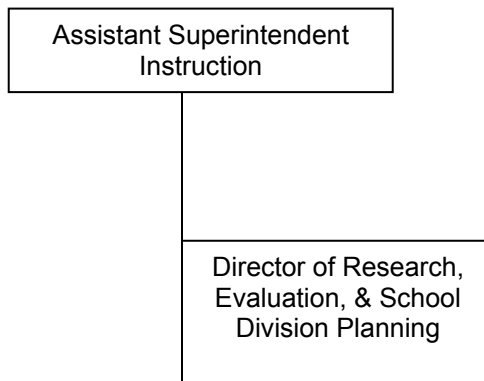
Source: Created by MGT of America, 2007.

FISCAL IMPACT

This recommendation could be accomplished by expanding an office of research and evaluation to include school division planning by the 2008-09 school year. The research supervisor would be reclassified to the director for research, evaluation, and school

division planning. The LCPS administrator salary scale for supervisors is Level 3 and for directors is Level 5. The variance at Step 1 between Levels 3 and 5 is $11,347 and fringe benefits of $3,745 for a total cost of $15,092.

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Reclassify Research Supervisor to Director of Research, Evaluation, and School Division Planning	($15,092)	($15,092)	($15,092)	($15,092)	($15,092)

FINDING

LCPS board has developed goals that were approved in September 2005. Implementation of the goals began three years ago during the 2005-06 school year. The goals are numerous and very few are measurable. The goals are statements and do not fit the SMART goal recommendation of being specific, measurable, attainable, relevant, and time-bound. Two examples of SMART goals related to students are listed below:

- The percentage of students missing 10 or more days of school per year will be decreased at Carter High School from 19 percent to 15 percent in 2005-06, then to 12 percent in 2006-2007, then to 9 percent in 2007-08.

- The percent of economically disadvantaged students that move from *Meets* to *Exceeds* will increase from 45 percent to 52 percent over the three-year period from 2008 to 2010 on the 8th grade CRCT mathematics test.

  - 2008 – 45%
  - 2009 – 48%
  - 2010 – 52%

Further, education and private sector research has continually found that organizations usually have too many goals and therefore have difficulty in defining and attaining their goals. This trend has been listed as one of the primary reasons strategic or comprehensive planning is not successful.   Board goals need to be the umbrella that opens to support the more detailed plans of the school division.

Exhibit 1-22 lists the goals set by the board for LCPS.

EXHIBIT 1-22
LCPS BOARD APPROVED GOALS

Student Achievement

- Instructional programs and school system practices will be reviewed annually to ensure continuous improvement in student achievement.
- All graduates will demonstrate readiness for continuing education and entry level skill for immediate employment.
- LCPS will continue to implement full-day kindergarten for identified students.
- At least 90% of students will pass all required Standards of Learning tests.
- Students and schools will attain the annual measurable objectives called for in the Adequate Yearly Progress requirements of NCLB.
- English language proficiency and achievement will improve among non-English speaking students, including students in English as a Second Language (ESL) classes and students who are identified as Limited English Proficient (LEP).
- LCPS will continue to review and revise school year and summer programs that support advanced achievement in order to provide expanded opportunities and participation for all students who meet program entry requirements.
- Programs and practices will be in place to eliminate the disparity in achievement among identified racial, ethnic, and socio-economic groups.
- In all years students in identified racial, ethnic, and socio-economic groups will exceed all requirements of Standards of Learning and NCLB.
- All students will demonstrate grade level reading proficiency by the end of the first grade or will have an individualized program of reading instruction.

Curriculum Development

- The curriculum will be assessed annually for appropriate content and rigor to meet students' needs.
- The curriculum will be reviewed annually for alignment with the Standards of Learning and to support the goals of NCLB.
- Alternative education programs will be enhanced and expanded.
- Academy/magnet school programs will be developed to serve students with special interests and abilities.
- Career and technical programs will be reviewed and revised to meet evolving employment and post-secondary educational requirements.
- High schools will support increased student participation in school-sponsored co-curricular activities.

Class Size
School staffing will be sufficient to provide for the following:

Elementary			Secondary	
	Avg. Class Size	Max Class Size w/out Teaching Assistant		
KG	22	15	GR. 6-8	21.6 (Teaching 6 of 8 periods a day)
GR. 1-3	22	25	GR. 9-12	25.9 (Teaching 5 of 8 periods a day)
GR. 4-5	22	27		

EXHIBIT 1-22 (Continued)
LCPS BOARD APPROVED GOALS

Compensation, Recruitment, and Retention of Staff

- A recruitment, compensation, and professional development package will be offered that will attract and retain highly qualified candidates for all employment positions.
- The orientation and mentoring program for new employees will be assessed annually for effectiveness with first year staff members.
- Methods will continue to be explored for improving the quantity and quality of instructional and team planning time.
- LCPS will increase recruitment and employment of minority applicants for teaching and administrative/supervisory positions.
- LCPS will expand support for National Board Certification and other forms of developing teacher excellence.

Growth and Resource Parity

- The effects of growth within the school system will continue to be managed to ensure resource parity between older and newer facilities.
- In order to maintain excellence in a large and rapidly growing system, necessary and sufficient district level staffing will be provided.
- Methods for assessing parity between older and newer campuses will ensure that all students, faculty and staff have access to quality facilities, resources, and instructional programs.

Community Relations

- Community relations will be enhanced by frequent communication and through maximized opportunities for public input related to issues under consideration by the School Board.
- Increased community participation will result from regular distribution of school information to the citizens of Loudoun County, including an Annual Report regarding progress made toward achieving system goals.
- LCPS will increase the outreach to parents of pre-school and school age children in order to increase parental awareness of available services, such as educational programs focused on parenting skills and the opportunities that already exist for testing, evaluation and special education services for children as young as two years of age.
- Increased involvement of parents, businesses and the community will be promoted and PTA' s, PTO's, PTSA's and PTSO's will be recognized as essential partners in every school.
- LCPS will provide means to include parental input in assessment of school performance.
- LCPS will develop content and maintenance standards for individual school Web sites to ensure that students and parents throughout Loudoun County will have access to the information they need for academic progress and success.
- LCPS will enhance the capabilities of schools and related infrastructure to facilitate emergency preparedness in the County.

Health, Safety, and Wellness

- LCPS will promote programs that enhance students' and employees' health, safety, and well-being.
- LCPS will strengthen programs that support safe learning environments free of bullying, teasing, and physical violence.
- LCPS will address student obesity through programs developed to improve nutrition and promote physical fitness through lifetime activities.
- LCPS will develop and maintain programs designed to promote employee wellness.

Adopted 09/17/05

Source: LCPS Web site, 2007.

RECOMMENDATION 1-10:

Develop and approve seven board goals utilizing a format similar to the SMART criteria.

This recommendation should be implemented utilizing the seven themes that are already the major topics of the current board goals. The themes should include (1) student achievement; (2) curriculum development; (3) class size; (4) compensation, recruitment, and retention of staff; (5) growth and resource parity; (6) community relations; and (7) health safety and wellness.

The implementation of the recommendation should assist the school division in meeting the stated goals of the school board. The school board chairman and the superintendent should work with the board and administrative staff to develop the seven goals. Once developed, the board should adopt the goals and develop a process for reviewing goal progression. Goals should be reviewed annually to determine if the goal is still applicable or needs to be modified or deleted. New board goals usually can be developed and adopted by senior staff and the school board in two or three meetings.

FISCAL IMPACT

This recommendation could be accomplished by the board clerk copying LCPS board goals. It is estimated that this will take less than one hour for the board clerk to complete this recommendation. Senior staff time is estimated to be four to five hours preparatory work. The school board and staff should be able to accomplish this recommendation in two or three meetings.

FINDING

LCPS has not implemented a division-wide strategic planning process to encompass board goals, central office departments, and all of the schools.

Interviews and review of documents indicate that planning is being completed by the LCPS school personnel in the form of SIPs. The instruction department has developed plans that connect to the SIP process. The plans are well developed and keyed to the board goals. The plans are reviewed by the appropriate director with each school principal. The SIP process is not a part of a strategic planning model that encompasses the entire school division.

Interviews and a review of the School Board Goals Status Report 2006-07 revealed that a strategic plan is not in place for the school division. **Recommendation 1-9** proposes the expansion of the office of research and evaluation to include school division planning for the coordination of a strategic planning process.

Exhibit 1-23 lists two primary strategic planning models utilized by many school divisions.

EXHIBIT 1-23
STRATEGIC PLANNING MODELS

MODEL 1	*MODEL 2*
BOARD GOALS	BOARD GOALS
1. District Plan Developed	1. School Improvement Plans Developed
↓	↓
2. Cluster Plans Developed (Correlate to District Plan)	2. Cluster Plans Developed (Correlate to School Plans)
↓	↓
3. School Improvement Plans Developed (Correlate to Board Goals Cluster & School Plans)	3. District Plan Developed (Correlate to Board Goals School & Cluster Plans)

Source: Created by MGT of America, May 2006.

RECOMMENDATION 1-11:

Develop and implement a divisionwide strategic planning process for LCPS.

The implementation of this recommendation should result in improved planning between the board goals, central office departments, and the division's schools.

It is recommended that the division utilize the strategic planning model number two shown in **Exhibit 1-23** to ensure that division, state, and federal accountability goals are addressed by each department, cluster, and school. LCPS should move to a division-wide strategic planning model to meet the challenges of today and tomorrow. The division should continue to address the rapid student population growth, the changing demographics, the increase in state and federal accountability standards, and the need to communicate the division's strategic goals and plans to the parents and community.

FISCAL IMPACT

The fiscal impact for **Recommendation 1-11** is included as a part of **Recommendation 1-9**, which is included in this chapter.

FINDING

The national retirement trend of the baby boomer generation has initiated discussions in both the public and private sector regarding succession planning. LCPS has a number of central office and school principals who are currently eligible to retire or will be eligible within the next three to five years. The LCPS superintendent initiated the succession planning dialogue with the school board in his letter to the board dated June 3, 2007.

Ms. Susan M. Heathfield, a Human Resources researcher, indicates that:

> *Succession planning is a process whereby an organization ensures that employees are recruited and developed to fill each key role within the company. Through your succession planning process, you recruit superior employees, develop their knowledge, skills, and abilities, and prepare them for advancement or promotion into ever more challenging*

*roles. Through your succession planning process, you also retain
superior employees because they appreciate the time, attention, and
development that you are investing in them. To effectively do succession
planning in your organization, you must identify the organization's long
term goals. You must hire superior staff.*

LCPS has to be very pro-active in securing administrators to sustain the division's needs
due to their student population growth and to meet the openings that will occur as the
baby boomer generation retires.

RECOMMENDATION 1-12:

Develop and implement a comprehensive succession plan for LCPS.

The LCPS board and administration should work together to develop a comprehensive
succession plan for the division. The plan should include processes to grow-your-own
school and central office administrators. Additionally, the plan should include processes
for the division to recruit the best administrative talent possible.

FISCAL IMPACT

This recommendation could be implemented by the senior staff team working with the
superintendent to identify succession planning processes for the division. The board
should provide input and ultimately approve the plan for implementation. The estimated
staff time for this planning process is four to five senior staff meetings and two school
board meetings. Exact staff and board time to accomplish this recommendation cannot
be accurately estimated until the scope of the plan is developed by the LCPS senior staff
team.

1.4.3 *Public Information and Community Relations*

Effective communication is a key aspect of developing and maintaining organizations
that facilitate the realization of essential goals and objectives. Phillip Schlechty in his
publication, *Working on the Work --- An Action Plan for Teachers, Principals, and
Directors*, continues his important theme that articulates his 12 standards for the WOW
school. The underlying piece, as always, is fundamentally sound communication. The
modern organization, having emerged to an age of producing results tailored to the
individual client, must engage in effective communication to all stakeholders and,
furthermore, produce needed responses in a timely fashion.

Community involvement programs are essential for bringing financial resources and
community support to schools and school divisions. Involved schools and school
divisions strive to build and maintain effective partnerships with parents, area
businesses, civic and faith-based organizations, and other concerned citizens, who
provide valuable support for each student's academic success. Members of the
community, including parents and grandparents, can offer needed volunteer services to
the schools. Building and maintaining open lines of communication with parents and
community members help in building long-term public support for its efforts.

FINDING

The LCPS public information office has three professional staff members. Staff positions include a public information officer who is responsible for the office, an assistant public information officer, and an Internet content manager.

Interviews with staff and review of documents found the following information related to the public information office:

- The office received several thousand e-mails annually concerning matters before the board, including the boundary process, location of schools, and budget considerations. These concerns were relayed to the board through the superintendent.

- Staff handled a large number of Freedom of Information Act (FOIA) requests.

- The office produced more than 600 press releases that detailed student and staff achievement along with highlighted upcoming events.

- Staff developed an annual report detailing the past year's achievements and gave the information for the upcoming school year which was distributed through a local newspaper at the beginning of the year. Over 90,000 copies of the annual report were distributed to every part of Loudoun County.

- The office developed over 70,000 copies of the school system's guide and directory which were direct-mailed to LPCS citizens.

- Staff served as the liaison to the Loudoun Education Alliance of Parents (LEAP), which represents all the parent organizations in the county's schools. LEAP also provided parent organizations with a direct forum with the superintendent and senior school administrators.

- The office served as the staff liaison to the School-Business Partnership Executive Council and the Loudoun Education Foundation. (The public information office also published a tabloid publication for the School-Business Partnership.)

- Staff staged the annual Excellence in Education Banquet, which included the top students and business and government leaders in the area. The 2007 gathering honored 266 students with a high school grade point average (GPA) of 4.0 or above.

- The office hosted the Content Management System (CMS) for LCPS. Through this system, more than 4,300 teacher Web pages have applications and every teacher has been required to create a Web page.

- Staff hosts the LCPS home page that averaged 187,287 distinct users per month from outside the school system (up from 115,416 in 2005-06). Of these users, 97,422 were first-time users (up from 73,081) with 87,866 being repeat users (up from 42,335).

- The office partnered LCPS with the County Alert System. The free service allows school emergency information, including closings, to be sent

electronically to any communications device. During the 2006-07 school year, 29,419 people signed up for this service (up from 9,925 in 2005-06).

■ The office developed plans for the Connect Ed system implementation, which will allow administrators to establish phone contact with stakeholders in the case of an emergency or to remind the stakeholders of an upcoming school event.

School board members, central staff, school principals, and community members indicated that the public information office provides very valuable information and services to the division.

COMMENDATION 1-D:

LCPS is commended for the processes that have been developed and implemented by the public information office in order to provide information to the school division's parents, students, and community members.

FINDING

The Minority Student Achievement Advisory Committee (MSAAC) works in partnership with the LCPS, parents and the community to further the academic, social and cultural development of every student and to ensure that the needs of all minority students are met. MSAAC membership is comprised of two board members, community members, parents, school administrators, teachers, and central office staff. The Instruction Department facilitates this initiative. Interviews with the school board, LCPS staff, and community members indicated that MSAAC has had a positive impact for division students.

MSAAC supports School Board and staff initiatives, and parent efforts to ensure that the school community becomes culturally competent, and provides the cornerstone to ensure fair and equitable instruction to all LCPS students. The committee supports the development of school cultures where every minority student is afforded the opportunity to achieve his or her full potential, feels welcome and is recognized as an integral member of the student body.

The First Annual Parent Involvement Symposium was held in April 2007 with over 300 parents, other family members, and teachers attending. The symposium's keynote speaker was Dr. Adolph Brown related parents dealing with children and their school experiences. A number of breakout sessions were also available for the participants to attend. A second symposium has been scheduled to take place in April 2008.

Efforts such as those supported by MSAAC are often found in urban school divisions, but are rarely in place in a more suburban school setting. LCPS has chosen to follow a proactive model to address the needs of the school division's growing minority student populations.

Exhibit 1-24 lists the major objectives and the activities associated with MSAAC.

EXHIBIT 1-24
MSAAC OBJECTIVES AND ACTIVITIES

MSAAC Objectives and Activities

- Ensure advocacy on behalf of minority issues within the LCPS Community.

- Promote parental involvement.

- Develop a process to facilitate the resolution of parental concerns.

- Encourage increased minority staff and volunteer presence in schools to: (1) Reinforce efforts to achieve cultural awareness and cultural sensitivity; and (2) Provide role models and assist minority students in developing self-esteem.

- Disseminate information regarding issues of interest, educational opportunities, strategies and support data.

- Participate in and host forums to encourage awareness and sensitivity, and provide needed information to parents and staff.

- Facilitate collaboration with local and national organizations and community resources.

- Advise the Loudoun County School Board regarding systemic issues affecting minority achievement.

- Facilitate communication between the community and Loudoun County Public Schools.

- Support School Board minority achievement goals and activities within the school system and at participating schools as needed.

- Review test result data on an annual basis and make recommendations.

- Submit an annual report to the Loudoun County School Board.

Last Modified on 5/20/2005 11:45:40 AM

Source: LCPS Web site, 2007.

COMMENDATION 1-E

LCPS board and administration are commended for proactively forming the Minority Student Achievement Advisory Committee (MSAAC) and the initial implementation of processes recommended by the committee for the division's students.

2.0 FINANCIAL MANAGEMENT AND PURCHASING

2.0   FINANCIAL MANAGEMENT AND PURCHASING

This chapter reviews the financial management and purchasing activities of Loudoun County Public Schools (LCPS). This chapter is organized into six sections as follows:

2.1   Overview of LCPS Business and Financial Services
2.2   Budget Management
2.3   Financial Management and Reporting
2.4   Risk Management
2.5   Purchasing
2.6   Warehouse Management

CHAPTER SUMMARY

The financial, purchasing, and other related functions in LCPS are effectively performed by the staff of the department of business and financial services. Staff performance has allowed the schools and departments within LCPS to also perform an effective job in managing their financial activities. The warehouse functions are managed in the department of support services.

These activities have resulted in a number of areas where the division can be commended for implementing and utilizing exemplary practices. These include the following key commendations:

- Developing and implementing an effective process for data collection in conjunction with development of the annual budget.

- Establishing well-designed procedures and an annual audit process for student activity funds that assures proper accountability for these funds.

- Establishing and maintaining excellent procedures and communication mechanisms to effectively manage the risk management functions of LCPS.

- Participation in numerous purchasing cooperatives and establishing standard contracts with vendors to provide an easy process for schools and departments to obtain necessary goods and services.

- Effectively implementing the use of purchase cards.

Recommendations contained in this chapter are focused on areas that will improve the ability of the school board, the superintendent, and the staff to more effectively manage the fiscal resources of LCPS. The following reflect key recommendations included in this chapter:

- Review the materials located on the Government Finance Officers Association (GFOA) Web site at www.gfoa.org/services/nacslb to gain an understanding of the best practices in public budgeting that serve as a foundation for a revision of the document that will lead to consistent scores of outstanding for the LCPS budget in the future.

- Restructure the budget into a program format within the various organizational units that provides information on those specific services that can be evaluated in more detail.

- Cease the practice of budgeting partial positions as a budget balancing tool. If this practice is to occur in the future, the financial impact of these positions on the future years' budget should be disclosed.

- Work with independent auditing firm to establish a process for publishing a Comprehensive Annual Financial Report (CAFR) for LCPS.

- Establish multiple salary schedules relating to the individual calendars and assess the current calendars to determine if those with minimal numbers of employees can be consolidated.

- Convert the insurance coverage portion of existing policy §4-6 to a regulation and establish a new policy entitled risk management that defines the purpose of the risk management program, spells out the responsibilities to be assigned to the program, and identifies the related responsibilities of the schools and departments.

- Establish a policy addressing the use of purchasing cards for LCPS with the revised school board policy §4-24 Methodology Procurements to include authorization of the use of purchase cards.

- Transfer management of the warehouse activities from the department of support services and facilities services to the department of business and financial services.

Although the education of students is the major responsibility of LCPS, this cannot be accomplished without a foundation of effective financial management policies and procedures. These activities enhance the ability of those responsible for the delivery of educational services to carry out their responsibilities.

Financial management must provide the following organizational capabilities:

- An integrated mechanism to translate the goals of LCPS into financial terms.

- Effective financial control and efficient processing of day-to-day financial activities.

- Useful financial information for the board and the administrative staff.

- A budget development process that will result in a document that effectively communicates to the board of education, the Board of Supervisors, and the community where resources are allocated and the value to be gained from these allocations.

Four other divisions in cluster three have been selected for comparison with LCPS, but it is also important to understand the unique circumstances associated with the fact LCPS

is a school division in the Washington D.C. area. Thus, additional comparisons are also provided with four major divisions included in the Washington Areas Boards of Education (WABE) group.

Exhibit 2-1 indicates that in comparison to the four peer divisions, LCPS expends 26.23 percent more for total operations, but expends essentially the same portion of those expenditures for instruction.

EXHIBIT 2-1
OPERATING COSTS PER STUDENT BY GENERAL CATEGORY
LCPS AND PEER DIVISIONS
2005-06 FISCAL YEAR

SCHOOL SYSTEM	INSTRUCTION	OPERATIONAL	OTHER	TOTAL OPERATING	INSTRUCTIONAL AS % OF TOTAL
Loudoun County	$ 8,761	$ 1,669	$ 1,134	$ 11,564	**75.76%**
Henrico County	$ 6,090	$ 1,159	$ 850	$ 8,099	75.19%
Prince William County	$ 6,864	$ 1,468	$ 953	$ 9,285	73.93%
Chesterfield County	$ 5,695	$ 1,209	$ 787	$ 7,691	74.05%
Virginia Beach	$ 6,844	$ 1,522	$ 802	$ 9,168	74.65%
Average	$ 6,851	$ 1,405	$ 905	$ 9,161	**74.78%**
LCPS Over(Under) Average	$ 1,910	$ 264	$ 229	$ 2,403	0.98%
%LCPS Over(Under) Average	27.88%	18.76%	25.28%	26.23%	1.31%

Source: Virginia's Educational Disparities FY 2005-06, Virginia Education Association based on data from the Department of Education's Annual School Report.

Operating cost information included in **Exhibit 2-2** comparing LCPS with the major Virginia school divisions in the Washington D.C area indicates that LCPS expends 18.10 percent less for general operations on a per student basis. The slight deviations in the amounts among the data for **Exhibits 2-1** and **2-2** occur because the Department of Education data reflects actual expenditures while the WABE data represents budgeted amounts.

EXHIBIT 2-2
COMPARATIVE OPERATING EXPENDITURES
LCPS AND WABE SCHOOL DIVISIONS
2005-06 FISCAL YEAR

SCHOOL SYSTEM	ENROLLMENT	OPERATING FUND[1]	OTHER[2]	TOTAL	AMOUNT PER STUDENT
Alexandria City	10,812	$ 174,862,270	$ 4,530,405	$ 179,392,675	$ 16,592
Arlington County	18,386	$ 299,419,346	$ 23,100,805	$ 322,520,151	$ 17,542
Fairfax County	164,918	$ 1,960,419,583	$ 51,147,250	$ 2,011,566,833	$ 12,197
Loudoun County	**47,467**	**$ 527,047,936**	**$ 2,218,558**	**$ 529,266,494**	**$ 11,150**
Prince William County	69,373	$ 655,072,626	$ 79,700,374	$ 734,773,000	$ 10,592
Five Division Average					**$ 13,615**
Loudoun County Over (Under) Average					$ (2,464)
% Loudoun County Over(Under) Average					-18.10%

Source: Washington Area Boards of Education WABE Guide FY2006.

[1] Governmental funds only, excludes Proprietary and Fiduciary Funds.

[2] Includes funds for entitlement grants not included in operating fund.

The funding for school divisions in the Commonwealth of Virginia is based on a formula that assesses the jurisdiction's wealth via calculation of the composite index of local ability to pay which uses local taxable retail sales, adjusted gross income, and the true value of real estate. This determines the resources to be provided by the Commonwealth and provides a basis to assess the local financial contribution in comparison with the community's ability to pay. **Exhibit 2-3** provides information comparing LCPS with the peer divisions as well as those in WABE. **Exhibit 2-3** indicates that although LCPS ranks tenth in the ability to pay, the community ranks fifth in the fiscal support provided. Compared to all of the divisions in **Exhibit 2-3**, LCPS is clearly providing resources well above those of the other divisions.

EXHIBIT 2-3
COMPARISON OF ABILITY TO PAY AND FISCAL EFFORT
PEER AND WABE DIVISIONS
2005-06 FISCAL YEAR

PEER DIVISIONS	ABILITY TO PAY		FISCAL CAPACITY	RANK	FISCAL EFFORT COMPARED TO CAPACITY	
	LCI	RANK	CAPACITY	RANK	EFFORT	RANK
Loudoun County	**0.7220**	**10**	**$ 178,976**	**9**	**2.3636**	**5**
Henrico County	0.4834	24	$ 117,564	25	1.2717	64
Prince William County	0.4086	39	$ 110,773	31	1.7846	18
Chesterfield County	0.3785	51	$ 92,791	59	1.5282	33
Virginia Beach	0.3353	73	$ 89,868	63	1.6537	25
WABE DIVISIONS						
Alexandria	0.8000	1	$ 334,718	1	0.8337	125
Arlington	0.8000	1	$ 331,812	2	1.0383	98
Fairfax	0.7489	9	$ 195,604	7	1.7009	22
Loudoun	**0.7220**	**10**	**$ 178,976**	**9**	**2.3636**	**5**
Prince William County	0.4086	39	$ 110,773	31	1.7846	18

Source: Virginia's Educational Disparities FY 2005-06, Virginia Education Association based on data from the Department of Education's Annual School Report.

A close look at **Exhibits 2-1**, **2-2**, and **2-3** seem to reflect a dichotomy, especially with the WABE divisions. LCPS is spending 18.3 percent less on average than the comparison divisions for operations, yet is contributing considerably more resources for education. The reason for this anomaly rests with the capital expenditures required of LCPS to house the expanding student population. This is reflected in **Exhibits 2-4** and **2-5**. **Exhibit 2-4** identifies the capital expenditures for the WABE divisions for fiscal years 2006, 2007, and 2008. Over this three year period, LCPS has expended 42.73 percent more for capital purposes than the other major Washington D.C area divisions.

EXHIBIT 2-4
COMPARATIVE CAPITAL EXPENDITURES
MAJOR WASHINGTON D.C. AREA SCHOOL DIVISIONS
FISCAL YEARS 2006, 2007, AND 2008

SCHOOL SYSTEM	AVERAGE ENROLLMENT FY06-FY-08	CAPITAL EXPENDITURES	CAPITAL EXPENDITURES PER STUDENT
Alexandria City	10,435	$ 66,892,010	$ 6,410
Arlington County	18,385	142,581,769	$ 7,755
Fairfax County	164,685	435,952,805	$ 2,647
Loudoun County	50,534	438,190,000	$ 8,671
Prince William County	70,880	480,385,000	$ 6,777
Total	**314,919**	**$ 1,564,001,584**	**$ 4,966**
Average Debt Service Expenditure Per Student			$ 4,966
Loudoun County Over(Under) Average			$ 3,705
% Loudoun County Over (Under) Average			42.73%

Source: Washington Area Boards of Education WABE guide FY2006, FY2007, and FY2008

Exhibit 2-5 identifies the debt service expenditures for the WABE school divisions for fiscal years 2006, 2007, and 2008. As shown, LCPS has 41.37 percent more debt per student than the comparison average.

EXHIBIT 2-5
COMPARATIVE DEBT SERVICE EXPENDITURES
MAJOR WASHINGTON D.C. AREA SCHOOL DIVISIONS
FISCAL YEARS 2006, 2007, AND 2008

| SCHOOL SYSTEM	AVERAGE ENROLLMENT FY06-FY08	DEBT SERVICE EXPENDITURES	DEBT SERVICE PER STUDENT
Alexandria City	10,435	$ 32,535,337	$ 3,118
Arlington County	18,385	79,130,790	$ 4,304
Fairfax County	164,685	414,355,235	$ 2,516
Loudoun County	50,534	318,600,232	$ 6,305
Prince William County	70,880	158,671,312	$ 2,239
Total	**314,919**	**$ 1,003,292,906**	**$ 3,696**
Average Capital Expenditure Per Student			$ 3,696
Loudoun County Over(Under) Average			$ 2,608
% Loudoun County Over (Under) Average			41.37%

Source: Washington Area Boards of Education WABE guide FY2006, FY2007, and FY2008

It is the combination of the resources provided for capital improvements and debt service that cause LCPS to require additional local resources in comparison to the other divisions in the Washington D.C. area, not the operating costs.

2.1   Overview of LCPS Business and Financial Services

The financial management activities of a school system encompass a number of functions that are distributed throughout the organization. They include general financial management (payroll, accounts payable, general ledger, financial reporting, and employee benefits), risk management, budgeting, purchasing, and warehouse services. With the exception of warehouse services, these responsibilities are managed by the department of business and financial services. The organization of this department is depicted in **Exhibit 2-6**. Administrative information technology included on this organization chart is not addressed in this chapter, but is discussed in **Chapter 7.0**. The department of support services is responsible for providing warehouse services; however, this area is addressed in this chapter as it is a finance/purchasing-related function.

EXHIBIT 2-6
DEPARTMENT OF BUSINESS AND FINANCIAL SERVICES
ORGANIZATION CHART
2007-08
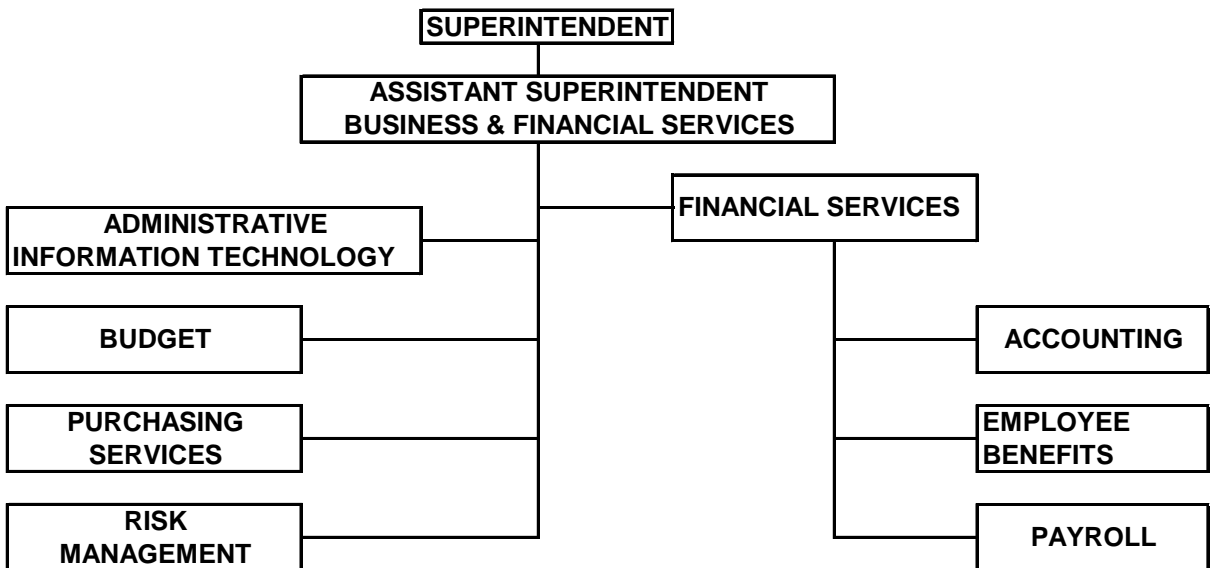
Source: LCPS Department of Business and Finance, 2007.

FINDING

Exhibit 2-7 reflects a summary of survey responses received from LCPS staff involving activities related to the division's financial management functions and provides a comparison of the LCPS responses with those of other divisions surveyed by MGT. As

shown, overall the LCPS staff responded with adequate or outstanding ratings of LCPS financial functions. It is further noted that LCPS received a much higher percentage of staff identifying financial services as *Adequate* or *Outstanding* when compared to other school systems.

EXHIBIT 2-7
LOUDOUN COUNTY PUBLIC SCHOOLS
FINANCIAL FUNCTIONS COMPARISONS
2006-07

SCHOOL DIVISION PROGRAMS AND FUNCTIONS	% (ADEQUATE + OUTSTANDING) / % (NEEDS SOME IMPROVEMENT + NEEDS MAJOR IMPROVEMENT)[1]					
	LCPS CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	LCPS PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	LCPS TEACHER	TEACHER IN OTHER DISTRICTS
Budgeting	79/19	47/45	90/6	48/49	38/28	16/65
Financial management and accounting	77/12	53/36	91/5	60/35	42/13	23/49
Grants administration	49/13	49/24	57/14	49/34	31/12	38/53
Purchasing	83/7	53/34	84/3	58/37	43/9	30/33
Risk management	76/8	54/20	94/4	63/23	48/6	32/22

Source: MGT Survey of LCPS and other schools 2006-07.

[1] Percentage responding adequate or outstanding / percentage responding needs some improvement or needs major improvement.

The neutral and don't know responses are omitted.

Exhibit 2-8 indicates that in comparison to similar MGT surveys administered across the United States, LCPS reflects a much higher percentage of staff identifying financial services as adequate or outstanding.

EXHIBIT 2-8
LOUDOUN COUNTY PUBLIC SCHOOLS
PERCENTAGE DIFFERENCES ADEQUATE + OUTSTANDING
COMPARED TO OTHER SCHOOL DISTRICTS DATA
2006-07

SCHOOL DIVISION PROGRAMS AND FUNCTIONS	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
Budgeting	75.56%		87.50%		137.50%	
Financial management and accounting	45.28%		51.67%		82.61%	
Grants administration	0.00%		16.33%		-18.42%	
Purchasing	56.60%		44.83%		43.33%	
Risk management	40.74%		49.21%		50.00%	

Source: MGT Survey, 2007.

Exhibit 2-8 reflects the magnitude of the differences between the responses for LCPS and the other school divisions surveyed by MGT. These data indicate the opinions of the LCPS staff are considerably more positive than the other divisions included in the

sample.   Only the grants management category is close; however, of the data related to those who felt there was need for improvement, LCPS reflects a 72 percent better response. The main factor involving grants management is a large number of neutral or "do not know" responses for both LCPS and the other divisions. Clearly, the financial management responsibilities for LCPS have a high level of credibility within the organization.

The data contained in **Exhibits 2-7** and **2-8** has been reinforced via positive comments regarding the financial activities communicated to the preferred review team during the on-site visit.

2.2   *Budget Management*

Effective school systems make program and service decisions and allocate scarce resources to programs and services using a structured budget process. As a result, this process is one of the most significant activities undertaken by LCPS. The quality of the decisions resulting from the budget process and the level of acceptance of these decisions by all parties is directly related to the process utilized and the ability of the proposed and final budget documents to communicate the priorities of the school system in financial terms.

The Government Finance Officers Association (GFOA) and seven other state and local government associations created the National Advisory Council on State and Local Budgeting (NACSLB) and charged it with developing a set of recommended practices in the area of state and local budgeting. The NACSLB's definition, mission, and key characteristics of the budget process is as follows:

- **Definition of the Budget Process** – The budget process consists of activities that encompass the development, implementation, and evaluation of a plan for the provision of services and capital assets.

- **Mission of the Budget Process** – To help decision makers make informed choices about the provision of services and capital assets and to promote stakeholder participation in the process.

- Key characteristics of the budget process are identified as follows:

  - Incorporates a long-term perspective.
  - Establishes linkages to broad organizational goals.
  - Focuses budget decisions on results and outcomes.
  - Involves and promotes effective communication with stakeholders.
  - Provides incentives to government management and employees.

The implementation of a budget process meeting the definition, mission, and characteristics of an effective budgeting process should provide a clear picture of how the resources of LCPS are to be allocated and the expected results to be achieved from the expenditure of these resources.

FINDING

The FY 2007 and prior year budgets for LCPS have been submitted to GFOA and the Association of School Business Officials (ASBO) for Distinguished Budget Presentation Awards and Meritorious Budget Awards respectively. The GFOA award is designed to assist participating governments to achieve the goal of improving their budget document and the criteria are consistent with the NACSLB. LCPS has received both of these awards for the past seven years.

COMMENDATION 2-A:

LCPS is commended for developing a budget document that has earned the awards for budget presentation from GFOA and ASBO for the past seven years.

FINDING

LCPS has implemented excellent procedures to aid in the mechanics of developing the annual budget. Materials are provided to the organizational units that support preparation of the budget through use of budget preparation software. This software is a relational database product designed to be used across the division's wide area network (WAN) and provides security features for the user and the budget office personnel. The FY 2009 budget preparation process represents the third year that this system has been in use.

The budget office staff provides workshops during multiple times of the year over a four day period on the use of the system and provides the following materials:

- **Budget Prep System Guide** – This document provides step-by-step instructions on how to use the system and includes pictures of the various screens involved in the process.

- **Operating Budget Preparation Instructions** – This information includes direction on the preparation of budget narrative information, amounts to be used for various furniture and equipment items, the school-based allotments, position category codes, and appropriate account codes.

- **Staffing by Index Code and Position Title** – This information includes all of the authorized positions within the division.

The effective use of budget preparation materials are one of the reasons for the positive comments achieved by the budget department on the MGT survey.

COMMENDATION 2-B:

LCPS is commended for developing and implementing an effective process for data collection in conjunction with the development of the annual budget.

FINDING

Not withstanding the achievement of the ASBO and GFOA awards, there are numerous issues that need to be addressed regarding the LCPS budget document.

To understand issues involving the LCPS budget document, it is important to understand the workings of the award programs. The discussion of these awards will focus on the GFOA award; as the criteria are more specific and LCPS has received specific feedback in the form of recommendations from GFOA regarding the budget document. **Exhibits 2-9** and **2-10** provide a summary of the scores received from the GFOA process.

The GFOA criteria include four major areas with each containing a number of subsidiary categories. These categories are as follows:

1. The budget as a policy document.
2. The budget as a financial plan.
3. The budget as an operations guide.
4. The budget as a communication device.

The GFOA explanation of the judging process states: "Each budget is evaluated separately by three reviewers. Each reviewer rates the document as being either not proficient, proficient, or outstanding in regard to 27 specific criteria, grouped into four basic categories" (see above list.) "Each reviewer also provides an overall rating for each of the basic categories. To receive an award, the budget must be rated either proficient or outstanding by at least two of the three reviewers for each category, as well as for 14 of the 27 specific criteria identified as "mandatory."

Exhibits 2-9 and **2-10** provide a summary of the scores by category achieved by LCPS for the 2007 and 2008 budgets. LCPS still received the award because only one reviewer identified the financial plan as not satisfying the requirements.

EXHIBIT 2-9
SUMMARY OF GFOA 2007 BUDGET REVIEW RESULTS

EVALUATION CATEGORIES	NOT PROFICIENT	PROFICIENT	OUTSTANDING	TOTAL SCORE	PERCENT DEEMED OUTSTANDING
Policy Document	0	13	5	18	27.78%
Financial Plan[1]	1	24	5	30	18.52%
Operations Guide	1	10	4	15	0.00%
Communications Device	1	23	6	30	20.00%
Total Score 2007	**3**	**70**	**20**	**93**	**21.51%**

Source: LCPS 2007 GFOA.

[1] One of the Not Proficient items involves information on capital expenditures which is a mandatory item.

EXHIBIT 2-10
SUMMARY OF GFOA 2008 BUDGET REVIEW RESULTS

EVALUATION CATEGORIES	NOT PROFICIENT	PROFICIENT	OUTSTANDING	TOTAL SCORE	PERCENT DEEMED OUTSTANDING
Policy Document	0	7	11	18	61.11%
Financial Plan[1]	3	21	6	30	18.52%
Operations Guide	1	14	0	15	0.00%
Communications Device	0	25	5	30	16.67%
Total Score 2008	**4**	**67**	**22**	**93**	**23.66%**

Source: LCPS 2008 GFOA.

[1] One of the Not Proficient items involves information on capital expenditures which is a mandatory item.

Two areas considered to be of significant importance in the GFOA process include information relating to capital expenditures and performance measurement. If a budget receives outstanding ratings by all three reviewers for these categories, the recipient will receive special recognition. There are two areas where LCPS has received one score in each year that identifies the document as "not being proficient". This rating along with some individual categories identified as outstanding in the communications device section, the LCPS document has been identified as proficient, not outstanding.

Although there are some conflicting observations by GFOA reviews, a continuing thread for both of these reviews involves the need to provide improved information relating to performance measures and capital improvements.

LCPS will continue to receive the award as long as no more than one reviewer identifies the shortcomings of the mandatory category involving capital improvements; however, in its current format, it will never be deemed as outstanding and will not qualify for the special capital and special performance recognition designations.

The goal must be to upgrade the budget document so it will be deemed outstanding in all categories, resulting in improved budget information for the school board and the community. The key areas to address are those associated with the document as an operations guide and as a communications device.

RECOMMENDATION 2-1:

Review the materials located on the GFOA Web site at www.gfoa.org/services/nacslb to gain an understanding of the best practices in public budgeting that serve as a foundation for a revision of the document that will lead to consistent scores of outstanding for the LCPS budget in the future.

The NACSLB materials not only provide specific information on what should be included, but also include materials from those governmental entities deemed to have met the guidelines in exemplary fashion. There are 72 different examples throughout the materials and although some will not relate directly to LCPS, they all provide different ways to communicate information.

FISCAL IMPACT

Both the assistant superintendent for business and financial services and the budget supervisor should review the NACSLB materials and statements regarding best practices identified on the GFOA Web site. This should take approximately four hours for each staff member.

FINDING

The LCPS budget document is presented in a landscape format that includes multiple pages of information for the various organizational entities. For example, the pupil services section contains 11 programs in the FY 2008 budget and of these 11 programs; the number of pages for each program range from two pages to seven pages. These types of inconsistencies exist throughout the financial section of the operating fund.

NACSLB does not address the portrait versus landscape format, nor does it specifically indicate requirements for the internal format other than to identify the following in the practice entitled *Present the Budget in a Clear, Easy-to-Use Format*:

> *Some items in a budget document that will assist the reader include:…a consistent format...succinct and clearly written summaries, uncluttered pages, and detailed information placed in appropriate locations so that it does not overwhelm the reader.*

Of the 72 budget documents provided as examples of best practices by NACSLB, 67, or 93 percent, are presented in the portrait format.

Most effectively prepared budget documents use a two page format for individual programs that allows the reader to see all of the information in one location with program information on one page and the financial data on the other. In the portrait format, both of these pages can be viewed together. Examples of this format can be found in the budgets of Arlington Public Schools and the budget for Loudoun County government.

Although it is clear that LCPS has made an effort to communicate all significant information in the budget documents and to meet the GFOA guidelines, the manner of the presentation makes the document difficult to follow.

RECOMMENDATION 2-2:

Redesign the format for the LCPS budget document and prepare the new document in a portrait format with a two page format for each program.

The assistant superintendent for business and financial services along with the budget supervisor should review the budget documents of Arlington Public Schools, Loudoun County, and others to develop ideas as to how the division can be organized to provide information in a more succinct and more easily read format.

FISCAL IMPACT

This will require considerable effort on the part of both the assistant superintendent for business and financial services and the budget supervisor. The total time involved will be approximately 80 hours.

FINDING

The structure of the operating budget in the financial section does not clearly identify the activities of a number of the central service departments. LCPS also provides a second document entitled *FY08 Appropriated Budget-Budget Detail for Accounting Use* which provides more detailed information to include a separate section at the beginning that identifies all of the positions by title. The salary information is excluded from this document as it is designed to be used internally. Separate pages are provided for each index code which is the equivalent of programs and identifies the positions in general categories such as supervisor/coordinator/specialist, staff aides, and secretarial/clerical with the related salary totals. There are also separate pages for each school identifying the line item expenditure items. The information in this document is helpful; and would be of value if portions were included in the formal budget document.

Two examples involving areas that are unclear, both in the internal document and the formal budget document, include the budgets for the assistant superintendent for support services on page 306-310 and facilities services on pages 315-322. Both of these categories provide financial information as summaries of services that could provide improved information to the reader if they were identified by program/service. **Exhibit 2-11** identifies the activities included on the budget page entitled Assistant Superintendent for Support Services. This page actually contains a budget for four separate programs, the office of the assistant superintendent, energy management, telecommunications services, and warehouse services. The internal document has the warehouse services portion identified separately. The information is further complicated as the utility costs associated with energy management are included in the facilities services department budget while the staff members handling the energy management function are included in the assistant superintendent's budget.

Exhibit 2-12 identifies similar information for the facilities services department. This is an all-encompassing page that consolidates the custodial services and building maintenance activities into a single category. By consolidating the information for the activities included in **Exhibits 2-11** and **2-12** in a single category with summary numbers of positions, the true cost of providing certain services is lost. It is especially problematic when the positions are identified in total with no detail as to the types of specific positions or the overall number of positions by title. An additional complication is reflected in the $677,351 variance between the two documents for facilities services.

The variance occurs because the resources for implementation of four paid holidays for all classified employees were included with the custodial salary costs rather than having these costs distributed to each classified job title throughout the document.

EXHIBIT 2-11
ANALYSIS OF FY 2008 BUDGET
ASSISTANT SUPERINTENDENT FOR SUPPORT SERVICES

INDEX CODE	DEPARTMENT/PROGRAMS	PER BUDGET DETAIL[1] POSITIONS	PER BUDGET DETAIL[1] AMOUNT	PER FY08 BUDGET[2] POSITIONS	PER FY08 BUDGET[2] AMOUNT
141201	**Ass't Supt Support Services**				
	Office of the Assistant Superintendent				
	Ass't Supt Support Services	1.00	$ 144,994		$ -
	Coordinator Support Services	1.00	88,786		
	Administrative Office Assistant	0.50			
	Secretary I	1.00			
	Secretary IV	1.00			
	Total for Clerical Staff		114,120		
	Total Personnel Costs-Ofc of Ass't Supt	**4.50**	**347,900**		
	Energy Management				
	Specialist, Energy Education	2.00	177,573		
	Total Personnel Costs-Energy Mgt	**2.00**	**177,573**		
	Telecommunications Services				
	Telecommunications Analyst	1.00	75,035		
	Voice Communications Spec	1.00	75,035		
	Telecommunications Manager	1.00	75,035		
	Total Personnel Costs- Telecommunications Svcs	**3.00**	**225,104**		
	Classified Substitutes		742		742
	Fringe Costs		256,212		
	Total Personnel Costs Ass't Supt	**9.50**	**1,007,531**		**742**
141202	**Warehouse Distribution**				
	Couriers	4.00			
	Warehouse Assistant	4.00			
	Total Staff Aides		364,123		
	Inventory Control Specialist	1.00			
	Supply Coordinator	1.00			
	Warehouse Technician	1.00			
	Total Secretarial		112,156		
	Part-time		67,320		67,320
	Overtime		22,770		22,770
	Fringe Costs		193,565		
	Total Personnel Costs-Warehouse	**11.00**	**759,934**		**90,090**
	Unallocated Costs				
	Position Salaries			20.50	1,226,856
	Fringe Costs				449,777
	Total Personnel Costs-Unallocated			**20.50**	**1,676,633**
	Total Ass't Supt for Support Services	**20.50**	**$ 1,767,465**	**20.50**	**$ 1,767,465**

Source: LCPS budget documents for FY 2008.

[1] FY 08 Appropriated Operating Budget - Budget Detail for Accounting Use document

[2] Per formal FY 08 Appropriated Budgets document

EXHIBIT 2-12
ANALYSIS OF FY 2008 BUDGET
FACILITIES SERVICES

INDEX CODE	DEPARTMENT/PROGRAMS	PER BUDGET DETAIL[1]		PER FY08 BUDGET[2]	
		POSITIONS	AMOUNT	POSITIONS	AMOUNT
140110	**Facilities Svcs Mgt and Direction**				
	Director	1.00	$ 126,644		
	Supervisor/Coordinator/Specialist	1.00	86,650		
	Secretarial/Clerical	3.00			
	Account Clerk III	1.00			
	Whse Ass't-Custodial Svcs	1.00			
	Total Secretarial/Clerical		225,422		
	Fringe Costs		159,425		
	Total Personnel Costs Facilities Svcs Mgt	**7.00**	**598,141**		
140120	**Custodial Services**				
	Supervisor	1.00	**103,700**		
	Head Custodian-Central Svcs	3.00			
	Head Custodian-Inst Center	1.00			
	Custodian-Inst Center	3.00			
	Custodian-Central Services	28.75			
	Custodian-Athletic	10.00			
	Head Custodian-Schools	69.50			
	Custodian-Schools	351.75			
	Lead Custodian-Central Svcs	2.50			
	Total Custodians		**13,164,923**		
	Refuse Equipment Operator	3.00			
	Supervisor-Custodial Operations	1.00			
	Total Personnel Costs Custodial Services	**474.50**	**13,268,623**		
140120	**Facilities Maintenance**				
	Supervisor-Facilities Services	1.00	**103,700**		
	Trade Technicians	119.50			
	Mechanical Trade Supervisor	1.00			
	Maintenance Supervisor	2.00			
	Parts Inventory Clerk	3.50			
	Wastewater Tech/Storekeeper	1.00			
	Total Maintenance Workers		**5,598,474**		
	Total Personnel Costs Facilities Maintenance	**128.00**	**5,702,174**		
140120	**Personnel Costs w/Location unknown**				
	Staff Aides		**324,920**		
	Part-Time		**347,490**		347,490
	Overtime		**1,490,940**		1,490,940
	Total Personnel Costs w/Location Unknown		**2,163,350**		**1,838,430**
140120	**Unallocated Costs**				
	Positions/Salaries			609.50	19,057,082
	Fringe Costs		9,320,993		9,480,418
	Total Personnel Costs- Unallocated		**9,320,993**		**28,537,500**
	Total Facilities Services	**609.50**	**31,053,281**	**609.50**	**30,375,930**
	Variance FY08 Budget Over(Under)Operating Detail [3]				**$ (677,351)**

Source: LCPS budget documents for FY 2008.

[1] FY 08 Appropriated Operating Budget - Budget Detail for Accounting Use document

[2] Per formal FY08 Appropriated Budgets document

[3] Variance reflects amount budgeted for implementation of four paid holidays for all classifed personnel which is included in the custodial salary costs.

In the practice area entitled "Identify Functions, Programs, and/or Activities of Organizational Units," the NACSLB materials note the following:

> *Clear identification of the functions, programs, and/or activities of organizational units assists those reviewing or evaluating the government develop a better understanding of the role of each organizational unit, and it aids in evaluating the services it provides.*

The current budget format for LCPS does not provide adequate information to support an effective evaluation of the services being provided.

RECOMMENDATION 2-3:

Restructure the budget into a program format within the various organizational units that provides information on those specific services that can be evaluated in more detail.

The financial page should be one of the pages in the two page format included in **Recommendation 2-2**.

The current process of listing the various personnel additions separately at the beginning of the document and identifying the number of positions in total on the individual budget pages does not provide a clear representation of what is driving the increases. The change to a more detailed program format will allow LCPS to better communicate how budget increases (decreases) relate to specific services being provided.

All positions should be identified by title, numbers of positions and the related salary. Line item expenditure categories should be organized by expenditure type, such as supplies, services, etc.

FISCAL IMPACT

Implementation of this recommendation represents a major undertaking that will initially impact the assistant superintendent for business and financial services, and the budget supervisor. It is estimated that implementation of this recommendation could require a total of over 120 labor hours in total.

FINDING

The multiple pages of accomplishments and goals included in the current budget document do not communicate effective information for the measurement of performance across the organization. The lack of performance measures prompted a number of recommendations from the GFOA reviewers of the LCPS budget.

GFOA, in a recommended practice document regarding performance measurement, recommends the following:

Performance measures should:

- Be based on program information and objectives that tie to a statement of program mission or purpose.

- Measure program outcomes.

- Provide for resource allocation comparisons over time.

- Measure efficiency and effectiveness for continuous improvement.

- Be verifiable, understandable, and timely.

- Be consistent throughout the strategic plan, budget, accounting and reporting systems and to the extent practical, be consistent over time.

- Be reported internally and externally.

- Be monitored and used in managerial decision-making processes.

- Be limited to a number and degree of complexity that can provide an efficient and meaningful way to assess the effectiveness and efficiency of key programs.

- Be designed in such a way to motivate staff at all levels to contribute towards organizational improvement.

The materials further state that GFOA encourages all governments to utilize performance measures as an integral part of the budget process.

LCPS currently attributes the majority of staffing increases to either increasing enrollment or the opening of new schools. Enrollment increases drive the need for school based positions which are determined by formula and new schools require certain fixed costs such as those associated with school administration, custodial staff and utility costs. The increase for central support positions are not necessarily related to the specific increase of enrollment for a given year. Over time, the cumulative impact of the growth of the division will require additional administrative support positions in areas such as personnel, finance and pupil support services. However, the need for these positions should be based on the specific demand for services, which increase as the number of employees increases, and the number of school locations and enrollment drives the need for additional staff.

The establishment of a program based budget with performance information will provide a basis for more clearly identifying the need for additional positions.

RECOMMENDATION 2-4:

Develop performance measures to correspond to the programs established as part of Recommendation 2-3 and include these measures on the facing page of the two page format contained in Recommendation 2-2.

This second page of the two page format should also include program descriptions and a general overview of the activities expected to occur during the budget year. There should be a relationship between any budget increases and the estimated impact on the performance measures. In conjunction with the financial page, it is important to identify the reasons for any significant budget changes.

Examples of performance indicators for some of the areas identified in **Exhibits 2-12** and **2-13**, could include:

- Cost per square foot for custodial services.
- Cost avoidance from the energy program.
- Inventory turnover for the warehouse services program.
- Response time for urgent service calls for building maintenance.

The current format that includes the multiple accomplishments and goals should be deleted and replaced by the performance information which will more effectively communicate the activities of the organization and the impacts of any changes in the budget.

FISCAL IMPACT

Developing the performance indicators will take a great deal of time; however, there is a high probability that much of the necessary information is already available. A great deal of time is currently being spent on development of the multiple achievements and goals in the current document, thus, time will be saved with the deletion of this section. An estimate of the additional net time required across the organization for the first year of the new format is 200 hours.

FINDING

LCPS balanced a portion of the FY 2008 budget by budgeting 39 new support positions for a portion of the year, (i.e. new positions were budgeted at .50, .75, or .25 rather than as full positions). This resulted in an identified increase of 19.5 support positions for FY 2008 when the reality is the number of full time support employees will increase by 39 positions during FY 2008. The estimated increased costs that have already been established for FY 2009 from these positions is approximately $1.1 million based on the FY 2008 salary levels and benefits. All of these positions were originally identified as full year positions in the FY 2008 proposed budget.

The fact that this FY 2008 decision will have a fiscal impact on the FY 2009 budget is not addressed in the budget document. This decision eased the difficult budgetary decisions for FY 2008, but passes the additional cost of these decisions to FY 2009. Thus, there will be a need to fund the additional $1.1 million for these full time positions that are already in place, but not identified as such in the budget; this will limit the options for budget increases in other areas of the FY 2009 budget. There is no documented best practice information relating to situations like this; however, it seems prudent to review the positions in question and determine organizational priorities and fund the full positions that can be financed from the current budget. The majority of these positions were originally requested in the FY 2007 budget, but were ultimately cut during the budget balancing process.

RECOMMENDATION 2-5:

Cease the practice of budgeting partial positions as a budget balancing tool. If this practice is to occur in the future, the financial impact of these positions on the future years' budget should be disclosed.

There is no way to know the availability of future years' resources, thus, a decision that appears to accomplish a need for support positions in the current year could exacerbate similar circumstances in the future year. It is also important to assure that any unusual decision such as this, be fully communicated complete with an explanation as to why it is important to fill the positions.

FISCAL IMPACT

Implementation of this decision will eliminate the potential of any future costs not currently included in the current year budget to be passed to the following year.

FINDING

As noted in the GFOA reviews of the FY 2007 and FY 2008 budgets, the LCPS budget document does not meet the accepted standards for reporting information for capital improvements. There are two aspects to providing the necessary information to achieve compliance with the best practices in this area: identifying the operating cost of deferred maintenance and identifying the increased operating costs associated with the construction of new facilities.

The financial information presented in the Capital Improvement Plan (CIP) Fund section of the budget identifies total costs by facility type (elementary, middle, high school) as well as building additions or improvements and land acquisitions in a six-year format. The information goes on to identify individual projects for each new school, but summarizes renovations as "middle school renovations" without identifying the specific schools involved. The circumstances requiring the renovations (changing education specifications and age of facilities are two examples) are also not addressed.

The FY 2007 and FY 2008 budgets provide an overview of the impact of the capital improvements program on the operating budget; however, this information is very general. In the FY 2008 budget, the current year impact of additional positions is provided in the introductory materials for the operating fund, yet this information is not included with the data relating to the capital fund.

Basic information relating to capital improvements and future operating cost impacts has been provided; however, this information does not provide the clear picture necessary to integrate the capital and operating needs of the division.

At some point, more than one reviewer of the LCPS budget document may concur that the budget presentation in this area does not meet the GFOA standards and LCPS may not receive the budget award.

RECOMMENDATION 2-6:

Expand the information in the CIP section of the budget to include information on LCPS standards on school size, enrollment information, and estimated future operating costs associated with the construction of new facilities.

Implementation of this recommendation will not only assure a continuation of the receipt of the GFOA budget award, but will also provide improved information to those using the LCPS budget document.

FISCAL IMPACT

All of the information pertaining to this recommendation should be available, thus, it should not be difficult to expand the CIP section of the budget in a way that will improve this presentation. This should take no more than 40 hours of the budget supervisor's time to develop.

FINDING

A program entitled, "non-departmental items" is included in the budget of the department of business and financial services. Non-departmental items by the very definition are identified separately and not included in a specific department budget.

There are five separate line items included in this program, four of which should be elsewhere in the budget. These items and the recommended location in the budget are identified in **Exhibit 2-13**.

EXHIBIT 2-13
NON-DEPARTMENTAL ITEMS
DEPARTMENT OF BUSINESS AND FINANCIAL SERVICES

EXPENDITURE CATEGORY	AMOUNT	PURPOSE OF EXPENDITURE	COMMENTS
Position Salaries	$677,351	This is an item to record increased costs for all classified employees as part of a plan to provide paid holidays to 12 month classified employees.	The financial impact of this change should be disclosed in the budget, but the actual costs should be allocated to the appropriate budget programs.
Fringe Costs	$3,064,312	This is the cost of the program to pay health care for retirees.	This is a non-departmental item.
Unemployment	$73,926	Cost of unemployment insurance paid by the division.	Unemployment insurance typically occurs as either an employee benefit item or in the personnel services area.
Workers' Compensation	$1,102,000	Premiums for workers' compensation.	This is a component of the risk management program and should be in the risk management budget.
Instructional Supplies	$100,000	The purpose for this item is not identified in the budget document.	Regardless of the purpose, this item should be in the appropriate budget program.
Total	**$5,017,589**		

Source: LCPS FY 2008 Budget.

The various items identified as belonging in different programs should be accounted for as appropriate; and the non-departmental program should be included separately and not part of any operating department.

RECOMMENDATION 2-7:

Create a separate category for non-departmental items outside the operating departments and include only those expenditures associated with payment of benefits for retirees in the program with all other budget items allocated to the appropriate departments/programs.

Inclusion of the non-departmental items in the department of business and financial services reflects a distortion of the actual costs associated with department's activities. To properly understand the cost of services all of the appropriate costs should be included in the programs where they are being incurred.
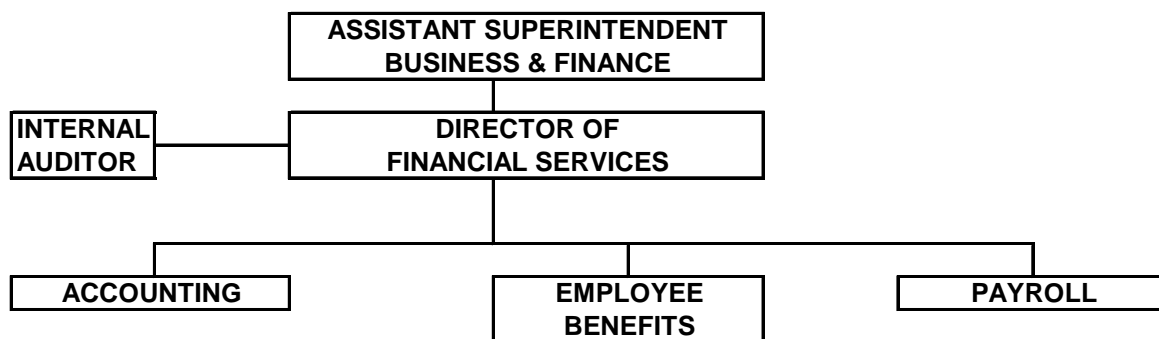
FISCAL IMPACT

There should be no significant fiscal impact from this recommendation. The budgets will have to be realigned and this should take less than an hour of the time of the budget supervisor.

2.3 Financial Management and Reporting

The financial services department is responsible for managing the ongoing financial activities for the division to include the general ledger, student activity funds, financial reporting, internal auditing, accounts payable, purchase card activity, payroll, and the employee benefits programs. The director of financial services is responsible for this department that contains 37 staff members.

EXHIBIT 2-14
DEPARTMENT OF FINANCIAL SERVICES
ORGANIZATION CHART

```
              ┌─────────────────────────────┐
              │  ASSISTANT SUPERINTENDENT   │
              │     BUSINESS & FINANCE       │
              └─────────────────────────────┘
                           │
  ┌──────────┐   ┌─────────────────────────┐
  │ INTERNAL │───│      DIRECTOR OF         │
  │ AUDITOR  │   │   FINANCIAL SERVICES     │
  └──────────┘   └─────────────────────────┘
                           │
      ┌────────────────────┼────────────────────┐
┌─────────────┐    ┌─────────────┐      ┌─────────────┐
│ ACCOUNTING  │    │  EMPLOYEE   │      │   PAYROLL   │
│             │    │  BENEFITS   │      │             │
└─────────────┘    └─────────────┘      └─────────────┘
```

Source: LCPS Department of Financial Services, 2007.

FINDING

LCPS does not provide a Comprehensive Annual Financial Report (CAFR). LCPS is a component unit of Loudoun County and all of the audited annual financial information for the division is included in the Loudoun County CAFR. This information is very brief as the expenditures for the operating fund are identified as a single amount representing the total expenditures for the fund. Thus, there is no mechanism in place to track financial activities from the budget to the CAFR. In addition, the total expenditures identified for the year ending June 30, 2006 are identified as $555,633,524 in the CAFR of the county, while the similar amount identified as the total FY 2006 expenditures in the FY 2008 budget is $536,500,077. The difference in these amounts is attributed to the cost of bus leases, computer leases, and food services activities. These leases are not identified in the LCPS operating fund, and food services activities are accounted for in a separate fund by LCPS.

This manner of year-end reporting is similar to a number of other school divisions in Virginia; however, both Prince William County Public Schools and Fairfax County Public Schools prepare their own CAFRs and given the significant amount of resources expended by LCPS, it would be appropriate to have a standalone year end CAFR for LCPS.

RECOMMENDATION 2-8:

Establish a process for publishing a Comprehensive Annual Financial Report (CAFR) by working with an audit firm.

This would not eliminate the inclusion of LCPS financial information in the Loudoun County government CAFR, but it would provide more useful information as well as provide a mechanism to reconcile to the Loudoun County report.

FISCAL IMPACT

Preparation of the first CAFR will require 80 to 120 labor hours for staff members of the financial services department and approximately $10,000 in additional audit fees.

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Establish a CAFR Process	($10,000)	$0	$0	$0	$0

FINDING

The food services fund is accounted for as a sub-fund of the operating fund in the Loudoun County CAFR, but is identified as a separate proprietary fund in the LCPS budget document which states:

> *The Food Services Fund is utilized to account for all revenues and expenditures relative to the operations of cafeteria services at schools. The fund is financed and operated in a manner similar to a private business enterprise in that its costs are financed through user charges. Some federal and state revenues are received in addition to cash from the sale of meals to students.*

The food services fund currently does not function as defined in the LCPS budget document, but as a special revenue fund where only the direct costs are identified.

The standard of accounting for food services programs across the country is to formally establish the food services fund as an enterprise fund where the acquisition of assets is capitalized, depreciation is accounted for, and all operating costs incurred by the program are charged to the fund. Enterprise funds are used to account for operations that are financed in a manner similar to private business enterprises, where the intent is that the costs of providing goods and services to the general public on a continuing basis be financed or recovered primarily through user charges. The concept is to have a food services fund that is self supporting with no demand for resources from the operating fund of the school system. Food services funds in Virginia are not accounted for as enterprise funds, but as special revenue funds. Special revenue funds are used to account for revenue sources that require separate accounting due to legal and regulatory restrictions or administrative requirements of the governmental entity.

The results of the sub-fund approach and its financial activities associated with the food services program are included with the total operating expenditures and revenues in the Loudoun County CAFR. There is no formal process for identifying the financial position of the program over time in the formal financial reporting.

RECOMMENDATION 2-9:

Formally establish the food services program as a special revenue fund and ensure that it is identified as such in the Loudoun County CAFR and LCPS CAFR if implemented.

The formal identification of the food services fund as a special revenue fund will be consistent with direction from Virginia Department of Education and provide improved information in the Loudoun County CAFR.

FISCAL IMPACT

Implementation of this recommendation will require minimal time to modify the definition of the food services fund in the budget document and work with representatives of Loudoun County to assure the food services fund is accounted for separately in the CAFR. This should require less than a total of eight labor hours from the financial services department staff.

FINDING

The financial reporting for the board consists of quarterly reports that provide an expenditure summary report by line item, summary revenue information, a discussion of projected financial activity for the remainder of the year, and summary expenditure reports for the organizational units for the operating fund only. This is a considerable improvement over similar reports prior to 2007 which contained only the line item information; however, the first report in the package is still the line item summary which helps to reinforce the issue raised in the employee comments in Section 2.1 relating to the apparent excessive concern with line items to the detriment of overall policy and operational management by the school board.

Summary comments are provided with each report and they are helpful; however, they address the line item categories and do not discuss the issues involved in the various operational units. Also, some comments are quite general and do not identify the causal factors for or the organizational decisions that led to variances, both positive and negative. For example, one comment from the June 30, 2007 report states: "As expected, electricity and heating costs were decreased resulting in a savings of $1,098,621". There is no discussion of how this savings was achieved.

This report provides projected year end revenues and expenditures and this is a helpful tool to monitor any potential financial problems that could arise.

This report includes only the operating fund and it should provide information for all funds.

RECOMMENDATION 2-10:

Develop an interim reporting process that includes monthly reports as well as the quarterly reports and continue to provide budgetary information by organizational unit and line item materials; however, the focus should be on any variances as they relate to the organizational units with summary line item information at the end of the report.

The report should provide information for all funds being managed by the division. In conjunction with the monthly reports develop a quarterly financial report that includes financial information on all funds with more detailed discussions of any significant variances.

The focus on organizational financial reporting will begin to focus on organizational issues rather just on individual line items. The inclusion of all funds will provide a more comprehensive picture of the financial activities of the division. The quarterly financial reports will provide an opportunity to relate the fiscal impact to organizational goals and decisions in an integrated fashion.

FISCAL IMPACT

The major change will be in the preparation of the quarterly reports which will probably take up to eight hours of the time of the director of financial services per quarter for a total of 24 hours as the year end report would be in conjunction with the CAFR.

FINDING

A significant amount of financial activities occur in the student activity funds. These are funds established for each school to account for revenues received for various student activities such as entertainment, athletic events, clubs, etc. The resources in these funds are to be allocated to the purposes for which they were collected with certain revenues being available to the student body as a whole. Each school has such a fund and a separate checking account opened by the school. The accounting for student activity funds is a major responsibility at each school and the financial services department established a Student Activity Funds Administrative and Accounting Manual in 2005 which provides excellent direction for those responsible for managing these funds in the schools. This is a very professional document that provides detailed instructions in understandable terms of the accounting procedures to be followed.

A process has also been initiated whereby the student activity fund for each school is audited annually. A summary report is prepared that identifies specific issues by school and each school receives a more detailed report complete with recommendations for improvements if necessary. The manner in which the student activity funds are managed at LCPS is clearly a best practice as very few school systems have as effective manual and seldom have complete audits of each school on an annual basis.

COMMENDATION 2-C:

LCPS is commended for establishing well-designed procedures and an annual audit process for student activity funds that assures proper accountability for these funds.

FINDING

LCPS currently has four salary schedules and 23 separate calendars with varying numbers of work days. The salary for all licensed staff that work other than the 197 work days per year (nine different calendars) requires a manual calculation based on the

appropriate hourly rate for the step and educational attainment of the employee. Classified staff are paid an hourly rate based on their classification from a single salary schedule. **Exhibit 2-15** summarizes the different calendars and the number of employees in each. Deviations from the base work year create the need for a separate calculation. It is estimated that approximately 1,000 of these calculations are required annually for the licensed staff. The standard payroll for LCPS is semi-monthly and the hourly rates for classified employees are converted to a semi-monthly amount.

EXHIBIT 2-15
SCHEDULE OF PAYROLL CALENDARS

JOB CLASSIFICATIONS	NUMBER OF DAYS	NUMBER OF EMPLOYEES
Licensed Staff		
Teachers, Therapists	197	4,780
Special Education Teachers	202	63
Technical Resource Teachers	203	78
Test Coordinators	208	12
Assistant Athletic Directors	208	10
Counselors (MS), Deans, Librarians	207	210
Counselors (HS)	212	61
Band - HS only	217	10
IA/Tech Ed/Vo Ag/Marketing	217	79
Detention Ctr, Child Find, Speech Therapists and Educators, Assistant Technology Trainers	224	12
Administrative Staff		
Full-Time 12 Month	248	311
Classified Staff		
Bus Drivers & Attendants & Cafeteria Workers	185	1,180
Teacher Assistants, Study Hall Monitors, Tech Ass'ts	187	1,036
Safety/Security Specialists	194	100
Career Center Assistants	198	10
School Secretaries	208	97
Library Assistants	208	80
Elementary School Secretaries	213	1
Resource Nurses	218	1
School Attendance Secretaries	221	89
Full-Time 12 month	248	1,080
Auxiliary Staff		
Substance Abuse spec, Social Workers, Spec Ed Counselors	198	12
Athletic Trainers	208	10
Full-Time 12 Month	248	60
Total		**9,382**

Source: LCPS payroll division, 2007.

This is an unusual and cumbersome way for a major school system to calculate pay for its employees. The general practice among school systems is to provide specific salary schedules to support the varying work years for employees. In Virginia, Fairfax County Public Schools is one division that uses this approach.

By establishing separate salary schedules based on the semi-monthly pay, the work of the payroll division will be streamlined and the employees will have a clear perspective on how they are to be paid based upon the schedules.

The number of calendars has evolved over time and although it is possible to have any number of salary schedules, it would be helpful to assess the need for the multiple calendars, especially those with a minimal number of employees.

RECOMMENDATION 2-11:

Establish multiple salary schedules relating to the individual calendars and assess the current calendars to determine if those with minimal numbers of employees can be consolidated.

This change could lead to a large number of salary schedules; however, once created the salary schedules will be much easier to manage and provide a schedule where employees will be able to see their salary level and future levels based on years of service.

FISCAL IMPACT

This process will entail time establishing the new schedules and installing them in the payroll system. Once operational, the time required to manage the payroll system will diminish. The conversion will require coordination with the personnel services department and should require approximately 120 labor hours of payroll staff and approximately 40 hours personnel services staff.

FINDING

LCPS implemented an E-pay program in 2006-07. With this program, every employee can access their pay information online. For those employees with direct deposit, this service eliminates the need to print direct deposit vouchers. Approximately 75% of the division employees take advantage of this program which has improved efficiency in the payroll operation as the need for direct deposit forms is reduced and the mechanical process of distributing them is also reduced. Perhaps most significant, in a school system with employees on a 12 month pay schedule, but with a school-based work year, it is not necessary to mail pay information during the summer months.

This practice is recommended by GFOA as stated in the Recommended Practice Regarding Electronic Commerce and Cash Management. GFOA recommends that state and local governments investigate and adopt electronic payment methods suitable for their specific needs. Advantages of these programs are identified as eliminating the storage, handling and processing of paper checks, reduces the visibility of information used in payment fraud, and reduces the occurrence of lost or stolen checks.

COMMENDATION 2-D:

LCPS is commended for implementing the E-pay system.

FINDING

The benefits division of the financial services department provides excellent support to the employees of the division. A well designed employee handbook that provides

detailed information about the benefits provided and how to access them is available to all employees. In conjunction with the risk management division, effective new employee orientations are provided weekly. These orientations not only discuss benefits and employee safety, but also provide general overall information about the division.

Each employee of the division receives an annual benefit report which identifies in detail the cost for both LCPS and the employee for the employee benefits received. Included is a calculation of the percentage of benefits received by the employee. This is very helpful in communicating to each employee the total value of their compensation beyond their salary.

Another example of benefits support is a series of wellness programs also scheduled annually and provided on a calendar which is available to all employees. LCPS is the only school system in the nation to be honored by the American Heart Association's "Fit Friendly" award. This is a highly selective award that recognizes employers who have embraced a culture of wellness at work.

COMMENDATION 2-E:

LCPS is commended for implementing and managing an effective comprehensive employee benefits program.

2.4   Risk Management

A well-managed school system limits its exposure to financial losses through adequate insurance coverage for division employees, students, and assets. Most school systems have a risk management function to manage risk through loss control programs.

LCPS participates in the Virginia Municipal Liability Pool (VMLP), a risk pool for Virginia governmental entities. Workers' compensation is self-insured with third party administrator services through the Virginia Association of Counties Risk Management Programs (VACORP).

FINDING

LCPS has no policy that clearly defines the responsibilities of the risk management program. The only policy relating to this topic is §4-6, Insurance, which identifies the minimum insurance coverage for the division. This policy also notes; "The assistant superintendent of business and financial services shall be responsible for administering the insurance program for the School System."

The risk management department has responsibility for managing over 100 property/liability claims and in excess of 200 workers' compensation claims annually. The annual cost associated with premiums and self-insured claims exceeds $2,000,000. Although the risk management program is being administered effectively, the board policy does not clearly define the responsibilities of the risk management department.

To effectively manage a risk management program of the magnitude being managed by LCPS, the specific responsibilities of the risk management function should be identified.

A good example of this type of policy can be found in Fairfax County Public Schools as also shown in **Exhibit 2-16**.

RECOMMENDATION 2-12:

Convert the insurance coverage portion of existing policy §4-6 to a regulation and establish a new policy entitled, "risk management" that defines the purpose of the risk management program, spells out the responsibilities to be assigned to the program and identifies the related responsibilities of the schools and departments.

The creation of a formal policy similar to **Exhibit 2-16** should provide LCPS with clear direction regarding responsibilities for risk management activities. The implementation of this recommendation will provide risk management with the authority to assure that the policy is adhered to across the division.

FISCAL IMPACT

This policy revision can be developed by the assistant superintendent for business and financial services and the risk supervisor and should take no more than a total of eight to ten hours.

FINDING

The risk management department has established written procedures for all areas of responsibility to include property and liability insurance management, workers' compensation, various activities involving requirements associated with the Occupational Safety and Health Administration (OSHA), maintaining a database of certificates of insurance required to support certain contracts for services, risk assessments, and recommendations relating to school activities, and overseeing compliance with the Americans with Disabilities Act (ADA).

These procedures provide specific direction for anyone within the risk management department regarding the responsibilities of the department as well as information required of staff members throughout the organization. Information is included for topics related to field trips, student activities support groups, and specific responsibilities associated for compliance with the Americans with Disabilities Act (ADA).

These materials represent a best practice for LCPS.

EXHIBIT 2-16
SAMPLE RISK MANAGEMENT POLICY

Policy 5705.1
School Board
FINANCIAL MANAGEMENT
Risk Management
Purpose and Responsibilities of Risk Management

This policy supersedes Policy 5705.
I. PURPOSE
The purpose of risk management in Fairfax County Public Schools (FCPS) shall be:
A. Minimizing all risks to the safety, and health, of its student population, its workforce, and its constituents, as well as, the financial resources of the Fairfax County School Board.
B. Reducing the frequency and severity of losses.
C. Achieving the above in the most effective**,** efficient, and sensible manner.

II. RESPONSIBILITIES
A. Risk Management (RM), Office of Finance, Department of Financial Services, shall:

1. Provide risk assessments for schools and offices on a wide range of issues (e.g., insurance, liability, unusual field trips, and other curricular and extracurricular activities) in order to identify the risks, treat the risks, monitor the treatment results, and modify the treatment when necessary.
2. Administer the School Board's liability self-insurance program, including coordinating claims investigation and legal actions.
3. Manage claims (both for and against FCPS), analyze restitutions and losses, and report on same.
4. Obtain commercial insurance policies from financially sound companies.
5. Manage the optional student insurance program, and fund insurance coverage for FCPS participation in the Virginia High School League.
6. Design risk financing options.
7. Monitor, analyze, evaluate, report, and make recommendations concerning student, employee, and citizen accidents, vehicle accidents, property losses, and legal liability issues.
8. Administer the Risk Management Information System (STARS).

B. All schools and offices shall:
1. Monitor and periodically inspect facilities and equipment to assure their safe condition and operation.
2. Report promptly, and take out of service if necessary, any facility or equipment that is in an unsafe condition.
3. Evaluate all curricular programs, extracurricular activities, and/or work practices for safety and loss prevention.
4. Coordinate issues involving risk management responsibilities with RM.
Policy

Adopted: April 28, 1994
Corrected: June 8, 1998
Revised: July 26, 2002 FAIRFAX COUNTY SCHOOL BOARD

Source: Fairfax County Public Schools, Board Policy, 2002.

COMMENDATION 2-F:

The risk management department is commended for establishing and maintaining excellent procedures and communication mechanisms to effectively manage the risk management functions for LCPS.

FINDING

The risk management division, working with the fire marshal, facilities services, and safety and security, performs an annual safety audit for each school to identify potential safety hazards. This results in a written document from the risk management supervisor identifying issues to be addressed. This is a very effective program as it incorporates cooperation between the appropriate departments within LCPS as well as including the fire department. In most large school systems, this type of activity is either nonexistent or accomplished for a fixed number of schools annually.

COMMENDATION 2-G:

LCPS is commended for implementing an excellent annual process for identifying safety hazards at each school.

2.5   *Purchasing*

Purchasing and contract management functions within a school system should ensure that the highest quality supplies, equipment, and services are purchased at the best price. The process must ensure that the decision has provided a fair opportunity to all participating vendors in compliance with applicable statutes of the Commonwealth of Virginia and School Board policies. A key element in providing a fair opportunity to vendors is to have a process that results in an objective decision and represents no conflict of interest. These criteria should be met for each purchase without sacrificing quality and timeliness of delivery.

FINDING

LCPS installed a new online purchasing system (OLPS) in 2006 that has been working effectively and is well understood by the schools and departmental users. It consists of on-line vendor registration, on-line notification to potential bidders of posted solicitations, on-line bidding, list of division contracts, and an electronic ordering process which has replaced the paper purchase orders.

Comments from school personnel and departments reflect a great deal of satisfaction with the new system. The introduction of this system was a major undertaking which has been successfully implemented and well received by school based personnel.

COMMENDATION 2-H:

The purchasing department of LCPS is commended for implementing the online purchasing system that provides improved efficiency and customer service.

FINDING

The purchasing department of LCPS has developed a process of awarding bids to vendors either directly or through any one of numerous purchasing cooperatives for the

purchase of standard products. With the purchasing cooperatives, LCPS is able to "ride" agreements entered into by other organizations as appropriate. One such organization is U.S. Communities. This is a nonprofit governmental agency that allows for improved purchasing power among governmental entities through competitively solicited contracts through lead public agencies. For example, LCPS purchases student furniture from the vendor who entered into a contract through Wichita Public Schools (WPS). A condition of this contract is that any school system participating with U.S. Communities will gain the terms and conditions solicited by WPS. This allows LCPS and other school systems to benefit from the economies of scale derived from such a program.

A list of the contracted vendors along with information relating to discounts and other conditions is included in the online procurement manual.

The approach being used by LCPS is consistent with current practices in governmental purchasing and has allowed the purchasing department to operate effectively with a total of six staff members. This is a small staff for an organization the size of LCPS.

COMMENDATION 2-I:

LCPS is commended for actively participating in numerous purchasing cooperatives and establishing standard contracts with vendors to provide an easy process for schools and departments to obtain the necessary goods and services.

FINDING

LCPS has implemented a purchase card process that allows schools and departments to order products and services directly from a vendor for purchases. The system has been established to provide schools and departments with the ability to purchase goods and services directly from vendors without the need to process a purchase request.

Formal procedures regarding the program have been implemented and the appropriate staff members have been trained on the use of the cards. These cards are limited to purchases of less than $1,000 with the exception of specific individuals who may be in a position to use the card for higher purchases. The system contains controls that will block the use of the cards for certain transactions such as travel and meals, although some positions such as recruiters are authorized to use the cards for travel purposes.

The use of purchase cards has become an accepted method of purchasing for local government entities and is typically identified as the preferred manner for the purchase of routine items. The purchase card is used in conjunction with the annual contracts identified in the previous finding.

A number of school based bookkeepers have indicated they process almost all of their transactions on the purchase card.

COMMENDATION 2-J:

LCPS is commended for effectively implementing the use of purchase cards.

FINDING

Although the purchase card process is functioning effectively, the use of this method of purchasing is not addressed in any school board policy. School board policy §4-24, methods of procurement, identifies the various methods of procurement available to LCPS, but does not reference the purchase cards. With the potential of purchase card transactions increasing, it would be prudent to address this issue either with a separate policy or an amendment to the existing purchasing §4-24 policy, Methodology Procurement.

RECOMMENDATION 2-13:

Establish a policy addressing the use of cards for LCPS with the revised school board policy §4-24, Methodology Procurement, to include authorization for the use of purchase cards.

The day-to-day management of this program is handled by the financial services department and specific procedures are in place. The revision of the policy will formalize this activity.

FISCAL IMPACT

The revision of this policy should take the director of financial services no more than two hours to complete.

2.6   *Warehouse Management*

The warehouse services operation is located in the support services department. The main items retained in inventory include furniture, copier paper and related supplies, and textbooks. Warehouse services also provides daily courier service for the division, receives and disposes of surplus property, and serves as a delivery point for certain products ordered by schools and departments as appropriate. There is also an inventory function involving building supplies in facilities services.

FINDING

There is no recording of the value of inventories for items such as furniture, copier paper, miscellaneous supplies, or textbooks on the financial records of LCPS.
There is a formal inventory of furniture and copier paper, but the value of the inventory is not recorded as an asset. An inventory of textbooks is maintained, but there are no inventory records identifying the number textbooks in the inventory.

The purchase of furniture retained in inventory is treated as an expenditure in the assistant superintendent for support services program. This is an unusual approach as the expenditure for what is mainly school furniture is identified as a support services cost rather than a cost associated with the schools.

The copier paper is also charged to the assistant superintendent for support services program, however, when the paper is distributed, a journal entry occurs allocating the cost to the school/department and crediting the expenditure account in the assistant superintendent program. This is a cumbersome process.

The textbooks are charged to the regular education program, delivered to the warehouse and distributed as required in the absence of a formal inventory.

Sound inventory management involves the effective accounting for inventoried assets. Each item in inventory should be priced and the inventory value identified on the balance sheet. The expenditures would then be recorded when the inventory items are purchased by the user school or department.

There is also an inventory function that supports the facilities services activities. This activity was not included in this review; however, any actions taken in relation to the central inventory should also be incorporated into the building maintenance inventory.

RECOMMENDATION 2-14:

Establish formal inventory values for the items managed in the central warehouse and charge the appropriate user accounts upon delivery of the goods to the user site.

The central inventory is an asset that should be accounted for as such on the financial records of LCPS. When issued, the items issued should be charged to the user school/department and the value of the inventory reduced. This is the standard manner for managing inventories in all organizations.

FISCAL IMPACT

This change will have the impact of a one time savings in the operating accounts of LCPS as the creation of the inventory asset will result in a reduction in expenditures. This is an accounting change that will not impact cash flow, but does impact the operating expenditure accounts. It is not possible to determine the value of the inventory until a formal inventory is taken; however, it is possible that the inventory value of the furniture, copier paper, and other miscellaneous items will be at least $300,000.

FINDING

The current arrangement for managing the inventories incorporates all of the related responsibilities for managing the inventories within a single organizational unit. This unit is responsible for receiving the goods, maintaining the perpetual inventory, and distributing the goods. A key element associated with the management of inventories is to have a separation of duties to assure appropriate internal control over the inventories. The management of inventories is a business activity and this function is traditionally assigned to the business office in most school systems to provide for both improved internal control and to assure that sound business practices for inventories are in place.

RECOMMENDATION 2-15:

Transfer management of the warehouse activities from the department of support services and facilities services to the department of business and financial services.

The transfer of this function to the department of business and financial services will improve internal control and ease the conversion of the inventories.

FISCAL IMPACT

There will be no fiscal impact except for one hour of the superintendent's time to notify staff and an additional hour of clerical staff to reflect the change in the organizational charts.

3.0 EDUCATIONAL SERVICES DELIVERY

3.0 EDUCATIONAL SERVICES DELIVERY

This chapter presents findings, commendations and recommendations relating to the cost of educational services in the Loudoun County Public Schools (LCPS). The major sections of the chapter include:

3.1   Professional Development of Certified Personnel
3.2   Student Performance
3.3   School Improvement

CHAPTER SUMMARY

The Loudoun County Public Schools is committed to utilizing its resources to provide appropriate instruction and support services to its students.

Key commendations in the area of educational services delivery include:

- Providing financial support for teachers obtaining certification in instructional technology integration to enhance their instructional expertise.

- Creating the MyLearning Plan Program as a portal for online registration with courses leading to the renewal of professional licenses for certified personnel.

- Providing a comprehensive program of training and orientation to new teachers. Program processes and content are in keeping with best practices.

Key recommendations in the area of educational services delivery include:

- Expand the Instructional Coach Program to all LCPS schools.

- Incorporate the strategies gained through previous cultural competency inservice activities with research-based, effective, instructional strategies.

- Create a school improvement plan checklist to guide the development of plans and to ensure the uniformity of plan components across the division.

LCPS serves a diverse population of 54,047 students with varying needs and abilities. The division offers a vast array of educational services and programs with a budget of over $548 million to meet these needs. One of the greatest challenges is closing the achievement gap between the sub-group student populations and increasing the number of schools achieving Adequate Yearly Progress (AYP) as per the federal mandate of *No Child Left Behind* (NCLB).

The division operates 72 schools as of the 2007-08 school year, more than half of which are elementary schools. The breakdown is as follows:

- 47 elementary schools (Grades K-5)
- 12 middle schools (Grades 6-8)
- 1 intermediate school (Grades 8-9)
- 10 high schools (Grades 9-12)
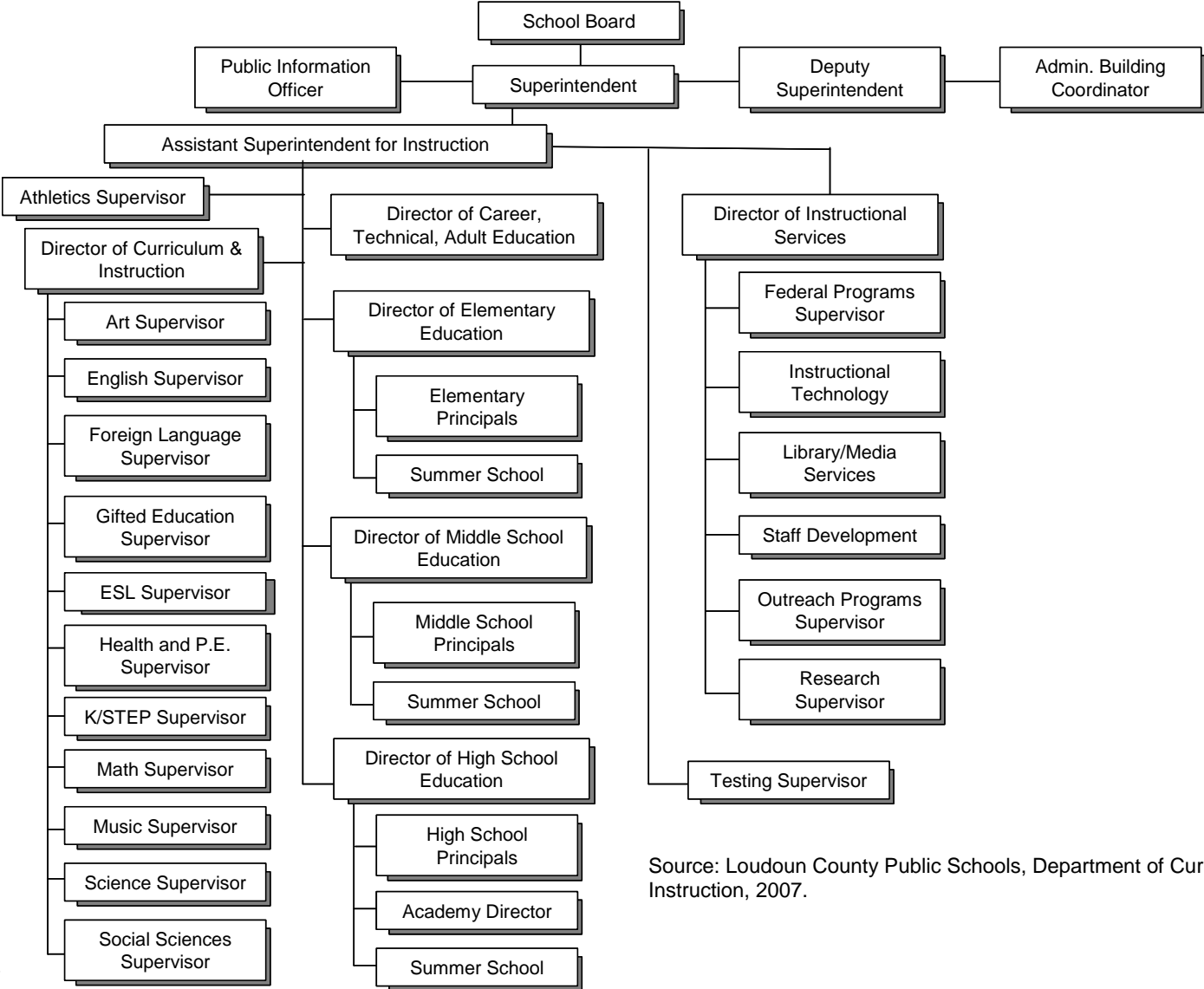- 2 instructional centers

A review of the organizational structure of the curriculum and instruction department reveals a traditional hierarchical structure. As shown in **Exhibit 3-1**, the department is headed by the assistant superintendent for instruction. The assistant superintendent has six directors who are direct reports to the assistant superintendent for instruction and supervise the areas of career, technical and adult education; elementary schools; middle schools; high schools; curriculum and instruction; and instructional services. The other direct reports are the division's testing supervisor and the athletics supervisor.

Under the director of curriculum and instruction are 12 supervisors each overseeing an area of curriculum. Each director of elementary, middle and secondary schools supervises the school principals at those levels. The director of instructional services supervises all federal programs, instructional technology, library/media services, staff development, outreach programs, and research and evaluation.

The department of instruction has worked with the division schools to achieve goals outlined in both division and school improvement plans. The stated mission of the department is to "provide leadership, support, direction, and resources in the areas of curriculum, instruction, and assessment, to create a climate of success for all learners." Notable accomplishments from the 2006-07 school year included the following:

- Increased the scope of summer school programs to include a variety of models in regional and individual school sites.

- Increased the number of elementary schools participating in the Steps to Literacy reading program by five schools.

- Implemented foreign language options for seventh grade students.

- Successfully implemented Year One of the Mandarin Chinese and Spanish for all grade 6 students in the middle school curricula.

- Exceeded the goal of a 10 percent increase in participation in advanced placement (AP) classes for all students (actual increase: 19.8 percent).

- Exceeded the goal of a 20 percent increase in participation in AP classes for minority students (actual increase: 21.3 percent).

EXHIBIT 3-1
ORGANIZATIONAL CHART FOR THE CURRICULUM AND INSTRUCTION DEPARTMENT
LOUDOUN COUNTY PUBLIC SCHOOLS
2007-08 SCHOOL YEAR

School Board

Public Information Officer

Superintendent

Deputy Superintendent

Admin. Building Coordinator

Assistant Superintendent for Instruction

Athletics Supervisor

Director of Curriculum & Instruction
- Art Supervisor
- English Supervisor
- Foreign Language Supervisor
- Gifted Education Supervisor
- ESL Supervisor
- Health and P.E. Supervisor
- K/STEP Supervisor
- Math Supervisor
- Music Supervisor
- Science Supervisor
- Social Sciences Supervisor

Director of Career, Technical, Adult Education

Director of Elementary Education
- Elementary Principals
- Summer School

Director of Middle School Education
- Middle School Principals
- Summer School

Director of High School Education
- High School Principals
- Academy Director
- Summer School

Director of Instructional Services
- Federal Programs Supervisor
- Instructional Technology
- Library/Media Services
- Staff Development
- Outreach Programs Supervisor
- Research Supervisor

Testing Supervisor

Source: Loudoun County Public Schools, Department of Curriculum and Instruction, 2007.

This chapter reviews LCPS academic programs and the accompanying levels of student achievement, along with the professional development services provided for instructional personnel.

LCPS devotes the majority of its fiscal resources to the support of instruction throughout the division. The 2007-08 operating budget totals $690,564,208. Of that total, $548,639,944 is allocated to instruction. This figure represents 79 percent of the total operating budget and the largest single expense. **Exhibit 3-2** shows the LCPS 2007-08 operating budget by operational area, with the amount budgeted for each area and the percent of the total budget the figure represents.

EXHIBIT 3-2
LCPS OPERATING BUDGET
2007-08 SCHOOL YEAR

OPERATIONAL AREA	BUDGET AMOUNT	PERCENT OF BUDGET
Instructional Services	$548,639,944	79.4%
Administration/Attendance/Health	$29,453,110	4.3%
Pupil Transportation	$47,073,195	6.8%
Facilities	$3,258,927	0.5%
Operations and Maintenance	$62,139,032	9.0%
TOTAL	**$690,564,208**	**100%**

Source: LCPS Fact Sheet, 2007-08.

In its review of these functional areas, MGT examined a variety of documentation including policy and procedural handbooks, personnel records, staff training and development logs, departmental financial data and forms, employment contracts, and informational brochures, along with the LCPS Web site. In addition, MGT consultants conducted interviews with all curriculum and instruction central office personnel, including the assistant superintendent for instruction, school-based administrators, and staff. These activities allowed the performance review team to gain insight into the operational routines of LCPS, make recommendations, and note commendations regarding division policies and practices.

Consultants surveyed LCPS central office administrators, principals, and teachers, seeking their perceptions of all aspects of division operations. These assistant principals and three employee groups were asked to rate four school division functions—curriculum planning, instructional supervision, instructional support, and staff development—as either needing *some improvement* or *major improvement* or as *adequate* or *outstanding*.

As shown in **Exhibit 3-3**, all three employee groups were uniformly positive in their ratings of all four functions, with 65 to 74 percent of central office administrators rating each function as *Adequate* or *Outstanding*. Principals were even more favorable with the percentage of *Adequate* or *Outstanding* responses with a range of 86 to 93 percent. Teachers' favorable ratings were considerably below those given by principals, with the percentage responding *Adequate* or *Outstanding* dropping to a 59 to 64 percent range.

EXHIBIT 3-3
SURVEY RESULTS
QUALITY OF SCHOOL DISTRICT FUNCTIONS

SCHOOL DISTRICT FUNCTION	ADMINISTRATORS		PRINCIPALS		TEACHERS	
	% ADEQUATE/ OUTSTANDING	% NEEDS SOME/MAJOR IMPROVEMENT	% ADEQUATE/ OUTSTANDING	% NEEDS SOME/MAJOR IMPROVEMENT	% ADEQUATE/ OUTSTANDING	% NEEDS SOME/MAJOR IMPROVEMENT
Curriculum Planning	65	17	86	13	59	32
Instructional Support	73	15	86	15	64	27
Instructional Technology	74	17	93	7	61	26

Source: MGT of America, Loudoun County Public Schools Survey Results, 2007.

In addition to specific areas of performance, the online survey asked administrators, principals, and teachers to respond to a series of statements regarding a variety of operations within curriculum and instruction. The statements and the responses of the three groups are shown in **Exhibit 3-4**. As shown in the exhibit, each survey participant was asked to read each statement and respond with either *Agree or Strongly Agree* or *Disagree or Strongly Disagree*. The statements receiving the highest percentage of *Agree or Strongly Agree* responses were as follows:

■ Teachers have adequate supplies and equipment needed to perform their jobs effectively.

■ Teachers and staff are given opportunities to participate in the textbook and material adoption processes.

■ Our schools have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.

■ Our division provides curriculum guides for all grades and subject areas.

Central office administrators' responses to the statement, "*Lessons are organized to meet students' needs*" varied a great deal from those by school administrators and teachers. While only 54 percent of central office administrators responded that they *Agreed or Strongly Agreed* to the statement, 92 percent of school administrators and 79 percent of teachers provided a favorable response.

EXHIBIT 3-4
SURVEY RESPONSES ON CURRICULUM AND INSTRUCTION
LOUDOUN COUNTY PUBLIC SCHOOLS
2007-08 SCHOOL YEAR

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
The emphasis on learning in this school division has increased in recent years.	80/1	86/4	68/8
Sufficient student services are provided in this school district (e.g., counseling, speech therapy, health).	81/6	90/6	76/13
Our schools have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	86/3	97/3	79/15
I know who to contact in the central office to assist me with curriculum and instruction matters.	82/1	98/1	73/14
Lessons are organized to meet students' needs.	54/5	92/0	86/4
The curriculum is broad and challenging for most students.	70/5	95/1	83/8
Teachers in our schools know the material they teach.	67/1	98/0	91/1
Teachers and staff are given opportunities to participate in the textbook and material adoption processes.	88/0	99/0	89/2
Teachers have adequate supplies and equipment needed to perform their jobs effectively.	83/2	97/1	74/17
Our division provides curriculum guides for all grades and subject areas.	72/5	98/0	91/3
Our division uses the results of benchmark tests to monitor student performance and identify performance gaps.	73/1	89/1	83/5

Source: MGT of America Survey, Loudoun County Public Schools, 2007.

3.1   *Professional Development of Certified Personnel*

The stated mission of LCPS professional development is "Provide high quality professional development that is focused on supporting the goals of the school division. The program is designed to provide opportunities for professional growth and improvement that will influence student learning, performance, and achievement." The program is based on standards specified by the National Staff Development Council (NSDC). According to NSDC, in order to positively impact student achievement, professional development must have the following:

Context Standards

- Organizes adults into learning communities whose goals are aligned with those of the school and division.

- Requires skillful school and division leaders who guide continuous instructional improvement.

- Requires resources to support adult learning and collaboration.

Process Standards

- Uses disaggregated student data to determine adult learning priorities, monitor progress, and help sustain continuous improvement.

- Uses multiple sources of information to guide improvement and demonstrate its impact.

- Prepares educators to apply research to decision making.

- Uses learning strategies appropriate to the intended goal.

- Applies knowledge about human learning and change.

- Provides educators with the knowledge and skills to collaborate.

Content

- Prepares educators to understand and appreciate all students, create safe, orderly and supportive learning environments, and hold high expectations for their academic achievement.

- Deepens educators' content knowledge, provides them with research-based instructional strategies to assist students in meeting rigorous academic standards, and prepares them to use various types of classroom assessments appropriately.

- Provides educators with knowledge and skills to involve families and other stakeholders appropriately.

Staff development has a Web page on the school division's Web site that provides a wealth of information regarding training activities and opportunities. The home page features links to six other sections of the site:

- Courses and Workshops
- Frequently Asked Questions
- GMU Technology Integration Certification
- Staff Development Council
- Staff Development Department Contacts
- Tuition Reimbursement

The department has created an online registration system for courses and workshops through a system called MyLearningPlan. In addition to course registration, the password-protected, electronic system allows for licensed personnel to track the number of license renewal points they have accumulated and to apply for tuition reimbursement

for completed college courses. The *contacts* link provides access to the names, emails, and phone numbers of staff development personnel in the central office.

According to the Web site, each year LCPS conducts the largest educational conference in the Commonwealth of Virginia. This three-day conference is conducted during the month of August, and provides over 700 workshop offerings relating to school board goals and system initiatives. The conference is structured as a professional learning community to allow teachers to engage in conversations facilitated by exceptional educators from both within LCPS and across the nation.

FINDING

LCPS has instituted a professional development program using instructional coaches that exemplifies the quality standards specified by NSDC.

The LCPS Instructional Coach Program is a school-based, one-on-one approach to staff development designed primarily to support beginning (first-year) teachers. The other targeted participants of the program are experienced teachers who are new to Loudoun County and non-tenured teachers in need of intensive support. The program's objectives are focused on increasing job satisfaction, improving teacher performance, and reducing teacher attrition.

Schools selected for the program must meet the following criteria: (1) the school failed to meet AYP the previous year; (2) meets the "hard-to-staff" designation as established by the Virginia Department of Education; and (3) other criteria as determined by the LCPS Department of Instruction.

Over the course of the 2006-07 school year, the two instructional coaches provided the following services outlined in **Exhibit 3-5**.

EXHIBIT 3-5
INSTRUCTIONAL COACH PROGRAM ACTIVITIES
LOUDOUN COUNTY PUBLIC SCHOOLS
2006-07 SCHOOL YEAR

INSTRUCTIONAL COACH ACTIVITIES	NO. OF HOURS
One-on-One Coaching Sessions (Visitations, classroom observations, teacher conferences)	264
Discussions with School Leadership (Principal conferences, assistant principals, department chairs)	34
Summer Faculty Retreat* (Orientation sessions for teachers)	20
Induction Team Meetings* (Monthly group discussions with teachers throughout the year)	7

Source: Loudoun County Public Schools, Research Office, 2007.
*Activities were only at Dominion High School.

The LCPS research staff conducted an evaluation of the program and presented its findings in September 2007. The conclusions contained in the report showed a high degree of satisfaction with the program by beginning teachers, and that the program was

especially beneficial to those teachers who had not had previous student teaching experience. The report included several recommendations that would enhance the program's effectiveness if it were continued and/or expanded.

This type of professional development reflects the high quality standards specified by NSDC and its utilization is becoming widespread in school divisions around the country. Given the positive feedback from participants in the pilot venture, expanding the program would provide the type of support for instruction that would serve as an effective companion to teacher retention efforts conducted by the personnel services department.

COMMENDATION 3-A:

LCPS is commended for conducting a program of professional development for licensed personnel that reflects the high quality standards specified by NSDC and that is being disseminated throughout the division.

RECOMMENDATION 3-1:

Expand the Instructional Coach Program to all LCPS schools.

The current number of instructional coaches should be expanded by deploying instructional resource personnel in the department of instruction such as content area supervisors. Using these staff members would require a restructuring of their current duty assignments; however, with their subject matter expertise, they could be used strategically in those schools and with teachers in greatest need of their services in order to enhance their professional performance. In planning for program expansion, the recommendations from the 2007 evaluation report would serve as an effective guide to structuring the expanded program.

FISCAL IMPACT

During the first year of program expansion, the only costs would be the time demands on the content area supervisors, but subsequent years may require hiring additional teachers to serve as instructional coaches. A follow-up evaluation by the research office at the end of the first year of program expansion would assist in making that staffing decision.

FINDING

LCPS has made a significant financial commitment to technology integration in the curriculum by providing tuition reimbursement for the Instructional Technology Program (ITP) at George Mason University.

The ITP prepares K-12 teachers to assume leadership roles in implementing, supervising, managing and integrating technology resources in schools. The ITP certificate includes a course of study delivered through an online process for students who do not desire or are unable to attend on-campus courses.

The division offers teachers the option to take the courses without pursuing the certificate, but discourages taking more than one course per semester. The certificate

program consists of eight courses worth 12 graduate credits. The courses are designed to enable staff to:

- Meet the VA Technology Standards.

- Develop expertise with instructional strategies for classroom practice.

- Complete the assignments independently in conjunction with an online mentor.

- Complete the assignments with a colleague, who is also registered for the online course, in conjunction with an online mentor.

The certificate program also provides online mentors who are teachers with expertise in the area of technology integration.

Technology is a valuable tool that extends a teacher's capability to reach students by appealing to a range of learning styles and academic interests. By providing teachers with a means to enhance their instructional technology skills at no cost to them, LCPS has provided an avenue through which it can build internal capacity in the area of instructional technology.

COMMENDATION 3-B:

LCPS is commended for providing financial support for teachers obtaining certification in instructional technology integration to enhance their instructional expertise.

FINDING

LCPS has a comprehensive system for selecting and participating in courses for professional license renewal.

Online registration systems provide a number of advantages to both individual users and the school division as a whole. These advantages include:

- **Increased convenience for the course registrant:** Pre-populated registration forms aid in the convenience of completing a registration form. Persons should only complete the personal data once, then the data should appear automatically the next time that individual logs on to the registration system.

- **System durability:** The capacity of the computer system should be sufficient to accommodate hundreds of users and thousands of records in an easily scalable manner. The system should also provide registrants with the ability to register for multiple courses, with different fee pricing, and all pricing totaled at the end.

- **Automated communication:** The system has the capability of generating e-mails to course registrants informing them of course updates, schedule changes, and automatic reminders of registered course date, time and

location. The system needs to have an opt-out function for those not wishing to receive e-mail messages.

■ **Increased efficiency for the course instructor:** The system would allow course instructors or others involved in professional development to monitor the registration level for all courses to determine if similar courses should be consolidated or cancelled due to low interest, or to see when courses have filled and if new sections need to be added to the schedule. The system needs to generate a roster of participants with specified data (e.g., name, school, grade/ subject) at the close of the registration period.

■ **Improved data analysis and reporting:** These systems typically provide the ability to track and manage multiple courses, and have built-in data analysis tools with graphs, budget comparisons, and other features, with reports generated using Excel, Access, and other reporting tools.

■ **Security and support:** Many systems allow the instructor or other authorized personnel to help ensure system accuracy and security. Secure socket layer (SSL) encryption is used to transfer payment (i.e., credit card) data or personal information such as Social Security numbers securely. These systems also feature highly secure data warehouses, with firewalls, backups, redundant fault-tolerant fail-over systems, and other features to protect data and eliminate system downtime.

The division's department of instruction produces a regular series of course offerings in the summer, fall, and spring of each year. A searchable, online catalog of courses is posted on the division's Web site in an application entitled MyLearningPlan.com, and each course title is accompanied by the following information:

■ Course number.
■ Number of credits that can be earned.
■ Who is eligible to take the course.
■ Name of the instructor.
■ Day and time of the course.
■ Cost.
■ Location.
■ Special information (for example, name and number of a contact person).

The Web site provides all relevant information regarding course offerings and presents the information in a concise, easily understood manner. Details relating to such areas as course attendance, payment, and any special circumstances surrounding the course are also provided. **Exhibit 3-6** provides a sample illustration of the course details offered at the Web site. As shown in the exhibit, the sample course advertisement provides all the information necessary to allow a teacher to make an informed decision on whether or not to enroll in the course.

EXHIBIT 3-6
PROFESSIONAL DEVELOPMENT EDUCATION
PARTICIPATION INFORMATION FOR COURSE REGISTRATION
2005-06 SCHOOL YEAR

1. **C - SU - SETR 505: Foundations/Legal/Ethical Aspects of Special Education** *Enrollment Closed*

Shenandoah - 3 credits/90 pts (Level 1) Content for all licensed staff. The course provides an introduction and overview of the field of special education from the perspective that it is a subsection of general education; that the field is in transition by virtue of philosophical, as well as legislative and programmatic changes. Emphasis is on current trends and future directions for special, remedial, and public education. In addition, critical analyses of research and legal aspects are addressed. This course is approved and meets the Virginia Dept. of Education requirements for conditional licensure. Textbooks for this course can be ordered through the SU bookstore at www.booksforsu.com Be sure to enter the site under the option for the main campus not the NVA campus. The course number and section will be required in order to view and order a text. The section number for all SU courses offered in Loudoun is CEEn.

| Dates: **Jan 10 - Apr 18** | Credits: **3.00** Hours: **45.00** | # Enrolled: **24/20** | Cost: **$0** |

Source: Loudoun County Public Schools, MyLearningPlan Web Site, 2007.

The provision of professional development courses in the division facilitates the ability of certified personnel to obtain the credits necessary for the renewal of their professional license. The structure of the course delivery and content of course offerings reflect best practices in professional development. In accordance with LCPS's strategic plan for professional development, course offerings are aligned with instructional and district initiatives. All courses are offered after the regular school day and on Saturdays, eliminating the cost for substitute teachers.

COMMENDATION 3-C:

LCPS is commended for its MyLearningPlan Program as a portal for registering for courses leading to the renewal of professional licenses for certified personnel.

3.1.2 *New Teacher Development*

The LCPS hires in excess of 700 new teachers each year. The challenge is to give these new employees the support they need not only to remain in the profession, but to develop into high-quality educators as demanded by the standards of *No Child Left Behind* and other accountability measures, including local division requirements. In recognition of this challenge, LCPS has created a support network consisting of print materials, mentor teachers, and specialized training to enhance their teaching skills and increase the likelihood of their remaining both in the division and in the profession.

The first step in developing effective strategies to support new teachers is to identify the areas in which these new educators need the most assistance. Most researchers agree that the day-to-day issues are the first priority: where to find necessary supplies, how to deal with behavioral problems, and exactly what classroom materials are needed.

Beyond these routine issues, research shows that new teachers need guidance and support in the following areas:

- Setting up a classroom for the first time.

- Learning school routines and procedures.

- Designing lesson plans.

- Developing classroom management skills.

- Responding effectively to behavior and discipline problems.

- Teaching with limited resources.

- Motivating students and engaging them in class activities.

- Creating a community of learners.

- Working effectively with English-language learners (ELL), learning disabled, and special needs students.

- Understanding social and environmental factors that may contribute to student behavior and performance.

- Assessing student performance.

- Understanding new state and division standards and assessments, and how they affect teaching strategies.

- Understanding procedures and policies related to curriculum adoption.

- Learning to communicate with and involve parents.

- Developing organization and time management skills.

- Identifying opportunities for professional development.

- Connecting theories and teaching methods learned in college to classroom practice.

FINDING

LCPS provides a number of orientation and induction activities designed to acquaint new teachers with the culture and customs of the school division.

The division has established a new teacher induction and mentor program to provide new teachers with the resources needed to positively affect each student's performance and attitude toward learning. The program seeks to assist both first-year teachers and experienced teachers new to Loudoun County by providing meaningful activities for personal and professional growth.

Trained mentors meet regularly with assigned protégés to provide support, guidance and expertise. The mentor and protégé work together to design meaningful activities for personal and professional growth. Other features of the program include:

- Beginning teachers participate in induction activities and spend a full year working with a trained mentor.

- Experienced teachers may opt out of the Mentor Program after the first grading period with the approval of the school principal.

- Workshops and classes are offered throughout the year to meet the needs of new teachers.

- Opportunities are provided for classroom visitation and peer observation.

- *Mentor Blackboard* provides on-line information, a forum for discussion, and an opportunity to network with colleagues.

- A lead mentor is located in each school to serve as a liaison between mentor participants and the LCPS mentor specialist.

COMMENDATION 3-D:

The department of instruction is commended for providing a comprehensive program of training and orientation to new teachers, with processes and content in keeping with best practices.

3.2   *Student Performance*

Virginia's K-12 students are assessed through the Standards of Learning (SOL). SOLs consist of subject area tests taken by students enrolled in public and charter schools in specific grades and specific programs. In LCPS, the following measures are used to gauge student achievement:

- Phonological Awareness Literacy Screening (PALS) Benchmark Report.

- Division Aggregate AYP Detail Report (Virginia DOE).

- Division SOL Trends Report.

- SAT Participation and Performance (12th Grade Senior's Best Report – LCPS).

- AP Participation Rates (LCPS).

- Graduation Rate (Virginia DOE).

- Student Discipline (LCPS).

The LCPS School Board has established specific, measurable goals for student achievement in the division. These goals include:

- All students will demonstrate grade level reading proficiency by the end of first grade or will have an individualized program of reading instruction.

- Students and schools will attain the annual measurable objectives called for in the Adequate Yearly Progress requirements of NCLB.

- At least 90 percent of students will pass all required Standards of Learning (SOL) tests.

- Programs and practices will be in place to eliminate the disparity in achievement among identified racial, ethnic, and socio-economic groups.

- All graduates will demonstrate readiness for continuing education and entry level skill for immediate employment.

Exhibit 3-7 illustrates the racial/ethnic distribution of students in the division. White students comprise the largest percentage of the student population (64 percent), with Asian and Hispanic students trailing far behind as the largest subgroups at 13 and 12 percent, followed by Black students at eight percent.

EXHIBIT 3-7
RACIAL/ETHNIC DISTRIBUTION OF STUDENTS
LOUDOUN COUNTY PUBLIC SCHOOLS
JULY 2004 THROUGH SEPTEMBER 2007
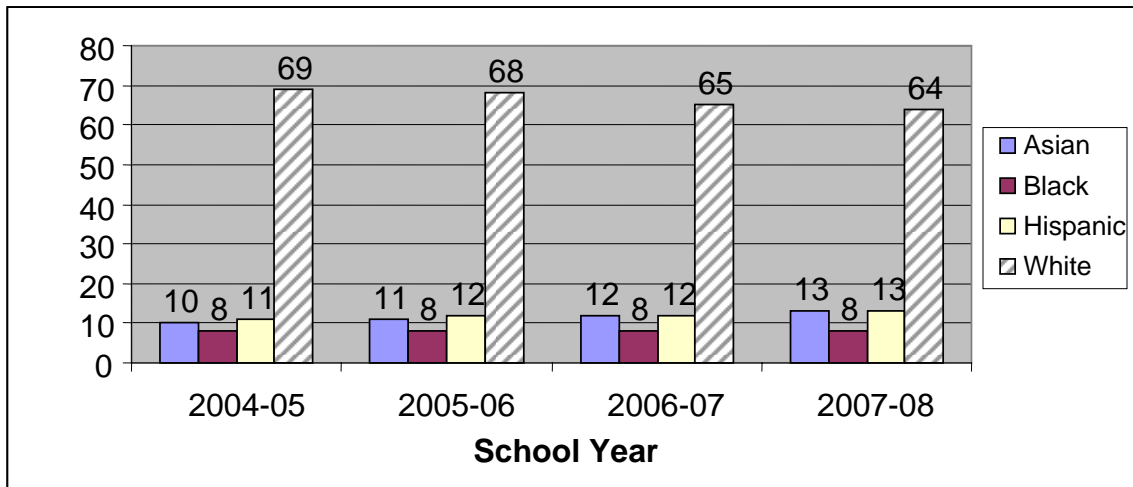
Source: Loudoun County Public Schools, Department of Instruction, 2007.

Exhibit 3-8 through **Exhibit 3-14** display student achievement data from several areas: (1) SOL Reading data for grades three, five, eight, and eleven; (2) SAT participation rates for 12th graders; (3) AP participation rates for 10th through 12th graders; and (4) graduation rates. All tables compare student performance by racial groups. Key information to note in each of the exhibits includes the following:

- *SOL Pass Rates in Reading.* The achievement gap between White and minority students (Black and Hispanic) persisted across all grade levels despite improved performance by minority students.

- *12th Grade SAT Participation.* The increase in participation of ethnic sub-groups averaged 13 percent, with Black students making the greatest gains in participation, increasing from 52 to 72 percent over four years.

- *10th Through 12th Grade AP Participation.* The increase in participation of ethnic sub-groups averaged 15 percent, with Black students making the greatest gains in participation, increasing from 17 to 32 percent over four years.

- *Graduation Rate.* The average rate of increase among ethnic sub-groups was 2 percent over three years.

EXHIBIT 3-8
THIRD GRADE READING SOL PASS RATES BY STUDENT POPULATIONS
LOUDOUN COUNTY PUBLIC SCHOOLS
2004 THROUGH 2007 SCHOOL YEAR
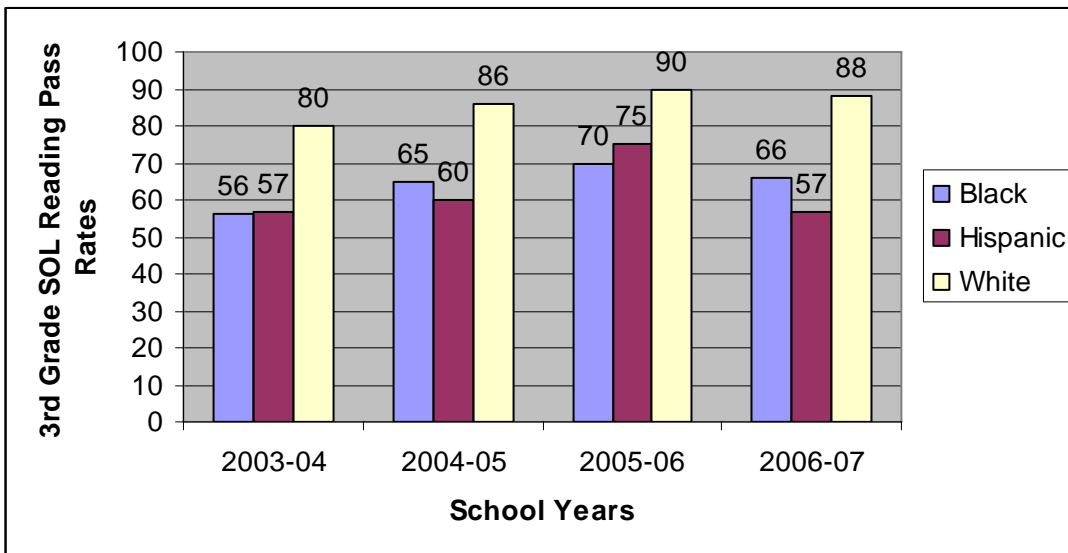
Source: Loudoun County Public Schools, Department of Instruction, 2007.

EXHIBIT 3-9
FIFTH GRADE READING SOL PASS RATES BY STUDENT POPULATIONS
LOUDOUN COUNTY PUBLIC SCHOOLS
2004 THROUGH 2007 SCHOOL YEAR
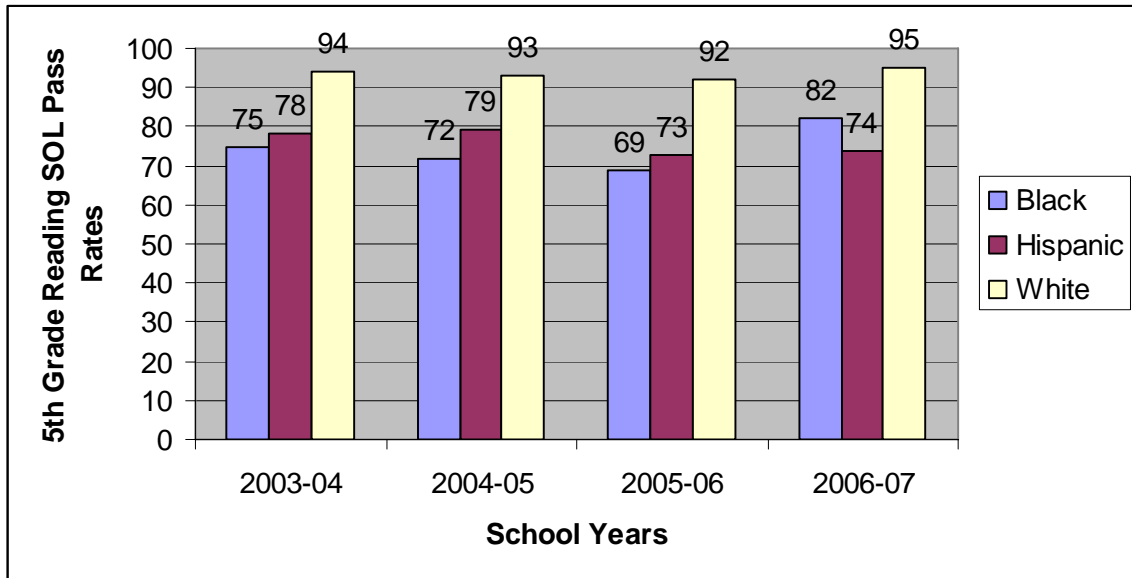
Source: Loudoun County Public Schools, Department of Instruction, 2007.

EXHIBIT 3-10
EIGHTH GRADE READING SOL PASS RATES BY STUDENT POPULATIONS
LOUDOUN COUNTY PUBLIC SCHOOLS
2004 THROUGH 2007 SCHOOL YEAR
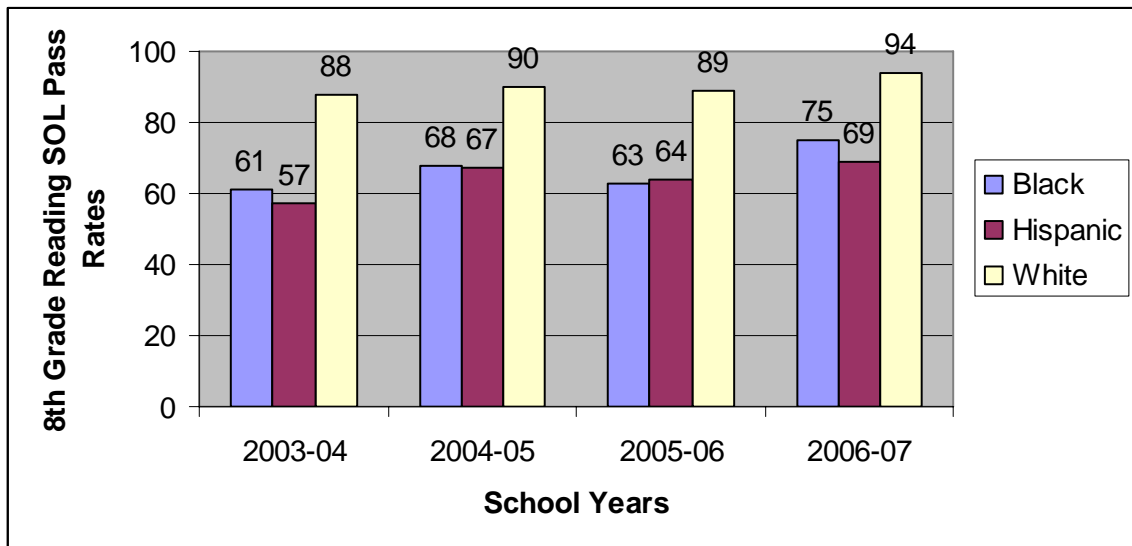
Source: Loudoun County Public Schools, Department of Instruction, 2007.

EXHIBIT 3-11
ELEVENTH GRADE ENGLISH SOL PASS RATES BY STUDENT POPULATIONS
LOUDOUN COUNTY PUBLIC SCHOOLS
2004 THROUGH 2007 SCHOOL YEAR
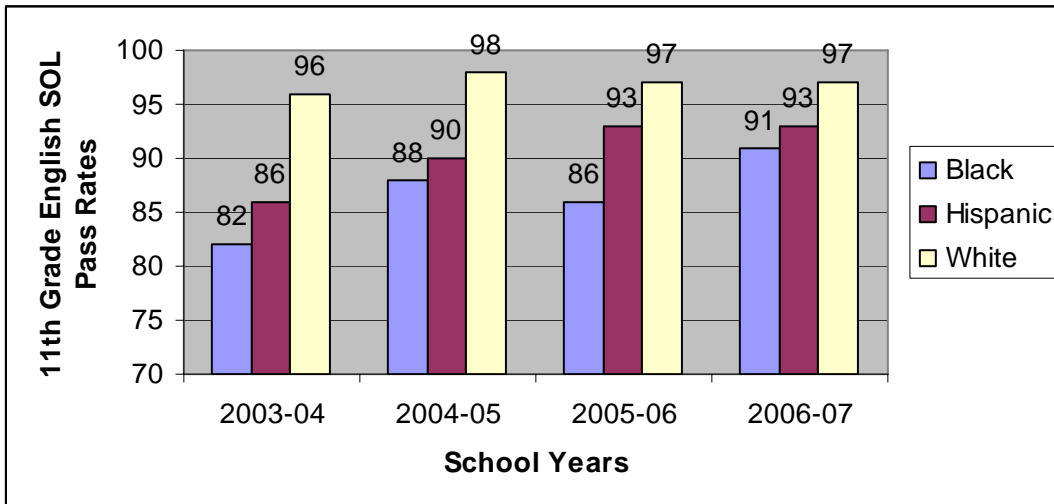
Source: Loudoun County Pubic Schools, Department of Instruction, 2007.

EXHIBIT 3-12
12 GRADE SAT PARTICIPATION RATES BY STUDENT POPULATIONS
LOUDOUN COUNTY PUBLIC SCHOOLS
2004 THROUGH 2007 SCHOOL YEAR
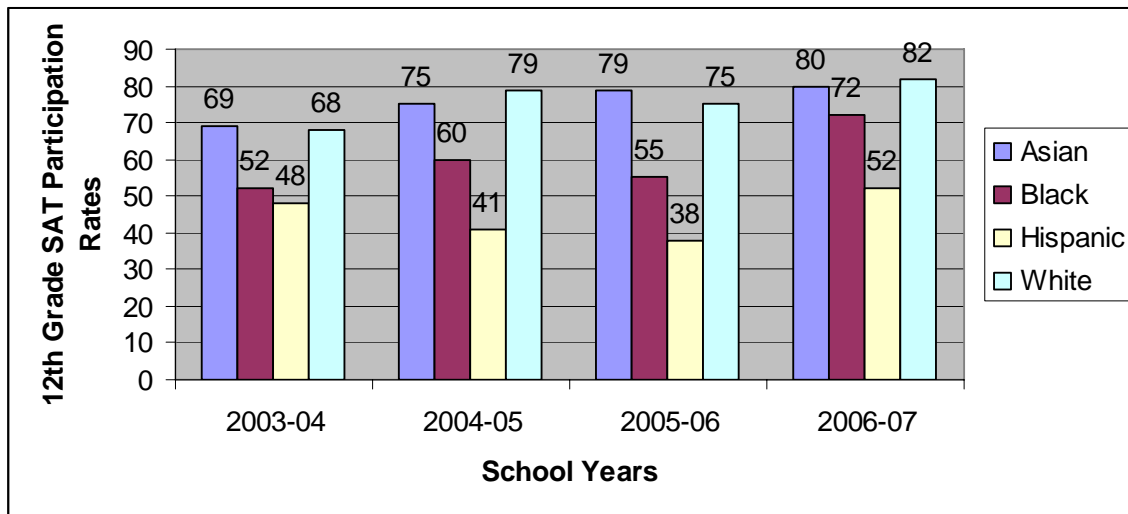
Source: Loudoun County Public Schools, Department of Instruction, 2007.

**EXHIBIT 3-13
AP PARTICIPATION RATES OF 1OTH THROUGH 12TH GRADE STUDENTS
BY STUDENT POPULATIONS
LOUDOUN COUNTY PUBLIC SCHOOLS
2004 THROUGH 2007 SCHOOL YEAR**
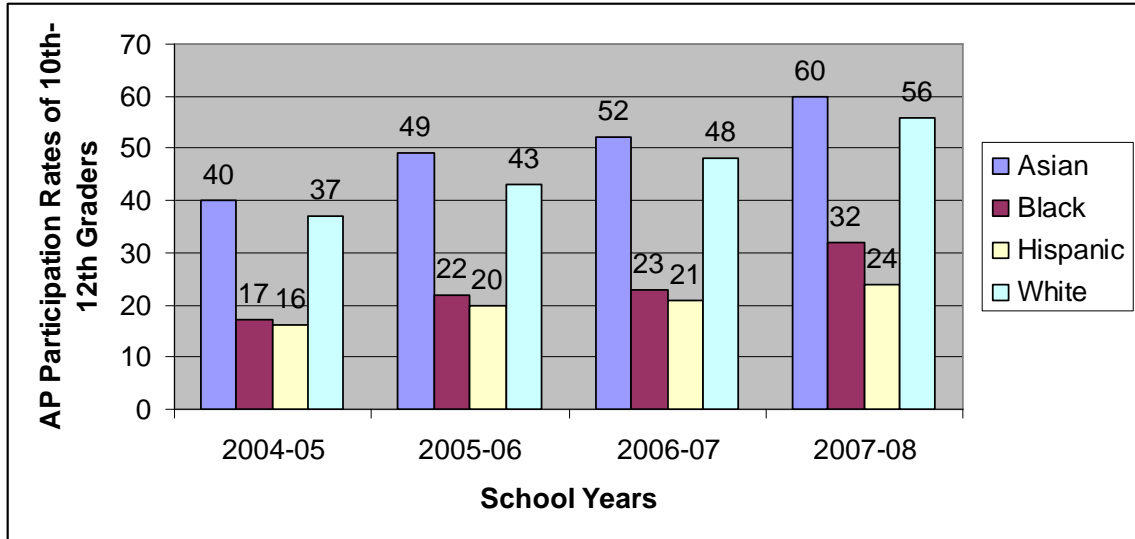
Source: Loudoun County Public Schools, Department of Instruction, 2007.

**EXHIBIT 3-14
GRADUATION RATE BY ETHNICITY
LOUDOUN COUNTY PUBLIC SCHOOLS
2004 THROUGH 2006 SCHOOL YEAR**
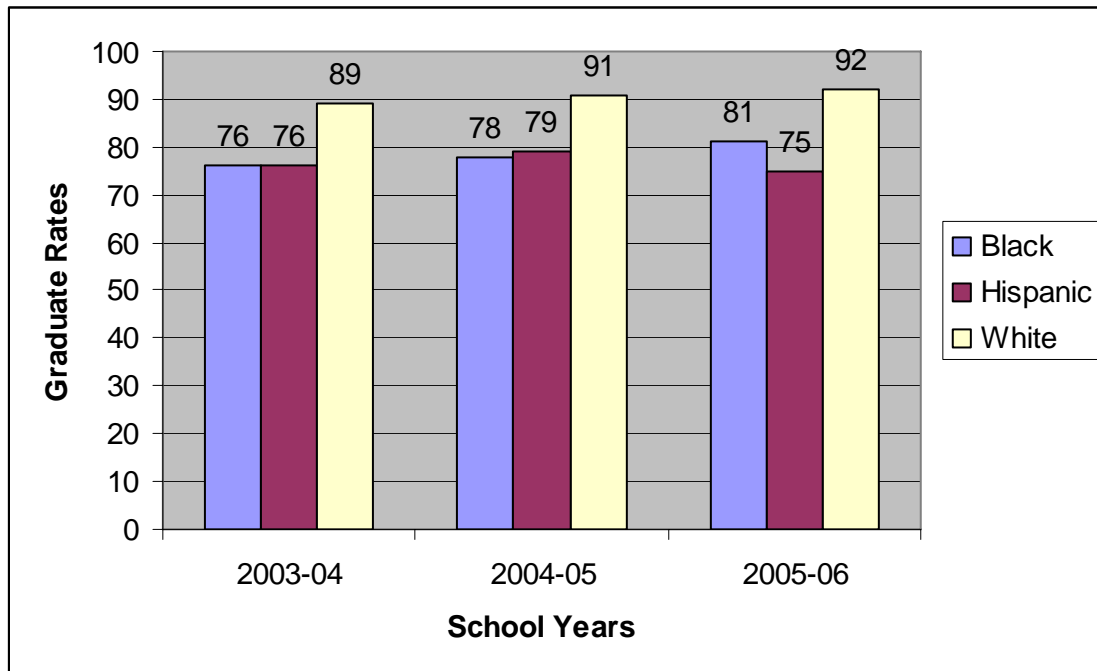
Source: Loudoun County Public Schools, Department of Instruction, 2007.

FINDING

LCPS has established an office of outreach programs as a means of closing the achievement gap.

Over the last five years, the division has made significant progress in increasing the number of minority students taking rigorous courses and increasing their performance on standardized tests (See Exhibit 3-7 through 3-12). As a part of these improvement efforts, the office of outreach programs was established in November 2005, to "coordinate the activities associated with the Parent Liaison Program, the Minority Student Achievement Advisory Committee, the Equity Team training for staff, and the early literacy community outreach efforts."

The office of outreach programs and the office of staff development have coordinated a series of workshops from 2004 through 2007 that focused on cultural competency and were attended by both LCPS employees and community members. According to information provided by the department of instruction, over 5,050 LCPS staff have participated in over 90 professional development sessions focused on "Closing the Achievement Gap." These sessions included:

- Creating an Inclusive and Equitable School Culture.
- Teaching About Race and Culturally Responsive Training.
- Do You Know Enough About Me to Teach Me?
- Making Content Comprehensible for English Language Learners.
- Empowering Diversity in Gifted Education.
- Culturally Responsive Teaching.
- Spanish for Educators—Communicating with Parents.

During this same period, LCPS also offered graduate level college courses to staff related to closing the achievement gap. These courses included the following:

- Foundations of Multicultural Education.
- Identifying and Reducing the Achievement Gap.
- Bilingualism and Language Acquisition Research.
- Applied Linguistics for Teachers, K-12.
- Reading/Writing for Multilingual Students.

The division has created an expansive data warehouse that allows teachers to drill down to the individual student to determine his or her areas of strength and weakness. With the large amount of student achievement data available and an understanding of the impact of language and culture on learning, LCPS educators are well-situated to incorporate this knowledge with the fundamentals of learning theory.

These activities represent a child-centered approach to addressing the achievement gap focusing on helping teachers and school administrators gain a greater understanding of the cultural and linguistic backgrounds of the children; however, the persistence of the achievement gap between majority and minority students would indicate that these strategies are not addressing all the issues that are contributing to the gap.

RECOMMENDATION 3-2:

Incorporate the strategies gained through previous cultural competency inservice activities with research-based, effective instructional strategies.

With the gains made by minority students in the school division over the past four years, it is apparent that teachers, parents, school administrators, and curriculum and instruction staff are taking actions that are moving student progress in the right direction. However, it will take continued effort with the existing strategies in order to produce a greater narrowing of the achievement gap.

Four strategies that can help provide a framework for improving the learning process and closing the achievement gap are knowledge acquisition, improved comprehension through consolidation, deep understanding, and learning for transfer. Each of these strategies is briefly explained below.

- **Knowledge Acquisition.** Focusing on improving African-American and Hispanic children's knowledge acquisition, whether it be in terms of information or actual learning skills, is the first step in bridging the achievement gaps. As Resnik and Hall (1998) put it, "What we know now is that just as facts alone do not constitute true knowledge and thinking power, so thinking processes cannot proceed without something to think about" (p. 101). Or, to put it even more simply, how much one knows affects how well one thinks.

- **Improved Comprehension through Consolidation.** After children acquire basic facts, they need to make this new information theirs, assimilating it into their existing network of ideas. The process of *consolidation* is essential for new information to stick, or to stay with an individual for a prolonged period, becoming part of long-term memory. Consolidation happens best when learning is "deep" and goes beyond the simple ability to parrot information or to explain concepts at a surface level.

- **Deep Understanding.** As Brown, Collins, and Duguid (1989) noted "understanding is developed through continued, situated use" (p. 2). The importance of this type of learning also places emphasis on the home environment or supplementary educational settings where learning and practice may occur in more naturalistic settings (Gordon & Bridglall, 2002; Steinberg, 1996).

- **Learning for Transfer.** *Transferability* is the ability to make connections to skills learned in one context and transfer those skills to another context. In most instances, instruction should involve some preparation in the form of modeling before students begin to work on a complex new problem. Equally important is for teachers to provide what Cazden (2001) calls "as needed" support while students are in the act of problem solving— whether individually, working in groups, or through whole-class work. Here, both the sequence of problem types and the manner in which students are socialized to engage with these problems are important.

LCPS curriculum and instruction staff should examine these and other research-based strategies, along with student achievement data, and using a professional learning

community (PLC) model, assist teachers and principals in conducting conversations on what is and is not working to close the achievement gap. Starting with those schools where the gap is most pronounced, designated department of instruction staff should work with faculties to determine what strategies will most effectively improve achievement among ethnic sub-groups.

FISCAL IMPACT

The implementation of this strategy will require a time commitment from department of instruction staff and classroom teachers and principals of several hours a week over a period of two to three months in order to conduct these PLCs in the division.

RECOMMENDATION 3-3:

Create an Intranet site to allow teachers to share their best practices in terms of effective instructional strategies.

As department of instruction staff members visit schools to conduct the PLCs, it will be important to have a means of sharing the effective strategies being employed in the classrooms with other teachers around the school division. LCPS should create a page with password-protected access on their Web site dedicated to sharing effective practices. The site should eventually be fully interactive and allow for persons reviewing the materials to post their own responses.

FISCAL IMPACT

The implementation of this strategy will require a time commitment from division technology staff to create the Web page, and for classroom teachers, principals and other division staff to post their content and comments.

3.3   *School Improvement*

A school improvement plan (SIP) serves as a blueprint for the decisions and actions needed to increase student achievement. Once developed, the SIP should guide resource allocation, staff development, instructional content and practice, and assessment. The school should focus staff meetings, staff in-service, staff recognition, and staff monitoring on the plan's objectives. To ensure that staff can implement the SIP, a staff development plan must be developed to address staff needs. To ensure that all members of the school community are aware of the SIP goals and objectives, a communication plan must be developed. These basic steps are the foundation of an effective school improvement process.

FINDING

LCPS does not have a quality improvement standards checklist to assist in the development of school improvement plans.

The SIP template that the division has created reflects key elements required to move from intention to achievement of planned actions. It is apparent that school and division leadership is focused on the goals of a continuous improvement cycle.

Many schools find having a checklist to use as a guide when writing SIPs is a useful tool. Checklists allow schools to add more specificity to the existing template, thus raising the likelihood that school improvement goals will be realized in every school in the division. A well-constructed plan such as the one that the Virginia Department of Education has compiled to guide school improvement provides:

- Details of goals and strategies it has identified as critical to improve student performance.

- An analysis of various sources of student performance data and demographic subgroup information.

- Assignment of explicit responsibility to individuals or groups.

- Includes periodic timelines for examination of progress so that interim adjustments can be made based upon newly collected data.

Currently, LCPS does not have such a checklist.

In reviewing the SIPs for a sampling of LCPS schools, it was evident that schools were clearly focused on aligning school division goals and objectives with their individual school objectives. With the growth of the school division, and the projection of at least two additional schools opening within the next five years, having tools that will allow principals and faculties to quickly assess whether the SIP is being written in accordance with best practices and division standards will be essential.

RECOMMENDATION 3-4:

Create a SIP checklist to guide the development of plans and to ensure the uniformity of plan components across the division.

Exhibit 3-15 provides an example of such a checklist. As shown in the exhibit, the checklist provides a means to monitor the development of the school's plan in five areas: (1) improvement plan cover sheet; (2) improvement plan development; (3) components of the school improvement plan; (4) professional development plan summary; and (5) plan organization.

The implementation of this recommendation should result in providing direct assistance to schools and having the benefit of providing a means to ensure that plans are consistent with school system goals.

EXHIBIT 3-15
CHECKLIST FOR SCHOOL/FEEDER/DIVISION IMPROVEMENT PLAN
FREDERICK COUNTY PUBLIC SCHOOLS
2007-08 SCHOOL YEAR

A. Improvement Plan Cover Sheet
1. Required representation from constituent groups is indicated.   Yes ☐   No ☐
2. Chairperson(s) has been designated.   Yes ☐   No ☐
3. Length of time for which plan was written has been indicated.   Yes ☐   No ☐

B. Improvement Plan Development, Review, and Consensus
1. Student achievement is the focus of the plan.   Yes ☐   No ☐
2. The plan makes sense, given the school's recent performance.   Yes ☐   No ☐
3. Data sources support the identified achievement focus:
    a. Trend data support the achievement focus.   Yes ☐   No ☐
    b. Disaggregated data support achievement focus.   Yes ☐   No ☐
    c. A copy of your school's data page from the most recent <u>Progress Report on Continuous Improvement</u> with the focus areas highlighted is included or data displays are included.   Yes ☐   No ☐
4. The Leadership Team's involvement in developing the School Improvement Plan is described.   Yes ☐   No ☐
5. The strategies used to obtain staff input and consensus are described.   Yes ☐   No ☐
6. The strategies used to share the plan with and gain input from parents/community are described.   Yes ☐   No ☐

C. Components of the Improvement Plan
1. All **system goals** whose evidence of progress does not show an improvement over a 3-year trend are addressed or a justification is provided.   Yes ☐   No ☐
2. **Objectives** are specific, measurable, and related to the evidence to support progress toward achievement of the system goal. A separate sheet has been used for each objective.   Yes ☐   No ☐
3. **Specific activities or action plans** are designed to accomplish the measurable objectives. These activities are research based and proven best practices.   Yes ☐   No ☐
4. **Personnel responsible** for implementing each activity are listed.   Yes ☐   No ☐
5. The **time frame** for implementation of each strategy is appropriate.   Yes ☐   No ☐
6. **Formative evaluation** includes milestone to monitor progress toward meeting the specific measurable objective.   Yes ☐   No ☐
7. **Summative evaluation** indicates the evidence/data used to measure the progress toward the attainment of the system goal?   Yes ☐   No ☐

D. Professional Development Plan Summary
The Professional Development Plan Summary sheet outlines a focused professional development plan directly related to specific outcomes in the improvement plan.   Yes ☐   No ☐

E. Plan Organization

1. Plan is well organized.   Yes ☐   No ☐
2. All pages are numbered.   Yes ☐   No ☐
3. Sections are clearly labeled.   Yes ☐   No ☐
4. Charts and graphs are used to display data.   Yes ☐   No ☐
5. Two copies have been submitted in 3-ring binders.   Yes ☐   No ☐

FOR DIRECTORS' USE ONLY
Commendations:
Recommendations:
Requested Revisions/Missing Items:
Action Taken:
☐ Plan approved
☐ Plan approved pending receipt of requested revisions/missing items.
☐ Plan not approved. Please submit requested revisions/missing items.
☐ Plan not approved. Please schedule a conference to discuss changes or additions.

Source: Frederick County Public Schools (MD), Department of Curriculum, Administration, and School Improvement, 2007.

FISCAL IMPACT

The implementation of this recommendation will require the involvement of appropriate department of instruction staff and school personnel to adapt the checklist to the SIP template in LCPS. The time commitment is estimated at one week.

4.0   HUMAN RESOURCES MANAGEMENT

4.0 PERSONNEL SERVICES

This chapter reviews the management and operational functions of the department of personnel services in Loudoun County Public Schools (LCPS). The four areas of review include:

4.1   Organization and Administration
4.2   Job Classification
4.3   Recruitment, Hiring, and Retention
4.4   Performance Appraisal

In its review of these functional areas, MGT examined a wide variety of documentation including policy and procedural handbooks, personnel records, staff training and development logs, departmental financial data, employment contracts, departmental forms and informational brochures, and the personnel services Web site. In addition, MGT consultants conducted interviews with all the central office personnel in the personnel services department, as well school-based administrators and staff. These activities allowed MGT to gain insight into the operational routines of the department, make recommendations, and note commendations regarding its policies and practices.

CHAPTER SUMMARY

High quality personnel services are a critical factor in the overall success of a school division. The department of personnel services in Loudoun County Public Schools is comprised of a group of experienced and highly competent professionals who are committed to providing a high standard of service to the division. The department is well-organized with clearly defined tasks and responsibilities assigned to various members of the department. The following key commendable personnel practices were noted:

- The division has a recognition program for substitute teachers that rewards outstanding job performance.

- Through efforts such as Candidate Care, and the Visiting International Faculty programs, the department of personnel services is commended for its persistence in meeting minority recruitment goals.

Part of the commitment to quality evidenced by members of the personnel services staff was their interest in continual improvement. In interviews with MGT consultants, each member of the staff spoke of a departmental program, practice or activity that they had modified or suggested improving in some way to improve its overall effectiveness and efficiency. The following key recommendations are cited to assist the division in its efforts to enhance the services provided by personnel services:

- Analyze manpower requirements in the personnel services department in order to reduce the amount of overtime by current employees and hire additional full and/or part-time employees as indicated by the analysis.

- Develop a process to gather more accurate information on the reason behind employee attrition.

Loudoun County Public Schools is one of the fastest growing school divisions in Virginia. As such, the personnel services department plays a vital role in carrying out all the personnel functions necessary to staff the school division with highly qualified, capable and competent employees. These functions include:

- Posting/updating position vacancy listings.

- Conducting initial screening/background checks of job applicants.

- Processing new employees.

- Monitoring the licensure status for all licensed personnel.

- Maintaining personnel files.

- Facilitating the orientation, training and evaluation of all LCPS employees.

- Ensuring proper adherence to state and federal regulations regarding personnel operations (e.g. EEOC, Title IX, etc.).

- Conduct an in-house pay and classification study for the maintenance staff (trades positions).

- Assisting in the administration of personnel compensation.

- Preparing materials for personnel services recommendations to the Loudoun County School Board.

- Performing any and all other personnel duties in accordance with board policies and procedures established for personnel services management.

The department of personnel services is responsible for delivering personnel services to both internal and external customers. Policies and procedures guiding the operations of the department should be well-written, comprehensive, easily accessible, and aligned with best practices in personnel services management. The organization and administration of the department affects the quality of services provided to the school division and impact the effectiveness and efficiency of the delivery of services.

MGT conducted a survey of LCPS central office administrators, principals/assistant principals, and teachers in order to ascertain their opinions with regard to personnel services and operations in the school division. The survey analyses provided comparisons of the results of each group. **Exhibit 4-1** through **Exhibit 4-4** show comparisons of the opinions of the three LCPS employee groups on selected items from the survey.

Central office administrators, school principals, and teachers were asked to rate three areas of personnel services—recruitment, selection, and evaluation—as either *Needs Some/Major Improvement* or *Adequate/Outstanding.* As shown in **Exhibit 4-1**, the central office administrators and principals consistently rated these areas as *Adequate/Outstanding*, at rates that ranged from 55 percent to a high of 76 percent. By contrast, only personnel evaluation received an *Adequate/Outstanding* rating above 50

percent from teachers. Teachers rated the division's recruitment efforts the lowest, with only 45 percent rating it as *Adequate/Outstanding*.

EXHIBIT 4-1
SURVEY RESPONSES REGARDING
PERSONNEL SERVICES
LOUDOUN COUNTY PUBLIC SCHOOLS
2007-2008 SCHOOL YEAR

SURVEY ITEM	ADMINISTRATORS		PRINCIPALS		TEACHERS	
	% ADEQUATE/ OUTSTANDING	% NEEDS SOME/MAJOR IMPROVEMENT	% ADEQUATE/ OUTSTANDING	% NEEDS SOME/MAJOR IMPROVEMENT	% ADEQUATE/ OUTSTANDING	% NEEDS SOME/MAJOR IMPROVEMENT
Personnel Recruitment	57	37	68	31	45	21
Personnel Selection	55	39	65	33	48	26
Personnel Evaluation	57	37	76	23	62	24

Source: MGT of America, Loudoun County Public Schools Survey Results, 2007.

The MGT survey also sought to determine the level of job satisfaction among LCPS personnel. **Exhibit 4-2** shows the ratings from the three employee groups on ten statements relating to job satisfaction. For each statement, respondents were asked to indicate *Agree/Strongly Agree* or *Disagree/Strongly Disagree*. The overall responses to the statements were very positive, with a majority of all groups expressing satisfaction. The three statements with the most positive responses (highest percentage of *Agree/Strongly Agree* responses) from all three groups were:

- I feel that I have the authority to adequately perform my job responsibilities.

- The work standards and expectations in this school district are equal to or above those of most other school districts.

- I feel that I am an integral part of this school division team.

One of the strongest indicators of job satisfaction is whether or not respondents replied affirmatively when asked to indicate whether they were looking elsewhere for employment. In response to the statement, *"I am actively looking for a job outside of this school division,"* only six percent of central office administrators, two percent of principals and six percent of teachers responded *Agree/Strongly Agree.*

EXHIBIT 4-2
SURVEY RESPONSES ON JOB SATISFACTION
LOUDOUN COUNTY PUBLIC SCHOOLS
2007-08 SCHOOL YEAR

STATEMENT	(%Agree + Strongly Agree) / (%Disagree + Strongly Disagree)		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
I feel that I have the authority to adequately perform my job responsibilities.	70/21	96/1	86/7
I am actively looking for a job outside of this school division.	6/80	2/90	6/82
I am very satisfied with my job in this school division.	74/8	90/3	80/10
The work standards and expectations in this school district are equal to or above those of most other school districts.	76/6	90/5	81/6
This school district's officials enforce high work standards.	81/10	93/0	84/5
Workload is evenly distributed.	40/34	59/25	46/41
I feel that my work is appreciated by my supervisor(s).	77/9	78/11	71/17
Teachers who do not meet expected work standards are disciplined.	26/20	61/16	28/32
Staff (excluding teachers) who do not meet expected work standards are disciplined.	41/22	63/15	22/26
I feel that I am an integral part of this school division team.	82/5	90/1	74/12

Source: MGT of America, Loudoun County Public Schools Survey Results, 2007.

Another component of job satisfaction is salary. As shown in **Exhibit 4-3**, there were two statements relating to salary that had the highest percentages of *Agree/Strongly Agree* responses:

- Salary levels in this school division are competitive.

- I know who to contact in the central office to assist me with human resources matters such as licensure, promotion opportunities, employee benefits, etc.

- I know who to contact in the central office to assist me with professional development.

- My salary level is adequate for my level of work and experience.

The job satisfaction surveys also showed several areas where there were differing opinions among the survey respondents. When responding to the statement, "*Our division has an effective employee recognition program,*" 63 percent of school administrators responded favorably (*Agree/Strongly Agree*), while 41 percent of central office administrators and 34 percent of teachers replied in the same manner. The second statement on which there were split opinions was "*I have a professional growth plan that addresses areas identified for my professional growth.*" In response to this statement, 81 percent of school administrators and 70 percent of teachers indicated *Agree/Strongly Agree*, while 52 percent of central office administrators gave the same response.

EXHIBIT 4-3
SURVEY RESPONSES REGARDING JOB SATISFACTION
LOUDOUN COUNTY PUBLIC SCHOOLS
2007-08 SCHOOL YEAR

STATEMENT	(%A + SA) / (%D + SD)		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
Salary levels in this school division are competitive.	91/4	90/4	85/9
Our division has an effective employee recognition program.	41/26	63/16	34/28
Our division has an effective process for staffing critical shortage areas of teachers.	50/21	61/19	32/22
My supervisor evaluates my job performance annually.	62/26	87/7	79/12
Our division offers incentives for professional advancement.	53/19	54/25	53/20
I know who to contact in the central office to assist me with professional development.	87/6	97/1	66/18
I know who to contact in the central office to assist me with human resources matters such as licensure, promotion opportunities, employee benefits, etc	84/8	95/2	74/15
My salary level is adequate for my level of work and experience.	67/23	71/15	54/31
Our division has an effective teacher recruitment plan.	60/13	81/8	51/12
I have a professional growth plan that addresses areas identified for my professional growth.	52/29	81/9	70/13

Source: MGT of America, Loudoun County Public Schools Survey Results, 2007.

4.1 *Organization and Administration*

The organizational structure for LCPS personnel services department is shown in **Exhibit 4-4**. The department is headed by an assistant superintendent of personnel services who reports directly to the superintendent. The department is divided into three sections—called communities--that carry out the functions listed below:

- **Administrative Support Community.** This section of personnel services includes the assistant superintendent, computer technology specialists, bookkeepers, and three clerical staff members, including the assistant superintendent's administrative assistant. This community is charged with administering the financial, technological, and administrative functions of the personnel services department.

- **Employee Relations Community.** Staff in this section of personnel services are charged with responsibilities that include, but are not limited to, employee retention, personnel evaluation, employee grievances, and professional licensure. In addition, staff in this section investigate complaints lodged against or by current LCPS employees. The community is headed by a director who is assisted by three clerical staff members. Direct reports to this position include three employee relations specialists and three licensure specialists. Each of the three employee relations specialists supervises a

group of staff members consisting of personnel analysts, Candidate Care ambassadors, and pre-employment investigators (PEIs).

■ ***Recruitment and Staffing Community.*** The third section of the department has primary responsibility for all activities related to the recruitment of personnel and staffing of LCPS schools. These duties include, but are not limited to, planning and coordinating all internal and external recruitment fairs, processing all new employee paperwork including scanning personnel documents into electronic files, conducting background checks of prospective employees, and coordination of the SubCentral® substitute teacher system. This community is headed by a director with one clerical support person. There are six other direct reports including the two SubCentral® specialists, two departmental secretaries, and two recruiting and staffing specialists. The two recruiting and staffing specialists supervise two personnel assistants, three document scanners, and two licensure specialists.

The staff members in the personnel services department represent a combination of novice and veteran employees with prior experience both within and outside of the school division. In interviews, these employees were very knowledgeable in their areas of assignment and the department as a whole.

EXHIBIT 4-4
PERSONNEL SERVICES ORGANIZATIONAL CHART
LOUDOUN COUNTY PUBLIC SCHOOLS
2007-08 SCHOOL YEAR
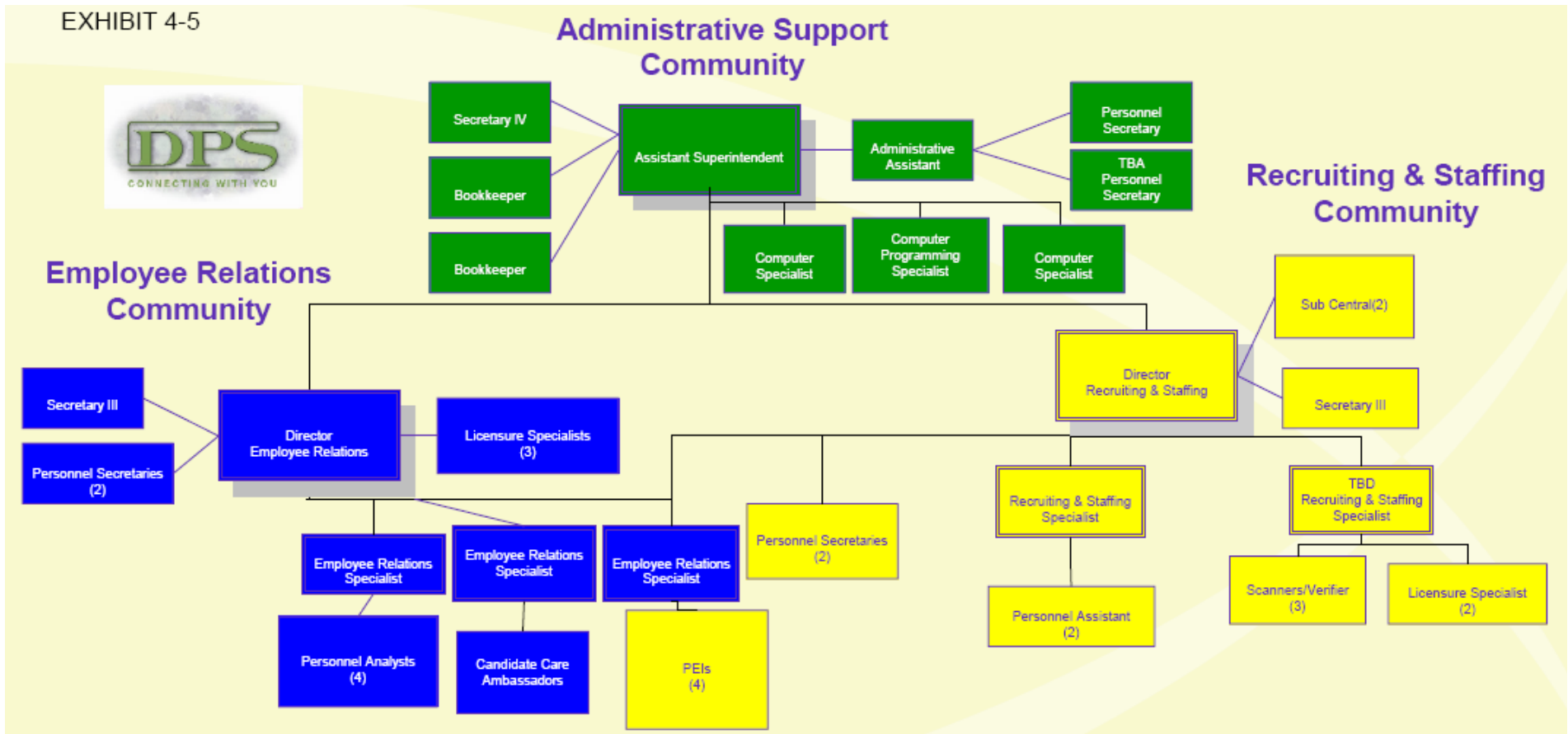
Source: Loudoun County Public Schools, Personnel Services Department, 2007.

FINDING

Employees in the Personnel Services department are accumulating excessive amounts of overtime.

There are 32 employees in personnel services whose non-exempt status qualified them to earn overtime. LCPS School Board Policy Manual contains language related to overtime in Policy 7-52: *Classified Employee Working Hours and Overtime*. The policy defines exempt and non-exempt employees and specifies the conditions under which non-exempt employees would be authorized to earn overtime compensation. As stated in the policy:

> *Department heads or building administrators may schedule overtime when it is deemed necessary provided that they have received approval from the appropriate member of the Division Superintendent's Senior Staff to verify the funding source before asking an employee to work on an overtime basis. (School administrators will assign overtime to non-exempt employees in the particular job for which overtime is required.) Non-exempt employees are not permitted to work overtime without the prior approval of their supervisor or department head.*
>
> *For the purposes of overtime compensation, only hours worked in excess of forty hours during a normal work week will be counted.*
>
> ■ *For work performed in excess of forty hours in a normal work week, non-exempt employees will be paid at a rate equal to one and one half times their regular rate of pay.*
>
> ■ *For work performed above the normal work schedule up to forty hours, employees will be paid their regular hourly rate for the additional time.*

The current policy supports the use of overtime and has no language related to limiting the amount of overtime non-exempt employees may accumulate in a given fiscal year. During MGT's onsite review of the school division, consultants reviewed the amount of overtime charged by personnel services staff throughout the year. As of the end of December 2007, a total of 10,657 hours of overtime had been accumulated in this department, which resulted in $390,842 in overtime payment to employees. This figure represents 25 percent of the total amount of money paid in salaries in the personnel services department.

Of the 32 employees who were paid overtime from July 2007 through December 2007, 19 had a minimum of 20 percent of their salary in overtime. These 19 salaries reflected overtime percentages ranging from 21 to 61. For this selected group, **Exhibit 4-5** shows the number of overtime hours worked along with the annual salary, additional overtime salary and the percentage of total salary that the overtime salary represented. As shown in the exhibit, the amount of overtime salary paid to these individuals ranged from $8,573 to $46,939 over this six month period. The total amount of overtime equaled $318,682, or 34 percent of the total salaries for that time period.

**EXHIBIT 4-5
PERSONNEL SERVICES DEPARTMENT
OVERTIME SALARIES TOTALING A MINIMUM OF
TWENTY PERCENT OF TOTAL ANNUAL SALARY
LOUDOUN COUNTY PUBLIC SCHOOLS
JULY THROUGH DECEMBER 2007**

TOTAL ANNUAL SALARY	HOURS OF OVERTIME	AMOUNT OF OVERTIME SALARY (YTD)	OVERTIME PERCENTAGE OF ANNUAL SALARY
$53,444.16	295.69	$11,440.91	21.41%
$67,697.28	302.75	$14,854.89	21.94%
$36,993.60	288.16	$8,574.01	23.18%
$46,710.72	337.25	$11,402.59	24.41%
$62,778.24	396.25	$15,376.42	24.49%
$34,856.64	334.00	$8,543.96	24.51%
$47,678.40	349.71	$12,096.94	25.37%
$35,925.12	354.59	$9,132.80	25.42%
$46,710.72	443.00	$14,963.18	32.03%
$42,396.48	454.75	$13,891.06	32.76%
$42,396.48	461.42	$14,119.59	33.30%
$63,806.40	473.34	$21,730.91	34.06%
$46,307.52	482.50	$16,182.87	34.95%
$35,925.12	486.17	$12,661.28	35.24%
$36,993.60	506.43	$13,618.60	36.81%
$35,925.12	524.67	$14,206.09	39.54%
$53,444.16	574.75	$22,191.59	41.52%
$91,707.84	696.48	$46,939.34	51.18%
$60,137.28	840.50	$36,755.14	61.12%
TOTALS			
$941,834.88	**8602.41**	**$318,682.17**	**34%**

Source: Loudoun County Public Schools, 2007.

Requiring employees to routinely work overtime can have an eroding effect on productivity by creating high turnover rates. High turnover then leads to increased costs for hiring and training new staff members, and productivity time lost while the position is vacant or while the new employee is being trained.

Payments made for overtime divert financial resources that could be used to hire additional personnel, thus reducing or possibly eliminating the need for overtime.

RECOMMENDATION 4-1:

Analyze the manpower requirements in the personnel services department and hire additional personnel sufficient to meet work demands.

As shown in **Exhibit 4-5,** $318,682 was spent on 8,602 hours of overtime wages for a six-month period in 2007. By conducting an analysis of the type and amount of work being done, decisions could be made regarding the additional full or part-time

employees that need to be hired to handle work loads. This analysis would also involve determining how to improve the distribution of work to ensure that work loads are evenly distributed. If it is determined that work loads increase at certain peak times during the year, then return to normal levels for the remainder of the year, decisions may be made to hire temporary workers or redefine the work of part-time employees to have them focus the majority of their work time on peak time work tasks. The final outcome of the manpower requirements analysis would be to reduce overtime to a minimum and redirect those dollars to full or part-time personnel services staff positions.

FISCAL IMPACT

The fiscal impact of this recommendation cannot be determined at this time as it would be dependent on the number and types of positions added to the department.

FINDING

The department of personnel services has created a well-designed, comprehensive Web site that provides detailed information on personnel policies and procedures for both current and prospective LCPS employees.

The LCPS department of personnel service's Web site is a powerful tool for internal and external communications, as well as for employee recruitment and marketing of the district's programs and advertising position vacancies. Key components of the Web site include the following:

- Departmental mission statement.

- Contact names, phone and fax numbers, directions, and physical address of the personnel services department.

- Listing of position vacancies.

- Link to online application.

- Current salary schedules.

- Links to employment benefits information page(s).

- Links to teacher initial and continuing certification requirements.

- List of past and upcoming recruitment fairs.

Website URL: http://cmsweb1.loudoun.k12.va.us/dps/site/default.asp

A well-designed Web site provides a school division generally, and the personnel services department in particular, with numerous advantages including the following:

Reduce Advertising Costs. With a well designed Web site, the department can have virtually unlimited information about the school division and related information. In addition, Web site changes are much more cost effective than print changes. Revising

an informational brochure may involve having it redesigned, printed and re-distributed. Web site changes can be made very quickly and, rather than mailing the changes, interested persons can be notified by a quick email.

Improve Customer Relations. Web site visitors can quickly and easily gather the information that they need, and don't have to wait until business hours for service. Going to the Web site also allows visitors to avoid having to wait on hold for a representative or work their way through the menus on a phone system. Potential employees can quickly and easily obtain information about the division and how to apply for employment from a well-designed Web site. Existing employees who have misplaced handbooks or other informational literature can quickly obtain a replacement without waiting for the mail. FAQ's can be used to help employees use departmental services and can be updated very quickly as needed.

Reduce Postage Costs. Postage costs can be significantly reduced by allowing potential and existing employees to download information such as recruitment schedules and benefits information at their convenience.

Improve Work Force Efficiency. If a Web site is used to answer routine questions, the department's work force can spend their time answering more difficult questions and complete more detailed job tasks.

The department adds to the effectiveness of the Web site by providing a variety of attractive and informative print materials to distribute at recruitment fairs and for walk-ins. More will be said about the print materials in the recruitment and retention section of this chapter.

COMMENDATION 4-A:

The LCPS department of personnel services Web site contains a wealth of information that meets and exceeds the standards of a well-designed site.

FINDING

The department of personnel services has an effective process for monitoring the use of substitutes and rewarding outstanding substitute teachers.

Substitute teachers are recruited to work in LCPS throughout the school year. Persons applying for work as a substitute are subject to the same background screening as regular employees and must attend a mandatory orientation session prior to working in the classroom. The placement of substitute teachers is done via the automated SubCentral® system which is managed by two full-time personnel services employees. The personnel services department keeps track of the number of applications for employment as a substitute submitted to the department each month, and maintains statistics on both the number of substitutes deployed throughout the year, and the types of leave taken by the employees whose duties they are covering. **Exhibit 4-7** shows the number of active substitutes employed by LCPS for the 2006-07 school year. As shown in the exhibit, the use of substitutes peaks during the months of October through January, with another spike close to the end of the school year in May. This pattern is

typical of most school districts. Results of the substitute teacher request monitoring process show that the majority of substitutes were retained for the following reasons:

- Personal illness of the regular employee.
- Personal leave.
- Professional leave.
- Family Illness.
- Family/Medical Leave (FMLA).

EXHIBIT 4-7
NUMBER OF ACTIVE SUBSTITUTES PER MONTH
LOUDOUN COUNTY PUBLIC SCHOOLS
2006-07 SCHOOL YEAR
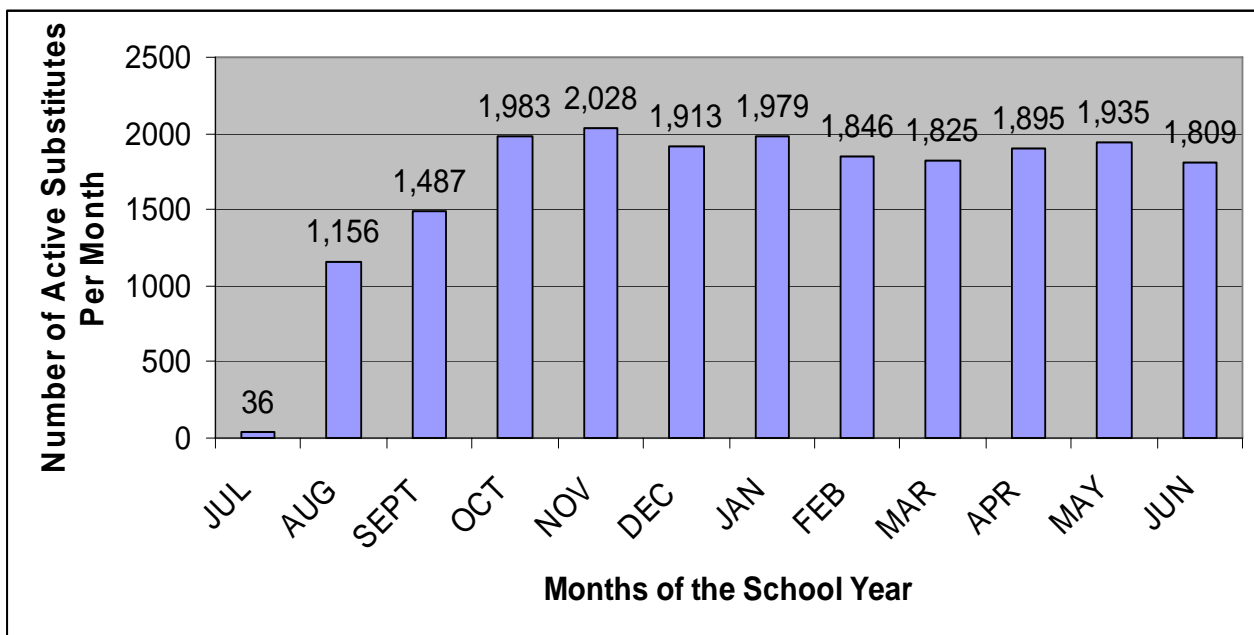
Source: Loudoun County Public Schools, Department of Personnel Services, 2007.

In recognition of the importance of a high quality substitute teacher, the department of personnel services has established an annual Substitute Recognition Awards Program. In the program, each school selects an Outstanding Substitute Teacher of the Year. These individuals are recognized with a $25 gift certificate and are eligible to become the county-wide Substitute of the Year. All school honorees are recognized at the April school board meeting. At that meeting three substitutes (one each at the elementary, middle, and high school level), will be announced as the Substitute of the Year.

The criteria for selection as a school honoree are as follows:

- Is on time and frequently accepts jobs at this location.
- Has the ability to follow lesson plans.
- Has good classroom management skills.
- Is flexible and adjusts their schedule as needed by location's administration.
- Is a positive role model.

- Demonstrates the ability to inspire students to learn.
- Is poised, professional and has the energy to withstand a taxing schedule.
- Earns the respect and admiration of students, location staff, and colleagues.

The criteria for selection as a division-wide honoree are as follows:

- Accepts 90 percent or more of the jobs offered throughout the year.

- Demonstrates good classroom management skills and the ability to follow lesson plans.

- Demonstrates flexibility and willingness to accept assignments on short notice.

- Is a positive role model to students and co-workers.

- Demonstrates professionalism when dealing with staff and students at the school and when contacted by the SubCentral office.

- Has the respect and admiration of students, school-based staff, and colleagues.

Nominations for the awards can be submitted online by the specified deadline.

This type of recognition helps to reinforce the positive and productive conduct of substitute teachers, and establishes a standard by which performance can be measured. It also assists in the effective recruitment of substitute teachers.

COMMENDATION 4-B:

LCPS is commended for establishing a recognition program for substitute teachers that rewards outstanding job performance.

4.2   *Job Classification*

Job classification is a key personnel function that is conducted to define and describe the duties and responsibilities of positions for purposes of:

- Determining proper compensation and qualification requirements (e.g., education level, previous work experience).

- Facilitating the functioning of other personnel processes, such as developing performance standards and actual performance appraisals based upon the assigned duties of specific positions.

- Identifying career ladders and promotional lines .

- Translating broad organizational plans into the assignment of duties and responsibilities to individual positions.

Factors that are considered when placing a job into a given classification include:

- Nature or type of work performed.
- Level of responsibility.
- Impact of position on the unit, department, or campus.
- Reporting relationships.
- Scope of duties.
- Complexity of work.
- Creativity/innovation.
- Supervision received.
- Supervision exercised.
- Knowledge and skills required to perform the duties.

These factors are applied through a job analysis process. This analysis involves research, examination and clarification of a job's distinct functions, objectives and organizational relationships in order to fully determine the role of the position within the organization.

FINDING

The job classification system used for maintenance staff is not appropriate for the current maintenance positions.

One of the issues discussed in the focus group with the maintenance staff was the lack of an appropriate job classification system. The staff indicated that staff with significantly different skills or certifications can be classified at the same job level. The director of facilities services agreed with this view and cited several examples:

> *There is only one pay level difference between Apprentice level employees and journeyman/master level employees HVAC I and Refrigeration Technician I (apprentice) are Level 12 employees and HVAC II and Refrigeration II (journeyman/masters) are Level 13 employees.*

> *The following employees are classified as Level 13 employees: HVAC II Technicians: Plumbers, Electricians, Carpenters, and General Maintenance Worker II. HVAC II and Electricians require a Journeyman or Masters license to qualify for the position, Carpenters and Plumbers do not require a license, and General Maintenance Worker II requires only a 10th grade education.*

Inappropriate job classification systems can cause poor morale among the employees. If an employee is not paid based on their skills and certifications, there is no incentive for the employee to improve and grow. In addition, this situation can make it more difficult for the division to compete with the private sector for skilled workers.

RECOMMENDATION 4-2:

Conduct an in-house pay and classification study for the maintenance staff (trades positions).

Job classifications become outdated over time and need to be updated on a regular basis. Unfair job classifications that don't appropriately recognize staff skills and certification create ill will and poor morale.

The personnel services department should conduct the study.

FISCAL IMPACT

This recommendation can be implemented using in-house resources. The pay and classification study will take about 40 hours of personnel services staff time.

4.3   *Recruitment, Hiring, and Retention*

One of the primary functions of personnel services is recruiting and hiring highly qualified teachers. Filling vacancies due to growth and or attrition is a challenge and national studies predict that teaching shortages will continue to exist over the next decade as the teacher applicant pool ages and K-12 enrollments increase. In addition to retirements, staffing difficulties are associated with inadequate salaries, lack of opportunities for advancement and personal reasons unrelated to working conditions. Further complicating the matter of teacher supply and demand is the federal NCLB requirement for "highly qualified" teachers.

4.3.1   *Teacher Recruitment*

The recruitment efforts of the LCPS department of personnel services extend throughout the United States and the world. The global approach taken by the division is in response to school board directives to hire minority candidates in such numbers as to reflect the racial-ethnic make-up of the school division's student body.

Exhibit 4-8 shows the number and percentage of LCPS licensed employees by race for the 2007-08 school year. As shown in the exhibit, 92 percent of licensed employees in the school division are White. African-Americans comprise the largest minority group at four percent, followed by Asian and Latino employees. White students make up the majority of the total student population (64 percent) and Asian and Latino students comprise the largest minority groups (13 percent each). African-American students comprise eight percent of the total student population.

EXHIBIT 4-8
PERCENTAGE OF LICENSED EMPLOYEES AND STUDENTS BY RACE
LOUDOUN COUNTY PUBLIC SCHOOLS
2007-08 SCHOOL YEAR

RACE	PERCENT OF LICENSED EMPLOYEES	PERCENT OF LCPS STUDENTS
African-American	4%	8%
White	92%	64%
Latino	2%	13%
Asian	2%	13%
Native American	*	*
Bi-Racial	*	*
Unspecified	*	2%

Source: Loudoun County Public Schools, Department of Personnel Services, 2007.
*These groups comprise less than one percent of the total population of licensed employees.

Exhibit 4-9 through **Exhibit 4-14** show the recruitment venues scheduled for the 2007-08 school year. As shown in the exhibits, the department hosts local recruitment events, and participates in recruitment fairs throughout the region and across the country. Local recruitment events are also specialized by area, with fairs especially targeting instructional personnel, special education teachers, teachers for critical shortage areas, classified, and administrative personnel.

Personnel services staff also participate in numerous college and university job fairs throughout the country.The Visiting International Faculty program extends LCPS's recruiting efforts throughout Central and South America, as well as in Europe, South Africa, Australia and New Zealand.

**EXHIBIT 4-9
INSTRUCTIONAL RECRUITMENT FAIRS
LOUDOUN COUNTY PUBLIC SCHOOLS
2007-08 SCHOOL YEAR**

INSTRUCTIONAL RECRUITMENT FAIRS - DEPARTMENT FOR PERSONNEL SERVICES			
DATE	**DAY OF WEEK**	**LOCATION**	**TIME**
August 22, 2007	Wednesday	Administration Building, Ashburn, VA	4:00 PM - 7:00 PM
October 27, 2007	Saturday	Freedom HS, South Riding, VA	9:00 AM - 12:30 PM
**February 9, 2008	Saturday	Heritage HS, Leesburg, VA	9:00 AM - 12:30 PM
*February 23, 2008	Saturday	Heritage HS, Leesburg, VA	9:00 AM - 12:30 PM
March 8, 2008	Saturday	Smarts Mill MS, Leesburg, VA	9:00 AM - 12:30 PM
*March 29, 2008	Saturday	Smarts Mill MS, Leesburg, VA	9:00 AM - 12:30 PM
**April 19, 2008	Saturday	Stone Bridge HS, Ashburn, VA	9:00 AM - 12:30 PM
May 17, 2008	Saturday	Briar Woods HS, Ashburn, VA	9:00 AM - 12:30 PM
July 19, 2008	Saturday	Briar Woods HS, Ashburn, VA	9:00 AM - 12:30 PM
August 20, 2008	Wednesday	Administration Building, Ashburn, VA	4:00 PM - 7:00 PM

Source: Loudoun County Public Schools, Personnel Services Department, 2007.
* Snow Date (Job Fair will be held only if previously scheduled Fair is cancelled due to inclement weather)
** Diversity Instructional Fair

**EXHIBIT 4-10
SPECIAL EDUCATION RECRUITMENT FAIRS
LOUDOUN COUNTY PUBLIC SCHOOLS
2007-08 SCHOOL YEAR**

SPECIAL EDUCATION RECRUITMENT FAIRS DEPARTMENT FOR PERSONNEL SERVICES			
DATE	**DAY OF WEEK**	**LOCATION**	**TIME**
August 6, 2007	Monday	Administration Building, Ashburn, VA	3:00 PM – 6:00 PM
April 3, 2008	Thursday	Administration Building, Ashburn, VA	3:00 PM - 6:00 PM

Source: Loudoun County Public Schools, Personnel Services Department, 2007.

EXHIBIT 4-11
CRITICAL NEEDS AREAS INSTRUCTIONAL RECRUITMENT FAIRS
LOUDOUN COUNTY PUBLIC SCHOOLS
2007-08 SCHOOL YEAR

CRITICAL NEEDS INSTRUCTIONAL RECRUITMENT FAIRS DEPARTMENT FOR PERSONNEL SERVICES				
DATE	**DAY OF WEEK**	**LOCATION**	**TIME**	**LICENSURE AREA**
May 1, 2008	Thursday	Administration Building, Ashburn, VA	3:00 PM – 6:00 PM	Math, Science, and Tech Education
April 3, 2008	Thursday	Administration Building, Ashburn, VA	3:00 PM - 6:00 PM	Math, Science, and Tech Education

Source: Loudoun County Public Schools, Personnel Services Department, 2007.

EXHIBIT 4-12
ADMINISTRATIVE RECRUITMENT FAIRS
LOUDOUN COUNTY PUBLIC SCHOOLS
2007-08 SCHOOL YEAR

ADMINISTRATIVE JOB FAIRS			
DATE	**DAY OF WEEK**	**LOCATION**	**TIME**
October 27, 2007	Saturday	Freedom High School, South Riding, VA	10:00 AM - 12:00 PM
March 8, 2008	Saturday	Smarts Mill MS, Leesburg, VA	10:00 AM - 12:00 PM
March 29, 2008*	Saturday	Smarts Mill MS, Leesburg, VA	10:00 AM - 12:00 PM

Source: Loudoun County Public Schools, Personnel Services Department, 2007.
*Snow Date (Job Fair will be held only if previously scheduled Fair is cancelled due to inclement weather)

EXHIBIT 4-13
CLASSIFIED PERSONNEL RECRUITMENT FAIRS
LOUDOUN COUNTY PUBLIC SCHOOLS
2007-08 SCHOOL YEAR

CLASSIFIED RECRUITMENT FAIRS DEPARTMENT FOR PERSONNEL SERVICES			
DATE	**DAY OF WEEK**	**LOCATION**	**TIME**
August 29, 2007	Wednesday	Harper Park Middle School, Leesburg, VA	4:00 PM - 7:00 PM
September 29, 2007	Saturday	Hampton Inn, Winchester, VA	9:00 AM - 12:00 PM
October 6. 2007	Saturday	Dulles Town Center, Sterling, VA	10:00 AM - 5:00 PM
October 25, 2007	Thursday	Cliffside Inn Conference Center, Harpers Ferry, WV	4:00 PM - 7:00 PM
November 14, 2007	Wednesday	Leesburg Corner Premium Outlets, Leesburg, VA	4:00 PM - 7:00 PM
January 15, 2008	Tuesday	Holiday Inn Express, Ranson, WV	4:00 PM - 7:00 PM

EXHIBIT 4-13(Continued)
CLASSIFIED PERSONNEL RECRUITMENT FAIRS
LOUDOUN COUNTY PUBLIC SCHOOLS
2007-08 SCHOOL YEAR

CLASSIFIED RECRUITMENT FAIRS DEPARTMENT FOR PERSONNEL SERVICES			
DATE	**DAY OF WEEK**	**LOCATION**	**TIME**
+February 19, 2008	Tuesday	Administration Building, Ashburn, VA	4:00 PM - 7:00 PM
March 3, 2008	Monday	Seneca Ridge Middle School, Sterling, VA	4:00 PM - 7:00 PM
+March 11, 2008	Tuesday	Seneca Ridge Middle School, Sterling, VA	4:00 PM - 7:00 PM
April 17, 2008	Thursday	Residence Inn, Frederick, MD	4:00 PM - 7:00 PM
May 5, 2008	Monday	Eagle Ridge Middle School, Ashburn, VA	4:00 PM - 7:00 PM
June 14, 2008	Saturday	Holiday Inn Express, Winchester, VA	9:00 AM - 12:00 PM
July 24, 2008	Thursday	Administration Building, Ashburn, VA	4:00 PM - 7:00 PM

Source: Loudoun County Public Schools, Personnel Services Department, 2007.
+Fair for Support Services - Transportation, Facilities Services, Food Services

EXHIBIT 4-14
2007-2008 COLLEGE/UNIVERSITY RECRUITMENT SCHEDULE
LOUDOUN COUNTY PUBLIC SCHOOLS

VENUE	LOCATION	DATE
Washington Post MEGA Career Fair	Tysons Corner, VA	9/13/2007
Loudoun Co. Chamber of Commerce Job Fair	Dulles, VA	10/1/2007
Washington State University Career Fair	Washington State U	10/2-10/3/2007
Coppin State University	Baltimore, MD	10/17/2007
Central Pennsylvania Fall Teacher Job Fair	State College, PA	10/30/2007
Greater Washington Reading Council		11/1/2007
UVA Diversity Career Day	Charlottesville, VA	11/1/2007
AAEE/SAEE (Combined Conference)	GA	11/11/2007
NABSE	Nashville, TN	11/13/2007
Cumberland Valley Consortium	Gettysburg, PA	11/16/2007
MAEE Education Job Fair	Pittsburg, PA	11/28/2007
Washington Post Job Fair	Washington DC	12/8/2007
Radford University Education Career Fair	Christiansburg, VA	1/24/2008
UVA Education Expo	Charlottesville, VA	2/08-09/2008
University of Missouri - St. Louis	St. Louis, MO	2/22/2008
George Mason University (Ed Fair Spring)	Fairfax, VA	2/20/2008
James Madison University	Harrisonburg, VA	2/25/2008
Marshall	Huntington, WV	02/26-27/2008

EXHIBIT 4-14 (Continued)
2007-2008 COLLEGE/UNIVERSITY RECRUITMENT SCHEDULE
LOUDOUN COUNTY PUBLIC SCHOOLS

VENUE	LOCATION	DATE
Wright State University	Dayton, OH	2/28/2008
Longwood Education Day	Farmville, VA	2/29/2008
College of William & Mary	Williamsburg, VA	TBD
Howard University	Washington, DC	February
Loudoun County Job Fair Chamber Event	Dulles, VA	February
Old Dominion University	Norfolk, VA	February
Fairmont State University	Fairmont State, WV	3/8/2008
Shippensburg State University	PA	3/10/2008
University of Maryland - Eastern Shore	Princess Anne, MD	3/13/2008
Arizona State University	AZ	3/26/2008
PERC	PA	3/27/2008
Bloomsburg University	Bloomsburg, PA	March
California University	PA	March
Delaware State University	DE	March
Elizabeth City State University	Elizabeth City, NC	March
Hampton University	Hampton, VA	March
New Jersey City University	NJ	March
Norfolk State University	VA	March
Northeastern Illinois	Northeastern U	March
University of Mary Washington	Fredericksburg, VA	March
Great Virginia Teach-In	Richmond, VA	March
Council for Exceptional Children	Louisville, Kentucky	4/2/2008
Texas State University	TX	4/2/2008
Long Island Education Consortium	Brookville, NY	4/4/2008
National Minority Ed. Expo	New York, NY	4/5/2008
Penn State University	Penn State, PA	4/7/2008
Indiana University	PA	4/15/2008
Eastern Michigan University	Ypsilanti, MI	April
MERC	MA	April
Pacific University	Oregon	April
SUNY Consortium		April
Loudoun County Job Fair Chamber Event	Dulles, VA	May
University of Missouri - St. Louis	St. Louis, MO	July
College of San Juan	Puerto Rico	Spring
VIF Spain		

Source: Loudoun County Public Schools, Personnel Services Department, 2007.

FINDING

LCPS has increased the percentage of minority licensed personnel hired from five percent to 21 percent in the last six years.

Faced with the challenge of a growing disparity between the diversity of the student population and the diversity of its teaching force, the LCPS School Board issued a challenge to the school division to increase the number and percentage of minority

employees to more closely match the percentage of minority students in the division. Personnel services created a strategic plan for recruitment and hiring in response to the directive, and took a number of actions to help ensure the success of its minority recruitment efforts, as well as overall efforts to secure highly qualified personnel. Among the actions taken by the department to increase the number and percentage of minority personnel, as well as increasing the overall number of teacher recruits are the following:

- **Branding of the Recruitment Campaign.** In August 2006, the department for personnel services created a recruitment program specifically designed to attract and retain highly qualified, diverse candidates for all employment positions. The campaign was branded as "Star in Your Own Life" and was supported by a customized Web site (www.teach4loudoun.com) for potential candidates to learn about all the advantages of working for Loudoun County Public Schools. The branding was carried throughout the Web site, as well as recruitment materials, brochures, and even the apparel worn by LCPS personnel at recruitment fairs.

- **Providing Specialized Training for Recruitment Staff.** The department of personnel services employs a research-based approach to conducting interviews and recruiting candidates for the school division. The department utilizes an approach called *Managed Conversations* when recruiting candidates at job fairs. The approach structures the interaction between LCPS staff and job candidates, with the keys goals of the conversation being: (1) establishing an emotional connection with the candidate; (2) fostering a memorable experience; and (3) inspiring a vision of teaching in Loudoun County Public Schools.

- **Creating Cultural Competence Among LCPS Recruitment Staff.** Cultural competence is defined as "the ability of people of one culture to understand, communicate, operate, and provide effective services to people of another given culture." In a human resources context, it means professional behavior that avoids racist or discriminatory practices while providing care to people of different cultural backgrounds. Personnel services staff as well as other LCPS employees participating in recruitment events were trained on managing non-verbal cues with various ethnic groups. The cues include engaging behaviors, personal space, eye contact, facial expressions, and touch.

- **Participating in the Visiting International Faculty (VIF) Program.** Virginia is one of seven states that participate in the VIF Program. VIF was founded in 1987, and is the largest cultural exchange program for teachers in the United States. VIF teachers come from 50 countries around the world including Argentina, Australia, Canada, Chile, Colombia, Costa Rica, Denmark, Ecuador, France, Germany, Ireland, Jamaica, Mexico, the Netherlands, New Zealand, Peru, South Africa, Spain, the United Kingdom and Venezuela. For the 2007-08 school year, 94 VIF teachers from 18 countries were placed in LCPS schools, up from 92 the previous year.

- **Establishing Metrics for Recruitment Initiatives.** In addition to the creation of a strategic plan for increasing employee diversity, the department established evaluation standards (metrics) for assessing the effectiveness of

recruitment efforts. These metrics included: (1) the number of letters of intent extended to applicants; (2) percentage of hires meeting NCLB "highly qualified" standards; (3) percentage of letters of intent offered to diverse applicants; and (4) number of vacancies unfilled at the start of the school year.

■ ***Establishing a Process for Continued Contact and Support of Candidates with Letters of Intent.*** LCPS issues letters of intent to high potential teacher candidates contacted at recruitment fairs and other venues. In addition to providing this incentive to teachers interested in working in Loudoun County, personnel services also has a process for continuing to follow-up and support these individuals throughout the period from the issuance of the letter through their hiring as a full-time employee. The Candidate Care program provides an additional level of commitment to high quality applicants that enhances recruitment and retention efforts.

Exhibit 4-15 shows the success of these efforts in terms of the increase in the percentage of minorities hired. As shown in the exhibit, the percentage has increased over the last six years, from five percent in 2002-03 to 21 percent for the 2007-08 school year. The department attributes much of this success, particularly over the last year, to the placement of teachers from the VIF program. **Exhibit 4-16** breaks out the percentage of minority hires by ethnic group to show the specific impact of the VIF program. As shown in **Exhibit 4-16**, the percentage of African-American, Asian, and Hispanic hires nearly doubled in the last three years.

By establishing clear goals and objectives in its strategic plan for recruitment, providing appropriate inservice training for recruitment staff members, and establishing defined measures for determining the effectiveness of recruitment efforts, the success of these efforts has been commendable.

EXHIBIT 4-15
COMPARISON OF PERCENTAGE OF LICENSED MINORITIES HIRED
OVER THE LAST SIX YEARS
LOUDOUN COUNTY PUBLIC SCHOOLS
2002 THROUGH 2007

ETHNIC GROUPS	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
White	95%	93%	94%	89%	84%	79%
Minorities*	5%	7%	6%	11%	16%	21%

Source: Loudoun County Public Schools, Department of Personnel Services, 2007.
*This group includes African-American, Hispanic, and Asian

**EXHIBIT 4-16
PERCENTAGE OF MINORITIES HIRED
OVER THE LAST THREE YEARS WITH VIF PROGRAM
LOUDOUN COUNTY PUBLIC SCHOOLS
2005 THROUGH 2007**

ETHNIC GROUPS	2005-06	2006-07	2007-08
African-American	3.89%	4.04%	7.90%
Hispanic	2.80%	2.65%	3.88%
Asian	3.88%	3.44%	0.27%

Source: Loudoun County Public Schools, Department of Personnel Services, 2007.

COMMENDATION 4-C:

Through efforts such as Candidate Care, and the Visiting International Faculty programs, LCPS department of personnel services is commended for its persistence in meeting minority recruitment goals.

FINDING

The timeline for the identification of projected position vacancies is not effectively aligned with the timeline for planning recruitment activities.

An essential element in determining recruitment venues and executing effective recruitment efforts is having an accurate count of the number of instructional vacancies projected for the coming year. School administrators are asked to submit the number of vacant positions at their schools for the upcoming year, but this process has not successfully ensured an accurate accounting for personnel services to create recruitment targets.

Currently, existing teachers have priority access to vacancies through the transfer process. The timeline for this process extends past the time when personnel services begins planning recruitment trips. Not having exact figures results in personnel services having to "guesstimate" the numbers of letters of intent that need to be issued at recruitment events. Inaccurate estimation also has the effect of needing to obtain the letters later in the hiring cycle which results in a more limited pool of qualified available candidates.
To document this problem, the department of personnel services has begun to track the number and percent of teachers placed on the "December List" (e.g., personnel identified as possible non-reappointments at the end of the school year) and the months in which these personnel were hired.

Exhibit 4-17 displays the number of teachers hired each month of the recruitment cycle and the percentage of these teachers who are placed on the "December List." As shown in the exhibit, teachers hired in July (25%) and August (28%), and mid-year hires in February (25%) had the highest percentage of placement on the December list.

EXHIBIT 4-17
COMPARISON OF EMPLOYEE MONTH OF HIRE
AND DECEMBER LIST PLACEMENT
LOUDOUN COUNTY PUBLIC SCHOOLS
DECEMBER 2006
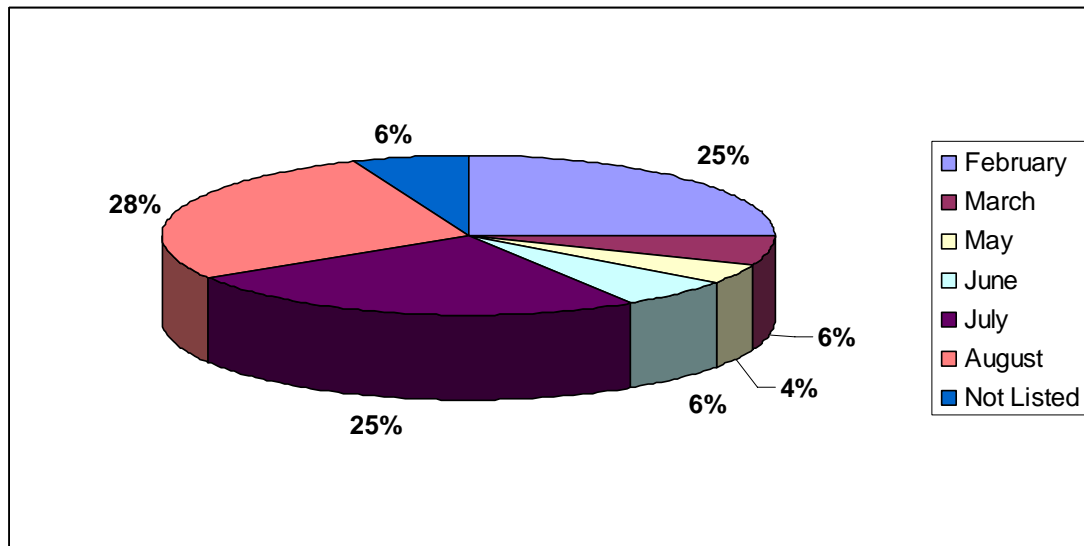
Source: Loudoun County Public Schools, Department of Personnel Services, 2007.

RECOMMENDATION 4-3:

Establish a reporting schedule that allows for early identification of position vacancies.

Given the high rate of growth in the school division, the timelines and processes for employee recruitment must be well-aligned in order to ensure that recruitment targets are accurate. To develop a more accurate system of projecting position vacancies, selected staff from the department of personnel services and administrators of schools that traditionally have had the highest vacancy rates should meet to review historical data on recruitment for the past five years, including the "December List" correlations, and to identify what policies, conditions, and practices impede the accurate projection of position vacancies. When these obstacles have been identified, personnel services administrators should take the steps necessary to amend the identified policies, conditions, and practices, and establish a revised vacancy reporting schedule.

FISCAL IMPACT

Providing more accurate vacancy projection procedures will increase the effectiveness of the department's current recruitment activities and has the potential for resulting in cost savings, although they cannot be accurately estimated at this time. Implementing the recommendation will require a time commitment from personnel services staff and school administrators of three to six months in order to both identify process impediments and make the changes necessary to correct the identified problems.

4.3.2   Hiring Practices

Just as a school division should maintain efficient and effective processes for recruiting potential employees, the process for reviewing applications for employment, screening applicants and hiring new employees should be equally efficient. This process should be transparent to the applicant and to the principals that review applications and make hiring recommendations. The division should maintain clearly defined job descriptions for all positions within the division. In critical shortage areas, the division should have both short and long term strategies to address those shortages, including making comparisons of entry level salaries and other key factors related to recruitment.

Over the last nine years, the number of licensed personnel hired by LCPS has nearly doubled. **Exhibit 4-18** shows the number of new hires over the period from 1999 to 2007. As shown in the exhibit, 455 licensed employees were hired in 1999-00, while 805 were hired for the 2007-08 school year, as of September 20, 2007. This figure represents an increase of 350 in the number of new hires.

Exhibit 4-19 shows a comparison of the number of classified new hires. LCPS personnel in this category include employees in transportation, food services, and facilities. As shown in the exhibit, the number of employees hired fluctuates from month to month across the two years, but the overall trend is an increase in the number of new hires.

**EXHIBIT 4-18
NUMBER OF LICENSED NEW HIRES
LOUDOUN COUNTY PUBLIC SCHOOLS
JULY 1999 THROUGH SEPTEMBER 2007**
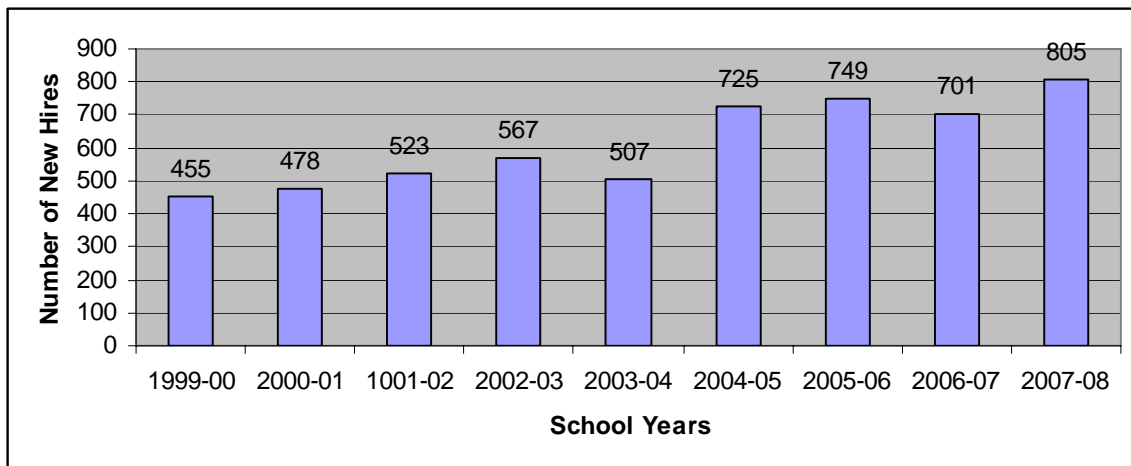
Source: Loudoun County Public Schools, Department of Personnel Services, 2007.

EXHIBIT 4-19
NUMBER OF CLASSIFIED NEW HIRES
LOUDOUN COUNTY PUBLIC SCHOOLS
2006-07 AND 2007-08 SCHOOL YEAR
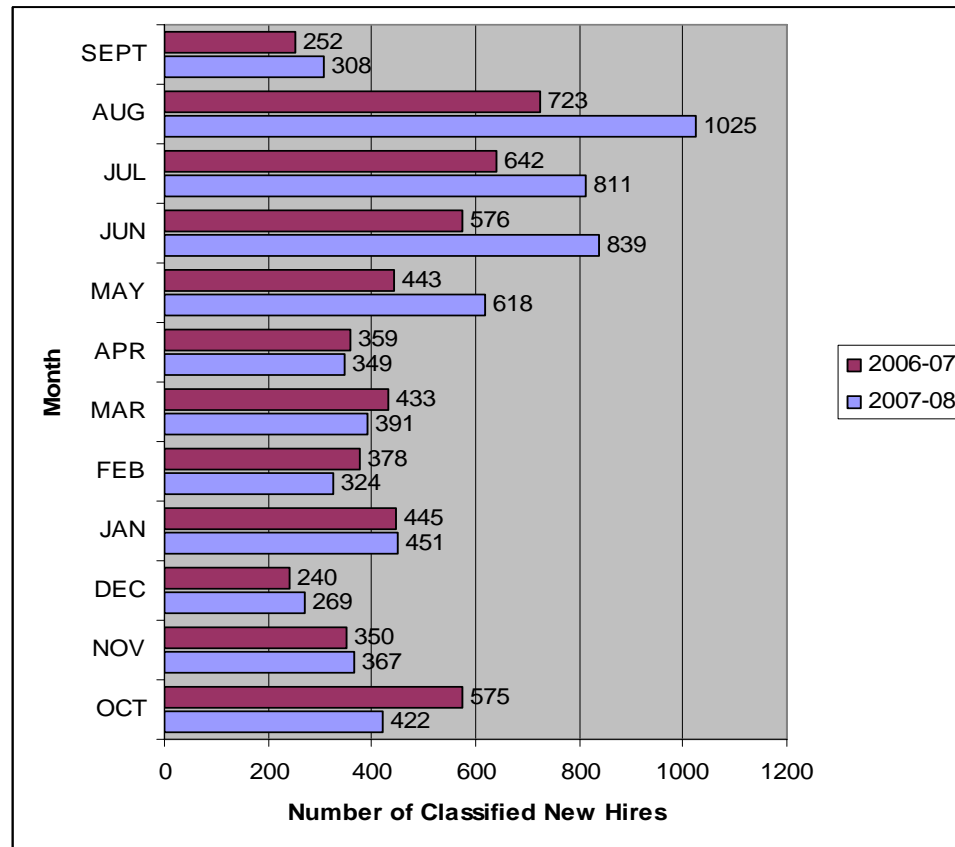
Source: Loudoun County Public Schools, Department of Personnel Services, 2007.

FINDING

LCPS has a well-written and comprehensive set of guidelines for hiring of all classifications of employees.

The department of personnel services has established clear processes for processing candidate applications, screening applicants, conducting requisite background checks, and all other actions necessary to hire a new employee. The department has outlined these procedures in a set of process flow charts and has created charts for the general hiring process, and specific charts for the following employee groups:

- School Principals
- Licensed Personnel
- Facilities Personnel
- Food Services Personnel
- Transportation Personnel

The flow charts allow for the training of new personnel on the hiring process and describe the connections both within the department and across other divisional departments. The clear delineation of the process allows for more effective analysis when troubleshooting problems or noting areas that are working exceptionally well. It also serves to inform school principals and other division personnel of the steps involved in the hiring process prior to after their involvement is complete.

COMMENDATION 4-D:

LCPS is commended for having a set of well-written and comprehensive hiring procedures.

FINDING

The division does not have a written process flow chart for the staffing of new schools.

LCPS is a rapidly growing school division that added at least one new school per year for the past several years. The staffing of new schools is a complex process that entails not only the placement of personnel and the new facility, but the replacement of personnel in position vacancies resulting from transfers to the new school. While the principals of the new schools will typically have had experience in the hiring of personnel, staffing a school "from scratch" requires greater coordination across the division to prevent staffing imbalances and to ensure a strong, positive site fit between the employee and their assigned school. With the increasing size of the division, the need for clearly communicated, uniform written procedures for staffing new schools is crucial.

RECOMMENDATION 4-4:

Modify the existing hiring process flow charts for licensed and support personnel to customize for use in staffing new schools.

The current process flow charts are well designed and could be adapted easily to reflect the additional system-wide impact of staffing new schools. Such adaptation would allow principals of these schools to see the "big picture" of new school staffing at a glance and improve the decision-making processes involved in the staffing activities.

FISCAL IMPACT

The implementation of this recommendation would require the expenditure of time by personnel services staff and school principals, as well as other central office staff involved in the hiring process. Time required to amend the existing flow charts is estimated at one to three months.

4.3.3 *Teacher Retention*

Teaching has been characterized as an occupation with high levels of attrition, especially among newcomers in the profession. Numerous studies have found between 40-50 percent of new teachers leave within the first five years of entry into the

occupation. To combat attrition, school divisions employ a number of strategies to support novice educators in the early stages of their careers including mentoring and induction programs, intensive professional development, and the establishment of learning communities.

LCPS provided MGT consultants with records of licensed employee separations from service for the past four years. **Exhibit 4-20** shows the numbers of retirements and resignations/terminations, the total number of licensed personnel, and attrition rates for that period. As shown in the exhibit, attrition rates have fluctuated between eight and ten percent over the four year period, with the number of retirements ranging from 44 to 56 and the number of resignation/terminations increasing from 249 to 370.

EXHIBIT 4-20
ATTRITION RATES FOR LICENSED EMPLOYEES
LOUDOUN COUNTY PUBLIC SCHOOLS
2003 – 2007

YEAR	RETIREMENT	RESIGNATION/ TERMINATION	NO. OF EMPLOYEES	ATTRITION RATE
2006-07	56	370	5,042	8%
2005-06	62	348	4,352	10%
2004-05	58	262	3,662	8%
2003-04	44	249	3,285	10%

Source: Loudoun County Public Schools, Department of Personnel Services, 2007.

FINDING

The largest percentage of employees who separate from service with the division do not specify a reason for leaving.

Exit interviews conducted by personnel services indicated the main reasons for employee attrition other than retirement were as follows:

- To obtain a higher paying position in another school division or in the private sector.

- For personal reasons such as a spouse's job relocation, child care issues, or relocation out of the area.

The majority of exit interview survey responses to reasons for resignation are "other." Nearly 25 percent of surveyed employees gave this reason, thus preventing the department from gathering valuable information on working conditions that may have contributed to the employee's departure. Not having a means to clearly identify the reasons for employee attrition prevents the school division from enacting procedures or amending existing conditions in order to retain a higher percentage of personnel.

RECOMMENDATION 4-5:

Develop a process to gather more accurate information on the reason behind employee attrition.

It is good public relations to be interested in every employee who is leaving the school division. Every employee who leaves the division has a neighbor, relatives, friends, and acquaintances. In conversations with them, he may talk in some detail, or at least make a casual comment or two about his experience as a LCPS employee. Each departing employee who leaves with incorrect information or a negative attitude towards the school or department where they were employed can do damage by building up misconceptions about the school division and dissuading people from accepting employment. An exit interview, properly conducted, can correct misinformation and modify negative attitudes.

A well-designed exit interview process yields a considerable amount of information regarding the working conditions or personal circumstances that lead to an employee's departure. The questions should be both open-ended and directed to provide the employee with as many opportunities as possible to express their views. In conducting exit interviews, the following standards are considered best practices:

- ■ *Prepare for the interview.* Review the employee's employment record prior to the interview. This background information can be helpful in "breaking the ice". It also helps to establish confidence if the employee feels that you know something about him—how long he has been in the school division, the kind of work he has done, etc. Have a discussion with the employee's supervisor prior to the interview.

- ■ *Provide for privacy*. This doesn't necessarily mean a private office. If you are in a room with other people your desk should be placed so that neither you nor the employee are interrupted or distracted by activities in the room, and so that your conversation is not audible to the other occupants.

- ■ *Open the interview in a friendly way to put the employee at ease*. If you and the employee are both relaxed and can assume a natural conversational attitude there will be a freer exchange of ideas. The ordinary rules of good manners should be observed such as greeting the employee by name, perhaps shaking hands, if this seems natural, followed by one or two casual, friendly remarks. A friendly, informal relationship should be established and tension relieved before trying to proceed with the interview.

- ■ *Tell the employee briefly the purpose of the interview*. Let the employee know that the division is interested in his future plans, his reasons for making a change and his evaluation of his work experience here. Tell him that the division also wants him to have any information he needs before leaving. This phase of the interview often makes a good starting point.

- ■ *Treat the employee as a conversational equal*. Even though you may know more about the subject under discussion than the employee, never lecture or talk down to him.

■ *Use language that the employee can understand*. Technical terms should be avoided. When giving instructions or information, be sure that what you are saying is clear and not likely to be misinterpreted.

■ *Show an interest in what the employee has to say*. Give the employee your undivided attention. Arrange your interview so that nothing will interrupt. Have someone else cover your phone during the interview.

■ *Phrase questions to encourage the employee to talk or to clarify a statement*. Questions that can be answered by "yes" or "no" tend to block the flow of easy conversation. "How have you enjoyed your work?" or "What do you like best about your work?" is better than, "Did you enjoy your work?", as the answer is an expression of ideas and attitudes and will not require a second question. Sometimes a direct statement such as, "I'm interested in hearing what you think of the promotion policy", instead of "Do you think the promotion policy is fair?" can be used effectively.

■ *Avoid the semblance of cross examination*. Questions should not be fired at the employee in rapid succession.

■ *Answers to questions should not be implied*. In order to obtain an unbiased answer, a question should be phrased, "How does the responsibility in your new job compare with your work here?"

Given the size of the division, the current system of gathering exit data should continue to be utilized, but for individuals who do not indicate a reason for their voluntary separation from service, a follow-up contact and request for a formal exit interview would be appropriate.

FISCAL IMPACT

The implementation of this recommendation will require a time commitment of one to two months for those persons charged with conducting exit interviews to receive training on the best practices and to review the current procedures and amend them to this standard.

4.4   *Performance Appraisal*

Performance appraisal is an important aspect of the effectiveness of a school division and to the public's perception of the quality of the school system. More than two-thirds of all states have legislation that addresses the importance of evaluation systems, and nearly all states require the evaluation of teachers. Over 50 percent of all states also require the formal evaluation of school principals.

According to Stronge (1991) a sound performance appraisal system can be characterized as one that (1) has established performance evaluation as a school district priority; (2) has determined and disseminated clearly articulated evaluation purposes, and (3) has adopted an evaluation plan that has a sound methodology that "provides an

orderly sequence of implementation stages, and follows a natural progression from intended purposes through actual use. [1]

FINDING

The LCPS school board policy manual does not include a policy regarding performance appraisal of division employees.

The department of personnel services has developed a set of guidelines for the performance appraisal of licensed, administrative, and classified personnel. MGT consultants were provided copies of these documents and noted that each outlined detailed procedures for evaluating employees including:

- The school division's philosophy and objectives for employee evaluation.
- Standards for performance appraisal.
- Timeline for the evaluation cycle.
- Grievance procedures (if applicable).

In the LCPS school board policy manual, there is a reference in the index to "Evaluation and Instructional Supervision," but it is only a one-line statement referring the reader to the four evaluation handbooks developed by the school division.

Board policies represent broad statements that allow professional staff to use its judgment concerning the specifics of the function addressed in the policy. Policy has the effect of law and reflects the importance of the issue in the overall governance of the school division. Failure to have a policy subjects the school division to scrutiny regarding the fairness and consistent application of its rules and procedures regarding performance appraisal.

RECOMMENDATION 4-6:

Establish a school board policy on performance appraisal for all employees.

Exhibit 4-21 shows a sample performance appraisal policy. As shown in the exhibit, the policy outlines the specifics of who should be evaluated, the timeline for evaluation, the type of evaluation instrument that should be used, and where completed evaluations should be submitted.

Having these procedures spelled out in policy provides a means of informing both internal employees and prospective employees about the division's expectations for job performance, as well as the means by which it will be assessed.

FISCAL IMPACT

The division currently has a process for reviewing and updating personnel policies. The process of creating a performance appraisal policy can be incorporated into the existing policy update procedures.

---

[1] Stronge, J.H. (1991). The dynamics of effective performance evaluation systems in education: Conceptual, human relations, and technical domains. *Journal of Personnel Evaluation in Education*, 5, 77-83.

EXHIBIT 4-21
SAMPLE EMPLOYEE PERFORMANCE APPRAISAL POLICY
VIRGINIA BEACH PUBLIC SCHOOLS
2007-08

Evaluation: Licensed Personnel
A. Evaluation of Administrative/Supervisory Personnel Other Licensed Personnel
1. Orientation
The evaluation process and procedure will be reviewed with staff members.
2. Schedule of Evaluation (Minimum Evaluation Cycle)
a. During the first three years of service in these positions, the employee will be evaluated annually.
b. Employees with three (3) or more years of experience in these positions within the school division will receive an evaluation every two years.
c. An individual may request additional evaluations.
d. Employees may receive an evaluation if on a continuing contract and it is not their year to be evaluated
B. Evaluation of Teaching Personnel
1. Orientation
The evaluation process and procedure will be reviewed with teachers.
2. Schedule of Evaluations
a. First Year Probationary Teachers (P-1)
(1) By November 1 - First observation completed.
(2) By January 15 - Second observation completed.
(3) By the last day of the first semester - Interim Evaluation completed using the Teacher Evaluation Instrument. Submit to Department of Human Resources.
(4) By March 1 - Third observation completed.
(5) By April 1 - Summative Evaluation completed using the Teacher Evaluation Instrument. Submit to Department of Human Resources.
b. Second Year Probationary Teachers (P-2)
(1) By January 15 - First observation completed.
(2) By last day of first semester - Interim Evaluation completed using the Teacher Evaluation Instrument. Submit to Department of Human Resources.
(3) By April 1 - Second observation completed.
(4) By April 1 - Summative Evaluation is completed using the Teacher Evaluation Instrument. Submit to Department of Human Resources.
c. Third Year Probationary Teachers (P-3)
(1) By April 1 - Observation completed.
(2) Prior to last ten teacher workdays - Summative Evaluation completed using the Teacher Evaluation Instrument. Submit to Department of Human Resources.
d. Probationary to Continuing Contract Teachers (PC-C)
(1) By April 2 – Observation completed using Summative Evaluation form.
(2) Prior to last ten teacher workdays – Summative Evaluation is completed using the Teacher Evaluation Instrument. Submit to Department of Human Resources.
e. Continuing Contract Teachers (CE-even year) or CO-odd year)
(1) By May 15 - One written observation completed.
(2) Every two years (prior to last ten teacher workdays) - Summative Evaluation is completed using the Teacher Evaluation Instrument. Submit to Department of Human Resources.
f. Special Probationary Teachers
(1) Within six weeks of beginning date of probation - one observation.
(2) Within one month following first observation - Interim Evaluation completed using the Teacher Evaluation Instrument. Submit to Department of Human Resources.
(3) Within six teaching weeks of cumulative evaluation - second observation completed.
(4) Within six weeks after second observation - Summative Evaluation completed using the Teacher Evaluation Instrument. Submit to Department of Human Resources.

Source: Virginia Beach Public School, School Board Policy Manual, 2007.

5.0   FACILITY USE AND MANAGEMENT

5.0 FACILITY USE AND MANAGEMENT

This chapter presents the results of the performance review of the facility use and management functions in Loudoun County Public Schools (LCPS). The five sections in this chapter are:

5.1   Planning Services
5.2   Capital Design and Construction
5.3   Maintenance
5.4   Custodial Services
5.5   Energy Management

A comprehensive facilities management program ensures that all division facilities are safe and healthy, and enhance the activities that they are housing. The program should accomplish these goals in an efficient and cost effective manner. Division facility planners and the facility plan need to be key elements in the division's strategic plan.

The design of well-planned schools is driven by the needs of the educational programs and accurate demographic studies. The design process should have participation 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 resources.

CHAPTER SUMMARY

The LCPS facilities management and use functions are the responsibility of the assistant superintendent for support services and the director of planning and legislative services. The assistant superintendent of support services oversees the director of construction, who is responsible for design and construction, and the director of facility services, who is responsible for maintenance and custodial services. The director of planning and legislative services oversees the supervisors for land management, planning, Geographic Information System (GIS) planning, and land acquisition.

Key commendations reported in this chapter include:

■   LCPS planners are effectively using technology to study the effects of attendance boundary changes.

■   LCPS has developed a "best practice" system for calculating the capacities of schools.

■   Construction is using a project management software application that is Web-based and, therefore, accessible to the division's architects and contractors.

Key recommendations contained in this chapter include:

■   Hold a public hearing to review the specific attendance boundary change that the board is going to vote on, prior to the vote.

- Lobby the county government to simplify the school site acquisition process.

- Reorganize the maintenance crews more effectively, such as the "roving crew" approach.

- Increase the number of lead custodians (supervisors) by one position.

- Create an energy coordinator position to oversee and coordinate all energy management programs in the division.

5.1   *Planning Services*

Planning services are those activities that are necessary prior to starting the actual design of a school facility. These services include demographic and attendance zone studies, capacity and utilization analysis, land acquisition, and school site permitting. The director of planning and legislative services is responsible for these planning services.

FINDING

LCPS develops accurate annual enrollment projections using sound methodology and multiple sources of accurate data. The enrollment projections are typically within 98 percent of the actual figures.

Accurate enrollment projections are a foundation of effective facility planning. Being able to accurately project the future number of students allows planners to determine the amount and kind of space the division will need to appropriately house all students.

The division uses a cohort survival method to project annual enrollment projections. This methodology, which is widely recognized and used, utilizes historic September 30 enrollment figures and determines the survival rate of students as they graduate through the school system. The cohort survival projections are then compared to additional demographic and economic data to determine the most realistic projections. The staff considers birth and death rates, migration in and out of the division, employment figures, and building permit information.

One of the key calculations made by the staff is the student per household ratio. This ratio is a measure of how many students, on average, each house produces. LCPS breaks this ratio down further by looking at the ratios for single family homes, town homes, and apartments. By applying the ratios to the number of building permits, the planners can fine tune the cohort survival projections.

Exhibit 5-1 presents a comparison of the LCPS enrollment projections to the actual enrollments for the last six years. As shown, the projections have been within two percent of the target every year.

EXHIBIT 5-1
COMPARISON OF ENROLLMENT PROJECTIONS AND ACTUAL ENROLLMENTS
2002-07

SCHOOL YEAR	PROJECTED SEPTEMBER 30 ENROLLMENT	ACTUAL SEPTEMBER 30 ENROLLMENT	NUMERIC DIFFERENCE OF PROJECTED V. ACTUAL ENROLLMENT	ACTUAL ENROLLMENT AS PERCENTAGE OF PROJECTED ENROLLMENT
2002	37,382	37,532	150	100.4%
2003	40,250	40,751	501	101.2%
2004	44,715	44,014	(701)	98.4%
2005	47,467	47,361	(106)	99.8%
2006	50,740	50,478	(262)	99.5%
2007	53,396	54,047	651	101.2%

Source: LCPS, planning and legislative services, 2007.

COMMENDATION 5-A:

The division is commended for developing accurate annual enrollment projections using sound methodology and multiple sources of accurate data.

FINDING

LCPS uses sophisticated GIS technology to map the affects of proposed attendance boundary changes. The methodology allows division planners to see the short- and long-term affects of proposed changes.

Effective facility planning requires using all facilities to their capacity. Many times the under- or over-utilization of a facility can be solved by changing the attendance boundary and adjusting the student enrollment. However, changing attendance boundaries is not a popular solution for most parents and students, and, therefore, changes need to be carefully studied prior to taking any action.

Many divisions use GIS mapping to locate students within attendance boundaries and review the effects of changes to those boundaries. However, LCPS goes further with this technology in two significant ways. The division's planners have created planning zones that are subdivisions of attendance zones. These planning zones are created by mapping out neighborhoods or logical groupings of houses. The smaller planning zone units allow the planners to reconfigure attendance zones in multiple ways quickly and thereby study multiple scenarios. These scenarios can be mapped graphically and are easily understood by the public.

Additionally, the division's planners have linked their enrollment projections to the planning zones. This practice allows the division to see the affects of an attendance boundary change six years into the future. This type of long-range planning helps reassure the public that the changes are being made based on long term solutions.

COMMENDATION 5-B:

LCPS planners are effectively using technology to study the effects of attendance boundary changes.

FINDING

The LCPS School Board is not as transparent as it should be in the decision-making process for attendance boundary changes. While adjusting attendance boundaries can be an effective tool for balancing the utilization of facilities, it is a tool that must be used carefully and transparently to avoid parental backlash and distrust.

Most parents can appreciate the wisdom of adjusting attendance boundaries to resolve an overcrowded situation rather than adding portables or building new classrooms. At the same time, if their child is going to be moved to a new school, they want to be assured that the change is the best solution and that they had some comments in the decision.

The school board has an appropriate policy describing the process for adjusting school attendance boundaries. The process generally follows these steps:

- The planning staff develops the demographic data and prepares multiple scenarios for boundary changes.

- The planning staff holds public meetings to share the data and scenarios with stakeholders. Comments are received from stakeholders. All scenarios are posted on the LCPS Web site for review and comment.

- Based on the public comments and the staff's professional judgment, a recommendation is forwarded to the board.

- The board holds at least one public hearing to take comments on the recommended change.

- The board votes on a final scenario at the next board meeting.

This process is effective up until the vote of the board. Sometimes, the board changes the scenario staff has recommended after the public hearing and before the board vote. This results in the board voting on a scenario without public input. This glitch in the process can be a fatal flaw negating all the previous good work. A more effective approach would be to publicly announce all specifics that will be voted on by the school board.

RECOMMENDATION 5-1:

Hold a public hearing to review the specific attendance boundary change prior to the school board vote.

This is a small but significant change in the process that will encourage public involvement and develop trust in the board's decisions. The board and the

parents/stakeholders can have an open discussion on the specific changes prior to the school board vote.

FISCAL IMPACT

This recommendation can be implemented by a simple change in procedures. Prior to the board voting on a specific attendance boundary change, the board should hold a public session at the same meeting.

FINDING

The division uses a highly effective, annual process to determine the capacity of its schools. Determining the capacity of school facilities is another foundation of effective school planning as is determining when facilities are too crowded or under utilized.

The functional capacity of a school should be a role of the educational programs within the school. Different programs require different sized rooms and different student/teacher ratios. Consequently, two school buildings with exactly the same floor plan but different educational programs could have different capacities. In addition, educational programs and the make-up of the student body changes from year to year; consequently, the capacity of the school can change on an annual basis as well.

LCPS has developed a Web-based capacity analysis tool. The floor plan for each school is in a CAD drawing, which can be accessed on the Web by the respective principal. The principal identifies the use of each room in the plan and then the capacity of the school is automatically calculated. The planning staff reviews the principal's designations to make sure they are consistent with division practices.

This methodology is quick, efficient, and lends itself to accurate, annual updates.

COMMENDATION 5-C:

LCPS has developed a best practice system for calculating the capacities of schools.

FINDING

Loudoun County has a very complicated, difficult, and expensive process for the acquisition, approval, and permitting of new school sites. The bureaucratic "hoops" that the school division is forced to jump through are particularly troubling in a county that is experiencing tremendous growth.

In Loudoun, the county government funds the acquisition of new school sites. The school division submits a request for land purchase funds in its annual Capital Improvement Program (CIP) and the county approves the funding as it sees appropriate. The funding is a line item by site for a specific school.

The process of funding by a specific school site can make the acquisition of land difficult for the school division. The real estate market in Loudoun County is very competitive due to the high growth rate. Purchasing land when competing with large developers

requires the ability to act fast and be flexible (Note: the division can acquire land through other means such as when a developer proffers a site). Because the funding for land acquisition is school site specific, the division does not always have the flexibility it needs to take advantage of opportunities that the market presents.

The county has a general plan that guides development by designating the types of development that can occur in different areas of the county. The general plan identifies locations for schools. The locations for schools are fairly specific in the general plan and not necessarily appropriate given the current demographics and market conditions. If the division needs to locate a school at a site that is not identified in the general plan, the division must apply for a permit to locate the school in the alternate site. This permit application process is time consuming and costly.

In addition to the general plan permit, the division must apply for and receive a special exception to locate a school in any particular zoning jurisdiction. This is true even for residential zones where one would expect to locate schools. The special exception application process requires numerous studies, approximately three to five months to complete, and can cost a half million dollars in engineering and consulting fees.

This combination of funding, planning, and zoning requirements puts an unnecessary and expensive burden on the school division when it is trying to provide a critical service to the residents of the county. One must ask the question, "are the citizens receiving value for the tax dollars that are being spent to meet these requirements?"

There is no question that the county must provide oversight in all of these areas. However, many jurisdictions accomplish this oversight without unduly burdening the public school system. LCPS is working hard to meet the needs of a rapidly growing county; it seems logical that the county government would work to facilitate the division's efforts. The county and the division might want to talk with officials in Clark County, Nevada, as it is a school district that is also experiencing significant growth.

Loudoun County needs to study other county jurisdictions and simplify this process for the division. For instance, school site acquisition funding could be done as a general fund and be non-site specific. The general plan could designate broad areas and not specific sites where schools are approved. Zoning regulations could be changed to allow schools "by right" in zones where schools are typically found and identify site development requirements for those zones.

RECOMMENDATION 5-2:

Lobby the county government to simplify the school site acquisition process.

Simplifying the school site acquisition process will allow the division to redirect valuable resources to efforts that will be of greater value to the citizens. Many other jurisdictions have done this and are still maintaining well planned communities.

FISCAL IMPACT

The implementation of this recommendation will require numerous hours of lobbying by division staff, board members and citizens. It is impossible to quantify this effort. The savings could be significant depending on the resulting approval process.

According to division staff, the division is currently spending approximately $700,000 in site studies, consultant fees, and staff time per site to attain approvals. If a "by-right" process were approved, the staff estimates the division could realize a savings in site studies of approximately $100,000, consultant fees of $100,000, and staff time of $35,000, or a total per site of approximately $235,000. If the division continues to build three schools per year, this could easily result in a savings of more than $700,000 per year ($235,000 x 3 = $705,000).

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Simplify Land Acquisition	$705,000	$705,000	$705,000	$705,000	$705,000

5.2 *Capital Design and Construction*

The design and construction of new schools and major renovation projects in LCPS is overseen by the director of construction and his staff. **Exhibit 5-2** presents the organizational chart for this group.

EXHIBIT 5-2
CONSTRUCTION SERVICES ORGANIZATIONAL CHART
2007-08
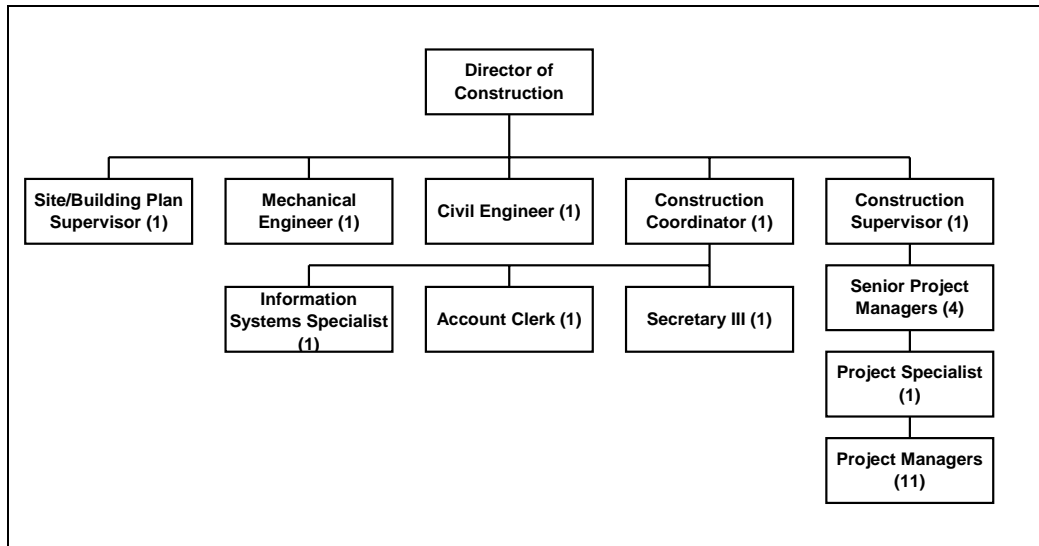
Source: LCPS, construction services, 2007.

FINDING

The construction services staff have developed effective procedures, but need to document many of these procedures in a manual for new school principals. A principal for a new elementary school is usually selected by the spring prior to the school opening (a high school principal is usually selected a year before) and has many responsibilities.

The construction services staff begin working with new school principals as soon as they are available. The principal attends monthly construction update meetings where final construction details are decided, equipment ordering is scheduled, and staff selection and training are finalized. In addition, the construction services staff have developed a "lessons learned" list from previous projects that it uses to improve the details of school designs and the move-in process.

These procedures could be improved and expanded by documenting them in a "New School Move-in Manual". The manual would become a guide for each principal of a new school and help ensure that nothing "falls between the cracks."

RECOMMENDATION 5-3:

Develop a "New School Move-in Manual" to guide principals of new schools.

Many school divisions that are experiencing significant growth have developed these manuals. Typical subjects for the manual might include:

- Construction procedures.
    - How to make changes.
    - How to resolve problems.
- Finishing the building.
- Ordering furniture and equipment.
- Staffing the school.
- Moving in.
- The commissioning process.
- The "punch list."
- Post occupancy evaluation.

FISCAL IMPACT

The implementation of this recommendation will require 16 to 20 hours of construction services staff time. The manual should be updated on a regular basis.

FINDING

Construction services staff have implemented effective procedures and have used prototype designs to control the cost of construction. Construction costs are affected by many factors, however effective design and management procedures are some of the best ways to control costs.

Some of the procedures that construction services has implemented include:

- Prototype designs for schools. Reusing the same basic design minimizes design costs, simplifies the construction process, and ensures good prices from contractors since they know what to expect. The division constantly reviews and tweaks the prototype and is now in the process of developing a new two-story prototype for restricted sites.

- Online project management software. Construction services uses a project management software application that is Web-based; consequently, project architects, engineers, and contractors have immediate access to all correspondence, submittals, change orders, etc. This speeds up the process and eliminates finger pointing over lost documents or lack of responses.

- Architect and Contractor Evaluations. Each architect and contractor who performs work for the division is evaluated using a standard evaluation form. The evaluation forms are multi-paged and detailed.

- Maintenance reviews. The final designs for new schools or renovations are reviewed by the maintenance department to ensure that the schools can be cost-effectively maintained.

Exhibit 5-3 presents a comparison of elementary school construction costs for LCPS and the Commonwealth of Virginia for 2007. As the exhibit shows, LCPS has been able to keep the construction costs of its new schools lower than the average in the Commonwealth.

EXHIBIT 5-3
ELEMENTARY SCHOOL CONSTRUCTION COSTS
2006-07

2006-07 ELEMENTARY SCHOOLS	VIRGINIA AVERAGE	LCPS AVERAGE
Square Feet per Pupil	105	93
Cost per Square Feet	$180.30	$160.84
Cost per Student	$18,963	$14,885

Source: LCPS, construction services, 2008.

Costs per square foot and the percentage of change in construction costs from the original contract can be measures of how well a construction project was designed and managed. Poorly designed or managed projects will often have excessive square footage costs and high change order percentages. Change orders can be initiated by the contractor, architect, or school district, and are sometimes necessary. However, change orders should be minimized because changes to a design typically cost more during the construction phase of a project than in the planning stage. According to the Council of Educational Facility Planners International (CEFPI), a reasonable change order budget is three to four percent of the construction budget. Renovation projects will typically have somewhat higher rates (six to eight percent) due to the unknown conditions in existing construction.

Exhibit 5-4 presents the change order history on major projects for LCPS for the last five years. As the exhibit shows, with the exception of four projects that had extreme circumstances, construction services staff have kept the change order rate at a best practice level.

EXHIBIT 5-4
CONSTRUCTION CHANGE ORDER HISTORY
2002-07

PROJECT	CONTRACT AMOUNT	TOTAL CHANGE ORDERS	% CHANGE ORDERS	COMMENTS
Countryside Elementary	$9,123,000	$289,009	3.17%	
Mountain View Elementary	$8,775,600	$2,542,263	28.90%	Bid for sewer and water treatment plant was treated like a change order.
Smart's Mill Middle	$19,388,681	$7,069,053	36.40%	Concurrent construction on same site with FHR ES. Logistical and weather delays required extensive soil treatment.
Frances Hazel Reid Elementary	$9,444,354	$1,842,917	19.50%	See above
Mercer Middle	$17,914,000	$966,567	5.40%	Shortened construction schedule
Belmont Station Middle	$9,244,500	$222,510	2.40%	
Freedom High	$33,475,000	$735,006	2.20%	
Briar Woods High	$32,985,000	$757,953	2.30%	
Pinebrook Elementary	$11,370,000	($308,365)	(2.70%)	
Newton-Lee Elementary	$12,239,000	($166,790)	(1.30%)	
Legacy Elementary	$12,635,000	$48,754	0.30%	
Stone Hill Middle	$26,151,000	$6,992	0.03%	
Rosa Lee Carter Elementary	$17,083,000	($35,278)	(0.21%)	
Arcola Elementary	$15,689,000	$112,035	0.71%	
Sycolin Creek Elementary	$16,660,000	$2,720,287	16.33%	Change order for road improvemens as required by county.
TOTAL / AVERAGE	**$252,177,135**	**$16,802,913**	**7.56%**	
TOTAL / AVERAGE W/O EXTREME CONDITIONS	**$197,908,500**	**$2,628,393**	**1.12%**	

Source: LCPS, construction services, 2008.

COMMENDATION 5-D:

Construction services has instituted best practices to control construction costs.

FINDING

Construction services does not use an independent commissioning agent to commission new buildings. Prior to a new building, or new building system in a renovation, being turned over to the owner, a series of tests are run on the major operating systems, HVAC, electrical, etc., to ensure all systems are operating as specified in the contract documents.

Currently LCPS typically includes the commissioning of new buildings within the general contractor's scope of work. (The division also uses staff to complete commissioning in some instances.) Consequently, this makes the commissioning agent, or engineer who performs the tests, an agent of the contractor. This situation presents an obvious conflict of interest.

Typically, commissioning agents are contracted directly to the owner to ensure that they are performing in the best interests of the owner.

RECOMMENDATION 5-4:

Contract directly with commissioning agents for new building systems.

Although it seems obvious that an owner would not accept a new building until it is operating correctly, the complexity of building systems requires professional testing to determine if a building system is operating not only correctly, but also to the specifications that were established in the contract documents. Since this testing can affect the bottom line of the contractor, it should be performed by an independent agent to ensure objectivity.

FISCAL IMPACT

This recommendation can be implemented by changing the contract language in the division's construction contracts. This can be accomplished by staff within 16 hours. The division may realize some savings since they will no longer be paying the general contractor's overhead and profit on this service. A specific fiscal impact cannot be determined at this time.

5.3 *Maintenance*

The proper maintenance and custodial/grounds services of facilities are 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.

Facilities maintenance is the responsibility of facilities services under the leadership of the director of facilities services (Note: custodial services is also the responsibility of the director of facilities services and will be discussed later in this chapter). Facility services maintains approximately 8.1 million square feet of building, with 137 staff and an annual budget of $51 million (including custodial services).

FINDING

LCPS funds the maintenance of its facilities at a level that will protect the public's investment. Levels of maintenance funding have typically been decreasing in school divisions across the nation and this has resulted in a high level of deferred maintenance, which negatively affects the condition of schools and the learning environment of students.

American School and University Magazine (AS&U) annually surveys school divisions regarding the amount of funding for facility maintenance. **Exhibit 5-5** presents the results of the 35th annual survey conducted in 2006, compared to LCPS's maintenance funding. As this comparison shows, LPCS is funding above these national norms.

**EXHIBIT 5-5
COMPARISON OF MAINTENANCE FUNDING
2007-08**

CATEGORY	AS&U SURVEY	LCPS
Maintenance $ per square foot	$4.73	$6.39
Square foot per Maintenance worker	80,240	59,190

Source: LPCS, facilities services, and American School and University Magazine, 35th annual Maintenance and Operations Cost Study, 2006.

While the level of funding for maintenance is above the national norm, this does not mean it is excessive. The General Accounting Office of the federal government (GAO) and other agencies have documented the considerable amount of deferred maintenance in the nation's schools, which indicates that most if not all school divisions are not funding the maintenance of facilities at a sufficient level. The AS&U survey found that funding levels had decreased over the last ten years as a percentage of total division expenditures. Consequently, funding above the national norm does not necessarily mean funding above what is necessary.

Surveys conducted of LCPS staff by the review team found that the overwhelming majority felt the facilities were safe, healthy, clean and well maintained, as shown in **Exhibit 5-6**.

**EXHIBIT 5-6
FACILITIES MANAGEMENT SURVEY RESPONSES**

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
Our school buildings provide a healthy environment in which to teach.	92/2	94/2	83/10
Our facilities our clean	94/2	94/2	84/7
Our facilities are well maintained	95/3	91/3	87/6
Our school buildings and grounds are free of hazards that can cause accidental injury	89/4	97/1	87/6
1. Percentage responding *agree* or *strongly agree* / Percentage responding *disagree* or *strongly disagree*. The *neutral* and *don't know* responses are omitted.			

Source: MGT of America, Inc., 2007.

COMMENDATION 5-E:

LCPS is commended for funding the maintenance of facilities at a level that will protect the public's investment.

FINDING

The maintenance function of facilities services is organized in the traditional trade shop structure. This is not the most effective organization for a large school division. Many large school divisions have organized their maintenance departments in innovative ways to respond to tight resources.

Exhibit 5-7 presents the organization of the maintenance staff. This structure is a traditional approach that groups different trades in shops with a supervisor. Each shop is located at the central plant office. All staff report to their respective shop each morning, receive their work orders, and then drive to the appropriate school to complete the work. This approach maximizes travel time since maintenance workers travel to different sites to complete different work orders throughout the day. Staff must also spend travel time to obtain necessary parts and equipment that they do not carry on their trucks.

EXHIBIT 5-7
ORGANIZATIONAL CHART FOR MAINTENANCE STAFF
2007-08
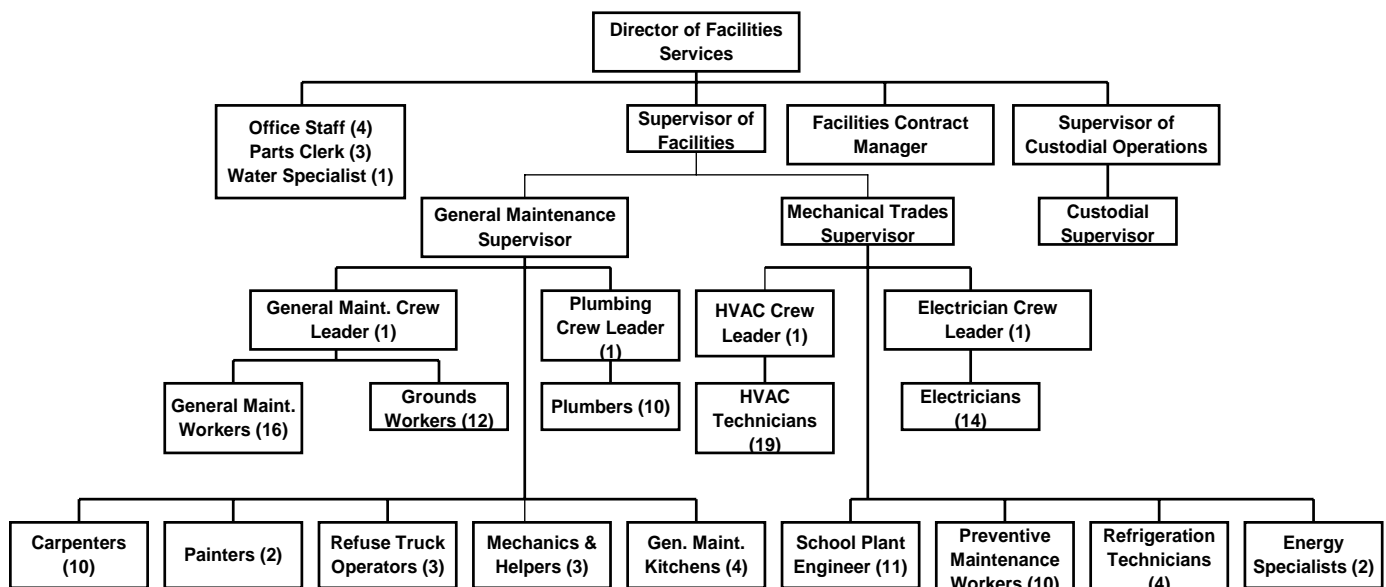
Source: LPCS, facilities services, 2007.

The "roving crew" approach to organizing maintenance crews can increase efficiency and improve customer satisfaction. This approach which the review team has seen implemented in other school systems utilizes a multi-trade crew model. The multi-trade crew works at specific schools on a pre-established schedule. The crew leader contacts the school principal in advance of the visit and reviews the work orders to be accomplished. The crew leader orders all materials that will be needed and has them delivered to the school. The crew then remains at the school for several days completing the work orders. When the crew leaves, all current maintenance needs have been met and the school knows when to expect the next visit. Depending on the number of schools and the number of maintenance staff, a division could have multiple roving

crews to meet the needs of the schools on a regular basis. Some maintenance staff from all trades would be designated to respond to emergency and urgent work requests.

The roving crew approach has improved efficiency and has improved customer satisfaction. It reduces travel time by allowing maintenance staff to stay at one site all day for several days. (Some crew members could even report directly to the site.) In addition, the staff are not using travel time to get parts or equipment since the crew leader has supplied the site prior to the crew's arrival. Customer satisfaction can increase because school site administrators and teachers know when maintenance staff will be at their school and can see a concerted effort at one time.

RECOMMENDATION 5-5:

Reorganize the maintenance crews in a more efficient approach, such as the "roving crew" approach.

The director of facilities services should analyze work loads and current staffing to determine the most effective organization. If the "roving crew" approach is selected, the director will need to determine how many multi-trade crews is appropriate for the division.

FISCAL IMPACT

The reorganization of maintenance crews can be accomplished at no additional cost and with existing resources. The increased efficiency will result in a savings to the division by not having to add additional staff as the division grows and increases the number of schools. While this increased efficiency is difficult to project, some conservative amounts can be calculated.

If facilities services reorganizes 30 percent of its staff in 'roving crews' and these crews obtain a 10 percent increase in efficiency, the division will be able to avoid an additional $246,000 per year in staffing costs. Facilities services currently budgets approximately $8.2 million in maintenance staff salaries and benefits. Thirty percent of $8.2 million equals $2.46 million, and 10 percent of $2.46 million equals $246,000. This calculation is based on personnel costs and does not include savings that should be realized from reduced vehicle fuel and maintenance due to reduced travel.

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Reorganize Maintenance Crews	$246,000	$246,000	$246,000	$246,000	$246,000

5.4   Custodial Services

The responsibility for custodial services is split between the director of facilities services and the building administrators. The building administrators (principals) are responsible for supervising the custodians on a daily basis. The director of facilities services oversees the supervisor of operations who is responsible for custodial training, equipment, supplies, and substitutes. There are three lead custodians, 452 custodians and 10 substitute custodians.

Exhibit 5-8 presents the organizational chart for custodial services. Splitting the responsibility for custodial services between building administrators and facilities services is not unusual. It is widely thought that principals must have control over all those who work in his or her school. At the same time, principals need support from professionals when it comes to cleaning supplies and techniques, and performance evaluations.

EXHIBIT 5-8
CUSTODIAL SERVICES ORGANIZATIONAL CHART
2007-08
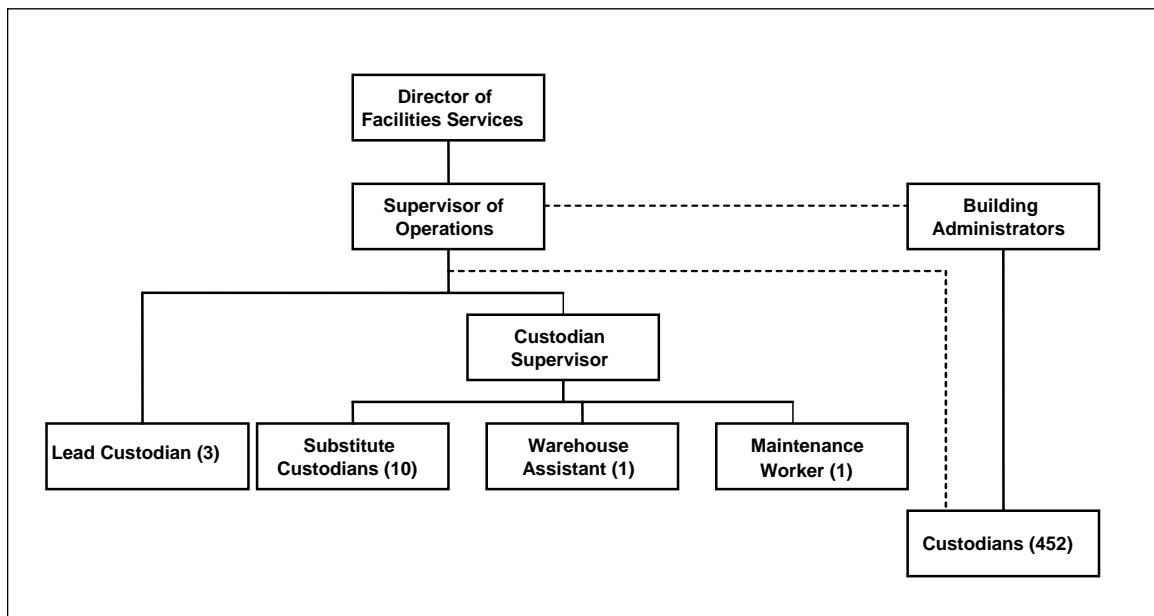
Source: LCPS, facilities services, 2007.

FINDING

Custodial services do not supply enough professional support for the custodians.

There are three lead custodians for 452 custodians at 83 sites. If each lead custodian spent one day at each site evaluating, training, and providing support, it would take approximately one and a half months to visit all the sites. Consequently, each school's custodians would receive professional support only six to eight times a year.

While this organizational model is not unusual, it requires more professional supervision to be effective. Three lead custodians for 452 custodians, results in a supervisor to staff ratio of one to 150. It is very difficult to have effective supervision with this ratio based on MGT's history of over 30 years reviewing school systems. Supervision is an important element in managing an effective custodial operation given the fact that custodians tend to be less skilled and experienced workers. In a focus group with a sample of custodians, the review team heard many negative comments about the general work habits of custodians. The custodians complained that many of their co-workers have poor work habits, spend too much time on their cell phones, do not report on snow days,

and do not receive any corrective instruction. Increasing supervision and individual training for custodians will help eliminate these poor habits.

RECOMMENDATION 5-6:

Increase the number of lead custodians (supervisors) by one position.

Each lead custodian should be responsible for a set number of school sites. They should visit the sites on a regular basis to provide supervision, discipline support for the building administrator, training in cleaning techniques, and instruction in using cleaning supplies efficiently and safely.

FISCAL IMPACT

The fiscal impact of this recommendation will be the increase in salaries and benefits for the addition of one lead custodian. This will amount to approximately $53,000 annually. (Lead custodian salary plus benefits = $53,000.)

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Add One Lead Custodian Position	$0	($53,000)	($53,000)	($53,000)	($53,000)

FINDING

LCPS does staff custodial services at an appropriate level, but does not maintain a sufficient number of substitute custodians.

The custodial staffing formula for the division provides one custodian for every 19,000 square feet (SF) of building. This is very close to MGT's best practice (within four percent) of one custodian for every 20,000 SF plus .5 FTE, .75 FTE, and 1.0 FTE position at the elementary schools, middle schools, and high schools respectively. This best practice standard has been established by reviewing staffing levels and cleaning standards at school divisions across the country for the last twenty years. **Exhibit 5-9** presents a comparison of LCPS custodial staffing levels at the school sites with this best practice.

EXHIBIT 5-9
COMPARISON OF LCPS CUSTODIAL STAFFING TO BEST PRACTICE
2007-08

School Name	School Square Footage	Current Custodial Positions (FTE)	Square Feet Per Custodial	Best Practice (GSF/20,000)	Over (Under) Best Practice
Elementary Schools					
Aldie ES	18,010	1.5	12,007	1.5	0.0
Algonkian ES	66,743	4.0	16,686	4.0	0.0
Arcola ES	90,100	5.0	18,020	5.0	0.0
Ashburn ES	77,830	5.0	15,566	4.5	0.5
Ball's Bluff ES	77,272	5.0	15,454	4.5	0.5
Banneker ES	31,329	2.0	15,665	2.0	0.0
Belmont Station ES	84,000	5.0	16,800	5.0	0.0
Catoctin ES	72,696	4.0	18,174	4.0	0.0
Cedar Lane ES	83,932	5.0	16,786	4.5	0.5
Cool Springs ES	66,743	3.5	19,069	4.0	(0.5)
Countryside ES	83,361	5.0	16,672	4.5	0.5
Dominion Trail ES	77,830	5.0	15,566	4.5	0.5
Emerick ES	63,222	3.0	21,074	4.0	(1.0)
Evergreen Mill ES	77,272	5.0	15,454	4.5	0.5
Forest Grove ES	77,033	5.0	15,407	4.5	0.5
Frances Hazel Reid ES	84,142	5.0	16,828	5.0	0.0
Guilford ES	65,964	3.5	18,847	4.0	(0.5)
Hamilton ES	37,303	2.5	14,921	2.5	0.0
Hillsboro ES	17,073	1.5	11,382	1.5	0.0
Hillside ES	77,272	5.0	15,454	4.5	0.5
Horizon ES	83,932	5.0	16,786	4.5	0.5
Hutchison Farm ES	84,038	5.0	16,808	5.0	0.0
John W. Tolbert, Jr. ES	84,038	5.0	16,808	5.0	0.0
Leesburg ES	59,853	3.0	19,951	3.5	(0.5)
Legacy ES	90,051	5.0	18,010	5.0	0.0
Lincoln ES	23,580	1.5	15,720	2.0	(0.5)
Little River ES	84,038	5.0	16,808	5.0	0.0
Lovettsville ES	70,896	4.0	17,724	4.0	0.0
Lowes Island ES	77,272	5.0	15,454	4.5	0.5
Lucketts ES	39,864	2.0	19,932	2.5	(0.5)
Meadowland ES	56,709	3.0	18,903	3.5	(0.5)
Middleburg ES	15,129	1.5	10,086	1.5	0.0
Mill Run ES	84,038	5.0	16,808	5.0	0.0
Mountain View ES	83,932	5.0	16,786	4.5	0.5
Newton-Lee ES	90,051	5.0	18,010	5.0	0.0
Pinebrook ES	90,051	5.0	18,010	5.0	0.0
Potowmack ES	77,272	5.0	15,454	4.5	0.5
Rolling Ridge ES	76,050	4.0	19,013	4.5	(0.5)
Rosa Lee Carter ES	90,100	5.0	10,820	5.0	0.0
Round Hill ES	77,373	5.0	15,475	4.5	0.5
Sanders Corner ES	77,272	5.0	15,454	4.5	0.5
Seldens Landing ES	84,038	5.0	16,808	5.0	0.0

EXHIBIT 5-9 (Continued)
COMPARISON OF LCPS CUSTODIAL STAFFING TO BEST PRACTICE
2007-08

School Name	School Square Footage	Current Custodial Positions (FTE)	Square Feet Per Custodial	Best Practice (GSF/20,000)	Over (Under) Best Practice
Sterling ES	67,081	4.0	16,770	4.0	0.0
Sugarland ES	76,050	4.0	19,013	4.5	(0.5)
Sully ES	61,366	3.5	17,533	3.5	0.0
Sycolin Creek ES	84,937	5.0	16,987	5.0	0.0
Waterford ES	22,987	2.0	11,494	1.5	0.5
TOTAL	3,241,125	193.0	773,257	190.5	2.5
Middle Schools					
Belmont Ridge MS	158,341	8.0	19,793	8.5	(0.5)
Blue Ridge MS	143,017	8.0	17,877	8.0	0.0
Eagle Ridge MS	158,341	8.0	19,793	8.5	(0.5)
Farmwell Station MS	162,596	8.0	20,325	9.0	(1.0)
Harmony IS	158,341	8.0	19,793	8.5	(0.5)
Harper Park MS	160,695	8.0	20,087	9.0	(1.0)
J. Lupton Simpson MS	149,646	8.0	18,706	8.0	0.0
Mercer MS	160,058	8.0	20,007	9.0	(1.0)
River Bend MS	157,341	8.0	19,796	8.5	(0.5)
Seneca Ridge MS	154,039	8.0	19,255	8.5	(0.5)
Smart's Mill MS	159,703	8.0	19,963	9.0	(1.0)
Sterling MS	145,573	8.0	18,197	8.0	0.0
Stone Hill MS	168,780	8.0	21,098	9.0	(1.0)
TOTAL	2,036,471	104.0	254,690	111.5	(7.5)
High Schools					
Briar Woods HS	251,915	13.0	19,378	13.5	(0.5)
Broad Run HS	217,841	11.0	19,804	12.0	(1.0)
Dominion HS	246,968	13.0	18,998	13.5	(0.5)
Freedom HS	251,915	13.0	19,378	14.0	(1.0)
Heritage HS	245,703	11.0	22,337	13.0	(2.0)
Loudoun County HS	200,916	11.0	18,265	11.5	(0.5)
Loudoun Valley HS	201,452	10.0	20,145	11.0	(1.0)
Park View HS	249,900	12.0	20,825	13.5	(1.5)
Potomac Falls HS	227,835	12.0	18,986	12.5	(0.5)
Stone Bridge HS	245,703	13.0	18,900	13.0	0.0
TOTAL	2,340,148	119.0	197,016	127.5	(8.5)
Other Schools					
CS Monroe Tech Center	78,420	2.5	31,496	4.5	(2.0)
Douglass School	51,022	2.5	20,049	3.0	(0.5)
TOTAL	129,442	5.0	51,545	7.5	(2.5)
GRAND TOTAL/AVERAGE	**7,747,186**	**421**	**18,402**	**437.0**	**(16.0)**

Source: LCPS, facilities services, MGT of America, Inc. 2007.

While the custodial staffing are near best practice levels, the number of substitute custodians is insufficient. The custodial supervisor reported a custodian absentee rate of 10 percent, or approximately 45 custodians daily. The division only maintains 10 substitute custodians which mean there are approximately 35 positions vacant on any given day. This situation is further exacerbated by the fact that many of these vacancies are long term due to prolonged illness or disability.

The obvious affect of being short staffed is that some cleaning will go undone. In addition, staff shortages result in more overtime, and poor employee attitude as a result of being chronically under staffed.

Custodial operations needs to maintain a list of substitutes that is twice the potential daily need. This practice will help to overcome the lack of availability for some substitutes on any given day, and the fact that there will be a high turnover on the list due to the nature of the work. The goal of filling 80 percent of the absentee positions must be established to minimize the affect on students and teachers.

RECOMMENDATION 5-7:

Provide substitute custodians for at least 80 percent of all absentees.

Providing sufficient substitute custodians is difficult and it is a common challenge in school divisions nationally. However, the impact of meeting this goal is immense on the attitudes of the permanent custodial work force and is substantial on the cleanliness of the schools.

FISCAL IMPACT

The fiscal impact of implementing this recommendation will be the addition of 26 substitute custodians. Since the director of facility services has already requested 10 additional positions, the recommendation will require an increase of 16 positions. This will result in an increase in custodial salaries and benefits of approximately $582,280. (A 10 percent absentee rate of 450 custodians = 45 positions. Eighty percent of 45 positions = 36 positions. Thirty-six positions less the existing 10 positions, less the 10 requested positions = 16 new positions. 16 positions x the beginning salary and benefits of $36,393 = $582,278.)

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Provide Additional Substitute Custodians	($292,000)	($582,280)	($582,280)	($582,280)	($582,280)

FINDING

The cost of custodial cleaning supplies is not consistent throughout the division.

The cost of custodial cleaning supplies varies widely when compared on the basis of dollars per square foot. **Exhibit 5-10** presents an analysis of cleaning supply costs per SF of facility at the division's schools. The exhibit shows that costs vary from $0.06 to $0.18 per square foot or 300 percent.

A common practice of many school districts is to establish cleaning supply budgets for schools and then automatically deliver the cleaning supplies accordingly. This eliminates over ordering or wasting supplies. Budgets are then adjusted to fit special needs and additional supplies are provided for exceptional situations.

EXHIBT 5-10
ANALYSIS OF CLEANING SUPPLIES PER SF
2007-08

School Name	School Square Footage	Custodial Supply Dollars	Dollars Per Square Foot	Best Practice (.09 per Sq Ft)	Over/Under Best Practice
Elementary Schools					
Aldie ES	18,010	$1,509	$0.08	$1,621	($112)
Algonkian ES	66,743	$7,240	$0.11	$6,007	$1,233
Ashburn ES	77,830	$9,964	$0.13	$7,005	$2,959
Ball's Bluff ES	77,272	$10,333	$0.13	$6,954	$3,378
Banneker ES	31,329	$4,110	$0.13	$2,820	$1,290
Belmont Station ES	84,000	$6,653	$0.08	$7,560	($907)
Catoctin ES	72,696	$7,742	$0.11	$6,543	$1,200
Cedar Lane ES	83,932	$10,764	$0.13	$7,554	$3,210
Cool Springs ES	66,743	$10,337	$0.15	$6,007	$4,330
Countryside ES	83,361	$10,154	$0.12	$7,502	$2,652
Dominion Trail ES	77,830	$12,842	$0.17	$7,005	$5,837
Emerick ES	63,222	$6,130	$0.10	$5,690	$440
Evergreen Mill ES	77,272	$10,747	$0.14	$6,954	$3,793
Frances Hazel Reid ES	84,142	$11,911	$0.14	$7,573	$4,338
Guilford ES	65,964	$6,516	$0.10	$5,937	$579
Hamilton ES	37,303	$3,862	$0.10	$3,357	$505
Hillsboro ES	17,073	$2,118	$0.12	$1,537	$581
Hillside ES	77,272	$13,248	$0.17	$6,954	$6,294
Horizon ES	83,932	$7,815	$0.09	$7,554	$262
Hutchison Farm ES	84,038	$12,203	$0.15	$7,563	$4,640
John W. Tolbert, Jr. ES	84,038	$11,491	$0.14	$7,563	$3,928
Leesburg ES	59,853	$8,099	$0.14	$5,387	$2,712
Legacy ES	90,051	$13,234	$0.15	$8,105	$5,129
Lincoln ES	23,580	$2,391	$0.10	$2,122	$269
Little River ES	84,038	$11,355	$0.14	$7,563	$3,791
Lovettsville ES	70,896	$8,933	$0.13	$6,381	$2,552
Lowes Island ES	77,272	$8,244	$0.11	$6,954	$1,290
Lucketts ES	39,864	$6,299	$0.16	$3,588	$2,711
Meadowland ES	56,709	$8,363	$0.15	$5,104	$3,259
Middleburg ES	15,129	$1,921	$0.13	$1,362	$560
Mill Run ES	84,038	$11,072	$0.13	$7,563	$3,508
Mountain View ES	83,932	$10,486	$0.12	$7,554	$2,932
Newton-Lee ES	90,051	$14,581	$0.16	$8,105	$6,476
Pinebrook ES	90,051	$11,701	$0.13	$8,105	$3,596
Potowmack ES	77,272	$10,059	$0.13	$6,954	$3,105
Rolling Ridge ES	76,050	$10,732	$0.14	$6,845	$3,887
Round Hill ES	77,373	$7,222	$0.09	$6,964	$259
Sanders Corner ES	77,272	$12,242	$0.16	$6,954	$5,288
Seldens Landing ES	84,038	$15,125	$0.18	$7,563	$7,562
Sterling ES	67,081	$8,227	$0.12	$6,037	$2,190

EXHIBT 5-10 (Continued)
ANALYSIS OF CLEANING SUPPLIES PER SF
2007-08

School Name	School Square Footage	Custodial Supply Dollars	Dollars Per Square Foot	Best Practice (.09 per Sq Ft)	Over/Under Best Practice
Sugarland ES	76,050	$10,219	$0.13	$6,845	$3,375
Sully ES	61,366	$8,979	$0.15	$5,523	$3,456
Waterford ES	22,987	$2,259	$0.10	$2,069	$190
Arcola ES	90,100	no data	no data	no data	no data
Forest Grove ES	77,033	no data	no data	no data	no data
Rosa Lee Carter ES	90,100	no data	no data	no data	no data
Sycolin Creek ES	84,937	no data	no data	no data	no data
TOTAL	2,898,955	$379,430	$0.13	$260,906	$118,524
Middle Schools					
Belmont Ridge MS	158,341	$13,714	$0.09	$14,251	($537)
Blue Ridge MS	143,017	$13,443	$0.09	$12,872	$572
Eagle Ridge MS	158,341	$15,980	$0.10	$14,251	$1,729
Farmwell Station MS	162,596	$14,643	$0.09	$14,634	$9
Harmony IS	158,341	$14,516	$0.09	$14,251	$265
Harper Park MS	160,695	$13,770	$0.09	$14,463	($693)
J. Lupton Simpson MS	149,646	$12,565	$0.08	$13,468	($903)
Mercer MS	160,058	$11,516	$0.07	$14,405	($2,889)
River Bend MS	157,341	$17,174	$0.11	$14,161	$3,013
Seneca Ridge MS	154,039	$14,399	$0.09	$13,864	$536
Smart's Mill MS	159,703	$16,022	$0.10	$14,373	$1,649
Sterling MS	145,573	$15,829	$0.11	$13,102	$2,728
Stone Hill MS	168,780	no data	no data	no data	no data
TOTAL	1,867,691	173,571	$0.09	$168,092	$5,479
High Schools					
Briar Woods HS	251,915	$16,564	$0.07	$22,672	($6,109)
Broad Run HS	217,841	$18,679	$0.09	$19,606	($926)
Dominion HS	246,968	$26,263	$0.11	$22,227	$4,036
Freedom HS	251,915	$19,729	$0.08	$22,672	($2,943)
Heritage HS	245,703	$22,202	$0.09	$22,113	$89
Loudoun County HS	200,916	$19,001	$0.09	$18,082	$919
Loudoun Valley HS	201,452	$23,057	$0.11	$18,131	$4,926
Park View HS	249,900	$20,086	$0.08	$22,491	($2,405)
Potomac Falls HS	227,835	$30,745	$0.13	$20,505	$10,240
Stone Bridge HS	245,703	$20,726	$0.08	$22,113	($1,387)
TOTAL	2,340,148	$217,052	$0.09	$210,613	$6,439
Other Schools					
CS Monroe Tech Center	78,420	$4,501	$0.06	$7,058	($2,557)
Douglass School	51,022	$4,726	$0.09	$4,592	$134
TOTAL	129,442	$9,228	$0.08	$11,650	($2,422)
GRAND TOTAL/AVERAGE	**7,236,236**	**$779,281**	**$0.11**	**$651,261**	**$128,019**

Source: LPCS, facilities services, MGT of America, Inc., 2007.

RECOMMENDATION 5-8:

Establish cleaning supply budgets for all schools.

By providing additional supervision and training as recommended earlier in this section, adhering to a cleaning supply budget should be easier to accomplish. In addition, custodial supervisors can validate when additional supplies are warranted by unique or different circumstances.

The supervisor of custodians should analyze the usage of cleaning supplies and the amounts spent on cleaning supplies to establish an appropriate budget amount. He should then establish a delivery schedule for all supplies so that head custodians only need to order on special occasions.

FISCAL IMPACT

The fiscal impact of implementing this recommendation will be a reduction in the amount spent on cleaning supplies across the division. As **Exhibit 5-10** shows, the average amount spent at both the middle schools and high schools is $0.09 per square foot. If this is established as the base line budget, and some latitude is allowed for special circumstances, the division should recognize a savings of at least $100,000 annually.

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Establish Cleaning Supply Budgets	$50,000	$100,000	$100,000	$100,000	$100,000

5.5 Energy Management

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.

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.

Energy management methods range from sophisticated, centralized, computer controls for HVAC systems to simple manual procedures for turning thermostats down and lights off during periods of minimal building utilization.

FINDING

LCPS has adopted an energy education program that has produced substantial savings.

The division has implemented a behavioral education program developed by Energy Education Inc. The program was adopted in 1993 and is administered by two energy education specialists. A request for how the specific program was operated in LCPS

received the following response, "*Details of the program are considered intellectual property and our Energy Education Team members are subject to the terms of a non-disclosure agreement regarding program details.*"

Despite the lack of details on how the program is operated, the energy education team documented considerable savings for the program. Since 2003, the program has realized approximately $12.9 million in savings. **Exhibit 5-11** presents the savings realized by this program in the last five years.

EXHIBIT 5-11
LCPS ENERGY SAVINGS
2003-07

FISCAL YEAR	COST AVOIDANCE (SAVINGS)
2007	$3,511,510
2006	$3,070,982
2005	$2,324,229
2004	$2,146,569
2003	$1,865,998
TOTAL	**$12,919,288**

Source: LCPS, energy education team, 2007.

COMMENDATION 5-F:

LCPS is commended for establishing an effective energy education program.

FINDING

LCPS does not have a comprehensive energy management program that coordinates the efforts of the energy education team, construction services, and facilities services.

In addition to the efforts of the energy education team, construction services and facilities services have made efforts at energy management. Construction services have incorporated energy efficient design elements into the prototype school designs. It is currently conducting a review to determine the energy consumption characteristics of the prototype design as measured against the Leadership in Energy and Environmental Design (LEED) program.

Facilities services operates a recycling program that collects paper, cardboard, cans, plastic bottles, and fluorescent light tubes. Facilities services have also installed some energy saving devices and systems in existing buildings.

All of these programs are commendable, but in a division the size of LCPS, these efforts need to be coordinated and overseen by an energy coordinator. The creation of an energy coordinator who oversees all energy savings efforts in the division will elevate the importance of these efforts, will ensure that all possible measures are being pursued, and will maximize the division's cost savings.

RECOMMENDATION 5-9:

Create an energy coordinator position to oversee and coordinate all energy management programs in the division.

This position should report directly to the assistant superintendent of support services and have responsibility for all energy management activities in the division. The division must utilize every effort possible to maximize its cost avoidance in this area as it continues to grow.

FISCAL IMPACT

The fiscal impact of implementing this recommendation will be an increase in cost avoidance (savings) for the division as it expands its energy management programs. The amount of this cost avoidance will depend on the specific programs that are instituted. Based on the savings already realized by an uncoordinated program at LCPS and based on savings realized in other districts, the cost avoidance (savings) will more than offset the additional salary of the energy coordinator, which one would expect to be in the $70,000 to $80,000 range.

6.0   TRANSPORTATION

6.0   TRANSPORTATION

This chapter presents the findings, commendations, and recommendations for the transportation function. The major sections in this chapter are:

6.1   Organization and Staffing
6.2   Planning, Policies, and Procedures
6.3   Routing and Scheduling
6.4   Training and Safety
6.5   Vehicle Maintenance

CHAPTER SUMMARY

Loudoun County Public Schools (LCPS) is in compliance with Virginia Department of Education (VDOE) transportation policies and procedures. The LCPS Transportation Department has one primary mission: to safely transport students to and from school effectively and efficiently. The division provides students with competent and safe transportation. During the efficiency and effectiveness evaluation of the LCPS Transportation Department, MGT of America found several issues that could be corrected or improved in order to increase efficiency, personnel retention, and operational integrity.

The key commendations reported in this chapter are as follows:

- The transportation department has an exceptional training program.

- The transportation department has excellent accident prevention and reporting programs and is in compliance with VDOE requirements regarding submission of bus accident reports.

- The Consolidated Vehicle Services (CVS) operations provide exceptional vehicle maintenance for LCPS and the County of Loudoun and are implemented and managed by the transportation department fleet manager.

- The transportation department vehicle maintenance information system (VMIS) program is commendable.

Overall, the transportation department does a satisfactory job complying with and implementing VDOE transportation policies and procedures, reducing costs, and planning. However, MGT found there were areas of the transportation function that could be improved. This chapter contains the following key recommendations:

- The spare bus policy should be reviewed and adjusted. A 10 to 15 percent spare bus policy should be considered.

- Encourage mechanics to achieve ASE certification and make ASE certification a condition for mechanics seeking employment.

As part of this efficiency review, MGT conducted an online survey to gather opinions of LCPS administrators, principals, teachers, and staff. These opinions and attitudes do

not offer a complete picture of the transportation function, but are nonetheless valuable. The perceptions and observations of LCPS administrators, principals, teachers, and staff include the following:

- Recruiting and retaining bus drivers and attendants is a challenge. LCPS is constantly looking for drivers to maintain both the regular and substitute driver pool. Staff shared that there were difficulties finding potential drivers who could pass screening tests to become bus drivers or who were willing to become substitute drivers given the low pay, the lack of benefits, and the negatives associated with discipline problems on some routes.

- Bus evacuation drills are held annually, and a driver's handbook is provided to all employees.

- Interviewees indicated an improvement in the transportation function during the past few years. Transportation staff is very responsive to requests and the lines of communication are great.

- The lack of satellite parking areas for school buses, combined with county zoning restrictions to allow school buses in residential areas, is an issue.

LCPS requested that the transportation chapter include a comparative assessment of the division with divisions in other parts of the Commonwealth of Virginia. The peer divisions chosen for this purpose were Chesterfield County Public Schools, Henrico County Public Schools, Prince William County Public Schools, and Virginia Beach City Public Schools. Our comparative analysis uses data, information, and reports provided by LCPS, peer school divisions, and LCPS onsite sources. Though the information is generally consistent, slight differences exist due to sources and reporting time frames.

Loudoun County is one of the fastest growing counties in the nation. **Exhibit 6-1** shows that all of the peer school divisions' counties or cities experienced increased population between 2000-01 and 2005-06. The average population growth for the comparative divisions grew 16.7 percent from 2001 to 2006. During the same period, the Loudoun County population grew 54.9 percent.

EXHIBIT 6-1
LOUDOUN COUNTY AND PEER POPULATION GROWTH TRENDS
2003 THROUGH 2006 SCHOOL YEARS

SCHOOL DIVISION	2000-01	2005-06
Loudoun County	**169,599**	**262,726**
Chesterfield County	259,903	289,568
Henrico County	262,104	284,399
Prince William County	280,813	363,015
Virginia Beach City	427,257	433,470
POPULATION AVERAGE	**279,935**	**326,636**

Source: U.S. Census Bureau statistics, 2006.

In view of these population growth trends, it is important to see if there have been corresponding increases in student populations. **Exhibit 6-2** reveals that from 2003 to 2007, the peer divisions' average student enrollment increased by 4,411 students, a 9.7 percent rate of growth. At the same time, LCPS's student enrollment increased by 11,942 students, a 43.2 percent rate of growth.

EXHIBIT 6-2
STUDENT POPULATION
LCPS AND PEER DIVISIONS
2002-03 THROUGH 2006-07 SCHOOL YEARS

SCHOOL DIVISION	2002-03	2003-04	2004-05	2005-06	2006-07
Loudoun County Public Schools	**27,626**	**29,722**	**30,574**	**37,660**	**39,568**
Chesterfield County Public Schools	41,369	41,757	43,009	44,482	45,498
Henrico County Public Schools	43,032	44,243	45,673	46,005	46,840
Prince William County Public Schools	45,076	48,058	50,655	54,628	55,316
Virginia Beach City Public Schools	69,385	67,616	67,616	66,056	61,321
PEER DIVISION AVERAGE	**45,298**	**32,677**	**47,505**	**49,766**	**49,709**

Source: Commonwealth of Virginia, Department of Education, 2007.
Note: Numerical entries are totals for students transported during morning and afternoon runs.

An important measurement of the transportation function is total yearly transportation costs. **Exhibit 6-3** shows that LCPS transportation expenditures were $21,641,448 in 2002-03 and $41,455,730 in 2006-07, an increase of $19,814,282 or 91.6 percent. The peer school division average was $22,111,042 in 2002-03 and $33,169,579 in 2006-07, an increase of $11,058,537 or 50 percent. The transportation costs increased in LCPS and the peer divisions as population growth and student enrollments increased, but LCPS experienced a greater percent increase based on VDOE data. There was a corresponding greater percent increase in student enrollment in LCPS over the same period of time.

EXHIBIT 6-3
TOTAL YEARLY TRANSPORTATION COSTS
LCPS AND PEER DIVISIONS
2002-03 THROUGH 2006-07 SCHOOL YEARS

SCHOOL DIVISION	2002-03	2003-04	2004-05	2005-06	2006-07
Loudoun County Public Schools	**$21,641,448**	**$21,886,721**	**$32,181,599**	**$33,853,271**	**$41,455,730**
Chesterfield County Public Schools	$18,187,578	$16,394,122	$21,637,431	$21,180,736	$26,382,705
Henrico County Public Schools	$16,540,153	$18,508,906	$20,222,675	$20,658,007	$22,254,950
Prince William County Public Schools	$32,168,391	$34,885,732	$41,294,278	$36,908,620	$42,561,013
Virginia Beach City Public Schools	$22,017,640	$25,661,229	$27,274,071	$27,542,561	$33,193,499
PEER DIVISION AVERAGE	**$22,111,042**	**$23,467,342**	**$28,522,010**	**$28,028,639**	**$33,169,579**

Source: Commonwealth of Virginia, Department of Education, 2007.

Exhibit 6-4 shows the number of regular students provided transportation services over a five-year period. LCPS had 27,008 students in 2002-03. This number rose to 38,871 in 2006-07, an increase of 11,863 or 43.9 percent. Prince William County Schools experienced an increase of 10,316 or 23.7 percent. Chesterfield County Public Schools experienced an increase of 4,271 or 10.6 percent. Henrico County Public Schools experienced an increase of 3,952 or 9.6 percent. Virginia Beach City Public Schools experienced a slight decline in the number of regular students riding buses. The overall peer division average was 4,541 or 10.4 percent. These comparative growth numbers track closely with the data presented in **Exhibit 6-2**.

EXHIBIT 6-4
NUMBER OF REGULAR STUDENTS TRANSPORTED
LCPS AND PEER DIVISIONS
2002-03 THROUGH 2006-07 SCHOOL YEARS

SCHOOL DIVISION	2002-03	2003-04	2004-05	2005-06	2006-07
Loudoun County Public Schools	**27,008**	**28,953**	**29,835**	**36,972**	**38,871**
Chesterfield County Public Schools	40,220	40,563	41,823	43,337	44,491
Henrico County Public Schools	41,265	42,477	43,483	44,605	45,217
Prince William County Public Schools	43,613	46,577	49,237	53,260	53,929
Virginia Beach City Public Schools	67,031	65,349	65,349	63,645	59,331
PEER DIVISION AVERAGE	**43,827**	**44,784**	**45,945**	**48,364**	**48,368**

Source: Commonwealth of Virginia, Department of Education, 2007.
Note: Numerical entries are totals for students transported during morning and afternoon runs.

Exhibit 6-5 shows the numbers of exclusive or special education students provided transportation services in LCPS and the peer school divisions. It is important to point out that exclusive or special education transportation services often account for a considerable amount of school division budgets in the Commonwealth of Virginia. Specially equipped buses, special equipment, and the need for bus aides all impact the significant cost to transport exclusive/special education students. **Exhibit 6-5** shows that over the five-year period exclusive students have decreased in number among the four peer divisions. This ridership decreased by 364 and 142 students in Virginia Beach City and Chesterfield County Public Schools, respectively. The number of exclusive students transported in LCPS increased by 79 students for a 12.9 percent increase while the peer division average decreased by 110 students for a 1 percent decline.

The number of exclusive students provided special transportation services has budgetary implications. As noted above, transportation service for exclusive students is more expensive, in part because of the need for specially equipped buses. VDOE reports show that total bus operations cost a total of $11,641,364 in 2002-03, of which exclusive bus operations was $4,773,884 or 41 percent of that cost. By 2006-07 and with the growth trends shown in previous exhibits, bus operations costs increased to $16,853,627 and exclusive bus operations costs increased to $8,227,698, or 48 percent of the total bus operations, a seven percent increase, while the number of exclusive students increased by 11.4 percent.

EXHIBIT 6-5
EXCLUSIVE STUDENTS TRANSPORTED IN
LCPS AND PEER DIVISIONS
2002-03 THROUGH 2006-07 SCHOOL YEARS

SCHOOL DIVISION	2002-03	2003-04	2004-05	2005-06	2006-07
Loudoun County Public Schools	**618**	**769**	**739**	**688**	**697**
Chesterfield County Public Schools	1,149	1,194	1,186	1,145	1,007
Henrico County Public Schools	1,672	1,766	2,190	1,400	1,623
Prince William County Public Schools	1,463	1,481	1,418	1,368	1,387
Virginia Beach City Public Schools	2,354	2,267	2,267	2,411	1,990
PEER DIVISION AVERAGE	**1,451**	**1,495**	**1,560**	**1,402**	**1,341**

Source: Commonwealth of Virginia, Department of Education, 2007.
Note: Numerical entries are totals for students transported during morning and afternoon runs.

Exhibit 6-6 shows the number of buses and the number of spare buses providing student transportation services. The exhibit shows the number of buses used for daily transportation services on the left side of the slash and spare buses on the right side in each column. LCPS's average percent of spare buses to the daily use bus requirement was 23.8 percent. The peer division average for the same period was 16.4 percent. The optimal standard for large school bus fleets for spare buses is 10 percent of the bus fleet.

EXHIBIT 6-6
NUMBER OF BUSES AND SPARES PROVIDING TRANSPORTATION SERVICES
LCPS AND PEER DIVISIONS
2002-03 THROUGH 2006-07 SCHOOL YEARS

SCHOOL DIVISION	2002-03	2003-04	2004-05	2005-06	2006-07
Loudoun County Public Schools	**385/105**	*	**445/90***	**463/97***	**515/125***
Chesterfield County Public Schools	446/64	*	478/44*	489/43*	511/42*
Henrico County Public Schools	428/77	*	488/63	508/68	533/68
Prince William County Public Schools	543/103	*	753/**	797/**	821/**
Virginia Beach City Public Schools	565/110	*	586/107*	590/107*	603/107*
PEER DIVISION AVERAGE	473/92	*	550/76*	569/79*	597/86*

Source: Commonwealth of Virginia, Department of Education, 2007.
*The VDOE report in 2003-04 did not list separate counts of regular and spare buses. Beginning in 2004-05, the report only listed the total of buses used to transport students to and from school and the number of spare buses was provided by the school divisions.
**Prince William County did not provide the number of spare buses.

Exhibit 6-7 reflects the number of deadhead miles in LCPS compared to the peer divisions. Deadhead miles are defined as mileage spent moving buses or vehicles to begin a route going to a designated location and waiting until it is necessary to begin a route, or going to a designated location to pick up a student prior to commencing transportation service. If not controlled, deadhead miles may result in significant transportation costs. Loudoun County is approximately 517 square miles larger than any of the peer divisions: Chesterfield County approximately 446 square miles, Henrico County approximately 244 square miles, Prince William County approximately 338, and Virginia Beach City approximately 249 square miles.

EXHIBIT 6-7
DEADHEAD MILES
LCPS AND PEER DIVISIONS
2002-03 THROUGH 2006-07 SCHOOL YEARS

SCHOOL DIVISION	2002-03	2003-04	2004-05	2005-06	2006-07
Loudoun County Public Schools	**1,884,741**	**2,039,221**	**2,810,100**	**2,783,987**	**3,153,141**
Chesterfield County Public Schools	2,213,641	1,618,160	1,560,700	1,755,348	1,943,100
Henrico County Public Schools	2,336,005	1,248,981	1,829,000	2,763,805	2,445,700
Prince William County Public Schools	1,096,285	1,830,059	2,126,500	2,465,091	2,376,400
Virginia Beach City Public Schools	967,727	1,427,464	1,910,100	1,330,018	2,105,500
PEER DIVISION AVERAGE	**1,699,680**	**1,267,143**	**2,047,280**	**2,219,650**	**2,404,768**

Source: Commonwealth of Virginia, Department of Education, 2007.

Exhibit 6-8 compares the transportation cost per student in LCPS and the peer divisions from 2002-03 to 2006-07. LCPS shows an increase in per student cost over the five

years. The peer division schools show a gradual and steady increase in cost per pupil.
The peer division average cost was $429 in 2002-03 and the cost rose to $537 in 2006-
07, an increase of 20.2 percent. Over the same period, the LCPS cost per pupil also
increased. The 2002-03 per pupil cost was $661. By 2006-07, the cost had risen to
$729, an increase of 9.3 percent. Increases are primarily attributed to increased costs in
fuel, labor, and inflationary trends.

EXHIBIT 6-8
TRANSPORTATION COST PER STUDENT
LCPS PUBLIC SCHOOLS
2002-03 THROUGH 2006-07 SCHOOL YEARS

SCHOOL DIVISION	2002-03	2003-04	2004-05	2005-06	2006-07
Loudoun County Public Schools	**$661**	**$651**	**$899**	**$603**	**$729**
Chesterfield County Public Schools	$440	$392	$432	$453	$485
Henrico County Public Schools	$308	$314	$347	$375	$389
Prince William County Public Schools	$481	$514	$559	$574	$659
Virginia Beach City Public Schools	$256	$275	$310	$340	$422
PEER DIVISION AVERAGE	**$429**	**$429**	**$454**	**$469**	**$537**

Source: Commonwealth of Virginia, Department of Education, 2007.
Note: Total cost divided by total number of students transported as shown in **Exhibits 6-3, 6-4,** and **6-5**.

6.1   *Organization and Staffing*

Exhibit 6-9 shows how the LCPS Transportation Department is structured to accomplish
transportation planning, training, maintenance, and daily operations. It shows a complex
organizational structure that works effectively.

**EXHIBIT 6-9
ORGANIZATIONAL STRUCTURE
LOUDOUN COUNTY PUBLIC SCHOOLS
PUPIL TRANSPORTATION
2006-07 SCHOOL YEAR**

```
                    ┌──────────────────────────┐
                    │ Director of Transportation │
                    └──────────────────────────┘
```

Supervisor of Transportation	Team Leader	Traffic Pedestrian Safety	Dispatch Center	Fleet Manager
Pupil Transportation Services	Business/ Payroll	Dispatch Supervisor		Fleet Management
Field Trip Service	Customer Service	Dispatcher (10)		Fleet Maintenance
Routing Automation				
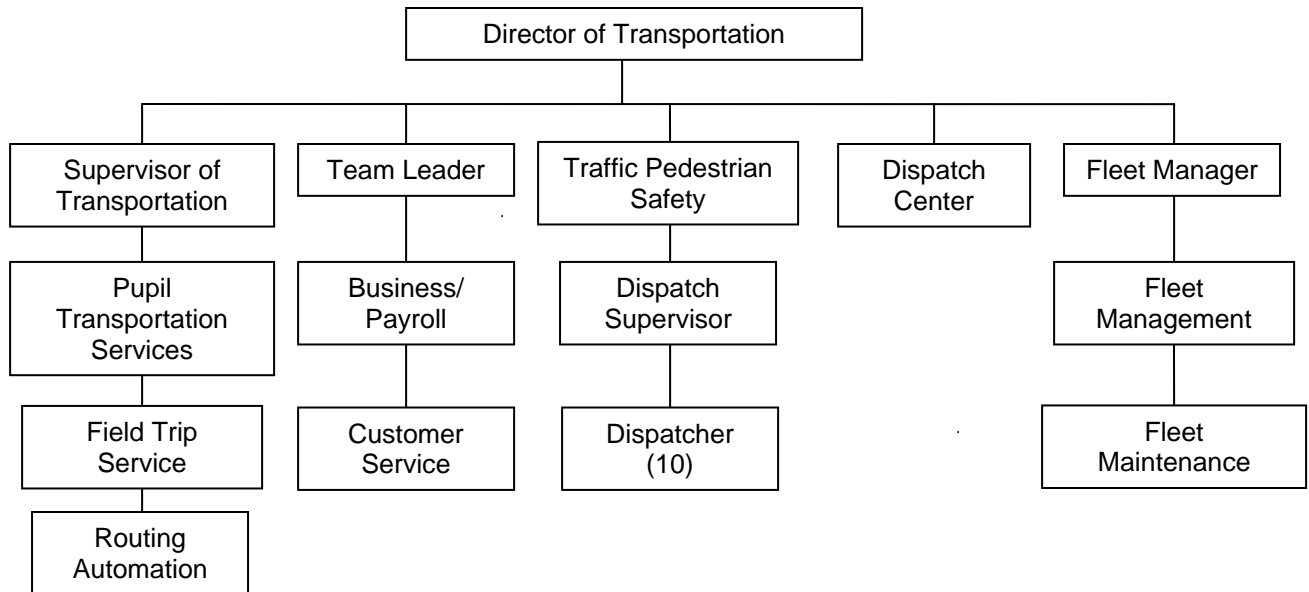
Source: LCPS Transportation Department, 2007.

FINDING

The transportation department has created paid substitute bus driver positions that are on stand-by and assigned to a determined location at each of their scheduled work times: two hours in the morning, one hour at midday, and three hours in the afternoon.

These drivers report to an area supervisor and are assigned to operate a bus route as needed. They must be available to drive or work as an attendant anywhere within the county and on some out-of-county routes. The position provides flexibility and enhances transportation service to situations that may occur daily such as a traffic jam or the absence of a regular route driver.

COMMENDATION 6-A:

The LCPS Transportation Department is commended for designing full-time substitute bus driver positions.

FINDING

Exhibit 6-10 shows the turnover rates of transportation employees as reported by the transportation department. For both bus drivers and non-bus drivers, there was an increase in turnover from 2004-05 to 2005-06. In 2007, the turnover rates for both bus

drivers and non-bus drivers decreased by 3.37 percent and 4.37 percent respectively, and the rate for bus attendants increased by 1.84 percent.

EXHIBIT 6-10
LCPS
TRANSPORTATION TURNOVER RATES
2004-05 THROUGH 2006-07 SCHOOL YEARS

CALENDAR YEAR	NON-BUS DRIVERS	BUS ATTENDANTS	BUS DRIVERS
2004-05	10.14%	13.82%	11.83%
2005-06	10.22%	11.89%	14.41%
2006-07	5.85%	13.73%	11.04%

Source: LCPS Transportation Department, 2007.

The number of bus drivers and attendants to be hired and trained can be a management challenge. The average number of turnover employees in the past three years has been 71 bus drivers and 18 attendants (for the 2006-07 school year, 117 new drivers were trained). The transportation department, with the personnel department, has aggressively worked to retain trained, qualified employees and reduce employee turnover. Reclassifying bus drivers to a higher pay grade and providing a full benefit package to all appointed drivers also improved the recruitment and maintenance of a stable work force. In addition:

■ LCPS provides a recruitment bonus program: 75 individual bonuses of $500 are available if a current employee recruits a new bus driver applicant. The applicant must complete the department driver training program and work at least 90 regular school days. Additionally, a quarterly perfect attendance program provides qualifying employees $50.

■ The transportation department recruitment program places advertising in the local print media as well as special mail-outs, attachments to school menus, newsletters, and flyers. In conjunction, the personnel department conducts job fairs in the region specifically for classified employees, with interviews available onsite.

■ New driver and attendant training classes are held monthly.

■ Regionwide compensation comparisons are used to establish budget and classification requests.

COMMENDATION 6-B:

The training staff is commended for accomplishing effective recruiting and training to ensure qualified bus drivers and attendants are available to safely transport students to and from school.

6.2   Planning, Policies, and Procedures

The LCPS Transportation Department has an experienced key staff that works effectively as a team. There are excellent published LCPS policies and procedures

governing transportation operations. Additionally, the public can access information on the Web site. All students are provided a student handbook each year. Parents are asked to sign a form of acknowledgement in the book indicating that they have reviewed the documents contained in the LCPS Student Rights and Responsibilities. School board policies define a safe and reasonable walking distance to clarify which students are eligible for bus transportation.

FINDING

LCPS allows drivers to park their assigned buses at their residence overnight and between morning and afternoon routes. This may potentially reduce deadhead miles and enhance the timely start of a route in the morning. However, there are safety and security issues associated with parking buses in an unsecured location.

Bus parking has become a "not in my back yard" issue, with the continuing population growth and the development of subdivisions with covenants restricting the size of vehicles allowed to park. Loudoun County and towns within the county have adopted or strictly interpreted zoning policies that restrict the parking of school buses along the street.

This issue was discussed with the director of transportation, and he indicated his concern and desire to have at least three secure satellite parking areas for buses. Currently, a secure bus parking lot and the school division/county government consolidated vehicle maintenance facility is located in the town of Leesburg. There is a limited service facility in western Loudoun County near the town of Hamilton, with a small, unsecured parking area, and numerous school buses park overnight in unsecured school parking lots throughout the county.

Exhibit 6-11 shows the proposed satellite maintenance facilities and secure parking areas contained in the Capital Needs and Capital Improvements programs.

EXHIBIT 6-11
LCPS
TRANSPORTATION DEPARTMENT SECURE PARKING AREAS
2010-11 THROUGH 2015-16

CALENDAR YEAR	CAPITAL IMPROVEMENTS	CAPITAL NEEDS
2010-2011	Eastern Facility	---
2011-2012	Eastern Parking Land	---
2013-2014	---	Southern Facility
2015-2016	---	Western Facility

Source: LCPS Transportation Department, 2007.

RECOMMENDATION 6-1:

Initiate a study to determine the feasibility of obtaining temporary satellite secure parking areas for school buses.

The director of transportation should obtain approval for a feasibility study to park school buses in secure paved sites with fencing and lighting. The study and cost estimates,

utilizing property already owned by LCPS, should be submitted through the director of construction, the director of facilities of services, the safety and security supervisor, and the assistant superintendent for support services for the superintendent's approval. The implementation of this recommendation should require a detailed study, community involvement, and approval.

FISCAL IMPACT

There are fiscal impacts associated with this recommendation. The MGT consultant cannot determine the impacts since a detailed study is not within the scope of work for this efficiency study. Costs associated may be significant due to the scarcity and the cost of possible additional property (one option may be to sell existing LCPS property and purchase property at a considerable distance from current development). A feasibility study should be completed so that an informed decision can be made by the Superintendent to develop secure parking areas for school buses.

FINDING

LCPS does not have a written school bus replacement policy. The transportation department practices a 12-year replacement schedule although LCPS has not developed a written policy.

Exhibit 6-12 shows bus replacement data provided by the transportation department listing the number of buses replaced yearly since 1996.

EXHIBIT 6-12
LOUDOUN COUNTY PUBLIC SCHOOLS
BUS REPLACEMENT DATA
1996 THROUGH 2007 SCHOOL YEARS

YEAR OF REPLACEMENT	BUSES REPLACED
1996	17
1997	19
1998	20
1999	25
2000	27
2001	30
2002	29
2003	37
2004	43
2005	47
2006	43
2007	52
2008	54
TOTAL BUSES REPLACED	**443**
AVERAGE YEARLY REPLACEMENT	**34**

Source: LCPS Transportation Department, 2007.

The data shown in **Exhibit 6-12** reveals that over the past 13 years, with the absence of a school board replacement policy, the purchase of buses in the division is inconsistent. It should be noted that LCPS did not follow the 12-year bus replacement program from 2005 through 2008. The division purchased 196 buses or 32 less than the 228 buses required to maintain the replacement cycle.

A bus replacement plan is a valuable planning and management tool that can increase efficiency, reduce costs, and improve inventory. VDOE's formula for state funding to localities assumes a 12-year bus replacement cycle. With the exception of a few small capacity type school buses, LCPS fleet is all diesel-powered and its vehicle maintenance program is excellent. These factors strongly suggest that LCPS should adopt a 13-year bus replacement policy as a realistic goal. **Exhibit 6-12** details that the average number of replacement buses purchased over the 13-year period was 34 buses.

RECOMMENDATION 6-2:

Establish a 13-year school bus replacement policy.

Purchasing buses evenly over the 13-year replacement cycle should facilitate fiscal planning in subsequent years.

FISCAL IMPACT

The implementation of this recommendation can be accomplished with policy development by the Transportation Director, the Superintendent, and the School Board.

FINDING

The spare bus inventory is excessive and the LCPS should adopt and implement a policy to eliminate excess spare buses to capture related cost savings.

Exhibit 6-13 shows the number of the buses assigned for the 2008 school year:

EXHIBIT 6-13
LOUDOUN COUNTY PUBLIC SCHOOLS
BUS ASSIGNMENT DATA
2008 SCHOOL YEAR

BUSES ASSIGNED	NUMBER OF BUSES
Regular Bus Routes	416
Special Needs Routes	125
Unassigned to Routes	21
Exclusive Special Needs Spare Bus	1
Activity/Trip Buses	30
Emergency Spare Buses	26
Spare Buses	124
TOTAL	**743**

Source: LCPS Transportation Department, 2007.

According to a review of data, there are 743 buses in the fleet inventory. **Exhibit 6-13** shows a total of 619 buses required to support daily transportation services. School divisions need enough spare buses to replace those under repair, in accidents, or removed from service for other reasons. The number of spares required is usually measured as a percentage of the number of buses required for daily service. LCPS has 124 buses in excess of operational requirements and considered spares. Though it is the prerogative of LCPS to maintain whatever percent of spare buses it desires, the generally accepted range for school bus fleets nationwide is between 10 and 15 percent unless there are unusual circumstances. It is noted that the peer divisions to which LCPS was compared maintain much higher spare bus rates (see **Exhibit 6-6**). The fleet of 743 buses in LCPS, with 619 buses required to provide daily service with a 10 percent spare bus policy, would equate to 62 buses. The 124 spares currently on hand could be reduced by 62 which would result in an LCPS spare bus policy of 10 percent. The excess buses should be reduced from its inventory to achieve a cost savings.

RECOMMENDATION 6-3:

Eliminate 62 buses from the current spare bus inventory and capture cost savings.

This recommendation is predicated on the finding that to continue having 124 spare buses when only 62 are not economical. Adjusting to a 10 percent spare bus requirement from 105 buses over operational requirements results in a 62 bus excess. The 62 buses should be disposed of by auction or other means and removed from the inventory of LCPS as soon as practical.

FISCAL IMPACT

The sale of 62 excess buses should generate a one-time income of approximately $124,000 (older buses normally sell for approximately $2,000 each depending on condition). Annual maintenance costs are estimated at approximately $1,400 per bus or $86,800 over the five-year budget cycle for 62 excess spare buses. Eliminating the excess busses would generate an estimated cost savings of $471,200.

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Sell 62 Excess Buses	$124,000	$0	$0	$0	$0
Reduced Annual Maintenance Costs	0	$86,800	$86,800	$86,800	$86,800
TOTAL SAVINGS	**$124,000**	**$86,800**	**$86,800**	**$86,800**	**$86,800**

FINDING

LCPS Transportation Department has worked with a variety of challenges related to special needs student transportation. To address bus service with the diverse student population, they have standardized the buses at a level that would serve any special needs student and still allow flexibility in the use of the bus.

The special needs buses are specified for the same equipment:

- One type of wheelchair restraint.
- All car seats are the same brand.
- All drivers and attendants use the same equipment for each bus.

All special needs buses maintain a notebook ("red notebook") with all route information. This enables the drivers and attendants to serve their students, and provides a familiar environment for the student. An updated route notebook makes the route easier when a substitute driver is needed.

The transportation supervisor of the special needs group (and additional operational staff if required) meet with the special education department to address any IEP special transportation considerations.

COMMENDATION 6-C:

LCPS Transportation Department is commended for its support of special needs education transportation services.

6.3   *Routing and Scheduling*

Routing and scheduling of student transportation services is one of the most important functions performed by the LCPS 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.

FINDING

The routing and scheduling of students by LCPS transportation department is exceptional.

The EDULOG® software is used to route and schedule student transportation services. The routing automation staff plans, reviews, and establishes bus routes and stops to provide services for all eligible students. In addition, LCPS transportation department augments the computer routing system, as follows:

- Coordinates input from operational staff through field observations concerning stop locations and route of travel.

- Bus driver input is encouraged regarding the stop locations; the input is reviewed by the operational and routing automation staff.

- An additional software system was purchased and installed during the 2007-08 school year specifically for special needs routing to reduce routing to no more than one hour in length of ride time, and increase the students per bus scheduled.

- Customer service response program started the 2007-08 school year, providing a contact point for parents and the public with a concern, complaint, or suggestion regarding routing and bus stop locations; and providing timely responses and follow-up of status of request.

- A traffic and pedestrian specialist was added for the 2007-08 school year to coordinate with school construction during the design phase of new construction and address any and all safety issues regarding traffic and pedestrian safety.

COMMENDATION 6-D:

The LCPS transportation department is commended for implementing and using an effective routing and scheduling program for student transportation services, recognition for the innovative customer service program, and for the additional staffing of a traffic/pedestrian specialist.

6.4   Training and Safety

The LCPS transportation department's training supervisor is responsible for training and safety programs for the bus drivers and attendants. This position has responsibilities to monitor all safety issues related to student transportation, investigate all accidents, and file accident reports with VDOE.

FINDING

LCPS has an exceptional accident prevention and safety program in effect.

In assessing the program, it was found that:

- Safety meetings are conducted for all drivers and attendants.

- Training exceeds the state-mandated classroom instruction and behind-the-wheel training is completed by all drivers.

- All drivers possess a valid Commercial Driver's License (CDL) and meet all physical requirements to operate a school bus safely.

- All drivers and attendants are required to attend five year re-certification training.

- The training section provides student safety brochures, pamphlets, hand outs, stickers, pencils, and numerous items that the school classroom teachers may order prior to the start of the new school year.

Exhibit 6-14 shows transportation-related staff development training offered as part of its safety and accident prevention program:

EXHIBIT 6-14
LOUDOUN COUNTY PUBLIC SCHOOLS
TRANSPORTATION-RELATED STAFF DEVELOPMENT TRAINING
2006-07 SCHOOL YEAR

TRAINING OFFERED	REQUIRED BY LAW	EMPLOYEE SATISFACTION	CERTIFICATION	ANY PAY DIFFERENTIAL
CPR & First Aid	Yes	High	Yes	No
Driver Training	Yes	High	Yes	Yes
VA Assn. for Pupil Transportation	Yes	High	Yes	No
Special Needs	Yes	High	Yes	No
Passenger Control	Yes	High	Yes	No
Safety	Yes	High	Yes	No
DMV Regulations	Yes	High	Yes	No
Drug Abuse	Yes	High	Yes	No
Bus Evacuation of Students	Yes	High	Yes	No
Radio and Cell Phone Use	Yes	High	Yes	No
School Bus Safety Curriculum	Yes	High	Yes	No
EDULOG Training	No	High	Yes	No
Automotive Service Excellence (ASE)	No	High	Yes	No

Source: LCPS Transportation Department, 2007.

Training, safety, and accident performance indicators are important management tools. In discussions with the director of transportation and his staff, it was determined that the transportation department uses many performance indicators to manage its safety and accident program. **Exhibit 6-15** shows the indicators that are currently used in the transportation department to improve safety and training.

EXHIBIT 6-15
LOUDOUN COUNTY PUBLIC SCHOOLS
TRAINING, SAFETY, AND ACCIDENT PERFORMANCE INDICATORS
2006-07 SCHOOL YEAR

PERFORMANCE AREA	PERFORMANCE INDICATOR
Safety	- Accidents per 100,000 miles - Incidents per 100,000 miles - Pre-performance checks - Safety Orientations
Cost Effectiveness	- Average rider trip time in minutes - Driver absentee rate - On-time performance - Open routes due to unfilled positions
Training	- Driver Training - Safety Training - Student Discipline Training

Source: Created by MGT of America, 2007.

Overall, the LCPS training program is exceptional. Training is supported and emphasized by the leadership in the school division. Employee satisfaction is good and training received contributes to operational efficiency and effectiveness.

COMMENDATION 6-E:

The LCPS Transportation Department is commended for its effective training program.

FINDING

The LCPS Transportation Department has developed a transportation communication dispatch center that provides service 24 hours a day, seven days a week.

The majority of transportation departments throughout the Commonwealth monitor and provide dispatch services for two-way communications between the school bus drivers, operational supervisors, and maintenance facilities during scheduled school work days. The transportation department provides dispatch services, 24 hours, seven days a week, and 365 days a year.

The communication dispatch center is housed at the transportation department administrative building. Each operational area has an assigned dispatcher for immediate communications with bus drivers. In addition, the center:

- Receives and monitors various alarms for all schools, administrative buildings, and the vehicle maintenance facility; and calls for the facilities services department.

- Receives and processes all emergency calls for Loudoun County Public Schools including building maintenance issues, burglar alarms, and emergency contact information. Emergency calls do not include 911 calls which are handled by the County Emergency Operations Center.

- Receives and monitors all school bus communications.

The center is an innovation that has combined all internal emergency communications and has reduced redundant positions throughout the school division and the county.

COMMENDATION 6-F:

The LCPS transportation department is commended for its outstanding emergency communication program.

6.5   Vehicle Maintenance

Loudoun County and LCPS vehicle maintenance is performed by a combined central garage and managed by the LCPS Transportation Department. A steering committee comprised of the director of general services for Loudoun County and the LCPS director of transportation provides executive management oversight and the operation is an internal enterprise fund operation. The central garage is the primary fleet maintenance facility, located at 42000 Loudoun Center Place in the town of Leesburg (the transportation administrative offices also operate together at this location) and a small second facility is located at the town of Hamilton. Both facilities support 743 school

buses, 398 LCPS support and administrative vehicles, and 1,168 Loudoun County vehicles (to include police cruisers, fire apparatus, bucket trucks, dump trucks, other special use vehicles and administrative use vehicles).

The LCPS Transportation Department has 35 mechanics assigned to maintain the fleets. The current ratios of mechanics per vehicles are 1:33 (buses and heavy vehicles) and 1:170 (sedans and light vehicles). The transportation industry and majority of school divisions nationwide have a common ratio of one mechanic per 20 to 30 vehicles with the average being approximately 1:25. The mechanic to vehicle ratio in LCPS is slightly higher than the national average. During interviews with staff, they have established a formula devised to determine when additional mechanics are required. Their mechanic to vehicle ratio calculation is based on:

- The average annual billable hours per mechanic.
- The total billed labor hours.
- The total number of vehicles.

LCPS determines the mechanic to vehicle ratio by determining the average billable work hours for a mechanic, the average work hours required per vehicle and the number and type of vehicle. While it seems to be above the industry average, the up-to-date maintenance facilities and equipment, the expertise and training of the mechanics, and the mechanic to vehicle ratio indicate that the staffing at LCPS is adequate.

FINDING

LCPS does not require America Service Excellence (ASE) certification as a condition of employment of the vehicle 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 ASE certified mechanic can have a significantly positive impact on the parts replacement and equipment repair program of any maintenance operation.

ASE certification is an important management tool that ensures mechanics are highly skilled and trained. These tests are administered at more than 750 locations nationwide. They determine the level of proficiency a mechanic has in a particular area or on particular kinds of equipment. They demand preparation. Mechanics who are ASE certified are considered superior in their profession. Qualified mechanics are needed to maintain school buses and other equipment. ASE certification is an excellent way of determining a mechanic's qualifications. The training of mechanics is one of the important cornerstones of an effective maintenance organization.

The transportation department is awaiting approval for an ASE incentive program. Currently, seven mechanics hold 49 certifications in automotive, heavy truck and school bus areas (several other mechanics have various ASE certifications).

RECOMMENDATION 6-4:

Encourage mechanics to achieve ASE certification and make ASE certification a condition for mechanics seeking employment.

FISCAL IMPACT

Registration fee for ASE tests are $32 per employee. The cost of the school bus initial tests is $27 each; the cost of the school bus advanced tests is $54 each; and the certification tests are $27 each, up to a maximum cost of $71 for three tests or more. There are seven different school bus ASE initial and advance tests. The cost for one mechanic (without ASE certification) for the seven initial tests is $189; the cost for the seven advanced tests is $376; and the cost for recertification tests is $71.

Based on the proposal submitted by the director of transportation to the school board and the County of Loudoun, the cost of the program will be paid for by the central garage and will not require additions to the budget by either the school board or The County of Loudoun. The cost would include the overhead costs (to cover training, shop cleaning, parts waiting, etc.) billed and prorated to individual departments using the garage.

FINDING

LCPS Transportation Department vehicle maintenance has implemented a vehicle maintenance information system (VMIS).

The transportation department meets Commonwealth of Virginia guidelines and employs several technological innovations and indicators to manage the vehicle fleet:

- Maintenance performance is measured through the Faster Fleet Management System and provides management with several reports: vehicle down time, mechanics accountability, parts turn ratios, parts inventory, scheduling, open work order reports, and scheduled versus unscheduled maintenance. The system also provides custom reports as needed.

- The vehicle maintenance program or staff monitors and submits warranty repairs and parts to the vehicle vendors/manufacturers. They recovered $215,000 reimbursement for warranty work in 2005-06; $236,000 in 2006-07; and recovered $21,000 in the first quarter of 2007-08.

- Mechanics have access to and use a wide variety of diagnostic tools to troubleshoot repair problems.

- In conjunction with the Faster Fleet Management System, the county/LCPS FAMIS accounting system manages costs, budgets and expenditures. This provides expenditures and other fleet cost tracking to all county and school division account managers with budget responsibilities.

The transportation department uses effective fleet management indicators to manage the vehicle fleet. This system is important to managing the fleet and contributes to the high standards of excellence achieved by the central garage staff. **Exhibit 6-16** lists an overview of fleet management indicators:

EXHIBIT 6-16
FLEET MANAGEMENT INDICATORS
LOUDOUN COUNTY PUBLIC SCHOOLS
2006-07 SCHOOL YEAR

OVERVIEW OF FLEET MANAGEMENT INDICATORS	PERFORMANCE INDICATOR
Maintenance Performance	▪ Miles between road calls ▪ Accidents per 100,000 miles ▪ Percent of preventive maintenance completed on time ▪ Operational rate/percentage for buses and vehicles ▪ Turnover time per bus repair ▪ Entity performing repairs ▪ Is repair maintenance performed in-house ▪ Driver requested bus repairs ▪ Type of maintenance performed
Cost Efficiency	▪ Operation cost per mile ▪ Annual operation costs per route for buses ▪ Monthly operational costs for non-bus vehicles ▪ Bus replacement costs ▪ Time mechanics spend repairing vehicle(s) ▪ Fuel
Cost Effectiveness	▪ Parts replacement and dollar amounts ▪ Labor hours ▪ Labor cost

Source: Created by MGT of America, 2007.

COMMENDATION 6-G:

The LCPS Transportation Department is commended for its exceptional VMIS and maintenance management programs.

FINDING

The LCPS Transportation Department contracts with a private vendor for providing fuel and fueling services for the vehicle fleet.

Throughout the Commonwealth, a majority of school divisions own and maintain their fueling sites. This includes:

- Fuel and related dispensing equipment.

- Site maintenance, equipment upgrades, and back-up generator.

- After hours and emergency maintenance response.

- Underground tank monitoring and reporting.

- The Commonwealth Department of Environment Quality (DEQ) and federal Environmental Protection Agency (EPA) inspections and compliance.

Under the terms of the LCPS Transportation Department's contract, the private vendor operates, repairs, and maintains all equipment at four fuel sites within the county, three county-owned sites, and one commercial site of its own. The fuel stored at county owned sites is held on consignment, and daily transactional data is transmitted to the central garage and uploaded into the Faster VMIS system. Fuel pricing is a part of the transactional data and is updated weekly.

Access to fuel is controlled through fuel cards assigned to each individual vehicle and a personal identification number (PIN) assigned to each eligible vehicle operator.

The contract was developed to meet specific environmental problems (fuel spills, containment and clean up, underground monitoring, and site assessments) that LCPS has neither the equipment nor expertise to deal with efficiently.

COMMENDATION 6-H:

The LCPS Transportation Department is commended for its innovative fuel management procedures.

While several school divisions contract with a private vendor to provide individual credit cards for employees for vehicles (for emergency and/or daily fueling services at a public fuel station), LCPS contracts with a private company to manage, maintain, monitor, and provide fuel for the school division and county government.

7.0 TECHNOLOGY MANAGEMENT

7.0 TECHNOLOGY MANAGEMENT

This chapter provides a summary of technology management for Loudoun County Public Schools (LCPS). The four major sections of this chapter are:

7.1   Organization and Staffing
7.2   Technology Policies and Planning
7.3   Software and Hardware
7.4   Staff Development

When reviewing the technology resources of a school division, MGT examines the host computer system that supports applications, the applications themselves and the degree to which they satisfy user needs, the infrastructure that supports the overall operations of the school system, and the organizational structure within which the administrative and instructional technology support personnel operate.

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 both administrative and instructional technology of LCPS. As a result of our findings, we have provided two major commendations, including:

- LCPS has implemented a user-friendly and cost-effective help desk system for administrative technology.

- LCPS has a four-to-one student to computer ratio, which is a desirable level for attaining true technology integration in the classroom.

In addition to the commendations listed above, a few key recommendations are presented in this chapter. The key recommendations include:

- Create a comprehensive long-term technology plan that incorporates both administrative and instructional technology as well as the financial needs associated with implementing the goals and strategies within the plan.

- Ensure 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.

As part of this performance review, LCPS staff were surveyed on opinions about technology. **Exhibit 7-1** shows the results of this survey.

As shown in this exhibit, central office administrators, principals and assistant principals, along with teachers, show a favorable response to each of the technology-related statements presented in the survey.

EXHIBIT 7-1
COMPARISON OF RESPONSES WITHIN THE DIVISION
TECHNOLOGY

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
Our school division provides adequate technology-related staff development.	80/6	92/4	75/15
I have adequate equipment and computer support to conduct my work.	93/3	92/3	74/18
Administrative computer systems are easy to use.	91/4	90/5	41/4
Technology is effectively integrated into the curriculum in our division.	69/4	92/1	72/15
The school division's job of providing adequate instructional technology.	79/11	94/6	73/24
The school division's use of technology for administrative purposes.	90/9	91/9	49/12

Source: LCPS staff responses to the MGT survey, 2007.
[1]Percentage responding *good* or *excellent* / Percentage responding *fair* or *poor*. The *don't know* responses are omitted.

Exhibit 7-2 shows how LCPS compares with other school divisions throughout the country. As shown in the exhibit, LCPS respondents for central office administrators, principals and assistant principals, as well as teachers have a more favorable response to having adequate computer equipment and support.

EXHIBIT 7-2
LCPS COMPARISON OF RESPONSES WITH OTHER DIVISIONS

STATEMENT	(%A + SA) / (%D + SD)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
I have adequate equipment and computer support to conduct my work.	93/3	70/22	92/3	74/19	74/18	54/36

Source: LCPS and school division staff responses to the MGT surveys related to technology.
[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree*. The *neutral* and *don't know* responses are omitted.

The 2006-07 budget for instructional technology is $17,883,831 and $2,107,427 for administrative technology during the same period. Additionally, e-Rate funding being sought for special projects is at $930,303.

Some of the initiatives underway for administrative technology include an active directory project, email archiving, disaster recovery with the county, and the installation of wireless technology in the remaining schools is projected for completion on the instructional side by the end of the current school year.

Additionally, while having current job descriptions is considered a standard, LCPS does have detailed job descriptions for technology-related staff, which shows that the division follows the industry standard for these positions.

7.1   *Organization and Staffing*

Ideally, technology is one area of a school division 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 organizational structure. These structures have technical support functions and instructional technology functions that may report differently, but each unit is cohesively organized, and there is communication between units.

The LCPS technology functions are organized into two separate and distinct areas: administrative and instructional technology. Administrative technology staff reports to a supervisor who reports to the assistant superintendent of business and financial services. The instructional technology staff report to a supervisor who reports to a director of instructional services, who is a direct report to the assistant superintendent of instruction. **Exhibit 7-3** shows the current organizational structure for technology in LCPS.

**EXHIBIT 7-3
LOUDOUN COUNTY PUBLIC SCHOOLS
CURRENT TECHNOLOGY ORGANIZATIONAL STRUCTURE
2007-08 SCHOOL YEAR**

ADMINISTRATIVE SERVICES

INSTRUCTIONAL SERVICES

AIT Supervisor

Secretary

Information Security Specialist

Technology Coordinator

Web Development Team
Web Developers (2)

Network Team
Network Engineers (6)
Network Specialists (2)

Technology Specialist
Help Desk Manager

Technology Specialist
Application Specialist

Equipment Support Team
Computer Tech Help Desk (1)
Computer Technicians (7)

Director

Supervisor
Instructional Technology

Supervisor
Technology Resource Teachers

Inst. Tech. Coordinator

Tech Support Coordinator

2 Staff Dev. Trainers

Sr. Network Engineer

Tech Support Coordinator

68 Technology Resource Teachers

Network Engineer

Technology Specialist

5 Computer System Engineers

5 AV Technicians

17 Network Specialists

2 Cable Technicians

13 Computer Techs

2 Secretaries

Source: LCPS administrative and instructional technology departments, 2007.

7.2   *Technology Policies and Planning*

Technology-related policies provide important information to drive internal operations, but are also important in maintaining proper procedures using division owned equipment. An absence of formal policies or regulations creates the potential for misinterpretations and omissions within school divisions.

Successful technology planning is the foundation for successful technology implementation and development. School division technology is not just a stand alone, long-term, ongoing project; it affects every aspect of school division operations. There are many factors to consider when planning around technology for any school division.

FINDING

Currently, as indicated in the division organization and administration chapter, LCPS does not have many draft regulations and technology is no exception. Draft regulations currently ready for review are:

- Acceptable Use Regulations
- Access to Systems & Networks
- AIT Confidentiality Agreement
- Audit Policy
- Backup DRP
- Data Retention
- Email Use
- Hardware
- Information Sensitivity
- Password
- Patch Management & Software Security
- Physical Access Regulation
- Record Keeping
- Remote Access
- Security Training
- Software
- Virtual Private Network
- Wireless Communication
- Workstation Security

However, these regulations are in draft form and have not been reviewed by the superintendent or senior staff and thus are not truly enforceable should a need arise. Additionally, these regulations are only addressing the administrative portion of technology.

A best practice as found in Leon County Schools (FL) is to have board approved policies or regulations that impact administrative and instructional technology in the school division.

RECOMMENDATION 7-1:

Review the current technology-related practices and develop regulations and implement after approval.

The implementation of this recommendation should provide the basis for guiding administrative and instructional technology throughout the division. These regulations should provide for integration of administrative and instructional technology with carefully defined school needs as reported in school improvement documents.

FISCAL IMPACT

The implementation of this recommendation can be accomplished with only five hours of staff time, including division-wide dissemination.

FINDING

While the division has a long-term technology plan, the plan only addresses the instructional portion of the school division and in fact, the name of the plan is the Educational Technology Plan for LCPS.

The committee members consist largely of instructional technology staff and the instructional technology resource teachers.

The plan contains the following components:

- Integration – The integration component seeks to improve teacher and student access to technological resources in classrooms and other learning centers.

- Professional Development – The professional development component seeks to establish training programs and incentives to enhance teaching and learning through the use of educational technologies.

- Connectivity – The connectivity component works towards establishing integrated voice, video, and data networks capable of providing access to instructional and administrative areas.

- Educational Applications – The educational applications component seeks to provide the instructional and remediation applications that will stimulate instruction.

- Accountability – The accountability component will establish a system of ongoing evaluation for the school division to assess technology application.

Additionally, there are goals, targets, direct benefits, gaps, status, and responsibility areas for the plan; however, there are no ties to financial information or to the administrative technology portion of the division.

Without a comprehensive long-term technology plan, the division could have issues with the administrative side keeping up with the needs of instructional technology.

A more effective and best practice that the division needs to consider is creating a comprehensive technology plan to ensure that the division as a whole is moving forward in the most effective and efficient manner.

RECOMMENDATION 7-2:

Create a comprehensive long-term technology plan that incorporates both administrative and instructional technology as well as the financial needs associated with implementing the goals and strategies within the plan.

A comprehensive plan ensures alignment across all areas of the division yet is tailored to specific needs of each school. A best practice can be found in Campbell County Public Schools, Virginia. **Exhibit 7-4** shows a sample that the division can use as a starting point.

FISCAL IMPACT

Since the division already has an instructional technology committee in place, the only additional resources needed would be staff time on the administrative technology side.

**EXHIBIT 7-4
SAMPLE TECHNOLOGY PLAN
CAMPBELL COUNTY PUBLIC SCHOOLS**

EDUCATIONAL TECHNOLOGY PLAN FOR CAMPBELL COUNTY SCHOOLS
2003 - 2009

EDUCATIONAL TECHNOLOGY PLAN FOR CAMPBELL COUNTY SCHOOLS **1**

Source: Campbell County Public Schools Web site, 2008.

7.3   *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 also serve an administrative function in most divisions. Moreover, adequate administrative technology must be present to support schools in meeting instructional goals. One of the primary tenets of the *No Child Left Behind Act* is that school divisions will make data-driven decisions. Having data readily and easily available to make decisions is possible only by having sufficient administrative software and hardware.

FINDING

LCPS administrative technology staff implemented a self-service Web-based help desk solution named AITHelp. The system is an application purchased from the vendor WonderDesk and customized by AIT staff to meet the needs of the division. This customized system was only $2,500 with annual maintenance cost of $250.

Administrative staff, including technicians stated that they liked the system, especially since it is simplistic and easy for users. Other departments within the division are now using the system, including the telecomm, personnel, and the copier support groups.

The system allows for unlimited work orders, unlimited users, and unlimited technicians. With the license agreement, this company allows LCPS to use the system without high licensing fees commonly found in other help desk applications.

Since implementing the system in 2003, over 25,000 work orders have successfully been entered and closed. During the time of the on-site visit, the system showed only 86 open work orders with many of them waiting on vendor action for completion. In fact, comments from stakeholders included that the "AIT staff is very responsive and responsible".

COMMENDATION 7-A:

LCPS has implemented a user-friendly and cost-effective help desk system for administrative technology.

FINDING

The division has a computer to student ratio of four-to-one, which is considered a best practice for school divisions.

Inventory reports and documentation provided by the instructional technology staff show that the division has one computer for every four students. The division has over 20,000 computers and laptops for the nearly 60,000 students enrolled. During MGT's visit to more than 40 schools, this was evident when looking into classrooms, labs, and media centers. In fact, the performance review team noticed that the computers were also in working order and observed staff and students using them. The team also noticed that

the computers did not have notes taped to them indicating any problems, which is extremely rare. In fact, only two other school systems in the country have shown this type of exemplary practice of maintaining computers.

As stated previously, LCPS survey results also show where central administrators, principals/assistant principals, and teachers have a favorable response to the statement that technology is effectively integrated into curriculum and that there is adequate instructional technology.

COMMENDATION 7-B:

LCPS has a four-to-one student to computer ratio, which is at a desirable level for attaining technology integration in the classroom.

FINDING

Only Loudoun County technology personnel currently have full access rights to the division's security and email servers. This scenario creates excessive time for changes or corrections to occur since the division must request changes through the county.

According to documentation and interviews, LCPS technology staff must request security changes or email administration changes of the county staff. This practice increases the length of time for completion of any type of request and is inefficient and ineffective. Furthermore, LCPS staff must wait behind other priorities that may be occurring in the county, which can compromise the division's security associated with the system infrastructure.

A more efficient and effective practice would be for the county to allow two LCPS technology staff members to have full rights to these servers. Since the county has the ownership rights to these servers, they would need to grant access to the division. In an effort to ensure a quality check on this type of process, the supervisor could issue an email for specific changes occurring on the servers for tracking purposes.

RECOMMENDATION 7-3:

Formally request that the county provide LCPS technology staff access rights to the security and email servers.

The LCPS security and email administrator roles should be provided full access to the servers that contain LCPS data. These rights could be reviewed annually by both entities to ensure proper documentation was provided for all changes made by LCPS staff. The supervisor should prepare an email to send to the county for each change made on the server as a component of dual control.

FISCAL IMPACT

There is no hard dollar cost for this recommendation and LCPS staff would need less than one hour per request to complete an email on the changes made. The specifics of

time needed for each change is not known and can only be determined based on needs per each request.

FINDING

Though the division uses state contracts for technology-related purchases, they are not using the most effective practice for these purchases. The current practice has each technology unit purchasing hardware and software per user needs but there is no coordination of effort to decrease costs of the actual product or maintenance. For example, instructional staff use Dell computers while administrative staff use Gateway. While this allows a clear path for support staff to know the user type, it does not allow for optimum purchase power or efficient maintenance on the machines.

Additionally, school administrators have the latitude to purchase technology-related equipment as does the central office administration. Even though state contracts are used for purchases, this lack of standardization allows for higher vendor costs and higher maintenance costs since staff can purchase the equipment or software without approval of the technology department to ensure compatibility and capability of maintenance. As examples of what can happen when technology policies and standards are not in place, the personnel department purchased a Web server without technology staff involvement (until assistance was needed), and the transportation department purchased a server that was incompatible with the division's infrastructure. When administrative technology staff is not involved in the decision-making process for product selection and purchase, inefficiencies and additional costs may arise.

A more effective approach like that provided by ISTE is needed for LCPS. The advantage of having and enforcing centralized and pre-approved technology is to maximize the useful life of new technology while ensuring compatibility throughout the division. An example can be found in the Pittsburgh School District (PA) where they have implemented a best practice with technology-related purchases.

RECOMMENDATION 7-4:

Implement and enforce a centralized model of technology hardware and software purchasing.

LCPS needs to implement and enforce a model of centralized technology hardware and software purchasing that should enable enhanced practices to the state contracts and eVA process. This procedure should serve the schools' needs by proactively communicating what software and hardware is acceptable, and what will occur with technology purchased or acquired that does not meet these specifications. IT staff should be sure to communicate the benefits for support and longevity that are the result of an enforced model. The model should be consistent so that technicians can work on both instructional and administrative machines.

The International Society for Technology in Education (ISTE) Technology Support Index contains a number of indicators related to hardware and software acquisition standards that can be used as guidance in this area.

FISCAL IMPACT

The implementation of this recommendation will only take a few hours of technology staff time to write a regulation for superintendent approval and then have the superintendent disseminate to all staff.

FINDING

A small inventory of spare parts is needed in the division to assist with quicker resolution for instructional staff.

According to staff interviews from both technology staff and teachers, there appears to be a sometimes lengthy process to replace computer parts due to normal wear and tear. The current process is to complete the work order and then instructional technology staff must seek approval; submit a request for quote, submit for approvals, and then order equipment from the vendor. This practice can take up to one month for shipment and replacement. This process was corroborated with instructional technology staff.

Additionally, when instructional technical resource teachers (ITRTs) need USB cables, or adapters, the principals usually have to provide documentation on why there is a need for additional equipment with the ITRT having to further provide documentation on classroom diagrams before the requested cable or adapter is approved. Instructional technicians have a similar problem when trying to replace CD ROMs, front I/O panels, power supplies, and keyboards.

These practices are inefficient and lead to teachers not having adequate equipment to continue integrating technology in the classroom during daily instruction.

A more effective and efficient approach would be for the division to purchase extra equipment to have on hand for quick repairs or enhancements.

RECOMMENDATION 7-5:

Purchase spare technology-related parts using an on-site inventory control system to continually maintain these parts for expedient repairs and enhancements.

By having an inventory of spare parts for computers used in the classroom, LCPS should have a faster response/repair time so that less interruption occurs with teaching staff. The district can use the space already dedicated to computers in the central office building.

FISCAL IMPACT

Based on information received during the on-site visit, spare parts such as USB cables, CD ROMs, power supplies and alike should be purchased. A conservative estimate of this newly implemented inventory should be less than $25,000 to initialize the inventory. Subsequent supplies should be expended to the department using the inventory items. This one-time outlay should be captured as inventory on the general ledger.

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Purchase Spare Technology-Related Parts	($25,000)	$0	$0	$0	$0

7.4   *Staff Development*

Training in the use of technology is the most critical factor in determining whether technology is used effectively or even used at all. Administrative and instructional staff must be able to use technology effectively that is available to them. Training must be ongoing since the technology environment is continuously evolving, and divisions must keep pace with the evolution.

FINDING

The division provided a listing of classes that were available to both administrative and instructional staff throughout LCPS; however, there is no real indication of a formal program to ensure all staff are regularly trained, which is imperative to having true instructional integration in the classroom.

Listings of course offerings by the North Tier Partnership – Online Professional Development was provided as documentation of what is available to instructional staff but the division was not able to provide a list of staff who actually registered and completed the course work by school year. Furthermore, there is no indication that principals ensure that teachers take at least one type of technology-related training each year to further enhance their skills.

For administrative technology, a comprehensive list of classes offered was provided for the 2006-07 through the current school year and included a list of participants.

Training for software applications is a necessity in order for true technology integration in the classroom, especially with the delivery of instruction.

LCPS does not have a tracking system to ensure staff is continually trained based on their skill level in technology.

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 21st Century. A main objective of this goal is to integrate technology in the 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 needed 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 personnel is appropriate.

■ The current education technology profile is adequate.

■ The school is focusing on the areas needed to improve the level of technology integration.

RECOMMENDATION 7-6:

Ensure 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 in the division. This training and accountability process can be slowly implemented with predetermined schedules and would only take approximately 20 hours of technology staff time to implement a spreadsheet listing all staff. An additional 100 hours would be needed over the course of each school year to maintain the newly developed tracking sheet.

8.0   FOOD SERVICES

8.0 FOOD SERVICES

This chapter presents the findings, commendations and recommendations regarding operations of food services for the Loudoun County Public Schools (LCPS). The major sections of this chapter include:

8.1 Organization and Staffing
8.2 Policies and Procedures
8.3 Planning and Budgeting

CHAPTER SUMMARY

The food services department participates in the National School Breakfast Program and National School Lunch Program and receives federal reimbursement for free, reduced, and paid meals. In addition, lump sum state funds are received at the beginning of the school year based on the prior year's participation.

Breakfast and lunch meals are offered to over 54,000 students with the exception of the 4,371 half-day kindergarten students who pay for a daily snack. Additional meal support comes in the form of United States Department of Agriculture (USDA) commodity foods. Meals and service is available to the 72 school locations prepared in individual kitchens, an increase from 68 schools in 2006.

The LCPS food services fund has operated at a deficit for eight of the last 10 years, and prior to 2003, deficits were absorbed using the fund balance. An internal food services performance audit was performed in February 2007 and addressed many financial practices that need revision, restructuring, cooperation and internal support.

The LCPS food services supervisor has implemented several of the audit report recommendations, most significantly the modification and adoption of the staffing model resulting in a staff reduction of 43 positions. The labor issue needs further consideration as it is one of the largest expenditures for the department. Key areas of commendation noted in the report include:

- LCPS food services department is commended for instituting a system of cross-training that provides for continuous coverage of all essential job functions.

- LCPS food services department is commended for encouraging the sharing of best practices across the school division.

The following key recommendations are proposed in this chapter:

- Explore additional training opportunities/topics for all staff using the media center to download presentations designed for distance learning.

- Revise the Blind Close policy from "signatures are recommended to verify a Blind Close was performed" to "signatures are required to verify a Blind Close was performed."

■ Develop and implement an aggressive marketing plan to attract more customers by involving students, teachers, administrators, parents, and community partners in the development stages and redefine the department mission.

■ Include kindergarten children in the LCPS school breakfast and lunch programs in lieu of the snack program.

■ Contact the Virginia Department of Education (DOE) School Nutrition office to request a National Food Service Management Institute financial technical assistance team.

MGT administered online surveys to central office administrators, school-based administrators and teachers to determine their perceptions of the quality, efficiency, and effectiveness of the food services department. The responses given by central office administrators, principals, assistant principals, and teachers are presented in **Exhibit 8-1.** As shown in the exhibit, the food services department is generally regarded favorably within the school division. Forty-nine percent of central office administrators *Agree or Strongly Agree* that food service provides nutritious and appealing meals and snacks, compared with 69 percent of principals and only 39 percent of teachers. The other responses to the survey were as follows:

■ The statement, "*The food services department encourages student participation through customer satisfaction surveys*." received the lowest percentage of *Agree or Strongly Agree*, with only 16 percent of central office administrators, 30 percent of principals, and 19 percent of teachers.

■ "*Parents/guardians are informed about the menus*" and "*Cafeteria facilities are clean and neat*" received the highest percentage of *Agree or Strongly Agree* responses from all three groups.

Opinions were divided over the statement, "*The food services department provides nutritious and appealing meals and snacks*" with only 39 percent of teachers and 49 percent of central office administrators responding *Agree or Strongly Agree*, but with 69 percent of school administrators responding.

These survey results suggest that the food service operation is doing well in areas related to staff friendless, facilities and keeping parents / guardians informed; however, these results also indicate that more work is needed in providing nutritious and appealing meals for faculty.

EXHIBIT 8-1
LCPS FOOD SERVICE SURVEY RESULTS

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
The food services department provides nutritious and appealing meals and snacks.	49/4	69/13	39/27
The food services department encourages student participation through customer satisfaction surveys.	16/7	30/27	19/14
Cafeteria staff is helpful and friendly.	53/1	91/4	72/7
Cafeteria facilities are clean and neat.	70/0	98/0	85/1
Parents/guardians are informed about the menus.	64/0	95/2	82/1

Source: LCPS staff response to MGT survey, 2007.
[1]Percentage responding *agree or strongly* agree/Percentage responding *disagree or strongly* disagree. The *neutral* and *don't know* responses are omitted.

Schools visited by MGT consultants observed staff providing exceptional consideration to faculty and other adult customers. There were numerous choices and in some instances special sandwiches and salads were prepared and reserved for adult customers. There seems to be a concern for the nutritional value of foods served and may be an indication of more work needed in marketing the nutrition values.

8.1   *Organization and Staffing*

The food service department is organized in a traditional hierarchical structure. The organizational structure for the department is shown in **Exhibit 8-2**. As shown in the exhibit, the department is headed by a food service supervisor, who has 11 direct reports. Four of the direct reports are administrative (field managers) and the other seven are departmental support staff for accounting, payroll, equipment and operations. Field managers are assigned an area of expertise to place emphasis and support each other.

School cafeterias are operated by food service managers who report to the building principals. Food service workers are direct reports to the cafeteria managers at each school. The food service supervisor has financial accountability for all food service operations and programs.

**EXHIBIT 8-2
LOUDOUN COUNTY PUBLIC SCHOOLS
ORGANIZATIONAL STRUCTURE
2007-08**

```
                    ┌──────────────┐
                    │ Food Service │
                    │  Supervisor  │
                    └──────────────┘
```

| Equipment Specialist | Accounting Clerk III (2) | Field Manager (4) | Operation Specialist | Computer Specialist | Payroll Specialist | Secretary I |

```
                    ┌──────────────┐
                    │  Building    │
                    │  Principals  │
                    └──────────────┘
                           │
                    ┌──────────────┐
                    │  Cafeteria   │
                    │  Managers    │
                    └──────────────┘
                           │
                    ┌──────────────┐
                    │ Food Service │
                    │   Workers    │
                    └──────────────┘
```
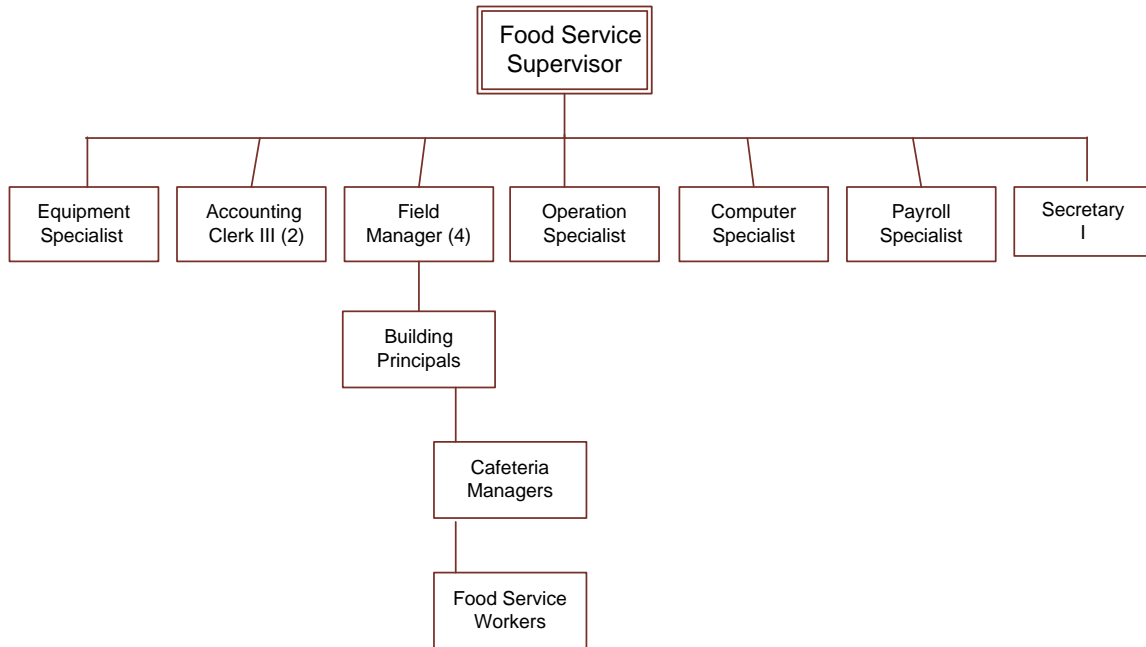
Source: Loudoun County Public Schools, Food Services Department, 2007.

Exhibit 8-3 shows the areas of responsibility assigned to each member of the food service department. The most notable aspect of the duty assignments is the presence of a support system for all major areas of operation. As shown in the exhibit, every position has an assignment as back-up for another position/operational area in the department.

EXHIBIT 8-3
FOOD SERVICE DEPARTMENT
AREAS OF RESPONSIBILITY
LOUDOUN COUNTY PUBLIC SCHOOLS
FEBRUARY 2007

Supervisor	*Operations Specialist*	*Field Manager*
Financial Management	Technical Assistance	Technical Assistance
Specifications & Bidding	School Reviews	School Reviews
Sub Hiring	Review School Records	Review School Records
Staff Evaluation	Free/Reduced Meal Application Mgmt	Purchasing
Staff Development & Training	Verification	Internal Food/Supplies Transfers
Personnel	Back-up Manager (emergency)	Review school orders
Financial Statements	Inventories	Commodity Distribution
Back-up Everybody (emergency)	New Employee Orientation	Back-up Manager
School communications	Sub assignments	
Oversee district accountability		
Training Manager	*Computer Specialist*	*Field Manager*
Technical Assistance/compliance	Technical Assistance	Technical Assistance/compliance
School Reviews	Back-up Manager (emergency	School Reviews
Review School Records	Web Page	Review School Records
Staff Development & Training	Computerization/ Network Management	Menu Planning /Production
Employee Newsletter	Computer Support	Nutrient Analysis
Sanitation Training FSW	Computer Training	Free/Reduced Application Back-up
Back-up Manager (emergency)		Back-up Manager (emergency)
Equipment Specialist	*Account Clerk III*	*Payroll Clerk/Office Mgr*
Equipment Specifications	Accounts Receivable	Payroll
Purchasing – Small Wares	Electronic Claims	Staffing support
Project Oversight	Internal Transfers	Personnel
Internal Transfer Deliveries	Internal Transfer Deliveries	Cashier Records/Printing
Technical Assistance	AR Invoicing	Back-up Account Clerks
Vending Machines	AR/FAMIS Reconciliation	
Back-up Cashier	Back-up Secretary/Account Clerks	
Internal Transfer Deliveries		
Account Clerk III	*Secretary*	*Field Mgr/Catering Coordinator*
Accounts Payable .	Greet Visitors & Answer Phone	Technical Assistance/compliance
Rebates	Copying/Collating	School Reviews
Purchasing	Incoming/outgoing Mail/Filing	Review School Records
Back-up Account Clerks/Secretary	Employee Database	Catering Coordinator
Reconciliation/Famis/Sunpac	Back-up Account Clerks	Back-up-Manager (emergency)
P&L	Accounts Payable Back-up	

Source: Loudoun County Public Schools, Food Service Department, 2007.

FINDING

The food service department has an effective staff support system in which departmental employees are cross trained to perform the essential tasks of other positions.

In interviews conducted during the on-site visit, each food service staff member was able to articulate the specific job tasks for other positions in the department that they had expertise in and served as back-up. In fact, some food service staff members possessed the training and ability to serve as back-up for several positions within the department.

Cross training provides numerous benefits for both the individual employee and the organization as a whole. Among these benefits are the following:

- Builds teamwork.

- Increases the level of employee participation and involvement.

- Increases employee interest.

- Increases employee value to the organization (their knowledge & understanding of operations).

- Creates an opportunity to develop instruction manuals.

- Provides backup support during peak work periods or vacations.

- Improves morale.

- Identifies opportunities for improvements in work flow and work processes.

Interviews with food services staff revealed that the department and staff members realized a number of these benefits, most notably, having adequate coverage during peak work periods and vacations, and the improvement of departmental morale.

Employees provide flow charts with job descriptions and detailed contact information. All training is done by shadowing for a day as the trainers go through their daily routine and contact information.

COMMENDATION 8-A:

LCPS food services department is commended for instituting a central office system of cross training that provides for continuous coverage of all essential job functions.

FINDING

A need exists for a more comprehensive training plan to further enhance and meet the needs of school staff.

Unlike the central office cross training procedure, the kitchen managers and area supervisors jointly decide the back up person based on capabilities and work hours.

While the division has an ongoing training program for the kitchen management and preparation staff, additional training and a comprehensive training plan is needed. The various classes operate with pre-established learning objectives: enhance employee skills, provide hands on preparation experiences; knowledge of how to prepare nutritionally sound meals using safe food handling techniques and meals that meet the USDA guidelines for reimbursable meals.

The current topics include:

- Sanitation for New Employees (ServSafe training for apprentice workers).
- Sanitation Certification (15-hour course leading to Sanitation Certification).
- Manager Training Class (For employees' management skills development).
- Culinary Skills Development.
- English as a Second Language (ESL) (To improve communications skills).
- Personal Computer Training (July – September).

The department has provided a 2007-08 staff development handbook for each employee. **Exhibit 8-4** displays the handbook table of contents. As shown in the exhibit, the handbook provides job-specific topics such as food safety, food storage, and "Offer vs. Service" portion control. It also reviews division policies relating to overall work performance such as attendance, employee leave, and submission of time sheets.

The training staff consists of the LCPS field manager, Virginia Cooperative Extension Services consultant, and certified chefs. Employees are required to sign a form indicating they have received the handbook and provided employee data profile contact information and an emergency contact number. Numerous managers volunteered their schools to be a training location for aspiring managers providing actual situations and hands on practice.

The 2007-2008 Staff Development Handbook provided complete descriptions of the training courses for employees, including training content, targeted audiences and course duration; however, the descriptions of the ESL classes were not as comprehensive. In discussions with food services personnel, and reviewing the training schedule, there appeared to be a need for additional offerings of ESL so they would be available to employees hired during the second semester of the school year.

The effectiveness of the food service department is dependent on qualified, well-trained employees. Without a plan to critique offerings and evaluate the effectiveness of the trainers, the training program will not grow and continue to benefit the employees and recipients of their services. The strategic plan should provide for evaluating training effectiveness.

EXHIBIT 8-4
LCPS FOOD SERVICES
STAFF DEVELOPMENT HANDBOOK
TABLE OF CONTENT
2007-08

Mission Statement	Preparation and Service Areas
Nondiscrimination Statement	Worker's Compensation Claims
Employee Guidelines	Food Storage
Dress Code	Dry food area
Code of Conduct	Freezer/Walk-in Refrigerator
Lunch Benefit	Cafeteria
Breaks	Chemicals and Fire Safety
Personal Phone Calls /Visitors	Receiving Area
Smoking	Door
Purchases for Personal Use	Food Irregularities
Work Performance Documentation	Emergency Food Transport
Drugs, Narcotics, and Alcohol	Emergency Supply List
Perfect Attendance	Food Safety
Recruitment Bonus	Temperature Checks for Freezers/Refrig.
Sexual Harassment	Normal Temperatures
Grievance Procedures	Emergency Numbers
Sick Leave	FIFO
Jury Duty	HACCP: Food Safety Program
Snow Days/Delayed Openings	Operations
Work Schedules	Retaining Food Samples
Time Sheets	Emergency Purchases
Acting Manager Pay	Food preparation and Serving Safety
Requesting a Substitute Worker	Frozen Foods
Training Schedule	Canned Foods
English/Spanish Classes	Hand washing
Meal Service and Accountability	Food Handling Safety
Student Meal Charges	Cold Food Handling
Student Payment Refunds	Hot Food Handling
A La Carte Prices	Leftover Food Storage
Offer Versus Service Potion	Leftover Foods
Second Student Meals	Maintenance and Service Work
Portion Control	AFTER HOURS EMERGENCY Procedures
Employee Safety	

Source: Loudoun County Public Schools, Food Services Department, 2007.

RECOMMENDATION 8-1:

Explore additional training opportunities for all staff and develop a formal training plan to further enhance food service skills.

The division should look at multiple locations to reduce travel time and allow for greater attendance. Each location should have an on-site monitor who distributes handouts, pre and post tests and records attendance. National Food Service Management Institute

(NFSMI) research indicates classes are more effective if limited to no more than 1 ½ hours.

The National Food Service Management Institute has produced numerous Teleconferences (Web based seminars) on a variety of topics and upon request will keep directors/supervisors informed of new topics and how they may access them. Previous broadcasts are located on the NFSMI Web resources.

The NFSMI Web site (http://nfsmi.org) lists information on topics and how to use and access printed materials, posters, and teleconferences. Preparation staff would benefit from *"Culinary Techniques: Cooking With Flair",* which has three parts: *Breads and Grains #ET24-01*; *Meats and Other Protein Foods #ET40-02;* and *Fruits, Salads, and Vegetables ET22-00.* Several presentations are published in Spanish.

Additional topics to consider are: *Customer Service, Work Simplification*, and *Food Service Assistant You Are Important.*

FISCAL IMPACT

For kitchen staff at the work site, the School Nutrition Association (SNA) provides Web-based and computer training modules for purchase called TrainSmart. Produced in English and Spanish, they provide opportunities for staff to refresh sanitation practices and other skills from the managers' computer any time during the work day. Successful completion provides a certificate and certification/continuing education units (CEU) credits. The director should contact Emporium at 800-877-8822 for additional information and purchase price. The cost of each module is approximately $100, for a total cost of $400 to purchase the previously mentioned training topics.

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Explore Additional Training Opportunities for Food Service Staff	($400)	$0	$0	$0	$0

FINDING

LCPS food services department has an effective method of sharing best practices across the school division.

School food service operations in each of the LCPS schools are overseen by cafeteria managers who are supervised by the building administrators. For those administrators (principals or cafeteria managers) who are considering making changes to the food service program at their school, or would like to see how a challenge they are having is handled in a different LCPS schools, have the opportunity to do so through a system in which they can contact a food services field manager and arrange to visit another school's food service program. Schools for visitation are selected that have similar demographics to the school requesting to visit. The field manager then makes arrangements to have an acting manager come and cover operations at the one school, while that cafeteria manager visits another school.

Providing this "hands on" experience of learning how a particular practice works in a school provides managers and school administrators the opportunity to see the effect of the practice in action, discuss the pros and cons with the staff members executing the program, and weigh the advantages and disadvantages for their own schools before executing the practice. In instances where incorporating the practice would involve the expenditure of food services funds, having the opportunity to get advanced information is particularly valuable.

COMMENDATION 8-B:

LCPS food service department is commended for encouraging the sharing of best practices across the school division.

8.2 *Policies and Procedures*

The following is a historical perspective of changes identifying progress made in addressing the need for written policies and procedures in LCPS.

Prior to 1991, there was no centralized department of food services. All cafeterias operated individually with the principals hiring a manager and staff, developing menus, purchasing food and supplies, and processing free/reduced applications.

In 1991 the first supervisor was hired and began the process of centralizing business operations. Food service office (FSO) staff positions were created and business practices established. The principals continued to operate as usual at the school level. The following were eventually handled by the FSO: centralized menus, procurement of food and supplies, account clerks for revenue and expenditures, free/reduced applications, payroll and computer support.

In February 2005 the second (current) supervisor was hired.

Prior to 2005, there was minimum emphasis placed on centralized policies and procedures and principals had autonomy over their school cafeteria and its operation.

The supervisor of food services has identified school-site practices that affect revenue and indicate imbalances in the span of control.

Principals do not have financial responsibility for the food programs in their schools, but are responsible for full or partial shut down of the cafeteria to allow external food providers to use the facility during serving hours. They fail to encourage provision of meals on field trips, deny the sale of nutritious a la carte items that support the bottom line, do not want a breakfast program, and are responsible for hiring and evaluating their managers, but do not require them to complete the manager training program.

Preliminary steps instituted by the supervisor of food services, who has financial accountability for the department, included:

- ■ Assigning financial accountability to food service managers through a monthly profit and loss statement including interpretation training.

- Evaluating managers in consultation with the principal on a volunteer basis.

- Providing principals with manager candidates who have completed the manager training program.

- Including principals in the mailing of the monthly profit and loss documents.

These actions have opened the door for communications and fostered better relationships.

FINDING

The written Blind Close policy does not comply with the actual practice and signatures are not legible on daily deposit count forms.

Blind Close is an accounting principle that eliminates one person from having complete knowledge, control or an opportunity to invite mishandling of funds. The person that opens the cash drawer does not complete the first count before closing. After another person counts the money and completes the first daily deposit form, the first person counts and completes the second daily deposit form. At this time, the opening fund is taken out. Counts are not juggled in order to balance.

The current LCPS practice recommends signatures to verify that Blind Close was performed, and requires the completion of two daily deposit forms. Completed Blind Close forms were reviewed for Parkview High, Evergreen Mill Elementary, and Seldens Landing Elementary during the on-site review.

A uniform policy and strict rules for adherence should be in place to conform to sound general accounting principles and to avoid possible mishandling of school funds.

RECOMMENDATION 8-2:

Revise Blind Close policy from "signatures are recommended to verify a Blind Close was performed" to "signatures are required to verify a Blind Close was performed."

In addition to amending the language of the policy requiring signatures verifying the "Blind Close" process, the policy should be modified to reflect the use of the two daily deposit forms.

FISCAL IMPACT

Minimal food service staff time is required to change written procedure. Field managers will implement and monitor in their respective schools.

8.3   *Planning and Budgeting*

The budget document is the road map for expenditure of funds and the generation of revenue to support expenditures. LCPS food service trend data indicates the food

services budget has not operated without support from the school operating budget for eight of the past 10 years, and has exhausted its budget reserves.

FINDING

LCPS Food Service Department has been operating at a deficit budget for the past several years.

Exhibit 8-5 shows the net loss trends and amount of funding transferred from the LCPS operating budget to the food service budget for the four fiscal years from 2003 through 2006. As shown in the exhibit, the amounts of the budget transfers increased each of the four years, with the cumulative total equaling $4,101,628.

EXHIBIT 8-5
NET LOSS TRENDS FOR THE FOOD SERVICE BUDGET
2003 THROUGH 2006 SCHOOL YEARS

SCHOOL YEAR	AMOUNT OF LOSS
2003	($627,074)
2004	($992,519)
2005	($1,031,748)
2006	($1,450,287)

Source: LCPS Food Service Department, 2007.

During this same period, income increased from $10,000,000 to $14,000,000, while expenditures increased from $10,000,000 to $16,000,000. Exhibit 8-6 shows there was little accompanying increase in student meal prices.

EXHIBIT 8-6
LCPS MEAL PRICES
DURING LOSS PERIOD

MEALS	2002-03	2003-04	2004-05	2005-06
LUNCH - Elementary	$1.70	$1.70	$1.70	$1.85
LUNCH - Secondary	$1.80	$1.80	$1.80	$1.95
LUNCH - Adults	$2.45	$2.45	$2.45	$2.45
BREAKFAST - Students	$ .90	$ .90	$ .90	$ .90
BREAKFAST - Adults	$1.20	$1.20	$1.20	$1.20

Source: Food Service Performance Audit, February 2007.

The pattern of increasing food services budget deficits puts an undue financial burden on the school division's general operating budget. Ideally, food services programs should operate in a manner that it is wholly self-sufficient.

Labor cost has increased. Trends reflect a salary and wage expense increase of 38 percent from July 2002 through June 2006. Benefit expenses also increased 75 percent over that same time frame.

Personnel increased in number from 276 to 378 partly due to new construction school openings resulting in a lower meal per labor hour standard. During these years, with a repeated deficit, the division did not charge indirect costs to the food services department nor were drastic cost saving measures activated to change the flow. All fringe benefits were paid by the food service department. There have been measures put into action that identify the problem areas and provide more information to the schools needing improvement. A new staffing formula is being used and profit and loss statements are provided for all schools. Thirty six cafeterias were identified that exceeded benchmark percentages for food costs for school year 2005-06.

RECOMMENDATION 8-3:

Establish a plan to increase profitability by incorporating ways to increase revenue.

LCPS snack vending machines are operated by the building principals and do not compete with USDA meals programs.

The secondary schools have an opportunity to increase customer service, serve more customers, and increase revenue. Healthy vended snacks have been used in several school divisions as a revenue source. As an added benefit to the students, vended snacks allow for an ala carte option at lunch and for after school activities.

Food services departments typically develop profit sharing agreements by exploring all details of the venue including machine costs, lease purchase, products, pricing, stocking, service contract, operating times, and profit sharing agreement document. The profit sharing agreement will include the profit split of 70 percent food service, 30 percent principal, quarterly profit payments and one hour of custodial assistance in stocking machines. If required by LCPS finance department, an accountability document can be provided.

This practice is currently providing a strong revenue stream in a number of school divisions around the state and around the country. The following school systems are recommended as "best practice" sites, and a contact would be beneficial to review established procedures.

- *Hampton City Schools (VA)* operates a la carte machines in Kecoughtan High School Cafeteria. All revenue accrues to food service. Julia Bryant, Director at jbryant@sbo.hampton.k12.va.us or 757-727-2358 and Cafeteria manager Twila Milliman at 757-848-2100

- *Fairfax County Schools* (VA) vending program for food services has been in place for several years. Contact Penny McConnell, Director.

The LCPS food services department should explore the feasibility of healthy vended snacks and beverages as an additional source of revenue under a cost sharing agreement with principals. A test in one school in April will project profit and establish procedures. This can be separate machines for beverages and snacks of a combination of products to include ala carte sandwiches.

A vended beverage/snack machine stocked with water, juices, and healthy snacks that meet division nutritional guidelines and the Governor's Scorecard standards will produce needed revenue. **Exhibit 8-7** shows a sample of the type of food items that could be sold in the machines, the cost per service, sample price, and profit per each sales unit. As shown in the exhibit, per unit profits range from $0.41 to $1.01.

EXHIBIT 8-7
LOUDOUN COUNTY PUBLIC SCHOOLS
FOOD SERVICES
SAMPLE ITEMS FOR VENDING PROFITABILITY

SAMPLE ITEM	COST PER SERVING	SAMPLE PRICE	PROFIT PER UNIT
1% Choc/Strawberry Milk 16oz	$0.50	$1.25	$0.75
Apple Juice 11.5oz	$0.39	$0.75	$0.36
Water 16.9 oz	$0.24	$1.25	$1.01
Citrus Punch 16oz	$0.68	$1.25	$0.57
Baked chips (all)	$0.18	$0.75	$0.57
Pretzels twists	$0.15	$0.60	$0.45
Cookies	$0.18	$0.60	$0.42
Granola Bar	$0.19	$0.60	$0.41

Source: LCPS current bid products and prices for 2007-08.

Industry vending benchmarks indicate that these machines must generate $20.00 per day gross sales profit to pay for itself in one year. **Exhibit 8-8** shows a sales forecast based on industry benchmarks. As shown in the exhibit, the daily gross profit based on moderate sales of some of the most popular snack items totals $205.80. Over the course of the 180-day school year, annual net profits would total $33,544, with the food services department receiving 70 percent of these profits or $23,480.80.

EXHIBIT 8-8
LOUDOUN COUNTY PUBLIC SCHOOLS
FOOD SERVICES
DAILY GROSS PROFITS FROM SALES – PROFITS

SAMPLE ITEM	DAILY SALES	UNIT PROFIT	DAILY PROFIT
1% Choc/ Strawberry Milk 16oz	25	$0.75	$18.75
Apple Juice 11.5oz	20	$0.36	$7.20
Water 16.9 oz	100	$1.01	$101.00
Citrus Punch 16oz	50	$0.57	$28.50
Baked chips (all)	40	$0.57	$22.80
Pretzels twists	15	$0.45	$6.75
Cookies	30	$0.42	$12.60
Granola Bar	20	$0.41	$8.20
	Daily Gross Profit		$205.80
	X 180 days		$37,044.00
	Less Cost of Vending		-$3,500.00
	Year Net Profits		$33,544.00
SHARED Yearly Profits	**70% Food Service**		**$23,480.80**
	30% School		$10,063.20

Source: LCPS current selling prices resulting in identified unit profit, 2007.

Hampton City Schools have incorporated school-made sandwiches into their vending machines and sold them for $2.30. This strategy would be a means to further meet the needs of the students, as well as increase departmental program revenue.

FISCAL IMPACT

The cost of refrigerated vending machine is $6,000 and can be purchased on a lease purchase agreement. No additional staff is needed to prepare food or load machines. There will be a minimum cost to link the machine to the computer program as a point-of-sale.

The following is an example of the revenue that could be produced at LCPS middle and high schools if four additional paying students purchase $2.20 in vended snacks for 180 days. This attainable goal will show managers the benefit of seeking and maintaining customers. The potential revenue would be generated as follows:

- Four additional customers per day would result in daily revenue increase of $1750: 4 X $2.43 (the reimbursement of $.23, plus $2.20 paid by the child) = $9.72 X 180 days = $1,749.60.

- LCPS has 13 middle and 10 high schools and if these 23 schools each had revenue increases from the four additional buying students, the increased revenue would total $40,240 (23 schools x $1,749.60).

Recommendation	2008-09	2009-10	2010-11	2011-12	2012-13
Purchase Refrigerated Vending Machine	($6,000)	$0	$0	$0	$0
Increase in Revenue From Vending Machine Sales	$40,240	$40,240	$40,240	$40,240	$40,240
TOTAL	**$34,240**	**$40,240**	**$40,240**	**$40,240**	**$40,240**

FINDING

LCPS does not have a food services marketing plan.

In interviews with food services staff and school personnel, MGT consultants found that marketing efforts in the division were limited to school breakfast and lunch menus being published in the local newspaper and at the division's Web site. There were no systematic marketing efforts aligned with targeted goals for increased food sales.

Marketing efforts may include on-going, regular activities throughout the school year, and special events. Typical examples of food service marketing efforts include the following:

- School Breakfast Week
- Parents' Breakfast
- Poster Contest
- Milk Contest

- Merchandising Tips for Food Service Directors
- Menu Ideas
- Flyers
- Student Panels
- Theme Days
- Serve Breakfast at Lunch
- Public Service Announcements (PSAs)

Marketing efforts are usually a lower priority in most school food service operations. Without marketing, parents and students are unaware of the benefits and opportunities of the school breakfast and lunch programs, and participation in these programs suffers. Adequate marketing helps to ensure more successful program operation.

LCPS should contact the Norfolk City Schools and Hampton City Schools food service departments for resources and procedures to assist with the implementation of this recommendation. Additional resources to consider are: *"Target your market"* (http://www.schoolnutrition.org) and *"Focus on the customer"* (http://nfsmi.org) for marketing training modules to develop strategies for achieving satisfied customers.

RECOMMENDATION 8-4:

LCPS food service develop and implement an aggressive marketing plan to attract more customers by involving students, teachers, administrators, parents, and community partners in the development stages and redefine the department mission.

There are several key components to successful marketing plans. These components include the following:

- Establish measurable goals.
- Identify the target audience.
- Assess the strengths and weaknesses of the current program.
- Develop a specific marketing message.
- Develop specific marketing strategies.
- Develop a marketing budget.
- Implement identified strategies.
- Evaluate results.

In the implementation stage with a budget and marketing plan in place, the business community may assist in the financing of such things as a much needed face lift in the student area of the cafeteria or cafeteria renovation sponsorship and grand opening celebration.

Students can also be involved in the marketing program, with their ideas possibly resulting in a new look in the serving and dining area, a mascot, school logo and more. An individual marketing plan for secondary schools should involve many departments and could be used for class credit.

FISCAL IMPACT

There is no identified cost during this stage; however, there is an opportunity to gain support and build relationships as well as increase participation in the school breakfast and lunch programs. Implementation would require approximately 5 to 6 hours of staff time commitment on the part of the food services director, area supervisors and/or cafeteria managers to develop the department mission and decide on the key components of the marketing plan.

9.0 SUMMARY OF POTENTIAL SAVINGS AND COSTS

9.0 SUMMARY OF POTENTIAL SAVINGS AND COSTS

Based on analyses of data obtained from interviews, community input, state and school documents, and firsthand observations, MGT developed 41 commendations and 60 recommendations, of which 16 have fiscal implications.

As shown in **Exhibit 9-1**, full implementation of the recommendations in this report would generate gross savings of more than $5.7 million over a five-year period. Net costs over the same period (including one-time savings/costs) are approximately $3.5 million, for a **net savings of more than $2.2 million** over a five-year period. It is important to note that many of the recommendations MGT made without specifying a fiscal impact are expected to result in a net cost savings to LCPS, 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 2008-09 dollars and do not reflect increases due to salary or inflation adjustments.

Exhibit 9-1 shows the total costs and savings for all recommendations.

EXHIBIT 9-1
SUMMARY OF ANNUAL SAVINGS AND COSTS

CATEGORY	YEARS					TOTAL FIVE-YEAR SAVINGS
	2008-09	2009-10	2010-11	2011-12	2012-13	
TOTAL SAVINGS	$1,042,815	$1,179,615	$1,179,615	$1,179,615	$1,179,615	$5,761,275
TOTAL (COSTS)	($441,453)	($784,733)	($784,733)	($784,733)	($784,733)	($3,580,385)
TOTAL NET SAVINGS (COSTS)	$601,362	$394,882	$394,882	$394,882	$394,882	$2,180,890
ONE-TIME SAVINGS(COSTS)						$57,500
TOTAL FIVE-YEAR NET SAVINGS (COSTS) INCLUDING ONE-TIME SAVINGS (COSTS)						$2,238,390

Exhibit 9-2 provides a chapter-by-chapter summary for all costs and savings. It is important to note that only the 16 recommendations with fiscal impacts are identified in this chapter. The remaining recommendations to improve the efficiency and effectiveness of LCPS are included in **Chapters 1.0** through **8.0** of this report, with key recommendations also listed in the **Executive Summary** chapter.

MGT recommends that LCPS gives each of the recommendations serious consideration and develops plans to proceed with their implementation and a system to monitor subsequent progress.

EXHIBIT 9-2
CHAPTER-BY-CHAPTER SUMMARY OF POTENTIAL SAVINGS (COSTS)

CHAPTER REFERENCE		ANNUAL SAVINGS (COSTS)					TOTAL FIVE YEAR SAVINGS (COSTS)	ONE-TIME SAVINGS (COSTS)
		2008-09	2009-10	2010-11	2011-12	2012-13		
CHAPTER 1: DIVISION ADMINISTRATION								
1-1	Purchase Board Book Software and Laptops for School Board Members (Page 1-8)	$0	$0	$0	$0	$0	$0	($25,000)
1-1	Reduce Printing Costs (Page 1-8)	$1,575	$1,575	$1,575	$1,575	$1,575	$7,875	$0
1-2	Copy and Distribute LCPS Board Policy 2-23 and RRISD Board Policy BE (Local) (Page 1-11)	$0	$0	$0	$0	$0	$0	($50)
1-3	Copy and Distribute Board Policy 2-16 (Page 1-13)	$0	$0	$0	$0	$0	$0	($50)
1-4	Develop and Implement Annual School Board Development Training (Page 1-16)	($5,000)	($5,000)	($5,000)	($5,000)	($5,000)	($25,000)	$0
1-8	Employ a Director of Elementary Education (Page 1-28)	($129,361)	($129,361)	($129,361)	($129,361)	($129,361)	($646,805)	$0
1-9	Reclassify Research Supervisor to Director of Research, Evaluation, and School Division Planning (Page 1-33)	($15,092)	($15,092)	($15,092)	($15,092)	($15,092)	($75,460)	$0
TOTAL SAVINGS/(COSTS)		**($147,878)**	**($147,878)**	**($147,878)**	**($147,878)**	**($147,878)**	**($739,390)**	**($25,100)**
CHAPTER 2: FINANCIAL MANAGEMENT								
2-8	Establish a CAFR Process (Page 2-22)	$0	$0	$0	$0	$0	$0	($10,000)
TOTAL SAVINGS/(COSTS)		**$0**	**$0**	**$0**	**$0**	**$0**	**$0**	**($10,000)**
CHAPTER 5: FACILITY USE AND MANAGEMENT								
5-2	Simplify Land Acquisition (Page 5-5)	$705,000	$705,000	$705,000	$705,000	$705,000	$3,525,000	$0
5-5	Reorganize Maintenance Crews (Page 5-13)	$246,000	$246,000	$246,000	$246,000	$246,000	$1,230,000	$0
5-6	Add One Lead Custodian Position (Page 5-15)	$0	($53,000)	($53,000)	($53,000)	($53,000)	($212,000)	$0
5-7	Provide Additional Substitute Custodians (Page 5-16)	($292,000)	($582,280)	($582,280)	($582,280)	($582,280)	($2,621,120)	$0
5-8	Establish cleaning supply budgets (Page 5-19)	$50,000	$100,000	$100,000	$100,000	$100,000	$450,000	$0
TOTAL SAVINGS/(COSTS)		**$709,000**	**$415,720**	**$415,720**	**$415,720**	**$415,720**	**$2,371,880**	**$0**

EXHIBIT 9-2 (Continued)
CHAPTER-BY-CHAPTER SUMMARY OF POTENTIAL SAVINGS (COSTS)

CHAPTER REFERENCE		ANNUAL SAVINGS (COSTS)					TOTAL FIVE YEAR SAVINGS (COSTS)	ONE-TIME SAVINGS (COSTS)
		2008-09	2009-10	2010-11	2011-12	2012-13		
CHAPTER 6: FACILITY USE AND MANAGEMENT								
6-3	Sell 62 Excess Buses (Page 6-12)	$0	$0	$0	$0	$0	$0	$124,000
6-3	Reduced Annual Maintenance Costs (Page 6-12)	$0	$86,800	$86,800	$86,800	$86,800	$347,200	$0
TOTAL SAVINGS/(COSTS)		**$0**	**$86,800**	**$86,800**	**$86,800**	**$86,800**	**$347,200**	**$124,000**
CHAPTER 7: TECHNOLOGY MANAGEMENT								
7-5	Purchase Spare Technology-Related Parts (Page 7-12)	$0	$0	$0	$0	$0	$0	($25,000)
TOTAL SAVINGS/(COSTS)		**$0**	**$0**	**$0**	**$0**	**$0**	**$0**	**($25,000)**
CHAPTER 8: FOOD SERVICES								
8-1	Explore Additional Training Opportunities for Food Service Staff (Page 8-6)	$0	$0	$0	$0	$0	$0	($400)
8-3	Purchase Refrigerated Vending Machine (Page 8-12)	$0	$0	$0	$0	$0	$0	($6,000)
8-3	Increase in Revenue From Vending Machine Sales (Page 8-12)	$40,240	$40,240	$40,240	$40,240	$40,240	$201,200	$0
TOTAL SAVINGS/(COSTS)		**$40,240**	**$40,240**	**$40,240**	**$40,240**	**$40,240**	**$201,200**	**($6,400)**
TOTAL SAVINGS		**$1,042,815**	**$1,179,615**	**$1,179,615**	**$1,179,615**	**$1,179,615**	**$5,761,275**	**$124,000**
TOTAL (COSTS)		**($441,453)**	**($784,733)**	**($784,733)**	**($784,733)**	**($784,733)**	**($3,580,385)**	**($66,500)**
NET SAVINGS (COSTS)		**$601,362**	**$394,882**	**$394,882**	**$394,882**	**$394,882**	**$2,180,890**	**$57,500**
TOTAL NET SAVINGS (COSTS) LESS ONE TIME SAVINGS (COSTS)							**$2,238,390**	

APPENDICES

APPENDIX A:

SURVEY RESULTS

APPENDIX A
SURVEY RESULTS
LOUDOUN COUNTY PUBLIC SCHOOLS

Total responses for Central Office Administrators = 96
Total responses for Principal/Assistant Principals = 116
Total responses for Teachers = 439

MGT uses a statistical formula to set an acceptable return rate in order to declare that survey results are "representative" of the population surveyed. In the case of Loudoun County Public Schools, response rates for central office administrators and teachers exceeded the standard, and the response rate for principals was slightly (one percentage point) below the standard.

EXHIBIT A-1
COMPARISON SURVEY RESPONSES
PART A: OVERALL QUALITY

STATEMENT	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
1. How long have you worked in the division?			
Five years or less	28	16	55
6-10 years	29	41	26
11-20 years	30	24	12
21 years or more	13	20	7
2. How long have you been in your current position?			
Five years or less	55	64	67
6-10 years	26	22	21
11-20 years	19	11	7
21 years or more	0	3	5
3. Overall quality of public education in our school division is:			
Good or Excellent	98	100	96
Fair or Poor	0	0	3
4. Overall quality of education in our school division is:			
Improving	78	88	65
Staying the Same	16	9	23
Getting Worse	2	0	8
Don't Know	4	3	4
5. Grade given to our school division teachers:			
Above Average (A or B)	83	100	93
Below Average (D or F)	0	0	0
6. Grade given to our school division school level administrators:			
Above Average (A or B)	91	99	77
Below Average (D or F)	0	0	5
7. Grade given to our school division central office administrators:			
Above Average (A or B)	87	91	56
Below Average (D or F)	1	0	9

EXHIBIT A-2
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART B: SCHOOL/DISTRICT CLIMATE

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
1. I feel that I have the authority to adequately perform my job responsibilities.	70/21	96/1	86/7
2. I am actively looking for a job outside of this school division.	6/80	2/90	6/82
3. I am very satisfied with my job in this school division.	74/8	90/3	80/10
4. The work standards and expectations in this school district are equal to or above those of most other school districts.	76/6	90/5	81/6
5. This school district's officials enforce high work standards.	81/10	93/0	84/5
6. Workload is evenly distributed.	40/34	59/25	46/41
7. I feel that my work is appreciated by my supervisor(s).	77/9	78/11	71/17
8. Teachers who do not meet expected work standards are disciplined.	26/20	61/16	28/32
9. Staff (excluding teachers) who do not meet expected work standards are disciplined.	41/22	63/15	22/26
10. I feel that I am an integral part of this school division team.	82/5	90/1	74/12

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree*. The *neutral* and *don't know* responses are omitted.

EXHIBIT A-3
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART C1: DISTRICT ORGANIZATION

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
1. Teachers and administrators in our district have excellent working relationships.	68/4	90/1	64/13
2. Most administrative practices in our school district are highly effective and efficient.	67/17	88/3	55/19
3. Administrative decisions are made promptly and decisively.	55/24	83/3	51/18
4. Central Office Administrators are easily accessible and open to input.	70/14	73/17	34/30
5. Authority for administrative decisions is delegated to the lowest possible level.	23/44	48/19	18/24
6. Teachers and staff are empowered with sufficient authority to perform their responsibilities effectively.	57/8	92/3	68/17
7. The extensive committee structure in our school district ensures adequate input from teachers and staff on most important decisions.	52/15	77/3	43/26
8. Our school district has too many committees.	16/39	19/40	37/17
9. Our school district has too many layers of administrators.	4/79	7/80	31/26
10. Most of district administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient.	69/18	76/8	49/17
11. Central office administrators are responsive to school needs.	88/1	80/8	38/23
12. School-based personnel play an important role in making decisions that affect schools in our school district.	69/5	82/5	45/19

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-4
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART C2: DISTRICT ORGANIZATION

STATEMENT	(%G + E) / (%F + P)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
1. Board of Education members' knowledge of the educational needs of students in this school division.	46/42	68/31	33/38
2. Board of Education members' knowledge of operations in this school division.	40/51	63/34	35/34
3. Board of Education members' work at setting or revising policies for this school division.	48/40	66/31	32/32
4. The School Division Superintendent's work as the educational leader of this school division.	91/8	97/3	72/14
5. The School Division Superintendent's work as the chief administrator (manager) of this school division.	86/14	100/0	78/11
6. Principals' work as the instructional leaders of their schools.	78/11	96/4	76/23
7. Principals' work as the managers of the staff and teachers.	77/13	96/3	78/21

[1]Percentage responding *good* or *excellent* / Percentage responding *fair* or *poor.* The *don't know* responses are omitted.

EXHIBIT A-5
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART D1: CURRICULUM AND INSTRUCTION

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
1. The emphasis on learning in this school district has increased in recent years.	80/1	86/4	68/8
2. Sufficient student services are provided in this school district (e.g., counseling, speech therapy, health).	81/6	90/6	76/13
3. Our schools have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	86/3	97/3	79/15
4. I know who to contact in the central office to assist me with curriculum and instruction matters.	82/1	98/1	73/14
5. Lessons are organized to meet students' needs.	54/5	92/0	86/4
6. The curriculum is broad and challenging for most students.	70/5	95/1	83/8
7. Teachers in our schools know the material they teach.	67/1	98/0	91/1
8. Teachers and staff are given opportunities to participate in the textbook and material adoption processes.	88/0	99/0	89/2
9. Teachers have adequate supplies and equipment needed to perform their jobs effectively.	83/2	97/1	74/17
10. Our district provides curriculum guides for all grades and subject areas.	72/5	98/0	91/3
11. Our district uses the results of benchmark tests to monitor student performance and identify performance gaps.	73/1	89/1	83/5
12. Our district has effective educational programs for the following:			
a) Reading and Language Arts	84/0	97/2	79/7
b) Writing	81/0	91/1	68/13
c) Mathematics	77/5	93/3	75/10
d) Science	83/0	95/2	78/5
e) Social Studies (history or geography)	84/0	100/0	79/4
f) Foreign Language	84/0	93/1	66/4
g) Basic Computer Instruction	77/1	88/1	71/7
h) Advanced Computer Instruction	62/3	63/3	37/7
i) Music, Art, Drama, and other Fine Arts	80/0	94/3	75/2
j) Physical Education	82/0	96/1	80/2
k) Career and Technical (Vocational) Education	78/1	74/3	42/5
l) Business Education	74/0	58/3	37/2
13. The district has effective programs for the following:			
a) Special Education	78/3	85/8	72/15
b) Literacy Program	72/3	86/7	67/8
c) Advanced Placement Program	75/1	70/1	50/5
d) Drop-out Prevention Program	48/6	39/6	16/6
e) Summer School Programs	73/4	90/3	62/5
f) Honors and Gifted Education	68/4	79/9	58/11
g) Alternative Education Programs	58/13	47/16	24/12
h) Career Counseling Program	56/2	50/0	28/5
i) College Counseling Program	64/3	54/0	29/5
14. The students-to-teacher ratio is reasonable.	86/3	93/4	67/23
15. Our district provides a high quality education that meets or exceeds state and federal mandates.	92/1	99/0	90/2
16. The school division adequately implements policies and procedures for the administration and coordination of special education.	76/2	83/6	69/12

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree*. The *neutral* and *don't know* responses are omitted.

EXHIBIT A-5 (Continued)
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART D1: CURRICULUM AND INSTRUCTION

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
17. There is generally cooperation and collaboration regarding special education issues in our school division.	70/5	76/11	65/13
18. The evaluation and eligibility determination process for special education is timely and comprehensive.	61/4	94/3	59/18
19. Special education teachers receive adequate staff development in cooperative planning and instruction.	42/15	57/23	43/21
20. The school division adequately implements policies and procedures for the administration and coordination of the English Language Learner Program	55/6	77/6	43/12
21. The school division adequately identifies students who are English language learners.	64/3	88/4	60/11
22. The school division provides appropriate and mandated assessments for English language learners.	61/0	86/5	46/11
23. The school division provides documents to parents in their native language.	43/12	53/25	52/13
24. The school division provides adequate translation services.	74/4	84/10	55/11

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-6
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART D2: CURRICULUM AND INSTRUCTION

STATEMENT	(%G + E) / (%F + P)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
1. Teachers' work in meeting students' individual learning needs.	69/13	92/9	92/7
2. Teachers' work in communicating with parents/guardians.	69/12	87/13	91/7
3. How well students' test results are explained to parents/guardians.	43/19	76/23	75/18
4. The amount of time students spend on task learning in the classroom.	57/13	93/7	86/13

[1]Percentage responding *good* or *excellent* / Percentage responding *fair* or *poor.* The *don't know* responses are omitted.

EXHIBIT A-7
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART E1: HUMAN RESOURCES

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
1. Salary levels in this school district are competitive.	91/4	90/4	85/9
2. Our district has an effective employee recognition program.	41/26	63/16	34/28
3. Our district has an effective process for staffing critical shortage areas of teachers.	50/21	61/19	32/22
4. My supervisor evaluates my job performance annually.	62/26	87/7	79/12
5. Our district offers incentives for professional advancement.	53/19	54/25	53/20
6. I know who to contact in the central office to assist me with professional development.	87/6	97/1	66/18
7. I know who to contact in the central office to assist me with human resources matters such as licensure, promotion opportunities, employee benefits, etc	84/8	95/2	74/15
8. My salary level is adequate for my level of work and experience.	67/23	71/15	54/31
9. Our district has an effective teacher recruitment plan.	60/13	81/8	51/12
10. I have a professional growth plan that addresses areas identified for my professional growth.	52/29	81/9	70/13

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-8
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART E2: HUMAN RESOURCES

STATEMENT	(%G + E) / (%F + P)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
1. Staff development opportunities provided by this school division for teachers.	79/7	95/5	75/25
2. Staff development opportunities provided by this school division for school administrators.	69/26	91/10	26/5
3. Staff development opportunities provided by this school division for support staff.	49/42	65/30	24/15

[1]Percentage responding *good* or *excellent* / Percentage responding *fair* or *poor.* The *don't know* responses are omitted.

EXHIBIT A-9
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART F: FACILITIES MANAGEMENT

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
1. Our school buildings provide a healthy environment in which to teach.	92/2	94/2	83/10
2. Our schools have sufficient space and facilities to support the instructional programs.	71/17	70/22	51/37
3. Our facilities are clean.	94/2	94/2	84/7
4. Our facilities are well maintained.	95/3	91/3	87/6
5. Our district plans facilities in advance to support growing enrollment.	89/2	95/4	64/22
6. Parents, citizens, students, faculty, and staff have opportunities to provide input into facility planning.	82/3	87/5	59/11
7. Our school buildings and grounds are free of hazards that can cause accidental injury.	89/4	97/1	87/6

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-10
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART G: FINANCIAL MANAGEMENT/PURCHASING AND WAREHOUSING

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
1. Funds are managed wisely to support education in this school district.	82/5	93/1	47/12
2. The budgeting process effectively involves administrators and staff.	86/3	83/7	29/25
3. School administrators are adequately trained in fiscal management techniques.	49/13	55/19	24/5
4. My school allocates financial resources equitably and fairly.	48/4	94/2	47/7
5. The purchasing department provides me with what I need.	85/2	94/0	51/12
6. The purchasing process is easy.	74/7	82/3	45/15
7. Textbooks are distributed to students in a timely manner.	60/3	98/0	88/1
8. The books and resources in the school library adequately meet the needs of students.	59/1	95/0	82/8

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-11
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART H: TRANSPORTATION

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
1. Students are often late arriving at or departing from school because the buses do not arrive at school on time.	4/41	9/88	15/77
2. The district has a simple method of requesting buses for special events and trips.	53/1	91/2	53/14
3. Bus drivers maintain adequate discipline on the buses.	40/2	71/11	37/6
4. Buses are clean.	52/0	95/0	53/0
5. Buses arrive early enough for students to eat breakfast at school.	38/1	72/15	43/13
6. Buses are safe.	61/0	95/3	62/1

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-12
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART I1: TECHNOLOGY

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
1. Our school district provides adequate technology-related staff development.	80/6	92/4	75/15
2. Our school district requests input on the long-range technology plan.	42/14	68/12	31/23
3. Our school district provides adequate technical support.	82/9	92/4	76/11
4. I have adequate equipment and computer support to conduct my work.	93/3	92/3	74/18
5. Administrative computer systems are easy to use.	91/4	90/5	41/4
6. Technology is effectively integrated into the curriculum in our district.	69/4	92/1	72/15

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-13
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART I2: TECHNOLOGY

STATEMENT	(%G + E) / (%F + P)[1]		
	CENTRAL OFFICE ADMINISTRATOR	PRINCIPAL/ ASSISTANT PRINCIPAL	TEACHER
1. The school division's job of providing adequate instructional technology.	79/11	94/6	73/24
2. The school division's use of technology for administrative purposes.	90/9	91/9	49/12

[1]Percentage responding *good* or *excellent* / Percentage responding *fair* or *poor.* The *don't know* responses are omitted.

EXHIBIT A-14
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART J: FOOD SERVICES

	(%A + SA) / (%D + SD)[1]		
STATEMENT	**CENTRAL OFFICE ADMINISTRATOR**	**PRINCIPAL/ ASSISTANT PRINCIPAL**	**TEACHER**
1. The food services department provides nutritious and appealing meals and snacks.	49/4	69/13	39/27
2. The food services department encourages student participation through customer satisfaction surveys.	16/7	30/27	19/14
3. Cafeteria staff are helpful and friendly.	53/1	91/4	72/7
4. Cafeteria facilities are clean and neat.	70/0	98/0	85/1
5. Parents/guardians are informed about the menus.	64/0	95/2	82/1

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-15
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART K: SAFETY AND SECURITY

	(%A + SA) / (%D + SD)[1]		
STATEMENT	**CENTRAL OFFICE ADMINISTRATOR**	**PRINCIPAL/ ASSISTANT PRINCIPAL**	**TEACHER**
1. Our schools are safe and secure from crime.	89/2	99/0	88/3
2. Our schools effectively handle misbehavior problems.	72/3	99/0	72/14
3. There is administrative support for managing student behavior in our schools.	81/3	97/0	75/13
4. If there were an emergency in my school/office, I would know how to respond appropriately.	81/4	100/0	93/2
5. Our district has a problem with gangs.	27/31	20/42	22/35
6. Our district has a problem with drugs, including alcohol.	26/23	24/38	30/30
7. Our district has a problem with vandalism.	6/41	15/52	16/40
8. Our school enforces a strict campus access policy.	55/5	80/3	55/13

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-16
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART L1: PARENTS/GUARDIANS AND THE COMMUNITY

STATEMENT	(%A + SA) / (%D + SD)[1]		
	CENTRAL OFFICE ADMINISTRATOR	**PRINCIPAL/ ASSISTANT PRINCIPAL**	**TEACHER**
1. In general, parents/guardians take responsibility for their children's behavior in our schools.	53/11	72/15	46/36
2. Parents/guardians in this school district are satisfied with the education their children are receiving.	87/0	97/1	84/1
3. Most parents/guardians seem to know what goes on in our schools.	66/4	90/5	70/12
4. Parents/guardians play an active role in decision making in our schools.	61/3	68/10	53/14
5. This community really cares about its children's education.	92/1	97/1	88/3
6. Our district works with local businesses and groups in the community to help improve education.	87/3	94/1	67/8
7. Parents/guardians receive regular communications from the district.	84/2	95/2	89/1
8. Our school facilities are available for community use.	95/0	100/0	90/0

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-17
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART L2: PARENTS/GUARDIANS AND THE COMMUNITY

STATEMENT	(%G + E) / (%F + P)[1]		
	CENTRAL OFFICE ADMINISTRATOR	**PRINCIPAL/ ASSISTANT PRINCIPAL**	**TEACHER**
1. Parent/Guardians/guardians' efforts in helping their children to do better in school.	70/9	86/14	68/30
2. Parent/Guardians/guardians' participation in school activities and organizations.	70/14	75/25	69/29
3. How well relations are maintained with various groups in the community.	70/9	90/8	64/20

[1]Percentage responding *good* or *excellent* / Percentage responding *fair* or *poor.* The *don't know* responses are omitted.

**EXHIBIT A-18
COMPARISON OF RESPONSES WITHIN THE DISTRICT
PART M: SCHOOL DISTRICT OPERATIONS**

	(%NSI + NMI) / (%A + O)[1]		
SCHOOL DISTRICT PROGRAMS AND FUNCTIONS	**CENTRAL OFFICE ADMINISTRATOR**	**PRINCIPAL/ ASSISTANT PRINCIPAL**	**TEACHER**
a. Budgeting	19/79	6/90	28/38
b. Strategic planning	38/52	13/80	24/37
c. Curriculum planning	17/65	13/86	32/59
d. Financial management and accounting	12/77	5/91	13/42
e. Grants administration	13/49	14/57	12/31
f. Community relations	9/82	5/92	16/63
g. Program evaluation, research, and assessment	15/71	10/85	21/49
h. Instructional technology	17/74	7/93	26/61
i. Administrative technology	7/89	9/92	12/39
j. Internal Communication	46/54	15/84	27/55
k. Instructional support	15/73	15/86	27/64
l. Coordination of Federal Programs (e.g., Title I, Special Education)	5/71	15/67	18/42
m. Personnel recruitment	37/57	31/68	21/45
n. Personnel selection	39/55	33/65	26/48
o. Personnel evaluation	37/57	23/76	24/62
p. Staff development	25/73	8/92	33/61
q. Data processing	9/67	7/75	8/39
r. Purchasing	7/83	3/84	9/43
s. Safety and security	9/85	4/95	12/75
t. Plant maintenance	9/83	14/85	10/61
u. Facilities planning	14/77	10/89	22/42
v. Transportation	5/82	5/95	15/63
w. Food service	13/64	26/74	24/57
x. Custodial services	13/73	30/70	16/71
y. Risk management	8/76	4/94	6/48

[1] Percentage responding *needs some improvement* or *needs major improvement* / Percentage responding *adequate* or *outstanding.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-19
COMPARISON OF RESPONSES WITH OTHER DISTRICTS

STATEMENT	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. How long have you worked in the district?						
Five years or less	28	N/A	16	N/A	55	N/A
6-10 years	29	N/A	41	N/A	26	N/A
11-20 years	30	N/A	24	N/A	12	N/A
21 years or more	13	N/A	20	N/A	7	N/A
2. How long have you been in your current position?						
Five years or less	55	N/A	64	N/A	67	N/A
6-10 years	26	N/A	22	N/A	21	N/A
11-20 years	19	N/A	11	N/A	7	N/A
21 years or more	0	N/A	3	N/A	5	N/A
3. Overall quality of public education in our school district is:						
Good or Excellent	98	85	100	89	96	74
Fair or Poor	0	14	0	11	3	25
4. Overall quality of education in our school district is:						
Improving	78	69	88	78	65	53
Staying the Same	16	20	9	15	23	27
Getting Worse	2	2	0	7	8	16
Don't Know	4	3	3	1	4	4
5. Grade given to our school district teachers:						
Above Average (A or B)	83	78	100	85	83	83
Below Average (D or F)	0	1	0	1	0	1
6. Grade given to our school district school level administrators:						
Above Average (A or B)	91	76	99	91	77	59
Below Average (D or F)	0	3	0	1	5	11
7. Grade given to our school district central office administrators:						
Above Average (A or B)	87	76	91	73	56	44
Below Average (D or F)	1	5	0	7	9	21

*Percentages may add up to over 100 percent due to rounding.

EXHIBIT A-20
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART B: SCHOOL/DISTRICT CLIMATE

STATEMENT	(%A + SA) / (%D + SD)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. I feel that I have the authority to adequately perform my job responsibilities.	70/21	79/15	96/1	80/13	86/7	81/12
2. I am actively looking for a job outside of this school division.	6/80	8/78	2/90	8/78	6/82	11/74
3. I am very satisfied with my job in this school division.	74/8	77/12	90/3	83/8	80/10	70/15
4. The work standards and expectations in this school district are equal to or above those of most other school districts.	76/6	75/7	90/5	83/6	81/6	63/14
5. This school district's officials enforce high work standards.	81/10	73/12	93/0	81/9	84/5	63/15
6. Workload is evenly distributed.	40/34	32/46	59/25	45/35	46/41	36/43
7. I feel that my work is appreciated by my supervisor(s).	77/9	75/13	78/11	74/15	71/17	65/21
8. Teachers who do not meet expected work standards are disciplined.	26/20	26/33	61/16	48/31	28/32	25/39
9. Staff (excluding teachers) who do not meet expected work standards are disciplined.	41/22	37/34	63/15	54/25	22/26	23/36
10. I feel that I am an integral part of this school division team.	82/5	74/11	90/1	74/12	74/12	59/20

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-21
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART C1: DISTRICT ORGANIZATION

STATEMENT	(%A + SA) / (%D + SD)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. Teachers and administrators in our district have excellent working relationships.	68/4	54/14	90/1	76/7	64/13	45/26
2. Most administrative practices in our school district are highly effective and efficient.	67/17	54/23	88/3	69/18	55/19	34/36
3. Administrative decisions are made promptly and decisively.	55/24	44/33	83/3	62/21	51/18	36/36
4. Central Office Administrators are easily accessible and open to input.	70/14	65/18	73/17	71/15	34/30	39/35
5. Authority for administrative decisions is delegated to the lowest possible level.	23/44	28/44	48/19	36/38	18/24	15/29
6. Teachers and staff are empowered with sufficient authority to perform their responsibilities effectively.	57/8	52/18	92/3	77/12	68/17	55/27
7. The extensive committee structure in our school district ensures adequate input from teachers and staff on most important decisions.	52/15	50/20	77/3	60/21	43/26	29/39
8. Our school district has too many committees.	16/39	37/32	19/40	35/34	37/17	43/13
9. Our school district has too many layers of administrators.	4/79	19/64	7/80	27/57	31/26	53/15
10. Most of district administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient.	69/18	54/25	76/8	57/26	49/17	35/28
11. Central office administrators are responsive to school needs.	88/1	76/8	80/8	65/20	38/23	27/34
12. School-based personnel play an important role in making decisions that affect schools in our school district.	69/5	48/23	82/5	61/24	45/19	35/33

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree*. The *neutral* and *don't know* responses are omitted.

EXHIBIT A-22
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART C2: DISTRICT ORGANIZATION

STATEMENT	(%G + E) / (%F + P)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. Board of Education members' knowledge of the educational needs of students in this school division.	46/42	40/51	68/31	39/57	33/38	24/64
2. Board of Education members' knowledge of operations in this school division.	40/51	36/58	63/34	41/56	35/34	29/55
3. Board of Education members' work at setting or revising policies for this school division.	48/40	44/48	66/31	50/47	32/32	27/58
4. The School Division Superintendent's work as the educational leader of this school division.	91/8	78/18	97/3	81/17	72/14	49/40
5. The School Division Superintendent's work as the chief administrator (manager) of this school division.	86/14	77/20	100/0	81/17	78/11	50/38
6. Principals' work as the instructional leaders of their schools.	78/11	70/29	96/4	89/11	76/23	63/36
7. Principals' work as the managers of the staff and teachers.	77/13	74/25	96/3	94/6	78/21	67/32

[1]Percentage responding *good* or *excellent* / Percentage responding *fair* or *poor*. The *don't know* responses are omitted.

EXHIBIT A-23
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART D1: CURRICULUM AND INSTRUCTION

STATEMENT	(%A + SA) / (%D + SD)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. The emphasis on learning in this school district has increased in recent years.	80/1	83/6	86/4	89/4	68/8	71/13
2. Sufficient student services are provided in this school district (e.g., counseling, speech therapy, health).	81/6	57/26	90/6	56/36	76/13	53/34
3. Our schools have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	86/3	63/17	97/3	75/14	79/15	54/31
4. I know who to contact in the central office to assist me with curriculum and instruction matters.	82/1	N/A	98/1	N/A	73/14	N/A
5. Lessons are organized to meet students' needs.	54/5	56/10	92/0	86/6	86/4	79/9
6. The curriculum is broad and challenging for most students.	70/5	70/8	95/1	86/7	83/8	77/11
7. Teachers in our schools know the material they teach.	67/1	69/6	98/0	90/4	91/1	88/4
8. Teachers and staff are given opportunities to participate in the textbook and material adoption processes.	88/0	N/A	99/0	N/A	89/2	N/A
9. Teachers have adequate supplies and equipment needed to perform their jobs effectively.	83/2	N/A	97/1	N/A	74/17	N/A
10. Our district provides curriculum guides for all grades and subject areas.	72/5	N/A	98/0	N/A	91/3	N/A
11. Our district uses the results of benchmark tests to monitor student performance and identify performance gaps.	73/1	N/A	89/1	N/A	83/5	N/A
12. Our district has effective educational programs for the following:						
i. Reading and Language Arts	84/0	N/A	97/2	N/A	79/7	N/A
ii. Writing	81/0	N/A	91/1	N/A	68/13	N/A
iii. Mathematics	77/5	N/A	93/3	N/A	75/10	N/A
iv. Science	83/0	N/A	95/2	N/A	78/5	N/A
v. Social Studies (history or geography)	84/0	N/A	100/0	N/A	79/4	N/A
vi. Foreign Language	84/0	N/A	93/1	N/A	66/4	N/A
vii. Basic Computer Instruction	77/1	N/A	88/1	N/A	71/7	N/A
viii. Advanced Computer Instruction	62/3	N/A	63/3	N/A	37/7	N/A
ix. Music, Art, Drama, and other Fine Arts	80/0	N/A	94/3	N/A	75/2	N/A
x. Physical Education	82/0	N/A	96/1	N/A	80/2	N/A
xi. Career and Technical (Vocational) Education	78/1	N/A	74/3	N/A	42/5	N/A
xii. Business Education	74/0	N/A	58/3	N/A	37/2	N/A

EXHIBIT A-23 (Continued)
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART D1: CURRICULUM AND INSTRUCTION

STATEMENT	(%A + SA) / (%D + SD)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
13. The district has effective programs for the following:						
i. Special Education	78/3	N/A	85/8	N/A	72/15	N/A
ii. Literacy Program	72/3	N/A	86/7	N/A	67/8	N/A
iii. Advanced Placement Program	75/1	N/A	70/1	N/A	50/5	N/A
iv. Drop-out Prevention Program	48/6	N/A	39/6	N/A	16/6	N/A
v. Summer School Programs	73/4	N/A	90/3	N/A	62/5	N/A
vi. Honors and Gifted Education	68/4	N/A	79/9	N/A	58/11	N/A
vii. Alternative Education Programs	58/13	N/A	47/16	N/A	24/12	N/A
viii. Career Counseling Program	56/2	N/A	50/0	N/A	28/5	N/A
ix. College Counseling Program	64/3	N/A	54/0	N/A	29/5	N/A
14. The students-to-teacher ratio is reasonable.	86/3	N/A	93/4	N/A	67/23	N/A
15. Our district provides a high quality education that meets or exceeds state and federal mandates.	92/1	N/A	99/0	N/A	90/2	N/A
16. The school division adequately implements policies and procedures for the administration and coordination of special education.	76/2	N/A	83/6	N/A	69/12	N/A
17. There is generally cooperation and collaboration regarding special education issues in our school division.	70/5	N/A	76/11	N/A	65/13	N/A
18. The evaluation and eligibility determination process for special education is timely and comprehensive.	61/4	N/A	94/3	N/A	59/18	N/A
19. Special education teachers receive adequate staff development in cooperative planning and instruction.	42/15	N/A	57/23	N/A	43/21	N/A
20. The school division adequately implements policies and procedures for the administration and coordination of the English Language Learner Program	55/6	N/A	77/6	N/A	43/12	N/A
21. The school division adequately identifies students who are English language learners.	64/3	N/A	88/4	N/A	60/11	N/A
22. The school division provides appropriate and mandated assessments for English language learners.	61/0	N/A	86/5	N/A	46/11	N/A
23. The school division provides documents to parents in their native language.	43/12	N/A	53/25	N/A	52/13	N/A
24. The school division provides adequate translation services.	74/4	N/A	84/10	N/A	55/11	N/A

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-24
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART D2: CURRICULUM AND INSTRUCTION

STATEMENT	(%G + E) / (%F + P)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. Teachers' work in meeting students' individual learning needs.	69/13	62/32	92/9	80/20	92/7	79/20
2. Teachers' work in communicating with parents/guardians.	69/12	49/41	87/13	68/32	91/7	75/24
3. How well students' test results are explained to parents/guardians.	43/19	36/44	76/23	51/47	75/18	38/52
4. The amount of time students spend on task learning in the classroom.	57/13	49/34	93/7	72/27	86/13	60/37

[1]Percentage responding *good* or *excellent* / Percentage responding *fair* or *poor*. The *don't know* responses are omitted.

EXHIBIT A-25
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART E1: HUMAN RESOURCES

STATEMENT	(%A + SA) / (%D + SD)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. Salary levels in this school district are competitive.	91/4	45/40	90/4	40/48	85/9	33/53
2. Our district has an effective employee recognition program.	41/26	N/A	63/16	N/A	34/28	N/A
3. Our district has an effective process for staffing critical shortage areas of teachers.	50/21	N/A	61/19	N/A	32/22	N/A
4. My supervisor evaluates my job performance annually.	62/26	N/A	87/7	N/A	79/12	N/A
5. Our district offers incentives for professional advancement.	53/19	N/A	54/25	N/A	53/20	N/A
6. I know who to contact in the central office to assist me with professional development.	87/6	N/A	97/1	N/A	66/18	N/A
7. I know who to contact in the central office to assist me with human resources matters such as licensure, promotion opportunities, employee benefits, etc	84/8	N/A	95/2	N/A	74/15	N/A
8. My salary level is adequate for my level of work and experience.	67/23	42/45	71/15	32/58	54/31	20/69
9. Our district has an effective teacher recruitment plan.	60/13	N/A	81/8	N/A	51/12	N/A
10. I have a professional growth plan that addresses areas identified for my professional growth.	52/29	N/A	81/9	N/A	70/13	N/A

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree*. The *neutral* and *don't know* responses are omitted.

EXHIBIT A-26
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART E2: HUMAN RESOURCES

STATEMENT	(%G + E) / (%F + P)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. Staff development opportunities provided by this school division for teachers.	79/7	N/A	95/5	N/A	75/25	N/A
2. Staff development opportunities provided by this school division for school administrators.	69/26	N/A	91/10	N/A	26/5	N/A
3. Staff development opportunities provided by this school division for support staff.	49/42	N/A	65/30	N/A	24/15	N/A

[1]Percentage responding *good* or *excellent* / Percentage responding *fair* or *poor.* The *don't know* responses are omitted.

EXHIBIT A-27
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART F: FACILITIES MANAGEMENT

STATEMENT	(%A + SA) / (%D + SD)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. Our school buildings provide a healthy environment in which to teach.	92/2	N/A	94/2	N/A	83/10	N/A
2. Our schools have sufficient space and facilities to support the instructional programs.	71/17	26/62	70/22	30/59	51/37	28/62
3. Our facilities are clean.	94/2	70/30	94/2	65/34	84/7	52/47
4. Our facilities are well maintained.	95/3	70/30	91/3	65/34	87/6	52/47
5. Our district plans facilities in advance to support growing enrollment.	89/2	N/A	95/4	N/A	64/22	N/A
6. Parents, citizens, students, faculty, and staff have opportunities to provide input into facility planning.	82/3	N/A	87/5	N/A	59/11	N/A
7. Our school buildings and grounds are free of hazards that can cause accidental injury.	89/4	N/A	97/1	N/A	87/6	N/A

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-28
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART G: FINANCIAL MANAGEMENT/PURCHASING AND WAREHOUSING

STATEMENT	(%A + SA) / (%D + SD)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. Funds are managed wisely to support education in this school district.	82/5	68/18	93/1	67/19	47/12	28/46
2. The budgeting process effectively involves administrators and staff.	86/3	N/A	83/7	N/A	29/25	N/A
3. School administrators are adequately trained in fiscal management techniques.	49/13	N/A	55/19	N/A	24/5	N/A
4. My school allocates financial resources equitably and fairly.	48/4	N/A	94/2	N/A	47/7	N/A
5. The purchasing department provides me with what I need.	85/2	N/A	94/0	N/A	51/12	N/A
6. The purchasing process is easy.	74/7	N/A	82/3	N/A	45/15	N/A
7. Textbooks are distributed to students in a timely manner.	60/3	N/A	98/0	N/A	88/1	N/A
8. The books and resources in the school library adequately meet the needs of students.	59/1	N/A	95/0	N/A	82/8	N/A

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-29
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART H: TRANSPORTATION

STATEMENT	(%A + SA) / (%D + SD)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. Students are often late arriving at or departing from school because the buses do not arrive at school on time.	4/41	8/55	9/88	18/68	15/77	17/60
2. The district has a simple method of requesting buses for special events and trips.	53/1	N/A	91/2	N/A	53/14	N/A
3. Bus drivers maintain adequate discipline on the buses.	40/2	N/A	71/11	N/A	37/6	N/A
4. Buses are clean.	52/0	N/A	95/0	N/A	53/0	N/A
5. Buses arrive early enough for students to eat breakfast at school.	38/1	N/A	72/15	N/A	43/13	N/A
6. Buses are safe.	61/0	N/A	95/3	N/A	62/1	N/A

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-30
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART I1: TECHNOLOGY

STATEMENT	(%A + SA) / (%D + SD)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. Our school district provides adequate technology-related staff development.	80/6	N/A	92/4	N/A	75/15	N/A
2. Our school district requests input on the long-range technology plan.	42/14	N/A	68/12	N/A	31/23	N/A
3. Our school district provides adequate technical support.	82/9	N/A	92/4	N/A	76/11	N/A
4. I have adequate equipment and computer support to conduct my work.	93/3	70/22	92/3	74/19	74/18	54/36
5. Administrative computer systems are easy to use.	91/4	N/A	90/5	N/A	41/4	N/A
6. Technology is effectively integrated into the curriculum in our district.	69/4	N/A	92/1	N/A	72/15	N/A

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-31
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART I2: TECHNOLOGY

STATEMENT	(%G + E) / (%F + P)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. The school division's job of providing adequate instructional technology.	79/11	54/43	94/6	46/52	73/24	47/51
2. The school division's use of technology for administrative purposes.	90/9	53/46	91/9	54/45	49/12	45/31

[1]Percentage responding *good* or *excellent* / Percentage responding *fair* or *poor.* The *don't know* responses are omitted.

EXHIBIT A-32
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART J: FOOD SERVICES

	(%A + SA) / (%D + SD)[1]					
STATEMENT	**CENTRAL OFFICE ADMINISTRATOR**	**CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS**	**PRINCIPAL/ ASSISTANT PRINCIPAL**	**PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS**	**TEACHER**	**TEACHER IN OTHER DISTRICTS**
1. The food services department provides nutritious and appealing meals and snacks.	49/4	62/14	69/13	58/26	39/27	43/34
2. The food services department encourages student participation through customer satisfaction surveys.	16/7	N/A	30/27	N/A	19/14	N/A
3. Cafeteria staff are helpful and friendly.	53/1	N/A	91/4	N/A	72/7	N/A
4. Cafeteria facilities are clean and neat.	70/0	N/A	98/0	N/A	85/1	N/A
5. Parents/guardians are informed about the menus.	64/0	N/A	95/2	N/A	82/1	N/A

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-33
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART K: SAFETY AND SECURITY

	(%A + SA) / (%D + SD)[1]					
STATEMENT	**CENTRAL OFFICE ADMINISTRATOR**	**CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS**	**PRINCIPAL/ ASSISTANT PRINCIPAL**	**PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS**	**TEACHER**	**TEACHER IN OTHER DISTRICTS**
1. Our schools are safe and secure from crime.	89/2	66/16	99/0	81/9	88/3	53/28
2. Our schools effectively handle misbehavior problems.	72/3	54/24	99/0	74/14	72/14	37/48
3. There is administrative support for managing student behavior in our schools.	81/3	69/12	97/0	89/6	75/13	55/29
4. If there were an emergency in my school/office, I would know how to respond appropriately.	81/4	78/7	100/0	96/2	93/2	87/7
5. Our district has a problem with gangs.	27/31	N/A	20/42	N/A	22/35	N/A
6. Our district has a problem with drugs, including alcohol.	26/23	N/A	24/38	N/A	30/30	N/A
7. Our district has a problem with vandalism.	6/41	N/A	15/52	N/A	16/40	N/A
8. Our school enforces a strict campus access policy.	55/5	N/A	80/3	N/A	55/13	N/A

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-34
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART L1: PARENTS/GUARDIANS AND THE COMMUNITY

STATEMENT	(%A + SA) / (%D + SD)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. In general, parents/guardians take responsibility for their children's behavior in our schools.	53/11	42/34	72/15	51/31	46/36	27/53
2. Parents/guardians in this school district are satisfied with the education their children are receiving.	87/0	57/16	97/1	73/9	84/1	53/14
3. Most parents/guardians seem to know what goes on in our schools.	66/4	36/38	90/5	43/36	70/12	29/50
4. Parents/guardians play an active role in decision making in our schools.	61/3	35/24	68/10	60/20	53/14	36/38
5. This community really cares about its children's education.	92/1	63/15	97/1	72/14	88/3	49/27
6. Our district works with local businesses and groups in the community to help improve education.	87/3	N/A	94/1	N/A	67/8	N/A
7. Parents/guardians receive regular communications from the district.	84/2	N/A	95/2	N/A	89/1	N/A
8. Our school facilities are available for community use.	95/0	N/A	100/0	N/A	90/0	N/A

[1]Percentage responding *agree* or *strongly agree*/Percentage responding *disagree* or *strongly disagree.* The *neutral* and *don't know* responses are omitted.

EXHIBIT A-35
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART L2: PARENTS/GUARDIANS AND THE COMMUNITY

STATEMENT	(%G + E) / (%F + P)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
1. Parent/Guardians/guardians' efforts in helping their children to do better in school.	70/9	29/56	86/14	35/64	68/30	21/76
2. Parent/Guardians/guardians' participation in school activities and organizations.	70/14	27/59	75/25	33/66	69/29	23/75
3. How well relations are maintained with various groups in the community.	70/9	60/35	90/8	66/32	64/20	43/44

[1]Percentage responding *good* or *excellent* / Percentage responding *fair* or *poor.* The *don't know* responses are omitted.

EXHIBIT A-36
COMPARISON OF RESPONSES WITH OTHER DISTRICTS
PART M: SCHOOL DISTRICT OPERATIONS

SCHOOL DISTRICT PROGRAMS AND FUNCTIONS	(%NSI + NMI) / (%A + O)[1]					
	CENTRAL OFFICE ADMINISTRATOR	CENTRAL OFFICE ADMINISTRATOR IN OTHER DISTRICTS	PRINCIPAL/ ASSISTANT PRINCIPAL	PRINCIPAL/ ASSISTANT PRINCIPAL IN OTHER DISTRICTS	TEACHER	TEACHER IN OTHER DISTRICTS
a. Budgeting	19/79	47/45	6/90	49/48	28/38	65/16
b. Strategic planning	38/52	44/42	13/80	38/53	24/37	47/24
c. Curriculum planning	17/65	30/50	13/86	40/59	32/59	52/41
d. Financial management and accounting	12/77	36/53	5/91	35/60	13/42	49/23
e. Grants administration	13/49	24/49	14/57	34/49	12/31	53/38
f. Community relations	9/82	39/53	5/92	37/61	16/63	42/38
g. Program evaluation, research, and assessment	15/71	34/50	10/85	32/65	21/49	53/40
h. Instructional technology	17/74	48/41	7/93	60/39	26/61	65/16
i. Administrative technology	7/89	42/49	9/92	48/49	12/39	24/34
j. Internal Communication	46/54	N/A	15/84	N/A	27/55	N/A
k. Instructional support	15/73	32/51	15/86	48/49	27/64	48/45
l. Coordination of Federal Programs (e.g., Title I, Special Education)	5/71	24/52	15/67	32/57	18/42	36/40
m. Personnel recruitment	37/57	47/42	31/68	47/48	21/45	40/35
n. Personnel selection	39/55	46/48	33/65	41/57	26/48	42/37
o. Personnel evaluation	37/57	47/49	23/76	40/58	24/62	41/48
p. Staff development	25/73	48/49	8/92	43/57	33/61	42/52
q. Data processing	9/67	38/45	7/75	39/51	8/39	21/34
r. Purchasing	7/83	34/53	3/84	37/58	9/43	33/30
s. Safety and security	9/85	26/61	4/95	29/67	12/75	40/46
t. Plant maintenance	9/83	43/48	14/85	55/43	10/61	41/37
u. Facilities planning	14/77	38/48	10/89	51/43	22/42	41/28
v. Transportation	5/82	21/65	5/95	43/54	15/63	32/46
w. Food service	13/64	18/67	26/74	35/65	24/57	41/47
x. Custodial services	13/73	37/54	30/70	47/52	16/71	44/49
y. Risk management	8/76	20/54	4/94	23/63	6/48	22/32

[1] Percentage responding *needs some improvement* or *needs major improvement* / Percentage responding *adequate* or *outstanding.* The *neutral* and *don't know* responses are omitted.

APPENDIX B:

PEER COMPARISON DATA

APPENDIX B
PEER COMPARISON DATA

Exhibits B-1 through **B-17** illustrate how the comparison school divisions compare to Loudoun County Public Schools in terms of enrollment, demographics, staffing, and funding for the most current school year available from the Virginia Department of Education's Web site.

EXHIBIT B-1
OVERVIEW OF PEER PUBLIC SCHOOL DIVISIONS
2005-06 SCHOOL YEAR

SCHOOL DIVISION	CLUSTER	TOTAL STUDENT POPULATION	STUDENT POPULATION PER 1,000 GENERAL POPULATION	PERCENTAGE STUDENTS WITH DISABILITIES	PERCENTAGE ECONOMICALLY DISADVANTAGED	TOTAL NUMBER OF SCHOOLS
Loudoun County	**3**	**47,236**	**278.5**	**10.02**	**10.3**	**66**
Chesterfield County	3	57,239	220.2	14.59	17.0	59
Henrico County	3	47,747	182.0	14.56	23.2	64
Prince William County	3	68,462	243.8	11.93	27.4	77
Virginia Beach City	3	74,313	174.7	13.94	23.4	81
DIVISION AVERAGE	**N/A**	**58,999**	**219.8**	**13.00**	**20.3**	**69**

Source: Virginia Department of Education Web site, 2007, United States Census Bureau, 2000 Census Data, www.schoolmatters.com.

EXHIBIT B-2
TEACHER STAFFING LEVELS AND PUPIL: TEACHER RATIOS
PEER SCHOOL DIVISIONS
2005-06 SCHOOL YEAR

SCHOOL DIVISION	TOTAL TEACHERS PER 1,000 STUDENTS*	RATIO OF PUPILS TO CLASSROOM TEACHING POSITIONS FOR GRADES K-7**	RATIO OF PUPILS TO CLASSROOM TEACHING POSITIONS FOR GRADES 8-12
Loudoun County	**72.22**	**14.1**	**11.1**
Chesterfield County	68.53	14.0	13.0
Henrico County	68.61	13.6	13.7
Prince William County	64.05	14.8	14.3
Virginia Beach City	73.60	13.6	11.4
DIVISION AVERAGE	**69.40**	**14.0**	**12.7**

Source: *2006 Superintendent's Annual Report for Virginia*, Virginia Department of Education Web site, 2007.
*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 B-3
RECEIPTS BY FUND SOURCE
PEER SCHOOL DIVISIONS
2005-06 FISCAL YEAR

SCHOOL DIVISION	SALES AND USE TAX	STATE FUNDS	FEDERAL FUNDS	LOCAL FUNDS	OTHER FUNDS[1]	LOANS, BONDS, ETC.[3]
Loudoun County	**4.6%**	**9.0%**	**1.5%**	**50.5%**	**1.7%**	**32.4%**
Chesterfield County	7.7%	31.2%	4.1%	36.3%	3.6%	8.6%
Henrico County	8.0%	26.3%	4.2%	38.4%	2.3%	12.1%
Prince William County	5.8%	24.8%	3.2%	37.4%	2.3%	6.9%
Virginia Beach City	8.6%	32.7%	7.2%	36.8%	2.3%	2.3%
DIVISION AVERAGE	**6.94%**	**24.8%**	**4.0%**	**39.9%**	**2.5%**	**12.5%**

Source: *2006 Superintendent's Annual Report for Virginia*, Virginia Department of Education Web site, 2007.
[1] Includes funds from private sources, food service receipts, transportation revenues, the sale of assets and supplies, rebates and refunds, and receipts from other agencies.
[2] Represents the total amount of beginning-year balances as reported by school divisions and regional programs on the Annual School Report Financial Section.
[3] Represents proceeds from Literary Fund loans, the sale of bonds, and interest earned on bank notes and/or investments.

EXHIBIT B-4
DISBURSEMENTS PER PUPIL FOR
INSTRUCTION AND ADMINISTRATION
PEER SCHOOL DIVISIONS
2005-06 FISCAL YEAR

SCHOOL DIVISON	INSTRUCTION PER PUPIL [1]	ADMINISTRATION PER PUPIL [2,3]
Loudoun County	**$8,820.54**	**$339.06**
Chesterfield County	$5,701.93	$221.58
Henrico County	$5,977.75	$222.48
Prince William County	$6,853.61	$431.85
Virginia Beach City	$6,766.46	$198.16
DIVISION AVERAGE	**$6,781.43**	**$283.44**

Source: *2005 Superintendent's Annual Report for Virginia*, Virginia Department of Education Web site, 2007.

[1] 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.

[2] 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 B-5
STAFF PER 1,000 STUDENTS
PEER SCHOOL DIVISIONS
2005-06 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
Loudoun County	**47,368.14**	**3.34**	**72.22**	**2.74**	**16.28**	**4.62**
Chesterfield County	56,921.43	3.30	68.53	0.67	12.32	4.31
Henrico County	46,727.84	2.86	68.61	0.00	12.13	4.47
Prince William County	67,325.79	3.43	64.05	0.00	7.34	4.17
Virginia Beach City	72,947.96	3.33	73.60	0.00	15.00	4.19
DIVISION AVERAGE	**58,258.23**	**3.25**	**69.40**	**0.68**	**12.61**	**4.35**

Source: Virginia Department of Education Web site, 2007.
*Ratios based on ADM.

**EXHIBIT B-6
INSTRUCTIONAL PERSONNEL
PEER SCHOOL DIVISIONS
2005-06 SCHOOL YEAR**

SCHOOL DIVISION	INSTRUCTION			
	ADMINISTRATIVE	TECHNICAL AND CLERICAL	INSTRUCTIONAL SUPPORT	OTHER PROFESSIONAL
Loudoun County	**63.00**	**385.50**	**32.25**	**20.50**
Chesterfield County	22.55	482.22	47.40	0.00
Henrico County	16.00	298.66	76.00	24.00
Prince William County	130.16	670.11	179.30	42.65
Virginia Beach City	18.00	608.59	210.00	0.00
DIVISION AVERAGE	**49.94**	**489.02**	**108.99**	**17.43**

Source: *2005 Superintendent's Annual Report for Virginia*, Virginia Department of Education Web site, 2007.

EXHIBIT B-7
ADMINISTRATIVE, ATTENDANCE AND HEALTH PERSONNEL
PEER SCHOOL DIVISIONS
2005-06 SCHOOL YEAR

SCHOOL DIVISION	ADMINISTRATION, ATTENDANCE AND HEALTH		
	ADMINISTRATIVE	TECHNICAL AND CLERICAL	OTHER PROFESSIONAL
Loudoun County	**37.25**	**160.00**	**118.00**
Chesterfield County	26.68	101.30	72.86
Henrico County	23.00	115.50	72.50
Prince William County	61.00	112.00	127.34
Virginia Beach City	24.00	147.00	188.10
DIVISION AVERAGE	**34.39**	**127.16**	**115.76**

Source: *2005 Superintendent's Annual Report for Virginia*, Virginia Department of Education Web site, 2007.

EXHIBIT B-8
TECHNOLOGY PERSONNEL
PEER SCHOOL DIVISIONS
2005-06 SCHOOL YEAR

SCHOOL DIVISION	TECHNOLOGY		
	ADMINISTRATIVE	TECHNICAL AND CLERICAL	INSTRUCTIONAL SUPPORT
Loudoun County	**5.00**	**24.00**	**40.00**
Chesterfield County	3.00	62.88	35.52
Henrico County	2.00	104.50	45.80
Prince William County	6.96	111.00	78.00
Virginia Beach City	4.00	80.50	112.50
DIVISION AVERAGE	**4.19**	**76.58**	**62.36**

Source: *2005 Superintendent's Annual Report for Virginia*, Virginia Department of Education Web site, 2007.

**EXHIBIT B-9
TRANSPORTATION PERSONNEL
PEER SCHOOL DIVISIONS
2005-06 SCHOOL YEAR**

SCHOOL DIVISION	TRANSPORTATION			
	ADMINISTRATIVE	TECHNICAL AND CLERICAL	OTHER PROFESSIONAL	TRADES, OPERATIVES AND SERVICE
Loudoun County	**2.75**	**38.75**	**0.00**	**700.25**
Chesterfield County	8.00	12.60	0.00	481.93
Henrico County	2.00	87.00	5.00	464.52
Prince William County	1.00	148.30	8.00	655.27
Virginia Beach City	1.00	14.50	17.00	635.50
DIVISION AVERAGE	**2.95**	**60.23**	**6.00**	**587.49**

Source: *2005 Superintendent's Annual Report for Virginia*, Virginia Department of Education Web site, 2007.

**EXHIBIT B-11
FOOD SERVICE DISBURSEMENTS
PEER SCHOOL DIVISIONS
2005-06 SCHOOL YEAR**

SCHOOL DIVISION	FOOD SERVICES	PER PUPIL COST
Loudoun County	**$15,921,534**	**$334.81**
Chesterfield County	$15,983,539	$278.92
Henrico County	$13,498,207	$288.02
Prince William County	$21,875,260	$320.02
Virginia Beach City	$22,790,369	$310.21
DIVISION AVERAGE	**$18,013,782**	**$306.40**

Source: Virginia Department of Education, Web site 2007.

**EXHIBIT B-12
FREE AND REDUCED LUNCH
PEER SCHOOL DIVISIONS
2007-08 SCHOOL YEAR**

SCHOOL DIVISION	ENROLLMENT	TOTAL FREE LUNCH	PERCENT FREE LUNCH	TOTAL REDUCED LUNCH	PERCENT REDUCED LUNCH	PERCENT FREE/REDUCED LUNCH
Loudoun County	**50,357**	**4,691**	**9.32%**	**2,163**	**4.30%**	**13.61%**
Chesterfield County	40,417	7,321	18.11%	2,164	5.35%	23.47%
Henrico County	48,499	9,818	20.24%	2,554	5.27%	25.51%
Prince William County	72,647	15,056	20.72%	6,637	9.14%	29.86%
Virginia Beach City	71,948	13,677	19.01%	5,877	8.17%	27.18%
DIVISION AVERAGE	**56,774**	**10,113**	**17.48%**	**3,879**	**6.44%**	**23.93%**

Source: Virginia Department of Education Web site, 2007.

**EXHIBIT B-13
FREE AND REDUCED
BREAKFAST PRICES
PEER SCHOOL DIVISIONS
2007-08 SCHOOL YEAR**

SCHOOL DIVISION	ELEMENTARY STUDENT BREAKFAST	MIDDLE STUDENT BREAKFAST	HIGH SCHOOL STUDENT BREAKFAST	ELEMENTARY REDUCED BREAKFAST	MIDDLE REDUCED BREAKFAST	HIGH SCHOOL REDUCED BREAKFAST
Loudoun County	**$1.30**	**$1.30**	**$1.30**	**$0.30**	**$0.30**	**$0.30**
Chesterfield County	$1.05	$1.05		$0.30	$0.30	
Henrico County	$1.15	$1.15	$1.15	$0.30	$0.30	$0.30
Prince William County	$1.20	$1.20	$1.20	$0.30	$0.30	$0.30
Virginia Beach City	$1.00	$1.00	$1.00	$0.30	$0.30	$0.30
DIVISION AVERAGE	**$1.14**	**$1.14**	**$1.16**	**$0.30**	**$0.30**	**$0.30**

Source: Virginia Department of Education Web site, 2007.
*Shaded areas indicate combined schools or no program participation.

EXHIBIT B-14
FREE AND REDUCED LUNCH PRICES
PEER SCHOOL DIVISIONS
2006-07 SCHOOL YEAR

SCHOOL DIVISION	ELEMENTARY STUDENT LUNCH	MIDDLE STUDENT LUNCH	HIGH SCHOOL STUDENT LUNCH	ELEMENTARY REDUCED LUNCH	MIDDLE REDUCED LUNCH	HIGH SCHOOL REDUCED LUNCH
Loudoun County	**$2.30**	**$2.30**	**$2.30**	**$0.40**	**$0.40**	**$0.40**
Chesterfield County	$1.75	$1.75		$0.40	$0.40	
Henrico County	$1.75	$1.75	$1.75	$0.40	$0.40	$0.40
Prince William County	$2.00	$2.15	$2.25	$0.40	$0.40	$0.40
Virginia Beach City	$1.75	$1.80	$1.80	$0.40	$0.40	$0.40
DIVISION AVERAGE	**$1.91**	**$1.95**	**$2.03**	**$0.40**	**$0.40**	**$0.40**

Source: Virginia Department of Education Web site, 2007.
*Shaded areas indicate combined schools or no program participation.

EXHIBIT B-15
GRADUATES BY DIPLOMA TYPE
PEER SCHOOL DIVISIONS
2005-06 SCHOOL YEAR

SCHOOL DIVISION	STANDARD DIPLOMA	ADVANCED STUDIES DIPLOMA	SPECIAL DIPLOMA	CERTIFICATE OF PROGRAM COMPLETION	GED CERTIFICATE	ISAEP	GAD DIPLOMA	MODIFIED STANDARD DIPLOMA	TOTAL GRADUATES AND COMPLETERS BY DIPLOMA TYPE
Loudoun County	**903**	**1,621**	**48**	**22**	**3**	**54**	**0**	**40**	**2,691**
Chesterfield County	1,559	2,142	63	27	38	27	3	60	3,919
Henrico County	1,287	1,421	108	6	58	9	0	56	2,945
Prince William County	1,794	1,904	119	0	0	71	0	86	3,974
Virginia Beach City	2,024	2,467	218	6	5	127	30	24	4,901
DIVISION AVERAGE	**1,513**	**1,911**	**111**	**12**	**21**	**58**	**7**	**53**	**3,686**

Source: Virginia Department of Education Web site, 2007.

**EXHIBIT B-16
GRADUATES BY CONTINUING EDUCATION PLANS
PEER SCHOOL DIVISIONS
2005-06 SCHOOL YEAR**

SCHOOL DIVISION	ATTENDING TWO-YEAR COLLEGES	ATTENDING FOUR-YEAR COLLEGES	OTHER CONTINUING EDUCATION PLANS	EMPLOYMENT	MILITARY	NO PLANS
Loudoun County	**29.2%**	**56.2%**	**4.7%**	**4.9%**	**1.8%**	**3.2%**
Chesterfield County	22.9%	51.8%	5.2%	16.5%	3.3%	0.3%
Henrico County	15.4%	49.6%	4.8%	11.6%	2.4%	16.2%
Prince William County	33.7%	46.0%	3.5%	13.1%	2.9%	0.7%
Virginia Beach City	26.7%	49.9%	7.8%	5.7%	3.9%	6.1%
DIVISION AVERAGE	**25.6%**	**50.7%**	**5.2%**	**10.3%**	**2.9%**	**5.3%**

Source: *2005 Superintendent's Annual Report for Virginia*, Virginia Department of Education, Web site, 2007.

**EXHIBIT B-17
DROPOUT PERCENTAGE
PEER SCHOOL DIVISIONS
2005-06 SCHOOL YEAR**

SCHOOL DIVISION	GRADES 7-12 ENROLLMENT	TOTAL DROPOUTS	DROPOUT PERCENTAGE
Loudoun County	**19,725**	**165**	**0.84%**
Chesterfield County	27,133	503	1.85%
Henrico County	22,196	678	3.05%
Prince William County	31,398	892	2.84%
Virginia Beach City	35,711	435	1.22%
DIVISION AVERAGE	**27,233**	**535**	**1.96%**

Source: Virginia Department of Education Web site, 2007.