

LOUISA COUNTY PUBLIC SCHOOLS SCHOOL DIVISION EFFICIENCY REVIEW

FINAL REPORT



Submitted by:



June 20, 2006

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EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

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

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

Louisa County Public Schools

Louisa County was formed in 1742 from Hanover County, and was named for Princess Louisa, daughter of King George II and Queen Caroline of England and wife of King Frederick V of Denmark. It is an area rich in American history, and its central Virginia location put it squarely in the path of Revolutionary and Civil War action, as well as other historical events. The county seat is located in the Town of Louisa, just 50 miles from the state capital in Richmond, Virginia. LCPS has five schools—three elementary, one middle school and one high school—that serve just over 4,400 students from a general population of 26,900. Approximately 34 percent of students are economically disadvantaged and 26 percent are minority.

LCPS third and fifth grade students performed slightly above the state average for mathematics on the Standards of Learning, and slightly below the state average in reading. The division's average daily attendance rate is above the state average at 96 percent, and it edges out the state average graduation rate at 82.4 percent.

Louisa's expenditure budget for the 2005-06 school year is \$43.1 million, \$29.4 million of which is budgeted for instruction (67 percent). The 2006-07 projected budget increases to \$60.9 million, with \$34.5 million allocated to instruction. A \$10.8 million increase in capital outlay expenditure is projected for the upcoming year, due to the construction of a new school in the division.

Review Methodology

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

- be based upon a very detailed work plan and time schedule;
- specifically take into account the unique student body and environment within which the school division operates;
- obtain input from board members, administrators, staff, and the community;
- identify the existence, appropriateness, and use of specific educational objectives;
- contain comparisons to other similar school divisions to provide a reference point;
- follow a common set of guidelines tailored specifically to the division being reviewed;
- include analyses of the efficiency of work practices;
- identify the level and effectiveness of externally imposed work tasks and procedures;
- identify both exemplary programs and practices as well as needed improvements;
- document all findings; and
- present straightforward and practical recommendations for improvements.

Our methodology is composed of all these elements and involved a targeted use of Virginia's review guidelines as well. Each of the strategies used in our review process is described in this chapter.

Review of Existing Records and Data Sources

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

Hundreds of documents were requested from LCPS. Examples of documents requested by MGT included, but were not limited, to the following:

- school board policies and administrative procedures;
- organizational charts;
- program and compliance reports;
- technology plan;
- annual performance reports;
- independent financial audits;

- plans for curriculum and instruction;
- annual budget and expenditure reports;
- job descriptions;
- salary schedules; and
- personnel handbooks.

Data from each of these documents were analyzed and the information used as the basis for both additional data collection and the recommendations and commendations contained in the report.

Diagnostic Review of the Division

A diagnostic review of the Louisa County Public Schools was conducted in February 2006. An MGT consultant interviewed central office administrators concerning the management and operations of LCPS.

Employee Surveys

To gather input from internal stake holders, MGT conducted a survey of central office administrators, principals, and teachers on their perception of the effectiveness and efficiency of division operations. The three on-line surveys were prepared and disseminated in January 2006. The surveys were similar to each other in format and content to provide a database for determining how the views of central office administrators, school administrators and teachers vary.

Survey results are contained in Appendix A of this report. Specific survey items relevant to findings in the operational areas reviewed by MGT are presented within those chapters.

Conducting the Formal On-Site Review

A team of seven consultants conducted the formal on-site review of Louisa County Public Schools during the week of March 13, 2006. As a part of this process, the following operational areas were reviewed:

- Division Organization and Administration
- Educational Services Delivery
- Personnel and Human Resources
- Finance and Purchasing
- Facilities
- Technology
- Nutrition Services
- Transportation

Prior to the on-site review, team members were provided with detailed information about LCPS operations. Additional information was gathered during the on-site, when review team members were provided with volumes of documents that were assembled from MGT document request list. During the on-site visit, team members reviewed the compiled documentation, conducted in-depth interviews with LCPS employees, school board members, Louisa County officials, and members of the general community. All

schools in the division were visited at least twice by one or more members of the review team.

In addition to school visits and interviews, the division hosted a community forum in which members of the community could come in and express their thoughts and observations concerning all aspects of school operations.

Comparison Summary

When comparing data on the Louisa County Public Schools to the other specified school divisions within the Commonwealth of Virginia, the following comparisons were notable:

- At 4,408, LCPS student population is slightly below the division average of 4,516.
- With 172 students per 1,000 people in the general population, LCPS has the highest student to general population ratio.
- LCPS' percent of economically disadvantaged students (34.1 percent) is at least 10 percent higher than its peer divisions and 14 percent higher than the division average.
- LCPS has the highest ratio of teachers per 1,000 students (82.04).
- In grades K through 7, LCPS has a ratio of 12.7 students per classroom teacher, the third-lowest ratio among the peer divisions.
- In grades 8 through 12, LCPS' teacher-student ratio (11.5) is lower than the division average (12.1).
- The highest percentage of funding for LCPS was from local funds (55.88 percent), which was 10 percent higher than the division average.
- LCPS had the lowest percentage of funds from state sources (23.62 percent) of all peer divisions.
- LCPS' percentage of federal funds (6.41 percent) is slightly higher than the division average (5.69 percent).
- On regular school day operations activities/items, LCPS spent \$5,343 per student, which was the third-lowest among peer divisions.
- On administration-related costs, LCPS spent \$226 per student, the highest per student cost among peer divisions.

Based on the analyses of data gleaned from interviews with both divisional personnel, parents and the community at large, surveys, state and division documents, and first-hand observations in Louisa County Public Schools (LCPS), the MGT team developed 34 commendations and 76 recommendations. Twenty-five recommendations are accompanied by fiscal implications.

As shown in Exhibit 1, full implementation of the recommendations in this report would general a gross savings of more than \$4.6 million over a five-year period, with a net cost of nearly \$800,000. It is important to note that nearly two-thirds of the recommendations made in the report have no specific fiscal impacts, but are expected to result in net cost savings to the division, depending on how the division opts to implement them. It should also be noted that costs and savings presented in this report reflect 2005-06 dollars and do not include increases over time due to salary or inflation adjustments.

Exhibit 1 shows the total costs and savings for all recommendations

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

CATEGORY	YEARS					TOTAL FIVE-YEAR SAVINGS (COSTS)
	2006-07	2007-08	2008-09	2009-10	2010-11	
TOTAL SAVINGS	\$738,199	\$919,199	\$949,199	\$979,199	\$1,028,539	\$4,614,335
TOTAL (COSTS)	(\$209,290)	(\$144,290)	(\$146,364)	(\$146,364)	(\$146,364)	(\$792,672)
TOTAL NET SAVINGS (COSTS)	\$526,769	\$772,769	\$802,769	\$832,769	\$882,109	\$3,821,663
ONE-TIME SAVINGS (COSTS)						(\$390,230)
TOTAL FIVE-YEAR NET SAVINGS (COSTS) INCLUDING ONE-TIME SAVINGS (COSTS)						\$3,431,433

Key Commendations

Detailed commendations for exemplary efficiencies are found in the full report in chapters 2 through 9. Among the major commendations for which Louisa County Public Schools is recognized are:

- The Louisa County Public Schools Division is commended for operating and administratively maintaining a high level of school-level customer satisfaction.
- The Louisa County Public Schools has developed a code of ethics to guide them in their duties as board members and observers report that it is observed.
- The Louisa County Public Schools' School Board and administration are commended for developing a comprehensive six-year improvement plan.

- LCPS is commended for developing and successfully implementing reading and math instructional models and curriculum pacing guides in alignment with the Virginia Standards of Learning.
- LCPS is commended for providing a continuum of alternative education programs for at-risk students.
- LCPS is commended for its increased pass rates on the Standards of Learning assessments and full accreditation relative to the Virginia Department of Education accreditation standards and for its Adequate Yearly Progress at Louisa County High School.
- The Louisa County Public Schools are commended for providing a level of administrative staffing that supports the academic program goals and objectives and allows the schools in the division to attain commendable levels of achievement.
- Louisa County Public Schools is commended for the financial commitment it makes to recruiting qualified teachers and to encouraging their continued professional development.
- Louisa County Public Schools is commended for creating and maintaining a competitive salary scale and providing monetary incentives for critical shortage areas and advanced degrees.
- LCPS is commended on an appraisal process that is both formative and summative and includes a process for facilitating performance improvement.
- The county and the LCPS are commended for taking a “bottom-up” approach to the development of its annual budget. The process is inclusive and provides workshops that should provide a forum to reach agreement on often difficult decisions.
- Louisa County and LCPS obtained a decrease in their health insurance rates.
- Centralizing most risk management activities, with the exception of claims tracking, in the Fiscal Services Department provides the level of central oversight that risk management programs should have.
- Louisa County Public Schools is commended for restructuring the maintenance department and creating an atmosphere of service throughout the division.
- Louisa County Public Schools is commended for instituting an on-line work order system that is well received by the customer and is not often seen in divisions of this size.
- Louisa County Public Schools is commended for instituting a regular program of preventative maintenance.

- The LCPS Transportation Department is commended for having an established organizational structure which supports the highest level of communication and ensures operational effectiveness and administrative oversight.
- LCPS Nutrition Services has been highly effective in increasing and maintaining school lunch participation rates.
- LCPS Nutrition Services has maintained consistently high levels of participation, particularly with regard to free/reduced lunches.
- LCPS has maintained high levels of participation as it pertains to free/reduced-qualified students in the breakfast program.
- Louisa County Public Schools is commended for the installation of a fiber-based network throughout the division.

Major Findings and Recommendations

The Executive Summary highlights the key findings related to the efficiency of operations in LCPS. Detailed recommendations for improving operations are found throughout the chapters of the report. Major findings and recommendations for improvement include the following:

- Provide for an annual self evaluation of the school board **(Chapter 2, Recommendation 2-1)**.
- Create a policy provision containing a listing of existing procedural manuals, handbooks, and planning documents and on the Web site, create a series of hot links from the manual to the cited documents or procedures **(Chapter 2, Recommendation 2-3)**.
- Include interim timelines and measurement criteria for each of the six-year plan objectives **(Chapter 2, Recommendation 2-4)**.
- Develop a system of regular professional development and training of administrative staff geared toward implementation of the six-year plan and other clearly defined division needs **(Chapter 2, Recommendation 2-5)**.
- Reorganize the Division of Instruction and decrease the number of teachers on special assignment over the next five years **(Chapter 3, Recommendation 3-1)**.
- Expand the responsibilities of the Director of Instruction and Testing to include program evaluation and develop a policy on program evaluation to strengthen its contribution as an integral component of the LCPS continuous improvement process **(Chapter 3, Recommendation 3-4)**.
- Ensure that all school improvement monitoring instruments are aligned to the characteristics of high performing and effective schools **(Chapter 3, Recommendation 3-7)**.

- Document staff development and instructional planning for subgroups of underachieving students, as well as for high performing students beyond SOL mastery (**Chapter 3, Recommendation 3-8**).
- Examine the flexibility offered by using Title I and other federal funds to support increased proficiency among all students through shared funding of general revenue or special education funds (**Chapter 3, Recommendation 3-11**).
- Develop activities, timelines, and data collection elements documenting and reporting improved educational and functional outcomes for students with disabilities as required by IDEA 2004 and as directed by the Virginia Department of Education (**Chapter 3, Recommendation 3-14**).
- Develop an annual special education action plan including mission, vision, goals, objectives, activities, evaluation, and a scope and sequence of timeline of training and educational support activities for schools (**Chapter 3, Recommendation 3-15**).
- Establish appropriate co-teaching model of inclusive education at secondary schools (**Chapter 3, Recommendation 3-16**).
- Implement a consistent, divisionwide pre-referral process in the general education program (**Chapter 3, Recommendation 3-17**).
- Establish a Coordinator of Human Resources position (**Chapter 4, Recommendation 4-1**).
- Reclassify the Executive Administrative Secretary position as a Personnel Specialist position (**Chapter 4, Recommendation 4-2**).
- Expand the capability of the Human Resources Web site to allow on-line submission of employment applications and submission of employment references (**Chapter 4, Recommendation 4-5**).
- Develop the current “buddy teacher” program into a true mentoring program (**Chapter 4, Recommendation 4-10**).
- Reduce the current rates being paid for the insurance coverage and benefits package offered for employees and compare with like divisions (**Chapter 4, Recommendation 4-11**).
- Institute a program to reduce the number of leave days taken by LCPS teachers (**Chapter 4, Recommendation 4-12**).
- Create, adopt, and implement formal financial policies and procedures manuals that can be used to train new employees, cross-train current employees, and provide guidelines and checklists to help ensure all work is performed as required (**Chapter 5, Recommendation 5-1**).
- Hire the equivalent of one FTE by adding a position and hiring one entry level accounting clerical person (**Chapter 5, Recommendation 5-2**).

- Adopt steps recommended by PriceWaterhouseCoopers for the evaluation of spreadsheet controls **(Chapter 5, Recommendation 5-5)**.
- Include a narrative with the budget document so readers understand what is happening, why are costs increasing, what are the forces behind changes over the prior year, and how does the budget tie to a strategic plan or long-term goals **(Chapter 5, Recommendation 5-6)**.
- Hire a professional facilitator to help resolve the continuous conflict between the Louisa County School Board and the Louisa County Board of Supervisors **(Chapter 5, Recommendation 5-7)**.
- Make direct deposit mandatory for all LCPS employees **(Chapter 5, Recommendation 5-8)**.
- Update the current payroll system to include a position control system and consider going to one period per month **(Chapter 5, Recommendation 5-9)**.
- Establish performance standards to be used in the annual evaluation of maintenance staff and as a standard to measure overall department efficiency **(Chapter 6, Recommendation 6-2)**.
- Institute an aggressive energy management program throughout all schools and facilities **(Chapter 6, Recommendation 6-4)**.
- Modify the existing discipline process for managing student behavior on school buses to include provisions for more direct input from transportation staff **(Chapter 7, Recommendation 7-1)**.
- Expand and upgrade the current transportation department's facility **(Chapter 7, Recommendation 7-4)**.
- Reduce nutrition services staff hours while maintaining current salary levels until LCPS reaches the MPLH benchmark for its schools **(Chapter 8, Recommendation 8-2)**.
- Join or create a food cooperative with other small school divisions **(Chapter 8, Recommendation 8-6)**.
- Implement à la carte offerings at the secondary level **(Chapter 8, Recommendation 8-13)**.
- Construct a detailed technology activity and implementation plan to identify timelines and expenditures associated with the activities described in the "Five-Year Technology Plan" **(Chapter 9, Recommendation 9-2)**.
- Request assistance in the development, design, engineering, and architecture of a comprehensive data and application integration system (AIS) **(Chapter 9, Recommendation 9-3)**.

1.0 INTRODUCTION

1.0 INTRODUCTION

In March 2006, MGT of America conducted a School Division Efficiency Review of Louisa County Public Schools (LCPS). The review concentrated on seven operational areas. Exhibit 1-1 shows the timeline for project activities, and Exhibit 1-2 provides an overview of the work plan utilized in this undertaking.

1.1 Overview of Louisa County Public Schools

Louisa County Public Schools division consists of five schools—one high school, one middle school and three elementary schools. The division has a seven member school board representing the districts of Louisa, Jackson, Cuckoo, Green Springs, Mountain Road, Mineral, and Patrick Henry. The administrative offices are in Mineral, Virginia. The division has over 4,400 students enrolled in grades Pre-K through 12, and nearly 700 teachers, administrators and support personnel. Twenty-seven percent of LCPS students are minorities and 38 percent qualify for free or reduced lunch. All the division's schools are fully accredited.

1.2 Methodology

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

- be based upon a very detailed work plan and time schedule;
- specifically take into account the unique environment within which the school division operates;
- obtain input from board members, administrators, and staff;
- identify the existence, appropriateness, and use of specific educational objectives;
- contain comparisons to other similar school divisions to provide a reference point;
- follow a common set of guidelines tailored specifically to the division being reviewed;
- include analyses of the efficiency of work practices;
- identify the level and effectiveness of externally imposed work tasks and procedures;
- identify both exemplary programs and practices as well as needed improvements;

- document all findings; and
- present straightforward and practical recommendations for improvements.

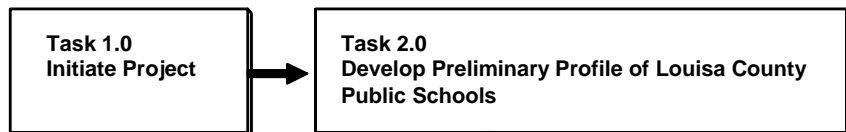
With this in mind, our methodology primarily involved a focused use of Virginia review guidelines as well as MGT's audit guidelines following the analysis of both existing data and new information obtained through various means of employee input.

**EXHIBIT 1-1
TIMELINE FOR THE EFFICIENCY REVIEW OF
LOUISA COUNTY PUBLIC SCHOOLS**

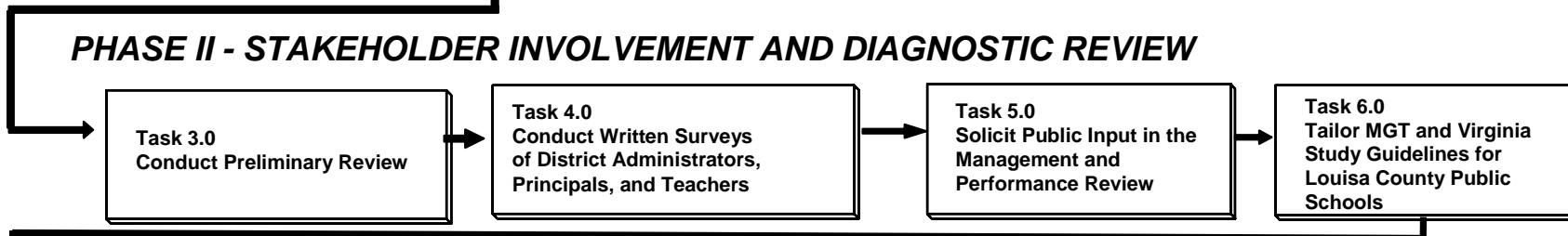
TIME FRAME	ACTIVITY
September 2005	<ul style="list-style-type: none"> ■ Finalized contract with the Commonwealth of Virginia. ■ Designed tailor-made, written surveys for central office administrators, principals, and teachers.
January 2006	<ul style="list-style-type: none"> ■ Collected and analyzed existing and comparative data available from the school division. ■ Produced profile tables of Louisa County Public Schools. ■ Disseminated surveys to administrators and teachers.
January 23-24, 2006	<ul style="list-style-type: none"> ■ On-site visit with Louisa County Public Schools. <ul style="list-style-type: none"> - Conducted diagnostic review. - Collected data. - Interviewed central office administrators.
January 2006	<ul style="list-style-type: none"> ■ Analyzed collected data.
January 2006	<ul style="list-style-type: none"> ■ Tailored review guidelines and trained MGT team members using findings from the above analyses.
Week of March 13, 2006	<ul style="list-style-type: none"> ■ Conducted formal on-site review, including school visits.
March–April 2006	<ul style="list-style-type: none"> ■ Prepared Draft Report.
May 2006	<ul style="list-style-type: none"> ■ Submitted Draft Report.
May 2006	<ul style="list-style-type: none"> ■ Revised Draft Report
June 2006	<ul style="list-style-type: none"> ■ Submitted Final Report

**EXHIBIT 1-2
OVERVIEW OF THE WORKPLAN FOR THE EFFICIENCY REVIEW
OF LOUISA COUNTY PUBLIC SCHOOLS**

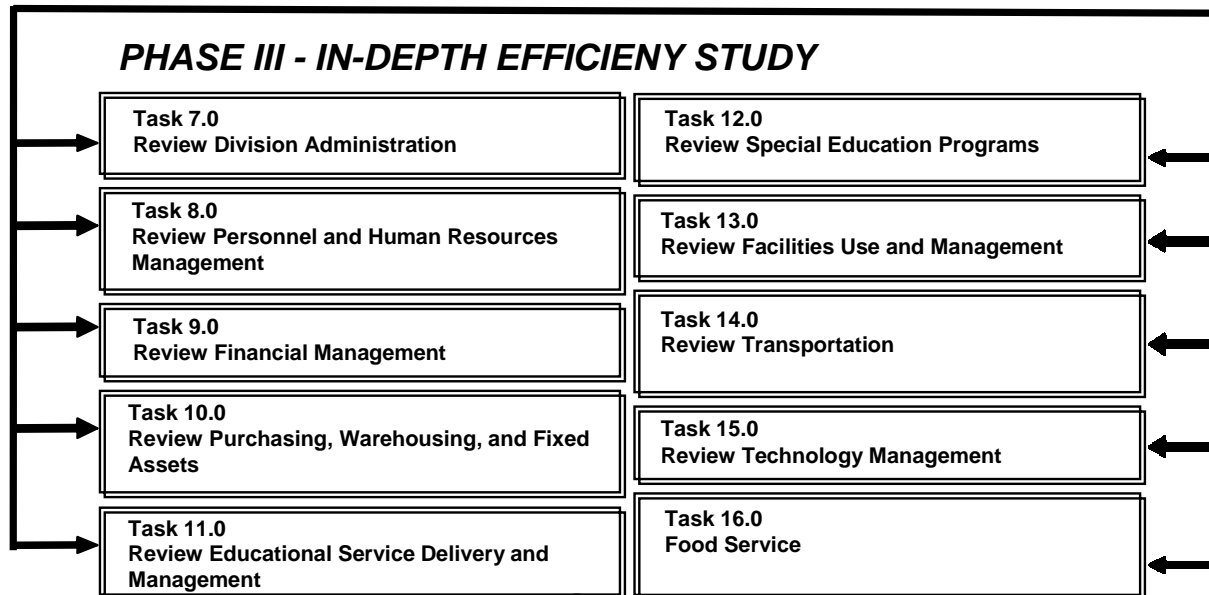
PHASE I - PROJECT INITIATION



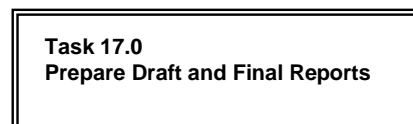
PHASE II - STAKEHOLDER INVOLVEMENT AND DIAGNOSTIC REVIEW



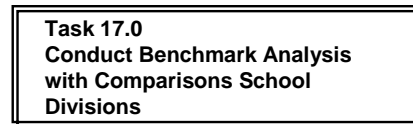
PHASE III - IN-DEPTH EFFICIENCY STUDY



**PHASE V -
PROJECT REPORTING**



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



1.2.1 Data Collection Prior to the On-Site Review

Since the diagnostic review in January 2006 and again during the on-site review in March of the same year, MGT consultants identified and collected numbers reports and data that provided both current and historical information related to the seven operational areas reviewed in the study. The materials requested and collected included, but were not limited to, the following:

- detailed organizational charts for current year and past two years;
- program compliance reports;
- school board policies and administrative procedures;
- school board meeting minutes and agendas;
- annual departmental and division budgets and expenditure reports
- job descriptions;
- salary schedules;
- technology plan;
- facilities/capital improvement plans;
- student demographic data;
- food service cost information; and
- school bus routes and staffing information.

Data collected from each of these sources were analyzed and discussed with related school personnel, and was incorporated into exhibits and narrative of the report.

As listed in the project timeline in Exhibit 1-1, MGT consultants conducted a diagnostic review of the district on January 23-24, 2006. During the diagnostic, central office and school-based administrators were interviewed regarding the efficiency and effectiveness of division operations, and to determine their perceptions of the issues being faced by the division.

In addition to the data gathered through personal interviews, an on-line survey was administered to LCPS central office administrators, principals, and teachers to provide them with an opportunity to express their views on the management of operation of the school division. These individuals were provided access to the survey from January 20, 2006 through February 8, 2006. The response rate for all three groups was excellent, with 93 percent of central office administrators, 87 percent of principals and 55 percent of teachers responding. MGT reported survey responses from all three groups, as well as comparison responses between each of the groups and role-alike groups in over 30 additional school districts where similar surveys were conducted.

1.2.2 The Formal On-Site Review

A team of seven MGT consultants conducted an on-site review of Louisa County Public Schools during the week of March 13th, 2006. As a part of this process, seven operational areas were reviewed:

- Division Organization and Administration
- Educational Services Delivery
- Personnel and Human Resources
- Finance and Purchasing

- Facilities
- Technology
- Nutrition services
- Transportation

In preparation for the on-site review, the division was sent an extensive data request list, with documentation for each of the operational areas. During the week of the on-site, the consultants reviewed the compiled documents, as well as conducted interviews with both central office and school-based administrators. In addition, focus groups were conducted with teachers and support staff in several of the operational areas. Each of the five schools in the division were visited by at least one member of the review team, and a community forum was held to solicit input from the general public.

The assessment process used by MGT is outlined in the company's *Guidelines for Conducting Management and Performance Audits of School Districts*. MGT also followed the directives contained in the Commonwealth of Virginia's school efficiency review guidelines.

1.3 Comparisons to Other School Divisions

When the leaders of organizations engage in a continuous improvement process, they are required to conduct an in-depth analysis of the organization's current systems and processes in order to identify both areas of strengths and areas in need of development. One strategy often used in this analysis is benchmarking. Benchmarking essentially involves learning, sharing information and adopting best practices to bring about positive changes in performance. In practice, benchmarking usually encompasses:

- regularly comparing aspects of performance (functions or processes) with best practitioners;
- identifying gaps in performance;
- seeking fresh approaches to bring about improvements in performance;
- following through with implementing improvements; and
- following up by monitoring progress and reviewing the benefits.

MGT initiated a benchmarking comparison of the Louisa County Public Schools with comparable school divisions in the Commonwealth. It is important for readers to keep in mind that when comparisons are made across more than one division, the data are not as reliable, as different school divisions have different operational definitions, and self-reported data from peer divisions can be subjective.

The Virginia Department of Education developed a cluster code to identify similar school divisions for comparison. Cluster identifiers were created by using data such as cost per student for each major operational area, major drivers of costs, and ranking of costs. Louisa County Public Schools is identified in Cluster 2. MGT, with advisement from the

Governor’s Office and LCPS leadership, selected a set of school divisions from Cluster 2 to capture the characteristics of comparable school divisions. The Virginia public school divisions chosen for comparison were:

- Fluvanna County Public Schools;
- Botetourt County Public Schools;
- Orange County Public Schools;
- Powhatan County Public Schools; and
- Shenandoah County Public Schools.

Exhibit 1-3 illustrates comparisons of student enrollment, number of schools and number of school division staff among Louisa County Public Schools and its peer divisions. As shown in the exhibit:

- At 4,408 LCPS student population is slightly below the division average of 4,516;
- With 172 students per 1,000 people in the general population, LCPS has the highest student to general population ratio;
- LCPS’ percent of economically disadvantaged students (34.1 percent) is at least 10 percent higher than its peer divisions and 14 percent higher than the division average;
- The five schools in the LCPS division are two fewer than the division average.

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

SCHOOL DIVISION	CLUSTER IDENTIFICATION	TOTAL STUDENT POPULATION	STUDENT POPULATION PER 1,000 GENERAL POPULATION	PERCENT ECONOMICALLY DISADVANTAGED STUDENTS	TOTAL NUMBER OF SCHOOLS
Louisa County	2	4,408	172	34.1	5
Fluvanna County	2	3,395	169	9.9	5
Botetourt County	2	4,831	158	14.5	11
Orange County	2	4,298	166	24.5	8
Powhatan County	2	4,209	188	11.9	4
Shenandoah County	2	5,954	170	26.3	9
Division Average	N/A	4,516	171	20.2	7

Source: Virginia Department of Education, Web site, 2006, United States Census Bureau, 2000 Census Data, www.schoolmatters.com.

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

- LCPS has the highest ratio of teachers per 1,000 students (82.04);
- in grades K through 7, LCPS has a ratio of 12.7 students per classroom teacher, the third-lowest ratio among the peer divisions; and
- in grades 8 through 12, LCPS' teacher-student ratio (11.5) is lower than the division average (12.1).

**EXHIBIT 1-4
TEACHER STAFFING LEVELS AND PUPIL: TEACHER RATIOS
PEER SCHOOL DIVISIONS
2003-04 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
Louisa County	82.04	12.7	11.5
Fluvanna County	77.18	14.2	11.3
Botetourt County	77.86	18.3	8.8
Orange County	68.16	10.7	15.8
Powhatan County	80.95	14.7	9.7
Shenandoah County	80.56	11.1	15.4
Division Average	77.79	13.6	12.1

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

*Ratios based on End-of-Year enrollments.

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

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

- the highest percentage of funding for LCPS was from local funds (55.88 percent), which was 10 percent higher than the division average;
- LCPS had the lowest percentage of funds from state sources (23.62 percent) of all peer divisions; and
- LCPS' percentage of federal funds (6.41 percent) is slightly higher than the division average (5.69 percent).

Exhibit 1-6 displays the disbursements per pupil based on a regular school day operation, plus administrative costs. As shown in the exhibit:

- on regular school day operations activities/items, LCPS spent \$5,343 per student, which was the third-lowest among peer divisions; and
- on administration-related costs, LCPS spent \$226 per student, the highest per student cost among peer divisions.

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

SCHOOL DIVISION	SALES AND USE TAX	STATE FUNDS	FEDERAL FUNDS	LOCAL FUNDS	OTHER FUNDS	LOANS, BONDS, ETC.
Louisa County	9.01%	23.62%	6.41%	55.88%	3.61%	1.46%
Fluvanna County	7.71%	42.99%	5.49%	42.18%	1.64%	0.00%
Botetourt County	9.43%	37.38%	4.37%	44.11%	4.71%	0.00%
Orange County	8.33%	33.86%	8.37%	46.11%	3.32%	0.00%
Powhatan County	6.96%	31.04%	3.18%	46.49%	2.04%	10.28%
Shenandoah County	9.54%	42.22%	6.29%	37.69%	4.28%	0.00%
Division Average	8.50%	35.18%	5.69%	45.41%	3.27%	1.96%

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

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

SCHOOL DIVISION	INSTRUCTION PER PUPIL ¹	ADMINISTRATION PER PUPIL ²
Louisa County	\$5,343.14	\$226.87
Fluvanna County	\$5,307.07	\$161.37
Botetourt County	\$5,741.87	\$145.11
Orange County	\$5,543.31	\$153.96
Powhatan County	\$5,236.50	\$220.73
Shenandoah County	\$5,378.09	\$102.76
Division Average	\$5,425.00	\$168.47

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

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.

1.4 Overview of Final Report

MGT's final report is organized into 10 chapters. Chapters 2 through 9 present the results of the School Division Efficiency Review of Louisa County Public Schools. Findings, commendations, and recommendations are presented for each of the operational areas of the school division. These commendations and recommendations are summarized in the executive summary at the beginning of the report. In each chapter, each of the division's operational areas is analyzed based on the division's current organizational structure. The following data on each component are included:

- description of the current situation in Louisa County Public Schools:
- a summary of study findings, including those from both documentation obtained from the division and on-site findings;
- MGT's commendations and/or recommendations for each finding; and,
- a five-year fiscal impact for recommended costs or cost savings which are stated in 2005-06 dollars.

The report concludes with a summary of the fiscal impact of the study recommendations in Chapter 10.

2.0 DIVISION ADMINISTRATION

2.0 DIVISION ADMINISTRATION

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

- 2.1 School Board Governance
- 2.2 Policies and Procedures
- 2.3 Comprehensive Improvement Planning
- 2.4 Organization and Management

CHAPTER SUMMARY

The Louisa County Public Schools is governed by a seven member board and managed by an appointed superintendent with the assistance of his leadership team. This chapter focuses on the division's governance and management along with the development of the comprehensive improvement plan and the associated organizational structures. The administration of the division has recently undergone changes in its organizational structure geared toward improving instructional services and maintaining fiscal responsibility.

The recent changes have had an impact on the management of the division and are reflected in a general feeling that things are on the right track. This chapter reflects the theme that the division is currently providing a good program for students that is well accepted by the numerous communities throughout the county. The school division is commended for:

- developing a consistent and predictable process for the development and dissemination of materials necessary for the conduct of business-like school board meetings;
- developing a code of ethics to guide them in their duties as board members and observers report that it is observed;
- developing a comprehensive six year improvement plan;
- operating and effectively maintaining a high level of school-level customer satisfaction; and
- establishing and operating numerous committees to help maintain communications both inside and outside of the division and to assist with the decision making process.

To move to the next level, and become outstanding, the division will require additional changes. This chapter reflects some of those changes, and includes the following recommendations:

- conduct an annual self evaluation of the school board;

- code by assigning an identifying asterisk, school board policies that are required by Commonwealth of Virginia law and other controlling regulations;
- create a policy provision containing a listing of existing procedural manuals, handbooks, and planning documents and on the Web site, create a series of hot links from the manual to the cited documents or procedures;
- update the policy manual as required by Virginia law and post the updated manual on the division Web site;
- include interim timelines and measurement criteria for each of the six-year plan objectives; and
- develop a system of regular professional development and training of administrative staff geared toward implementation of the six-year plan and other clearly defined division needs.

INTRODUCTION

Historically, states have adopted provisions that place the governance and day-to-day management of schools in the hands of local authorities, typically local school boards. These boards generally have broad powers to establish policy, enter into contracts, develop budgets, and employ personnel. Among the 50 states there is considerable variation in the legal structure of school divisions. Some school divisions are fiscally independent (i.e., do not have to depend upon the state or another body politic for fiscal resources) while others are totally dependent upon other entities for their resources (i.e., some divisions must rely on city councils, county commissions or like bodies and the state for budget approval and funds). Some school divisions must take budget proposals or operating tax levies to the public for approval and other boards have latitude to set budgets and approve revenue levies within the constraints of law. The legal foundation of school divisions is critical to the overall functioning of the organization as it defines the locus of power that determines how school boards and executive personnel may carry out their assigned responsibilities.

The primary state laws controlling the governance and operation of schools in Virginia are found in Title 22.1 of the Virginia Code. These laws give the school board broad powers to adopt policies, fix contracts, approve the appointment of personnel, develop a budget for further review and approval by the city, and other actions designed to ensure secure, safe, and proper schools for Louisa County.

Exhibit 2-1 details information about the seven members of the school board, including three of the seven board members are in their first year on the board and one other board member is in their first term of office.

**EXHIBIT 2-1
LOUISA COUNTY PUBLIC SCHOOLS
2005- 06 SCHOOL YEAR**

NAME	TITLE	DISTRICT	TERM EXPIRES	LENGTH OF SERVICE AS OF END OF 2005-06
Robin Horne	Chair	Louisa	2007	6 Years
Harold Schaffer	Vice-Chairman	Jackson	2007	2 Years
Vivian Powers	Member	Cuckoo	2007	6 Years
Brian Huffman	Member	Green Springs	2009	4 Years
Gail Proffitt	Member	Mountain Road	2009	0 Years
Sherman Shifflett	Member	Mineral	2009	0 years
Gregory Strickland	Member	Patrick Henry	2009	0 Years

Source: Louisa County Public Schools, April 2006.

2.1 School Board Governance

FINDING

The Louisa County School Board has adequate time and background materials to conduct their business in a professional manner each month. The superintendent, in consultation with the board chair, develops an agenda and background information for each agenda item as necessary. This information is provided to board members ahead of time so it can be studied before the meeting. Unless there is an emergency, issues are placed on the agenda as discussion items prior to coming before the board for action. This practice allows the school board to study the issues and deliberate at some length before acting and creates stability in the decision making process.

COMMENDATION

The Louisa County Public Schools has developed a consistent and predictable process for the development and dissemination of materials necessary for the conduct of business-like school board meetings.

FINDING

The Louisa County School Board has adopted and observes a code of ethics to guide their processes and deliberations, keeps the code in view, and has placed it prominently on their Web site.

The content of the code of ethics is:

As a member of my local school board, I will strive to be an advocate for students and to improve public education and to that end:

1. I will have integrity in all matters and support the full development of all children and the welfare of the community, Commonwealth and Nation.

2. I will attend scheduled board meetings.
3. I will come to board meetings informed concerning the issues under consideration.
4. I will make policy decisions based on the available facts and appropriate public input.
5. I will delegate authority for the administration of the schools to the superintendent, and establish a process for accountability of administrators.
6. I will encourage individual board member expression of opinion and establish an open, two-way communication process with all segments of the community.
7. I will communicate, in accordance with board policies, public reaction and opinion regarding board policies and school programs to the full board and superintendent.
8. I will bring about desired changes through legal and ethical procedures, upholding and enforcing all laws, state regulations, and court orders pertaining to schools.
9. I will refrain from using the board position for personal or partisan gain and avoid any conflict of interest or the appearance of impropriety.
10. I will respect the confidentiality of privileged information and make no individual decisions or commitments that might compromise the board or administration.
11. I will be informed about current educational issues through individual study and participation in appropriate programs, such as those sponsored by my state and national school boards associations.
12. I will always remember that the foremost concern of the board is to improve and enhance the teaching and learning experience for all students in the public schools of Virginia.

COMMENDATION

The Louisa County Public Schools has developed a code of ethics to guide them in their duties as board members and observers report that it is observed.

FINDING

There is no evidence that the Louisa County School Board conducts a regular self-evaluation process, although some board members reported participation in “informal” feedback.

Board policy AFA, Evaluation of School Board Operational Procedures, requires an annual self-evaluation. The policy states:

The School Board will review its performance annually to ensure its proper discharge of responsibilities to the community. Evaluation will be based on a positive approach, which will indicate the strengths of the School Board and the areas that need improvement.

To help the School Board meet this goal, the following elements will be included in the self-evaluation process:

1. *School Board members will be involved in the development of an evaluation instrument and procedure.*
2. *The School Board evaluation instrument will be completed by individual board members on a confidential basis, and submitted to the School Board Chairman, or his or her designee, for compilation.*
3. *The School Board will meet, with all members present, to review and discuss the composite results.*
4. *Each conclusion will be supported by objective evidence.*

Upon final discussion of the results, the School Board will develop both short and long-range goals and objectives to ensure continued proficiency in its areas of excellence, to strengthen weak areas, and to improve the efficiency of the board.

The Louisa County School Board is comprised of seven members who receive both formal and informal board training each year; however, the effects of the training and general school board effectiveness are not evaluated. The school division, as a whole, has a culture of evaluating its personnel, its programs, and its financial condition. The school board evaluates the superintendent annually, but does not have a self-evaluation process in place. Informal processes do not provide a systematic way to discuss their operations and what may be improved.

RECOMMENDATION

Recommendation 2-1:

Provide for an annual self evaluation of the school board.

Providing feedback, both formally and informally, is one of the “basics” in any improvement process. Structured feedback in the form of an evaluation instrument can supplement honest ongoing dialogue and discussion.

Governing boards in any organization can improve their performance through a formal self evaluation in addition to an informal feedback process. In addition, by conducting and annual evaluation, the board models for their organizations, the importance of the evaluation process. As a result, both the board and the organization develop a culture of participation in improvement cycles. Better organizations and improved performance are the end result. Exhibit 2-2 is one example of a self assessment instrument used by some boards.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

**EXHIBIT 2-2
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 president or 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.

2.2 Policies and Procedures

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

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

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

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

- a system of two-way communication between employees and the local school board and its administrative staff;
- the selection and evaluation of all instructional materials purchased by the division, with clear procedures for handling challenged controversial materials;
- standards of student conduct and attendance, and related enforcement procedures;
- school-community communications and involvement;
- guidelines to encourage parents to provide instructional assistance to their children;

- information about procedures for addressing school division concerns with defined recourse for parents;
- a cooperatively-developed procedure for personnel evaluation; and
- grievance, dismissal procedures, and other procedures as prescribed by the General Assembly and school board.

Each division school and the public library has a copy of the LCPS policy manual but the policy manual has not been placed on the Web site.

Policies are overseen and managed in the superintendent's office by the School Board Clerk. The official policy manual is located in the superintendent's office.

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

Exhibit 2-3 presents the LCPS policy manual classifications (chapters), titles, and policy codes.

**EXHIBIT 2-3
POLICY HANDBOOK ORGANIZATION
LOUISA COUNTY PUBLIC SCHOOLS**

CLASSIFICATION	SECTION TITLES	POLICY CODES
A	Foundations and Basic Commitments	AA - AFA
B	School Board Governance and Operations	BB - BHE
C	General School Administration	CA - CM
D	Fiscal Management	DA - DO
E	Support Services	EA - EI
F	Facilities Development	FA - FG
G	Personnel	GA - GDQN
H *	Negotiations	None
I	Instructional Program	IA - INDC
J	Students	JB - JP
K	School-Community Relations	KA - KQ
L	Education Agency Relations	LA - LI

Source: LCPS School Board Policy Manual, April 2006.

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

Exhibit 2-4 shows the revision status of LCPS School Board policies. As can be seen:

- 301 policies and procedures were reviewed for current adoption status;
- of the 301 provisions reviewed, 66 have not been reviewed each five years as required by Virginia law; and
- an additional 49 will need to be reviewed by the end of 2006 in order to meet the requirements.

**EXHIBIT 2-4
REVISION/ADOPTION STATUS OF LCPS
BOARD POLICIES AND PROCEDURES
APRIL, 2006**

POLICY REFERENCE LETTER	POLICY AREA	NUMBER OF POLICIES/ PROCEDURES EXAMINED	NUMBER OF POLICIES/PROCEDURES ADOPTED/UPDATED/RESTATED IN:			
			PRIOR to 2000	2000-01	2002-04	2005-06
A	Foundations and Basic Commitments	6			4	2
B	School Board Governance and Operations	33	15	1	14	3
C	General School Administration	13	6	1	5	1
D	Fiscal Management	17	9		8	
E	Support Services	27	10	1	16	
F	Facilities Development	10	4	2	4	
G	Personnel	61	22	7	22	10
H	Negotiations *					
I	Instructional Program	54		11	34	9
J	Students	43		12	21	10
K	School-Community Relations	29		10	17	2
L	Education Agency Relations	8		4	2	2
TOTALS		301	66	49	147	39

Source: LCPS Board Policy Manual, April 2006. * The Supreme Court of Virginia has stated that neither Virginia constitution or statutory authority exists for school boards to enter into collective bargaining agreements with their employees.

FINDING

School board policies are codified in an alphabetical system as noted in Exhibit 2-4. The Commonwealth of Virginia Statute 22.1-253.13:7 provides, as previously stated, a variety of policy provisions that the School Board must address and include in its policy

manual. Exhibit 2-5 shows samples of required state provisions that are addressed in the updated policy manual along with the specific code.

**EXHIBIT 2-5
SAMPLE COMMONWEALTH OF VIRGINIA REQUIRED POLICY TOPICS
AND RELATED LOUISA COUNTY PUBLIC SCHOOLS
SCHOOL BOARD POLICY**

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

Source: LCPS School Board Policy Manual, April 2006.

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

RECOMMENDATION

Recommendation 2-2:

Code by assigning an identifying asterisk, school board policies that are required by Virginia law and other controlling regulations.

The implementation of this recommendation should result in placing an asterisk by the letter code of each policy that is required by Virginia statutes and other controlling regulations. This designation should enable school board members, central office personnel and school-level employees, as well as other stakeholders, to know which policies must be developed and adopted by the school board. Furthermore, this coding system should make it easier for staff to readily identify important provisions that must be kept up-to-date and consistent with all requirements, thus increasing employee efficiency in this process.

FISCAL IMPACT

This recommendation can be accomplished with existing resources and at no additional cost.

FINDING

The policy and procedures manual contains some references to procedural documents related to policy implementation but it is difficult to obtain these when needed.

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

RECOMMENDATION

Recommendation 2-3:

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

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

This provision may be phrased as follows:

SCHOOL BOARD AND SCHOOL SYSTEM PLANS AND PROCEDURES

The School Board has plans, manuals, handbooks and codes that outline procedures to be followed relative to stated topics. The plans, manuals, handbooks, and codes listed below may be adopted by reference as part of these policies when required by other board provisions, Virginia laws, or other controlling requirements. These include, but are not limited to...

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

Exhibit 2-6 provides a partial listing of the types of documents often included in such a document. Upon development and adoption of the list of documents a series of hot links should be created between the policy manual and related documents. This action should result in providing the policy manual user easy access to other related information thus increasing user efficiency by reducing time required to locate needed documents.

**EXHIBIT 2-6
SAMPLE LIST OF PROCEDURAL, OPERATIONAL, PLANNING
AND OTHER DOCUMENTS**

Administration

Emergency Plan
Strategic Plan
Staff Development Plan
Safety Plan
General Outline of Revenue and Meal Accountability Procedures
Human Resources Management Procedures
Capital Project Priority List
Transportation Procedures Manual
Food Service Procedures

Instructional & Student Services

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

Source: Created by MGT of America, 2006.

2.3 Comprehensive Improvement Planning

Comprehensive school improvement planning is one of the key components of division school board and administrative functions. The provision of the best programs possible for students within the financial constraints of the community is the primary goal of most school divisions throughout the United States. In the age of “No Child Left Behind” and the associated requirements of adequate yearly progress, school divisions need to develop long range improvement plans and then allocate resources in accordance with that plan. It is important that all stakeholders in the division have input into the plan and

are provided with information regarding the implementation, the on-going activities and the results.

FINDING

The Louisa County Public Schools has developed a six-year improvement plan for the years 2004-2010 that includes objectives, assessment, enrollment forecasts, regional services, a technology plan and a needs assessment as key components. Community participation in the development of the plan is documented and updates are provided biennially.

The six-year plan objectives are:

- I. Student Achievement
 - a. By the 2008-09 school year, the Louisa County Public Schools will meet AYP at 80%.
 - b. All Louisa County Public School will be fully accredited after SOL testing at the end of the 2008-09 school year.
 - c. By the 2008-09 school year the Louisa County Public Schools will increase by 6% the retention of highly qualified teachers.
 - d. By 2008-09, all professional development will be based on student achievement and be researched based.
 - e. By 2008-09, the Louisa County Public Schools will increase the number of preschool classes for four year olds by 100%, from three to six classes.
 - f. By 2008-09, the percent pass rate for students in remediation/recovery programs will increase by 25%.
- II. Communication/Collaboration
 - g. After completion of a survey of community members, parents and teachers at the end of the 2008-09 school year, 80% of those responding will report effective communication by the school division.

III. Safe Schools

- a. By the 2008-09 school year, the number of serious referrals will be reduced by at least 25% as measured by the crime and violence report.
- b. By the 2008-09 school year, a new elementary school will be constructed and operational.

The six-year plan is then organized and reported by adopted standards. These standards are:

1. basic skills, selected programs, and instructional personnel;
2. support services;
3. accreditation, other standards, and evaluation;
4. literacy passports, diplomas, and certificates;
5. training and professional development;
6. planning and public involvement;
7. policy manual;
8. capital improvement; and
9. parent and community involvement.

COMMENDATION

The Louisa County Public Schools' School Board and administration are commended for developing a comprehensive six-year improvement plan.

FINDING

While the LCPS plan is comprehensive in content and outcomes, for the most part are self-explanatory, it could be strengthened by adding interim timelines and measurement criteria for each objective.

An example of these includes specifying targeted goals for reduction of serious referrals over the period 2006 through 2009 by including a percent reduction each year rather than simply 25 percent by 2009. Another example could be specifying timelines showing when expected facility planning should occur, property acquisition made, and other landmark events associated with the construction of a new school would be completed. Additionally, each year another year could be added to the plan so that it continuously reflects a six-year period.

RECOMMENDATION

Recommendation 2-4:

Include interim timelines and measurement criteria for each of the six-year plan objectives.

While the six-year plan includes dates for completion and reporting is done biennially, there is no indication of an interim timeline or criteria for measurement. This addition would allow those responsible for implementation of the plan to monitor their progress on a regular basis.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

2.4 Organization and Management

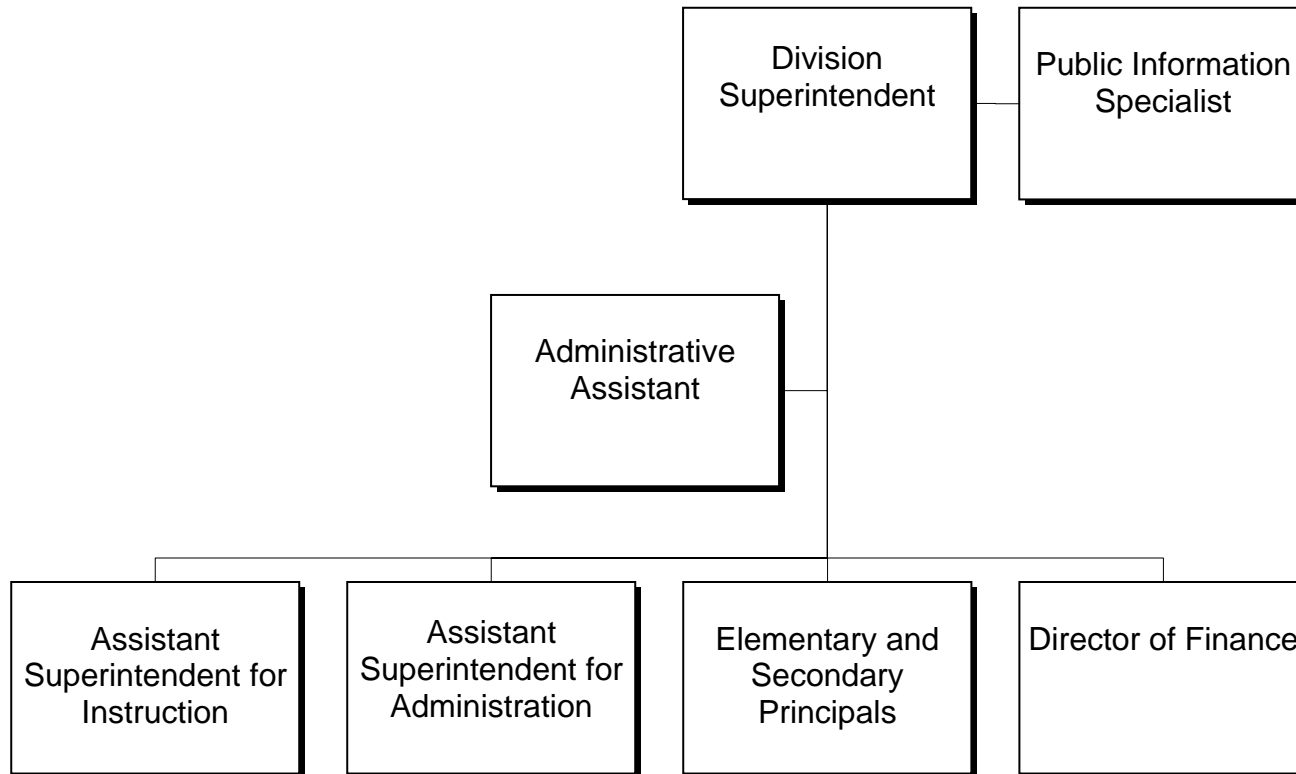
The effective organization and management of a large organization is typically composed of the executive and management functions incorporated into a division organization. Within this division a series of functional areas, determined as a response to its mission and related goals, are assembled. The successful, contemporary organization has, among its essential characteristics, the capacity to alter its structure to meet changing client requirements. The more existent culture of the organization restricts this response, the less likelihood of the organization meeting client requirements and, as a result, experiencing successes.

This section reviews the Louisa County Public Schools' organization, decision-making, management, planning and accountability, internal and external communications, and school organization and management.

2.4.1 Division Organization

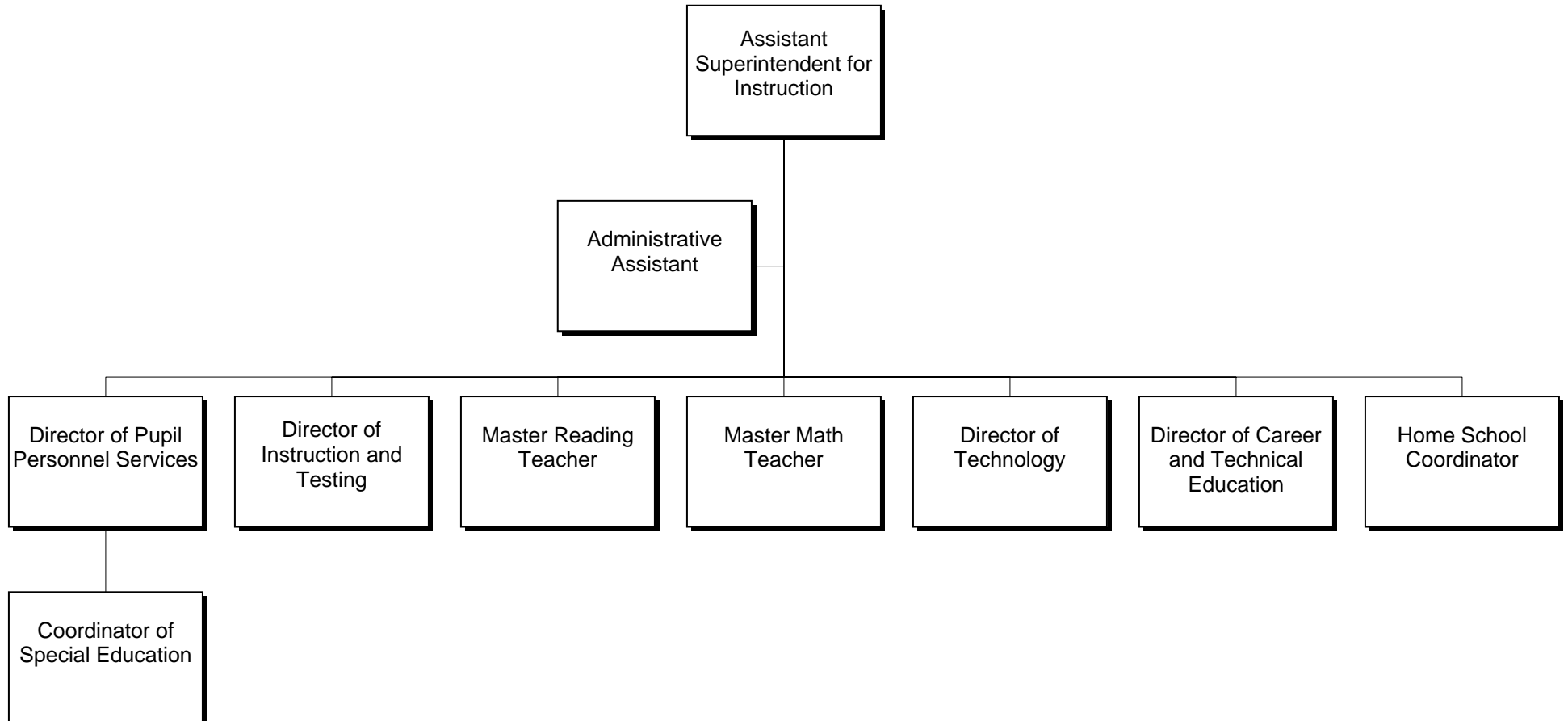
Exhibits 2-7 through 2-9 provide the current organizational chart in the Louisa County Public Schools for the reporting structures of the superintendent, assistant superintendent for instruction, and assistant superintendent for administration, respectively.

**EXHIBIT 2-7
LOUISA COUNTY PUBLIC SCHOOLS
CURRENT ORGANIZATIONAL CHART
SUPERINTENDENT OF SCHOOLS**



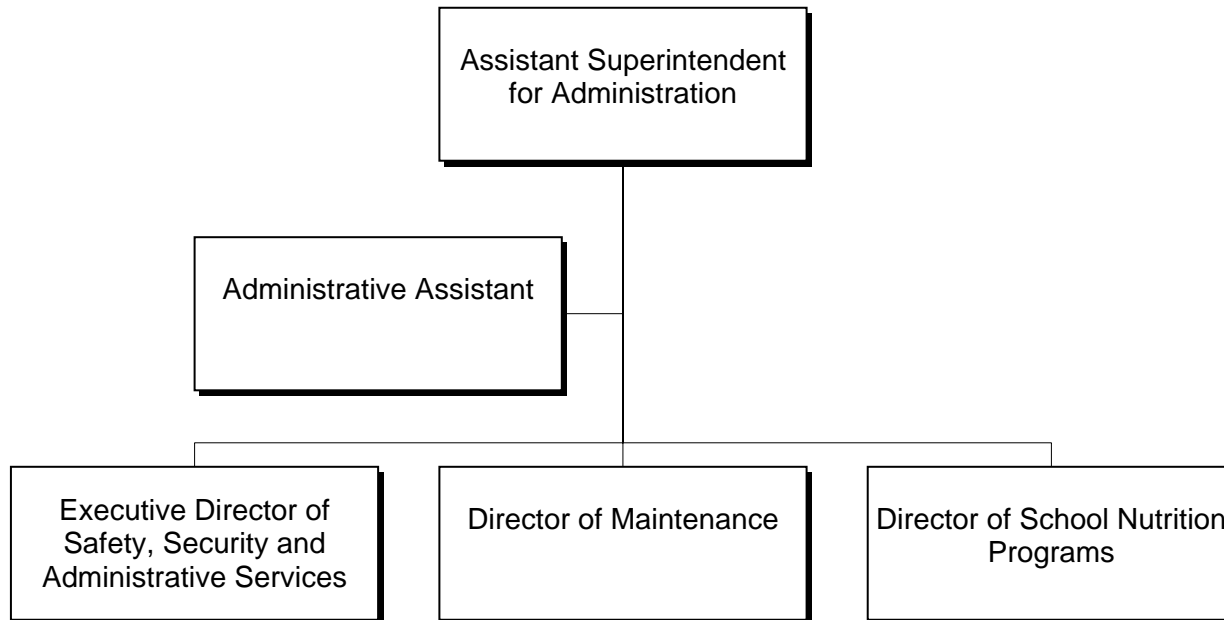
Source: Louisa County School Division, 2006.

**EXHIBIT 2-8
LOUISA COUNTY PUBLIC SCHOOLS
CURRENT ORGANIZATIONAL CHART
ASSISTANT SUPERINTENDENT FOR INSTRUCTION**



Source: Louisa County School Division, 2006.

**EXHIBIT 2-9
LOUISA COUNTY PUBLIC SCHOOLS
CURRENT ORGANIZATIONAL CHART
ASSISTANT SUPERINTENDENT FOR ADMINISTRATION**



Source: Louisa County School Division, 2006.

FINDING

Division administration in the Louisa County School Division is staffed higher than the peer division average and peers with greater enrollment. Exhibit 2-10 shows these comparisons.

**EXHIBIT 2-10
ENROLLMENT AND ADMINISTRATION
LCPS AND PEER SCHOOL DIVISIONS
2003-04 SCHOOL YEAR**

SCHOOL DIVISION	STUDENT ENROLLMENT AND ADMINISTRATION POSITIONS		
	ENROLLMENT	CENTRAL OFFICE	SCHOOL LEVEL
Louisa County	4,408	11.0	8.0
Fluvanna County	3,395	7.0	5.2
Botetourt County	4,831	7.0	6.0
Orange County	4,298	7.0	7.0
Powhatan County	4,209	8.0	4.2
Shenandoah County	5,954	8.0	9.0
District Average	4,516	8.0	6.6

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

While the division has a higher ratio of administrators to student enrollment than the peer average, they have been able to maintain a high level of satisfaction among division and school-level staff. Satisfaction levels with central office services is very high for LCPS as shown in Exhibit 2-11, with 93 percent of principals and 55 percent of teachers responding *agree or strongly agree* to the statement, "Central office administrators provide quality service to schools." In response to the statement, "Louisa County Schools has too many layers of administrators," none of the central office administrators or principals, and only 22 percent of teachers agreed with the statement. An equally positive affirmation was given to the statement, "Most of Louisa County Schools administrative procedures (e.g., purchasing, travel requests, leave applications, etc.) are highly efficient and responsive." Eighty-four percent of principals and 64 percent of teachers agreed or strongly agreed with the statement, along with 92 percent of central office administrators.

This is confirmed through the staff survey results where 84 percent of principals and 61 percent of teachers graded the district office administration as "A" or "B." Because of this effectiveness report and a careful examination of the use of administrative and support positions, consultants believe that the current organizational pattern should be maintained. This pattern will permit the division to meet the demands of NCLB, state mandates, and projected increases in student enrollment and an increase in the number of schools to be served.

**EXHIBIT 2-11
COMPARISON SURVEY RESPONSES
WITHIN LOUISA COUNTY SCHOOLS**

PART F: ADMINISTRATIVE STRUCTURE/PRACTICES	(% A + SA) / (% D + SD) ¹		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. Most administrative practices in Louisa County Schools are highly effective and efficient.	93/8	100/0	44/28
2. Administrative decisions are made promptly and decisively.	93/8	92/0	40/29
3. Louisa County Schools administrators are easily accessible and open to input.	85/8	77/0	49/32
4. Authority for administrative decisions is delegated to the lowest possible level.	38/31	46/38	21/24
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	84/0	100/0	58/25
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	8/62	15/69	29/33
7. The extensive committee structure in Louisa County Schools ensures adequate input from teachers and staff on most important decisions.	77/0	92/0	37/31
8. Louisa County Schools has too many committees.	15/69	15/77	44/27
9. Louisa County Schools has too many layers of administrators.	0/85	0/100	22/45
10. Most of Louisa County Schools administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	92/0	84/0	64/13
11. Central office administrators are responsive to school needs.	92/8	85/15	52/19
12. Central office administrators provide quality service to schools.	92/8	93/8	55/17

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

COMMENDATION

The Louisa County Public Schools Division is commended for operating and administratively maintaining a high level of school-level customer satisfaction.

2.4.2 Decision-Making and Management

Within the heart of an organization resides its life providers—the decision making and management processes. Richard Beckhard in *The Organization of the Future* profiles the healthy organization and notes that it:

- has a strong sensing division for receiving current information on all parts of the division and their interactions (division dynamics thinking);
- operates in a “form follows function” mode --- work determines the structures and mechanisms to do it and, consequently, it uses multiple structures (formal pyramidal structures, horizontal structures and teams, project structures, and temporary structures (as when managing a major change);
- has a management division that is information driven, and information is shared across functions and organization levels;
- encourages and allows decisions to be made at the level closest to the customer, where all the necessary information is available;
- communicates relatively openly throughout the division;
- operates in a learning mode and identifying learning points is part of the process of all decision making;
- makes explicit recognition for innovation and creativity, and has a high tolerance for different styles of thinking and for ambiguity; and
- is generally managed with and guided by a strong executive officer employing a variety of work groups composed of individuals possessing appropriate skills and complementary traits.

FINDING

The administrative team in the Louisa County Public Schools meets on a regular basis to review on-going matters and provide updates. This process is completed through the use of the following mechanisms:

- Regularly scheduled principals’ meetings involving all school and division office administrators.
- A Superintendent’s Advisory Council, consisting of representatives from each school faculty, cafeteria staff, custodial staff, instructional assistants, secretaries, maintenance, transportation and the

education association. The Advisory Council meets monthly with agendas often consisting of program updates and reviews, budget items, school calendar, etc.

- A Division Leadership Team that consists of division administrators, principals, and building leadership team chairs. This team meets four times a year for the purpose of planning and implementing division wide instructional priorities. Each school has a building leadership team to guide the implementation of these activities at each school.
- A Superintendent's Parent Advisory Council consisting of a parent representative from each magisterial district in Louisa County. The purpose of the Parent Advisory Council is to maintain good communication between the division and the community.

COMMENDATION

The Louisa County Public Schools Division has established and operated numerous committees to help maintain communications both inside and outside of the division and to assist with the decision-making process.

FINDING

The Louisa County Public School Division does not have an established program of providing regular professional development for administrators and staff, particularly as related to the implementation of the six year plan.

There are numerous informal opportunities for this to occur but it is not organized and evaluated in a systematic way. With the demands of NCLB, state standards and accreditation, changing technology, the need to prepare personnel to replace retiring and other departing personnel, the modern educational organization is recognized as needing a comprehensive professional development program based on an assessment of division needs.

RECOMMENDATIONS

Recommendation 2-5:

Develop a system of regular professional development and training of administrative staff geared toward implementation of the six-year plan and other clearly defined division needs.

The plan should include all division level staff and principals and include activities that will ensure regular communications regarding school improvement throughout the division. This will provide the framework for all levels of the administrative staff to understand what their role is in school improvement efforts and how success will be determined. Sample activities may include:

- strategic and long-range plan development;

- identification of data necessary to ensure that decisions are based upon accurate and complete information;
- effective community involvement;
- preparing the team to function effectively, including identification and treatment of dysfunctional activity and establishing effective internal communications;
- strategies for the specific and purposeful abandonment of obsolete, unproductive practices and programs;
- divisions or means for monitoring the division's organizational climate;
- development and promotion of divisions thinking.

Additionally, the professional development opportunities should include preparation of personnel to fill arising roles and critical administrative positions as they open.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

2.4.3 Schools Organization and Management

All activity in a school division should be related directly or indirectly to the education of the students. The delivery of educational programs typically occurs at the school level through prescribed programs. The school curriculum and instructional programs, safety and security requirements, student management necessities, employment of personnel and other considerations are often school-level management decisions.

To meet the requirements of providing appropriate administrative and instructional support to schools, standards to guide the determination of positions to be budgeted and assigned to each school are typically adopted.

FINDING

The school division exceeds the Standards of Quality as well as the Southern Association Accreditation Standards (SACS) for administrative staffing of schools.

LCPS provides instructional programs to students in one high school, one middle school, and three elementary schools. The five high, middle, and elementary schools are each staffed with a principal and assistant principal positions as well as activities/athletic, guidance, and library positions. Exhibit 2-12 shows data related to various positions in LCPS. As can be seen there are a total of 12 assistant principals.

**EXHIBIT 2-12
SCHOOL ENROLLMENT AND ASSIGNED
ASSISTANT PRINCIPAL POSITIONS
APRIL 2006**

SCHOOL	ENROLLMENT	ASSISTANT PRINCIPALS	PROJECTED ASSIGNMENT OF ASSIST. PRINCIPAL BASED ON SACS
Louisa County High	1,355	5	3.40
Louisa County Middle	1,094	3	2.70
Thomas Jefferson Elementary	725	2	1.50
Jouett Elementary	623	1	1.25
Trevilians Elementary	581	1	1.15
Totals	4,378	12	10.00

Source: Prepared by MGT of America from 2003-04 Superintendents' Annual Report for Virginia, Virginia Department of Education, Web site, 2006.

Typically, elementary schools are staffed at a ratio of one assistant principal for each 500 students in enrollment and secondary schools have one assistant principal for each 300 to 400 students. Applying this formula shows that the board has approved increasing school-level assistant principal staffing in each school. Interviews with personnel, community forum information, and survey data indicate that this decision has been beneficial to the students of LCPS and, combined with other actions, has resulted in better student performance (see the chapter on Educational Service Delivery for a more detailed discussion of student performance).

COMMENDATION

The Louisa County Public Schools are commended for providing a level of administrative staffing that supports the academic program goals and objectives and allows the schools in the division to attain commendable levels of achievement.

**3.0 EDUCATION SERVICE
DELIVERY**

3.0 EDUCATION SERVICE DELIVERY

This chapter of the report reviews the delivery of educational and support services to students in Louisa County Public Schools (LCPS). The chapter examines the education service delivery to determine if programs that serve students are efficient, effective, and staffed appropriately in order for the school division to meet its goal to provide a rigorous, standards-based instruction for all students and to meet the federal requirements of No Child Left Behind (NCLB) and Individuals with Disabilities Education Act (IDEA) legislation. The review includes an analysis of documents, interviews, school visits, and survey responses from many employees who participated in the study as well as comparative information from school divisions selected for their similarity to LCPS in size and student demographics.

The chapter is divided into six sections, each providing an overview of specific educational service delivery functions that are critical to effective programs and services for all students.

- 3.1 Organizational Structure and Administrative Management
- 3.2 Curriculum and Instruction
- 3.3 Program Evaluation, Student Assessment and Accountability
- 3.4 School Improvement
- 3.5 Federal Programs
- 3.6 Pupil Personnel Services

CHAPTER SUMMARY

LCPS has demonstrated exemplary practices in the delivery of educational services and management. Dedicated staff have provided leadership and delivery of instruction to students throughout Louisa County that is consistent with the Virginia Standards of Learning.

The instructional models for reading and math, as well as the curriculum pacing guides serve as the framework for instruction in LCPS. When teachers follow the instructional model and the curriculum pacing guides provided for them, it can be assured that instruction of the Standards of Learning is provided. The SOL assessment scores have continued to increase for LCPS students over the last five years. This increase in academic performance is largely due to the instructional models for reading and math as well as the curriculum pacing guides. The instructional model and the curriculum pacing guides that have been developed for LCPS are exemplary.

LCPS offers a comprehensive Career and Technical Education (CTE) program. The program had noted deficits in the 2003-04 audit report, but with the dynamic leadership within the department, the CTE programs continue to improve. The department strives to increase dual enrollment with local colleges, increase industry credentials of the teaching staff, and increase the certification or credentials for the CTE programs. LCPS recognizes the importance of a quality CTE program and is committed to quality programs.

Alternative education programs offer options for students who are not successful in the general education setting. LCPS has an array of alternative programs for students who need additional credits for graduation, GED, or need a more restrictive setting due to their behavior. The administration of the alternative education program works closely with the administration of the secondary schools and share resources, as needed.

The No Child Left Behind Act (NCLB) has established the highest level of accountability in the history of public schools. NCLB requires that schools, school divisions, and states be held accountable for school improvement and Adequate Yearly Progress (AYP) for all students. LCPS demonstrates consistent practices for school improvement and accountability. LCPS administrators are improving their use of data analysis and working with teachers to use performance data for instructional planning. The purchase of the SOL Tracker software should greatly enhance the data analysis process for teachers and administrators throughout LCPS.

The Department of Federal Programs has assumed the responsibility for federal entitlement programs and gifted education. With a reorganization of the department and better alignment of the functions within the department, greater emphasis can be placed not only on management of federal programs, but also on effective instruction. Greater emphasis needs to continue to be placed on special student populations, including students whose native language is other than English (ESL) and students who are economically disadvantaged. The ESL population continues to grow in Louisa County and students who are economically disadvantaged are struggling academically at several Louisa County schools.

The Department of Pupil Personnel Services oversees special education and student support services. These services are highly regulated by federal and state regulations. LCPS continues to be challenged by delivery of educational and related services to students with disabilities. The electronic Individual Educational Plan (IEP) software will be an asset to the department in the development and monitoring of IEPs and compliance requirements with state and federal law.

While MGT found LCPS to have many exemplary practices in the delivery and management of educational services, other findings lead to recommendations for continued improvement of instruction and services to students. Recommendations include:

- Reorganize the Division of Instruction and decrease the number of teachers on special assignment over the next five years.
- Integrate learning strategies and differentiated instruction into the general education curriculum.
- Expand the responsibilities of the Director of Instruction and Testing to include program evaluation and develop a policy on program evaluation to strengthen its contribution as an integral component of the LCPS continuous improvement process.
- Purchase and implement the SOL Tracker data reporting software.

- Examine effective practices and resources that can be collected and disseminated to all school administrators and teachers.
- Ensure that all school improvement monitoring instruments are aligned to the characteristics of high performing and effective schools.
- Increase staff development and instructional planning for subgroups of underachieving students, as well as for high performing students beyond SOL mastery.
- Develop a consolidated application for participation in programs authorized by the *No Child Left Behind Act*.
- Ensure that all teachers are highly qualified by 2006.
- Examine the flexibility offered by using Title I and other federal funds to support increased proficiency among all students through shared funding of general revenue or special education funds.
- Develop and implement a divisionwide elementary guidance curriculum consistent with national standards and state regulations.
- Review and select a schoolwide positive behavioral support system.
- Ensure that consistent compensatory attendance procedures are implemented at LCHS.
- As directed by the Virginia Department of Education, develop activities, timelines, and data collection elements documenting and reporting improved educational and functional outcomes for students with disabilities as required by IDEA 2004.
- Develop an annual special education action plan including mission, vision, goals, objectives, activities, evaluation, and a scope and sequence of timeline of training and educational support activities for schools.
- Establish an appropriate co-teaching model of inclusive education at secondary schools.
- Implement a consistent, divisionwide pre-referral process in the general education program.
- Implement an electronic system for the development of individual educational plans and maintaining compliance with special education state and federal requirements.
- Discontinue the terminology of categorical special education classrooms and refer to special education as a service in the least restrictive environment, which may include more restrictive cross-categorical environments.

INTRODUCTION

A cost-effective educational service delivery system is one that is accountable for student achievement without unnecessary expenditures. In order for effective management of instructional programs to take place, planning and budgeting must be interrelated. In addition, the school division must provide a clearly focused mission supported by measurable goals and objectives. In a small school division, it is critical to ensure that programs are equitable for students, regardless of the school they attend, and that processes are streamlined and focused in the most effective and efficient manner possible. For this to happen, programs, processes, and outcomes in all facets of the organization must be monitored and evaluated to ensure that the division's focus is maintained on student learning and achievement, and that all teachers maximize instructional time.

Exhibit 3-1 shows an overview of peer public school divisions in 2004-05. As shown, LCPS has similar enrollment to other divisions, yet has the highest percentage of economically disadvantaged students.

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

SCHOOL DIVISION	CLUSTER IDENTIFICATION	TOTAL STUDENT POPULATION	STUDENT POPULATION PER 1,000 GENERAL POPULATION	PERCENT ECONOMICALLY DISADVANTAGED	TOTAL NUMBER OF SCHOOLS
Louisa County	2	4408	172	34.1	5
Fluvanna County	2	3395	169	9.9	5
Botetourt County	2	4831	158	14.5	11
Orange County	2	4298	166	24.5	8
Powhatan County	2	4209	188	11.9	4
Shenandoah County	2	5954	170	26.3	9
Division Average	N/A	4,516	171	20.2	7

Source: Virginia Department of Education, Web site, 2006,
United States Census Bureau, 2000 Census Data,
www.schoolmatters.com.

Exhibit 3-2 shows the teacher staffing levels and pupil to teacher ratios for LCPS and peer school divisions in 2003-04. As shown, LCPS has the highest total teacher per student ratio. This is reflective of the number of teachers on special assignment, primarily Title I funded, in LCPS. The LCPS ratio of pupils to classroom teachers is one of the lowest when compared to other school divisions.

**EXHIBIT 3-2
TEACHER STAFFING LEVELS AND PUPIL: TEACHER RATIOS*
PEER SCHOOL DIVISIONS
2003-04 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
Louisa County	82.04	12.7	11.5
Fluvanna County	77.18	14.2	11.3
Botetourt County	77.86	18.3	8.8
Orange County	68.16	10.7	15.8
Powhatan County	80.95	14.7	9.7
Shenandoah County	80.56	11.1	15.4
Division Average	77.79	13.6	12.1

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

*Ratios based on End-of-Year enrollments.

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

MGT survey results show that administrators, principals, and teachers strongly agree (or agree) that:

- Overall quality of public education in LCPS is good or excellent.
- Overall quality of public education in LCPS is improving.
- Grade given to the LCPS is A or B.
- Grade given to LCPS administrators is A or B.
- The emphasis on learning in LCPS has increased in recent years.
- Our schools have materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.
- Our schools are good places to learn.
- Most students are motivated to learn.
- Lessons are organized to meet students' needs.
- The curriculum is broad and challenging for most students.
- Teachers in our schools know the material they teach.
- Teachers in our schools care about students' needs.
- Teachers expect students to do their very best.
- Principals and assistant principals in our schools care about students' needs.

- Sufficient student services are provided in this school division.
- School-based personnel play an important role in making decisions that affect schools in the division.

MGT survey results further indicate that administrators, principals and teachers overwhelmingly believe that the curriculum planning, instructional support, and staff development, are adequate or outstanding.

3.1 Organizational Structure and Administrative Management

LCPS is committed to using its resources, including personnel, to provide students with a safe, technology-rich environment so that students can engage in meaningful school work that challenges them to think, reason, and develop ownership for their learning. This section of the report reviews the organizational structure of education service delivery including the Departments of Testing, Pupil Personnel Services, and Federal Programs.

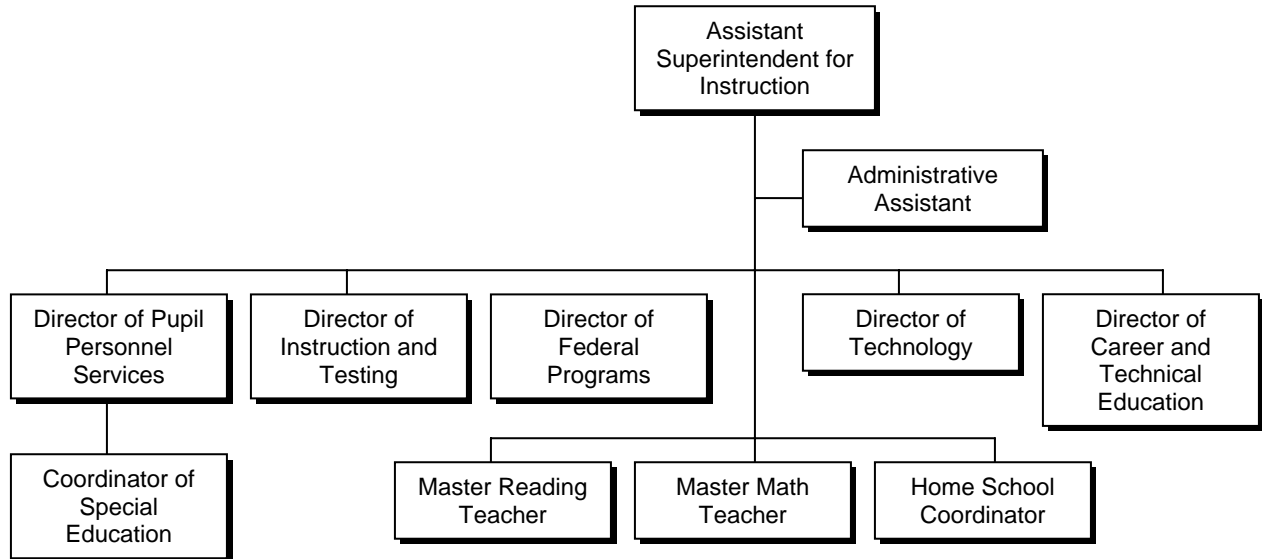
FINDING

The current organizational structure limits the division's administrative effectiveness and efficiency of curriculum and instruction initiatives. Four of the five schools in Louisa County did not meet federal requirements of AYP.

Exhibit 3-3 shows the current organizational structure of the Department of Instruction. As can be seen the Assistant Superintendent of Instruction has nine direct reports including the: Administrative Assistant, Director of Pupil Personnel Services, Director of Instruction and Testing, Director of Federal Programs, Master Reading Teacher, Master Math Teacher, Director of Technology, Director of Career and Technical Education, and the Home School Coordinator. The Division of Instruction can be more efficiently managed if the Assistant Superintendent of Instruction has fewer direct reports and a greater concentration of administrative staff who were experts in teaching and learning, as well as staff development.

The Director of Federal Programs is currently responsible for federal grants management and gifted education. The administrator in this position has announced his retirement at the end of this academic year. The vacancy of this position can allow LCPS to better align curriculum and instruction functions within the division. Greater emphasis must be placed on this position assuming a strong leadership role in curriculum development, implementation, and support to schools. In addition, this position can further assume program development areas of English as a Second Language and pre-kindergarten expansion. Currently, the Director of Instruction and Testing assumes responsibility for both these programs areas. With the need for greater emphasis in these two areas, the Director of Instruction and Assessment cannot manage program expansion and the growing need for assessment, accountability, and data analysis. With a clear focus on curriculum and instruction, the master reading and math teachers could directly report this position and decrease the number of direct reports to the Assistant Superintendent of Instruction.

**EXHIBIT 3-3
LOUISA COUNTY PUBLIC SCHOOLS
ORGANIZATION STRUCTURE
DIVISION OF INSTRUCTION**



Source: LCPS, Superintendent's Office, 2006.

The Director of Instruction and Testing has responsibility for functions of curriculum and testing. With the emphasis on accountability and improved student performance, this position must have a primary focus on coordination of testing, accountability through the school improvement process, and providing technical assistance to schools, particularly in the area of data analysis. This is further supported by the fact that four of the five schools in Louisa County did not meet federal requirements of AYP.

The Director of Instruction and Testing must also assume greater responsibility in implementing SOL Tracker software and providing staff development to school principals and teachers in the reporting of data, analysis of data, and using the data for instructional planning. The implementation of the automated data reporting system is imperative to the accountability functions of the division and must be given a high priority by the Director of Instruction and Testing. The Director of Instruction and Testing's responsibilities for instruction must be transferred other staff to allow the concentration of time and expertise in the areas of testing, as well as school and division accountability.

The Department of Pupil Personnel Services is lacking an effective framework to ensure efficient leadership. A realignment of functions within the department can improve the functions within the department. In addition, there is a lack of overall leadership and focus on student services or providing support to teachers of special education. Initiatives for improvement within the department appear to be limited and lack a strong emphasis that can lead to improved student performance. Initiatives that could be considered for improvement of special education and student services include:

- assigning school psychologists as chairpersons for the eligibility team, thus eliminating the need for the director to attend all

meetings. The director could be more selective in attending particular meetings, as appropriate. This change of function would allow more time for the director to assume the leadership duties within the department.

- hiring one additional Coordinator of Special Education to serve as a curriculum liaison with general education. If LCPS chooses not to assign the eligibility team chair responsibilities to the school psychologist another option to consider would be to assign one coordinator to special education compliance and another special education coordinator for curriculum. The curriculum and instruction for students with disabilities is extremely deficient, and is separate and apart from general education in many instances. Based on a review of class rosters, student performance data, and interviews while on-site, the quality of inclusive education is also lacking, particularly at the secondary level.
- designating a lead special education teacher at each school to help coordinate case conferences and IEP meetings. The lead special education teacher could also assist with school-level staff development and implementation of the department's initiatives for improved performance of students with disabilities.
- aligning speech pathologists with the division's literacy initiative to focus, as appropriate, on language development and an integrated model of language services in conjunction with classroom teachers. The Virginia Department of Education has recently published a best practices document for speech and language services in public schools which can serve as an excellent resource in this alignment.
- maintaining lead staff for school psychology, nursing, and guidance to assist the director in assessing student services needs, identifying initiatives for improvement, and implementation of technical assistance to schools. These lead staff must also assume leadership responsibilities within their discipline and assist the director in the overall management and delivery of student support services.

The Departments of Career and Technical Education and Technology are adequately staffed and provide appropriate administrative leadership, respectively.

As previously shown in Exhibit 3-2, LCPS has a greater teacher to pupil ratio than every comparison school division. MGT finds that this is largely due to the number of teachers on special assignment who serve as Reading Specialists in LCPS. For example, there are seven reading specialists assigned to Thomas Jefferson Elementary School and four reading specialists assigned to Trevilians Elementary School. There is one reading specialist assigned to the middle school, but none at the high school.

When comparing, the number of teachers on special assignment in LCPS with peer comparison divisions, the number of reading specialists is excessive. In reviewing other school divisions throughout Virginia, MGT has not found more than two reading

specialists per school. Most frequently, MGT has found that there is only one reading specialist assigned to each school. LCPS also does not have reading specialists at the secondary level even though student performance data show that there is a three year decrease in the percentage of subgroups of students rated as proficient or advanced in reading and language arts in seventh and eighth grades.

Elimination of reading specialists positions at the elementary schools during 2006-07 would be not advised due to the change in administration and leadership at the elementary level. In time, as new administrators provide the instructional leadership necessary at their respective schools and as classroom teachers are more skilled at teaching reading to a diverse group of students, the need for excessive numbers of reading specialist should decrease. In addition, LCPS can consider realignment of reading specialists to target secondary students who are struggling readers.

RECOMMENDATION

Recommendation 3-1:

Reorganize the Division of Instruction and decrease the number of teachers on special assignment over the next five years.

LCPS should reorganize the Division of Instruction and align functions to highly concentrate on curriculum and instruction, testing, accountability, and data analysis, as well as improved special education and student services. It is recommended that LCPS:

- Change the Director of Federal Programs to the Director of Instruction and Federal Programs. The proposed Director of Instruction and Federal Programs should assume responsibilities for curriculum and instruction including pre-kindergarten programs, EUSOL, and gifted education. The Director of Federal Programs should also maintain responsibility for federal grant applications and monitoring in conjunction with the Assistant Superintendent for Instruction and school principals. The proposed position should also assume administrative oversight of master teacher functions for math and reading, thus decreasing the number of direct reports to the Assistant Superintendent of Instruction.
- Change the Director of Instruction and Testing to the Director of Assessment and Accountability. The proposed Director of Assessment and Accountability should assume responsibilities for testing, SOL Tracker, school improvement, and technical assistance to schools in data analysis. Transferring all instructional responsibilities to the proposed Director of Instruction and Federal Programs will allow the proposed Director of Assessment and accountability to focus strictly on data reporting, analysis, and technical assistance to schools for overall school improvement.
- Create stronger leadership in the Department of Pupil Personnel Services by:

- reassigning eligibility team meetings to other staff;
 - assigning lead psychologist, guidance counselor, and nurse to assume leadership of key initiatives within each discipline, respectively.
 - aligning language services with literacy initiatives and collaborate with teachers in general education curriculum; and
 - assigning a lead special education teacher at each school to serve as a liaison for staff development, communication, and initiatives implementation with the central office.
- Eliminate five reading specialists at the elementary level within the next five years;
 - Transfer two reading specialists to the secondary level, as needed, to improve reading of students at the middle and high school.

FISCAL IMPACT

To hire a second Coordinator for Special Education, the costs would be \$50,000 salary plus \$15,000 benefits at 30 percent for a total salary and benefits of \$65,000.

To eliminate five reading specialists during the next five years, the savings would be \$38,000 times five positions equals \$190,000 plus \$58,900 benefits at 31 percent for a total savings and benefits of \$248,900. LCPS should eliminate one position in years 2006-07 through 2009-10 and two positions in 2010-11.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Hire Coordinator of Special Education	(\$65,000)	(\$65,000)	(\$65,000)	(\$65,000)	(\$65,000)
Eliminate Five Reading Specialists	\$49,780	\$49,780	\$49,780	\$49,780	\$99,560
Total Savings	\$15,220	\$15,220	\$15,220	\$15,220	\$34,560

3.2 Curriculum and Instruction

The Department of Curriculum and Instruction provides leadership and expertise in the development of general education curriculum and instructional initiatives that support achievement for all students in LCPS. The department is responsible for the development of new curricula, and curricula and pacing guides that are based on Virginia Standards of Learning. Professional development opportunities are related to the effective implementation of new curricula and designed to support the instructional needs of teachers.

LCPS classrooms are focused on teaching and learning. The pursuit of mastering the Virginia Standards of Learning (SOLs) serves as the core for the instructional day. Beyond the SOLs, all LCPS strive to serve the diverse needs of students by offering gifted and accelerated programs as well as the needed special education services. While technology and creativity are inherent in the instructional program, the division's primary goal is to improve learning and student achievement. Progress toward this goal is demonstrated by the continued and significant academic improvement of LCPS students in recent years.

FINDING

LCPS demonstrates many exemplary practices to improve student achievement and instructional practices. Improvement in SOL reading and math scores for grades kindergarten through fifth over the past five years can be attributed, in part, to the implementation of a *Literacy Diet* in 2001-02 and a *Math Diet* in 2003-04 along with hiring a Master Reading Teacher in 2001-02 and a Master Math teacher in 2003-04.

The *Literacy Diet*, developed by the University of Virginia's McGuffey Reading Center, provides suggested amounts of time to be allocated each day to literacy instruction. Sample schedules are also included in the Literacy Diet. Organizing topics for English include seven components of language arts, including: oral language, writing, phonemic awareness, phonics, fluency, vocabulary, and comprehension. These components are taught daily throughout the year according to the guidelines which address the instructional needs of the emergent to instructional reader. Oral language is integrated throughout all subject areas.

The *Math Diet* offers daily instruction in fluency which a balance of efficiency, accuracy, and flexibility. Daily instruction also includes problem solving and concept building. Mathematical literacy develops in students when they understand what they are doing as they manipulate numbers, symbols, or geometric objects. It also requires that students be able to explain and support their answers verbally and in writing.

The LCPS instructional model provides all teachers with the division's expectation for planning and delivery of instruction to students. Developed in 2003, from a recommendation by a state academic review team, the instructional model was shared by the Assistant Superintendent for Instruction with all teachers at faculty meetings and provided to new teachers during their pre-service induction program. The elements of the model are included on the division's Web site and are used by principals as a guideline for observations.

The LCPS curriculum guides are also comprehensive and aligned with the Virginia SOLs. The guides provide the organizing topics, time for instruction, related SOLs, released test items, assessments, and instructional resources. Teachers are actively involved in the development and revision of curriculum guides. When teachers follow the curriculum pacing guides provided for them, they can be assured that instruction of the SOLs is included.

COMMENDATION

LCPS is commended for developing and successfully implementing reading and math instructional models and curriculum pacing guides in alignment with the Virginia Standards of Learning.

FINDING

LCPS must continue to work toward implementing differentiated instruction and incorporating effective learning strategies into instruction. While teachers may include differentiation and learning strategies in lesson plans, the actual implementation continues to need improvement.

Interviews with staff and onsite observation shows that teachers continue to need support in differentiation and instructional strategies. LCPS has provided training in Creating Independence through Student-owned Strategies (Project CRISS). The division has also provided some staff development using *What Works in Classroom Instruction* published by McREL.

The Differentiated Classroom: Responding to the Needs of All Learners (Tomlinson, 1999) is also an excellent resource for differentiated instruction. Exhibit 3-4 compares traditional and differentiated classrooms. As can be seen, differentiated, or multi-level, instruction provides students with many ways to access and learn content within the general curriculum.

RECOMMENDATION

Recommendation 3-2:

Strengthen the integration of learning strategies and differentiated instruction into the general education curriculum.

LCPS should integrate learning strategies and differentiated instruction into the general education curriculum. The Department of Curriculum and Instruction should assume the primary responsibility for this recommendation. The Department of Curriculum and Instruction should ensure that administrators, general education and special education teachers participate in staff development related to the integration of learning strategies and differentiated instruction into the general education curriculum, as well as summative assessment and ongoing monitoring of student progress.

FISCAL IMPACT

This implementation can be implemented with existing resources.

**EXHIBIT 3-4
PRINCIPLES, RATIONALE, AND CRITERIA IN APPLYING UNIVERSAL DESIGN TO
CURRICULUM, INSTRUCTION, AND EVALUATION**

PRINCIPLES/RATIONALE	CRITERIA
<p>1. Flexible use. Curriculum, instruction, and evaluation should be designed from the outset for students with diverse abilities.</p>	<ul style="list-style-type: none"> ▪ Accommodates students with diverse abilities. ▪ Accommodates students who speak various languages. ▪ Does not stigmatize students. ▪ Benefits as many potential users as possible. ▪ Avoids inconveniencing students with any particular characteristics.
<p>2. Simple and intuitive use. Curriculum, instruction, and evaluation should be designed from the outset to be as easy to understand and use as possible.</p>	<ul style="list-style-type: none"> ▪ Is easy to use. ▪ Avoids unnecessary complexity. ▪ Provides clear directions and understandable examples. ▪ Breaks complex tasks into small steps.
<p>3. Perceptible information. Curriculum, instruction, and evaluation should be designed from the outset to be readily perceived regardless of environmental conditions or a user's sensory abilities.</p>	<ul style="list-style-type: none"> ▪ Communications information to users independent of environmental conditions and/or users' sensory abilities. ▪ Highlights essential information. ▪ Breaks information into comprehensive chunks.
<p>4. Tolerance for error. Curriculum, instruction, and evaluation should be designed from the outset to minimize the likelihood of error and the negative consequences resulting from error.</p>	<ul style="list-style-type: none"> ▪ Avoids punishing students for mistakes. ▪ Provides ample time to respond. ▪ Provides immediate and thorough feedback. ▪ Monitors progress. ▪ Provides adequate practice time.
<p>5. Reasonable physical, cognitive, and psychological efforts. Curriculum, instruction, and evaluation should be designed from the outset to avoid making a user uncomfortable or fatigued.</p>	<ul style="list-style-type: none"> ▪ Presents information that can be completed in a reasonable timeframe. ▪ Avoids physically, cognitively, and/or psychologically exhausting the user.
<p>6. Size and space for approach and use. Curriculum, instruction, and evaluation should be designed from the outset to be used in a physically accessible manner.</p>	<ul style="list-style-type: none"> ▪ Requires reasonable amount of space. ▪ Incorporates accessible materials and learning activities.

Source: Adapted from Wehmeyer, M. L., Lance, G.D., & Bashinski, S. (2002). Promoting access to the general curriculum for students with mental retardation: A multi-level model. *Education and Training in Mental Retardation and Developmental Disabilities*, 37(3), 223-234.

3.2.1 Career and Technical Education

One of the critical needs of employers is to hire workers with new and different sets of knowledge and skills, including positive attitudes, good work habits, the ability to learn a diverse set of tasks, and problem-solving, communication, scientific, and interpersonal skills (Connecticut Department of Labor, 2001). Educators, especially those in career and technical education (CTE), are addressing those new and different sets of knowledge and skills alongside other, more traditional knowledge and skills.

In the early twenty-first century, the best-paying jobs will demand high skills levels, particularly in areas on reading, writing, math, reasoning, and computing. A larger scale of the fast-growing occupations also will require education beyond high school, but not necessarily a four-year college degree. (Work Force 2020, Work and Workers in the 21st Century).

FINDING

LCPS offers a comprehensive career and technical education program. The division's competency attainment rate of essential competencies, board seal attainment rate, and performance by students who are members of a special population exceeded state percentages.

LCPS' CTE courses can greatly enhance students' ability to become productive workers and citizens. The following LCPS sections provide students with complete course and program descriptions and any of the necessary prerequisites for the individual programs:

- Business Information Technology;
- Army ROTC;
- Trade and Industrial Education;
- Cosmetology;
- Firefighting;
- Computer Systems Technology;
- Emergency Medical Technician;
- Technology Education;
- Health and Medical Sciences;
- Family and Consumer Sciences; and
- Agricultural Education.

CTE offers dual enrollment with the local community college for business information and technology, trade and industrial education, technology education, health and medical sciences, family and consumer sciences, and agricultural sciences.

Each course has a comprehensive course description and curriculum map. The description includes the task or competency, task definition, related SOLs, and a crosswalk to Virginia's *All Aspects of Industry*.

The Annual Audit Report for LCPS for 2003-04 shows:

- **Academic Achievement - Percent of students enrolled in CTE courses who passed the SOL end-of-course tests:**

English – 74.77 percent as compared to 81.48 percent statewide;
Mathematics – 51.68 percent as compared to 70.60 percent statewide;
History – 70.71 percent as compared to 73.80 percent statewide;
Science – 64.94 percent as compared to 70.30 percent statewide.

- **Occupational Competence - Competency Attainment Rate of essential competencies on state-provided, industry-validated competency lists:**

LCPS – 100 percent as compared to 95.83 percent statewide.

- **Secondary School Completion:**

LCPS – 100 percent as compared to 99.63 percent statewide.

- **Diploma/Credential - Board Seal Attainment Rate:**

LCPS – 61.36 percent as compared to 58.48 percent statewide.

COMMENDATION

LCPS is commended for its high student performance in CTE occupational competence, secondary completion, and diploma/credential rates.

FINDING

The Annual Audit Report for LCPS for 2003-04 also documents areas for improvement. These areas include:

- **Access/Success - Performance by student who are members of a special population:**

English – 62.63 percent as compared to 69.63 percent statewide;
Mathematics – 43.31 percent as compared to 61.26 percent statewide;
History – 55.85 percent as compared to 61.23 percent statewide;
Science – 50.80 percent as compared to 55.92 percent statewide;
Occupational Competence – 100 percent as compared to 94.50 percent statewide;
Transition – 100 percent as compared to 96.04 percent statewide.

- **Non-traditional career preparation - nontraditional enrollment:**

LCPS – 10.39 percent as compared to 13.48 percent statewide.

- **Non-traditional career preparation - nontraditional completion:**

LCPS – 18.05 percent as compared to 11.97 percent statewide.

RECOMMENDATION

Recommendation 3-3:

Continue to address program deficit areas to improve the academic performance of students in the CTE program and to increase the number of non-traditional students.

The Executive Administration Improvement Plan for 2005-06 shows that the Department of Career and Technical Education is addressing the program deficits. The leadership of the Department of Career and Technical Education is dynamic, focused, and provides a framework for documenting improvement in the CTE course offerings, student achievement, and course completion.

FISCAL IMPACT

This recommendation can be implemented with existing funds from the Carl Perkins Act.

3.2.2 Alternative Education

The purpose of alternative education has expanded from the education of youth who have dropped out, or who are at risk of dropping out, to students with diverse learning needs whose behavior warrants a more restrictive setting outside the general education setting. Those programs provide alternative programming, including flexible curricula that can address the unique social, behavioral, emotional, cognitive, and vocation needs of the individual student.

Alternative education programs are designed to meet the specific individual needs of students in the programs. While there is some variation in programs, the legislation outlines the following components:

- intensive, accelerated instructional program with rigorous standards for academic achievement and student behavior;
- low pupil-teacher ratio (the average ratio is one teacher for every ten students) to promote a high level of interaction between the student and teacher;
- plan for transitioning the enrolled students into the relevant school division's regular program;
- current program of staff development and training;
- procedure for obtaining the participation and support from parents as well as community outreach to build school, business, and community partnerships; and
- measurable goals and objectives and an evaluation component to determine the program's effectiveness.

FINDING

LCPS offers a number of quality programs for students who are unable to complete their studies in the standard middle school or high school environments. Both long-term and short-term programs offer students the opportunity to complete their studies and maintain acceptable attendance in an academic setting.

Real Educational Alternatives in Louisa County Involving the Youth (REALITY) is an alternative setting for students in grades six through twelve who are at risk of failure. While students remain the academic responsibility of their base school, the program provides alternative educational opportunities within a non-traditional setting. Smaller class size provides an avenue to strengthen the student's academic focus, to foster a greater realization of one's abilities, and to assist students with time management skills.

The ***Out-of-School Suspension*** component of Alternative Education Services provides an opportunity to positively impact upon the inappropriate behaviors of student while affording them a chance to stay academically focused. The community service component will afford students an opportunity to give back to the community as well as broaden their outlooks and re-channel some of the negative energies being display in the home school.

Success Performance Reading Investigating New Knowledge and Teaching (SPRINT) is designed to be a learning *outside the box* approach for high school students who are not being success in their academic pursuits in the home school. The goal is to put students on a recovery track which will allow for up to eight repeat classes in a semester.

Real Education Alternatives Against Drugs (REAAD) is a four day education program for assessment, self-evaluation, student group counseling and family counseling. The program aims to heighten awareness of harmful effects of mood-altering chemicals. The curriculum of REAAD provides students and their parents with accurate information aimed to encourage a realistic assessment of the role that drugs play in hampering academic, social, physical, and emotional success.

The Special Education Alternative Placement (SEAP) is structured for students with disabilities in grades six through twelve who are at risk of failure due to social issues. While students remain the academic responsibility of their base school, the program provides alternative education opportunities for learners within a non-traditional academic setting.

The dropout rate in LCPS has decreased from 5.51 percent in 1998-99 to 2.91 percent in 2004-05. This decrease is partially due to the division's commitment to alternative education. Contributing factors to successful results include:

- small school size;
- small teacher to student ratio;
- effective communication with high school staff, social services and juvenile court;

- individual and small group instruction;
- site separation from sending schools;
- cooperation from sending schools;
- support from the school board; and
- infusion of technology.

LCPS has developed an array alternative education options for students who are performing successfully in the general education setting. These alternative options provide varied opportunities for students to remain in school, and be successful academically and socially, rather than dropping out of school.

COMMENDATION

LCPS is commended for providing a continuum of alternative education programs for at-risk students.

3.3 Program Evaluation, Student Assessment, and Accountability

NCLB has dramatically changed the focus and accountability of schools and divisions throughout the country. Guiding principles mandated in the legislation include:

- ensuring that all students are learning;
- making all school systems accountable;
- ensuring that information is accessible and parental options are available; and
- improving the quality of teachers.

As a result, performance goals have been established in federal legislations including:

- By 2013-14, all students will reach high standards, at a minimum attaining proficiency or better in reading and mathematics.
- All limited English proficient students will become proficient in English and reach high academic standards, at a minimum attaining proficiency or better in reading, language arts, and mathematics.
- By 2005-06, all students will be taught by highly qualified teachers.
- All students will be educated in learning environments that are safe, drug free, and conducive to learning.
- All students will graduate from high school.

Local school divisions are required to test students in grades three through eight in reading and mathematics and once in each subject at the high school level. Each year, the percentage of students at these grade levels who pass these tests must increase according to a timeline established by the Virginia Department of Education. For the Commonwealth of Virginia, the Standards of Learning assessments are accountability measures used to determine not only accreditation by the Virginia Department of Education, but also adequate yearly progress (AYP) for meeting the benchmarks of NCLB.

3.3.1 Program Evaluation

To accomplish effective program planning, decisions that impact the delivery system of educational services and its resource allocation must be based on comprehensive data analyses and systematic planning process. Effective planning of education programs must consider specific needs of all students served throughout the division and the multiple resources available to meet student needs. To determine if resources are effectively used, school systems must establish a clear basis for evaluating the impact of its educational programs. Effective evaluation is ongoing to ensure that resources are expended in ways that are delivering intended results. An evaluation plan should be an integral part of any new program or practice.

FINDING

LCPS does not conduct any kind of formal internal evaluation of its programs. External reviews, such as the Southern Association of Schools and Colleges accreditation reviews and program monitoring from the Virginia Department of Education are the only ones that could be cited as regularly occurring program evaluations.

LCPS has one administrator assigned to divisionwide testing. The responsibilities of this position directly relate to planning for, delivery of, and disseminating of testing materials and assessment results. A greater need in LCPS includes the evaluation of student performance, based upon achievement data, within particular programs and instructional practices.

In addition, LCPS does not have a specific policy related to the evaluation of instructional programs. There is no regular practice, schedule, or rationale for conducting evaluations of existing programs, nor for including evaluation components in new programs. LCPS has no accountability for the use of evaluation as a tool for continuous improvement.

Without such accountability, the division is missing the opportunity for regular evaluation of programs and practices related to the student achievement of the purposes for which they were initiated. When program evaluation is an integral part of division practice and adoption of new programs, regular checkpoints offer information that can be used to inform the division of the need to add a new program, adjust an existing one, or to eliminate programs and practices that are not providing the benefits for which they were adopted.

RECOMMENDATION

Recommendation 3-4:

Expand the responsibilities of the Director of Instruction and Testing to include program evaluation and develop a policy on program evaluation to strengthen its contribution as an integral component of the LCPS continuous improvement process.

LCPS should expand the responsibilities of the Director of Testing to include program evaluation and develop a policy on program evaluation. The division should ensure that there is ample internal program evaluation to justify the continuation or elimination of instructional programs. Establishing a process to inform staff on a specific timetable of the effectiveness and efficiency of its programs will ensure that it is truly meeting the division's goals, and also provide information regarding program strengths. The division should create a set of guidelines and expectations for all evaluations, including templates for evaluation plans and results to facilitate use of the information that the evaluations provide.

The division works closely in some areas with the local community college and university. By taking better advantage of the assistance of the local postsecondary institutions in the area of research, it could provide benefits to the institutions and LCPS. Such an agreement should provide both a field experience for university or college students and faculty, and provide more consistent feedback regarding the effectiveness of programs, without administrators having to assume full responsibility for program evaluation.

FISCAL IMPACT

This recommendation can be implemented with existing resources. Through utilization of existing partnerships with local postsecondary institutions, evaluations should not incur further expenses.

3.3.2 Student Assessment

LCPS are fully accredited according to the Virginia accreditation standards.

Depending on IEPs and Section 504 Plans, students with disabilities may be exempted from one or more tests in grades 3, 5, and 8, and may participate in the Virginia Alternative Assessment Program (VAAP) test. Students who have English as a second language (ESL) are given a one-time exemption from the Standards of Learning (SOL) tests in those grades, if a building-level committee determines that such an exemption is necessary.

Based on student performance (pass rates) on those tests, schools are assigned levels of accreditation. For the 2004-05 school year and beyond, for full accreditation, students must meeting the following criteria:

- seventy (70) percent pass rate in four content areas;

- seventy-five (75) percent pass rate in grade three and five English; and
- fifty (50) percent pass rate in each of grade three science and social science.

During 2004-05, all LCPS were fully accredited according to the accreditation standards of the Virginia Department of Education. Academic growth trends for LCPS further show significant increase in pass rates from 1999-2000 to 2003-04 in all academic subjects including history, English, science, and math. Exhibit 3-5 shows the percentage of students passing the SOL assessments from 2001-02 to 2004-05. These data also represent successful Adequate Yearly Progress (AYP) for the division and Louisa County High School in 2004-05

COMMENDATION

LCPS is commended for its increased pass rates on the Standards of Learning assessments and full accreditation relative to the Virginia Department of Education accreditation standards and for its Adequate Yearly Progress at Louisa County High School.

**EXHIBIT 3-5
LOUISA COUNTY PUBLIC SCHOOLS
ACCREDITATION REPORT FROM THE VIRGINIA DEPARTMENT OF EDUCATION
PERCENTAGE OF STUDENTS PASSING THE STANDARDS OF LEARNING
ASSESSMENTS
2001-02 TO 2004-05 SCHOOL YEARS**

SCHOOL	ENGLISH				MATH				SCIENCE				HISTORY			
	2001-02	2002-03	2003-04	2004-05	2001-02	2002-03	2003-04	2004-05	2001-02	2002-03	2003-04	2004-05	2001-02	2002-03	2003-04	2004-05
Trevilians Elementary School	70	76	79	83	65	68	78	83	74	72	76	88*	51	59	72	86*
Thomas Jefferson Elementary School	62	70	77	77	67	64	86	77	71	81	74	81*	57	80	77	79*
Jouett Elementary School	62	72	90	86	69	67	84	89	76	83	89	92*	58	74	92	92*
Louisa County Middle School	69	69	74	74	72	74	91	95	78	78	79	83	43	66	69	N/A
Louisa County High School	75	83	94	88	66	68	81	81	73	78	83	80	58	85	86	85

Source: Virginia Department of Education Accreditation Report, 2005.
*Third and fifth grades combined for science and history.

FINDING

LCPS does not effectively use student performance data to plan for instruction. The division does not have an automated system for data analysis.

LCPS did not meet AYP in 2004-05 at Louisa County Middle School, Thomas Jefferson Elementary School, Trevilians Elementary School, and Jouett Elementary School. More specifically, subcategories of students not meeting IEP include:

- **Louisa County Middle School:** English - disadvantaged students and students with disabilities;
- **Thomas Jefferson Elementary School:** English: black students;
- **Trevilians Elementary School:** English – disadvantaged students; and
- **Jouett Elementary School:** English – disadvantaged students.

During on-site visits, it was reported that schools have the availability of data, but analysis has to be completed in hand reports by the principal or teachers at each school. Currently, there is no automated system for analyzing student data for administrators or teachers. Considerable time must be spent in analysis of student data, test items, and hand tracking of subcategories of students.

The SOL Tracker data analysis software is customized for the state of Virginia to provide educators with the ability to view the school's data through a series of process reports. Tracker provides visibility from the division level all the way down to the individual student. The specialized reports on curriculum alignment allow teachers to analyze the alignment between curriculum, instruction, and assessment.

Data analysis software is essential in providing outcome achievement data to administrators and teachers for analysis and instructional planning. The software provides reports designed to make the collection, organization, and analysis of SOL data easier for administration and teachers. LCPS is considering and has budgeted for purchase of the SOL Tracker data analysis software.

RECOMMENDATION

Recommendation 3-5:

Purchase and implement the SOL Tracker data reporting software.

LCPS should purchase and implement the SOL Tracker data analysis software. Such an automated program should provide three types of data, including outcome (achievement), demographic, and process (contextual). Specific analysis should be conducted for subcategories of students who are not meeting AYP. The reports should be used in school improvement plans as well as NCLB/AYP progress reporting.

FISCAL IMPACT

The implementation of this recommendation will realize no additional costs as the item is currently in the 2005-06 budget.

3.4 School Improvement

The development of a school improvement plan is one of the most important tasks of the school. It is the tool that schools use to plan, implement, monitor, evaluate, and adjust curriculum, and programs to ensure that all students are achieving at high levels. The underlying foundation for an effective school improvement plan is a thorough analysis of the school's data. Schools must set and prioritize their goals based on the analysis of data and then select research-based, proven effective instructional strategies to create an action plan for school improvement. School improvement plans should include:

- baseline data from which progress will be measured;
- specific timelines from interim as well as final determination of successful implementation;
- designated individuals responsible for action accomplishment, rather than general positions identified as responsible;
- resources in terms of funds, time and professional development needed to achieve the goal and underlying strategies;
- provisions for the evaluation of success or re-examination of progress for revision of goals and/or re-adoption of them in the future; and
- provisions for monitoring at the division level to ensure that adequate resources and support are being offered and that plans are progressing in implementation.

Furthermore, the school improvement process is much easier to monitor by central office administration if the format of the plan is consistent from school to school, using a template to ensure that all plans include the same goals, objectives, and strategies, as well as procedures for evaluation.

FINDING

LCPS has implemented a consistent school improvement process in each of the division's schools. Review and monitoring of the school improvement plans are reviewed and monitored at the school level.

School Improvement Plans (SIPs) are based on the division's mission and the schools' vision, mission, and values and are developed every two years, although they are updated annually. The SIP is developed by the school-based building leadership team

following the Effective Schools' Process at each school and is approved by the entire staff. SIP goals are based on division target areas of student achievement, safety and security, and communication, as well as identified needs at each through data analysis and client surveys.

The Virginia Department of Education documents that SIPs must:

- assess academic achievement for each student population;
- base objectives on the Academic Excellence indicator system and other assessments;
- specify how campus goals will be individualized;
- identify resources and sources of supplemental support;
- set timelines for reaching the goals and monitoring strategies;
- include plans for the state compensatory education program as part of the campus improvement plan;
- tie strategies to research and proven practices;
- establish and measure progress towards measurable performance objectives; and
- include formative and summative evaluation criteria.

LCPS consistently documents the Virginia Department of Education requirements for SIPs, including;

- an annual measurable goal and objective;
- a strategy for accomplishing the goal and objective;
- action steps to be taken;
- persons responsible;
- persons involved;
- resources needed;
- timelines; and
- monitoring evaluation procedures.

COMMENDATION

LCPS is commended for ensuring each school is following a consistent school improvement planning process.

FINDING

LCPS does not have a method for collecting and disseminating best practices among personnel throughout the division.

During on-site interviews and school visits, MGT observed and reviewed many exceptional practices in schools and departments within LCPS. While there are many research-based practices in place throughout the division, there is no coordinated approach to documenting and disseminating those best practices. Although central office and school-based staff referenced the need for the examination of data, few referred to the examination and use of research as another basis for instructional and curricular decisions.

RECOMMENDATIONS

Recommendation 3-6:

Examine effective practices and resources that can be collected and disseminated to all school administrators and teachers.

The practices, resources and use of data that are being used in various locations and departments should to be systematically examined and disseminated to all LCPS principals and teachers. The dissemination of successful strategies ensures that the best practices of individual schools and departments contribute to the improvement of all schools in the division.

FISCAL IMPACT

The implementation of this recommendation can be accomplished with existing resources.

Recommendation 3-7:

Ensure that all school improvement monitoring instruments are aligned to the characteristics of high-performing and effective schools.

The implementation of this recommendation should ensure that all school improvement efforts are consistent with the research on high-performing, effective schools. This action will further ensure that research that has proven to be comprehensive and systematic is included in decisions and strategies as the division works for continuous improvement.

Exhibit 3-6 shows nine characteristics of high-performing schools.

FISCAL IMPACT

The implementation of this recommendation can be accomplished with existing resources.

FINDING

LCPS school improvement plans do not effectively address the diversity of student ability and achievement.

In reviewing SIPs, MGT found that the benchmark for student performance is the grade level SOL. MGT did not find any goals, objectives, or actions to address the accelerated learning of high performing students.

**EXHIBIT 3-6
NINE CHARACTERISTICS OF HIGH PERFORMING SCHOOLS**

Research has shown that there is no silver bullet – no single thing that schools can do to ensure high student performance. Rather, three decades of research demonstrate that high performing schools tend to show evidence of the following nine characteristics:

1. Clear and Shared Focus

Everybody knows where they are going and why. The vision is shared – everybody is involved. The vision is developed from common beliefs and values, creating a consistent focus.

2. High Standards and Expectations

Teachers and staff believe that all students can learn and that they can teach all students. There is recognition of barriers for some students to overcome, but the barriers are not insurmountable. Students become engaged in an ambitious and rigorous course of study.

3. Effective School Leadership

Effective leadership is required to implement change processes within the school. This leadership takes many forms. Principals often play this role, but so do teachers and other staff, including those in the division office. Effective leaders advocate, nurture, and sustain a school culture and instructional program conducive to student learning and staff professional growth.

4. Supportive Learning Environment

The school has a safe, civil, healthy, and intellectually stimulating learning environment. Students feel respected and connected with the staff and are engaged in learning. Instruction is personalized and small learning environments increase student contact with teachers.

5. High Levels of Community and Parent Involvement

There is a sense that all educational stakeholders have a responsibility to educate students, not just the teachers and staff in schools. Parents, as well as businesses, social service agencies, and community colleges/universities all play a vital role in this effort.

6. High Levels of Collaboration and Communication

There is constant collaboration and communication between and among teachers of all grades. Everybody is involved and connected, including parents and members of the community, to solve problems and create solutions.

7. Frequent Monitoring of Teaching and Learning

Teaching and Learning are continually adjusted based on frequent monitoring of student progress and needs. A variety of assessment procedures are used. The results of the assessment are used to improve student performances and also to improve the instructional program.

8. Curriculum, Instruction, and Assessment Aligned with Standards

Curriculum is aligned with local, state, and national standards. Research-based materials and teaching and learning strategies are implemented. There is a clear understanding of the assessment system, what is measured in various assessments and how it is measured.

9. Focused Professional Development

Professional development for all educators is aligned with the school's and division's common focus, objectives, and high expectations. It is ongoing and based on high need areas.

Source: Compiled by MGT Using Effective Schools Research, 2005.

Data collected during on-site visits also show that the division offers four on-line advanced courses including Advanced Placement Psychology, Advanced Placement Biology, Introduction to Engineering, and Computer Math. ACT results for 2004-05 show that only seven percent of LCPS graduates, as compared to 19 percent state graduates, are prepared for college in all four areas of college English composition, college algebra, college social science, and college biology. LCPS ACT scores in all academic areas are also consistently lower the state ACT average scores from 2001-01 to 2004-05.

Additionally, data on the schools failing to meet AYP this year indicate that black students and students identified as disadvantaged and students with disabilities were those not achieving at high levels. These data indicate a need to better develop strategies that meet the needs of subgroups of students as required by NCLB.

RECOMMENDATION

Recommendation 3-8:

Document staff development and instructional planning for subgroups of underachieving students, as well as for high performing students beyond SOL mastery.

LCPS should address the diversity of student learning and performance. Special emphasis should be placed on the instructional planning for underachieving and overachieving students in the division.

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

3.5 Federal Programs

Exhibit 3-7 lists the federal entitlement programs of the NCLB. As shown, there are 10 entitlements within the NCLB. Federal entitlement funds are budgeted on a per pupil allocation basis to eligible schools. Each school uses funds to provide supplemental educational interventions for students who have difficulty with skill mastery and are not meeting performance expectations. LCPS receives Title I, Title II, Title IV, and Title V federal entitlement funds.

Title I, Part A of the Elementary and Secondary Education Act of 1965 (ESEA) provides local education agencies (LEAs or school divisions) with extra resources to help improve instruction in high-poverty schools and ensure that poor and minority children have the same opportunity as other children to meet challenging state academic standards. NCLB, which includes Title I, promotes local control and flexibility. The legislation encourages local solutions to local problems. In addition, the legislation encourages federal money to be used to solve problems, rather than subsidize bureaucracy. LCPS receives \$738,486 in Title I funds for use at Trevilians Elementary School (TES), as a targeted assistance school, and Thomas Jefferson Elementary School (TJES), as a school-wide Title I program, including salaries and benefits, special programs, and professional development. LCPS serves 213 eligible students at TJES and 73 eligible students at TES.

Federal monitoring in 2005-06 show that Title I program in LCPS is in full compliance. Documentation of compliance with NCLB regulations was reviewed in six areas including: curriculum and instruction, student assessment and program evaluation, teacher qualifications and professional development, parent and community involvement, fiscal requirements, and recordkeeping.

**EXHIBIT 3-7
LOUISA COUNTY SCHOOLS
NO CHILD LEFT BEHIND ENTITLEMENT PROGRAMS
2005-06 SCHOOL YEAR**

- Title I Improving the Academic Achievement of the Disadvantaged**
 - Part A Improving Basic Programs Operated by LEAs
 - Part B Student Reading Skills Improvement Grants
 - Subpart 1 -Reading First
 - Subpart 2-Early Reading First
 - Part C - Migrant Education
 - Part D - Neglected and Delinquent
 - Part E - National Assessment of Title 1
 - Part F- Comprehensive School Reform

- Title II Preparing, Training and Recruiting High-Quality Teachers and Principals**
(Old Title II-Consolidates Title II, CSR, School Renovation and Technology programs)
 - Part A - Teacher and Principal Training and Recruiting Fund
 - Part B - Math and Science Partnerships
 - Part C - Innovation for Teacher Quality
 - Subpart 1(A) - Troops to Teachers
 - Part D - Enhancing Education Through Technology
(Old Title 111-Consolidates several technology programs)

- Title III Language Instruction for Limited English Proficient and Immigrant Students**
(Old Title VII)
 - Part A - English Language Acquisition, Language Enhancement and Academic Achievement

- Title IV 21st Century Schools**
(Old Title IV)
 - Part A - Safe and Drug Free. Schools and Communities
 - Part B - 21st Century Community Learning Centers

- Title V Promoting Informed Parental Choice and Innovative Programs**
(Old Title VI)
 - Part A – Innovative Programs

- Title VI Flexibility, Accountability, and Rural Education Initiative**
 - Part A Improving Academic Achievement
 - Subpart 1-Accountability
 - Subpart 2-Funding Transferability for the SDE and LEAs
 - Part B – Rural Education Initiative
 - Subpart 1-Small, Rural School Achievement Program
 - Subpart 2-Rural and Low-Income School Program

- Title VII Indian, Native Hawaiian, and Alaska Native Education Programs**
 - Part A – Indian Education

- Title VIII Impact Aid Program**

- Title IX General Provisions**

- Title X Repeals, Redesignations, and Amendments to Other Statutes**
 - Part C - Education for Homeless Children and Youth

Source: Virginia State Department of Education, 2005.

Title II, Improving Teacher and Principal Quality of the *No Child Left Behind Act*, provides funds to support and help improve teacher quality and increase the number of highly qualified teachers and principals, including:

- salaries and benefits for three classroom size reduction teachers;
- teacher quality improvement;
- support fund for substitutes pay
- professional development;
- teacher materials and supplies;
- Chesapeake Bay curriculum; and
- recruiting.

Title II focuses on using practices that are research-based to prepare, train, and recruit high-quality teachers. LCPS receives \$202,764.58 Title II funds for use at all five schools in Louisa County for the following:

Title IV, Safe and Drug-Free Schools and Communities, supports programs in violence prevention in and around schools; prevents the illegal use of alcohol, tobacco, and drugs; involves parents and communities; and is coordinated with other state and local resources to foster a safe and drug-free environment that supports student academic achievement. LCPS receives \$24,542 Title IV funds and provides alternative education counseling through programs at all five schools in Louisa County.

Title V, Innovative Programs, supports an array of activities related to promoting challenging academic achievement standards, improved student academic achievement, and overall education reform. Examples of programs include recruitment and retention of highly qualified teachers, technology, school improvement programs, academic intervention programs for at-risk students, and dropout prevention. LCPS receives \$22,517 in Title V funds and provides support to all five Louisa County schools for computer software, supplies and materials, technology support, differentiation, and program and curricular specialists.

FINDING

LCPS does not have a consolidated application for participation in programs authorized by NCLB.

The Virginia Department of Education has developed a consolidated application for participation in programs authorized by NCLB. LCPS does not have a consolidated application. A consolidated application allows a local school corporation to align NCLB programs and demonstrate a systemwide focus on improving students' achievement and accountability. In addition, a consolidated application for programs supported by NCLB allows the local school corporation to more effectively align with state-level goals and measures supporting the state aims for education.

RECOMMENDATION

Recommendation 3-9:

Develop a consolidated application for participation in programs authorized by the *No Child Left Behind Act*.

LCPS should develop a consolidated application for participation in programs authorized by NCLB. The Department of Federal Programs should prepare the consolidated application for federal funds with a focus on alignment with state-level goals and measures support the state aims for education.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

A number of teachers of special education lack NCLB highly qualified status.

At the time of the MGT on-site visit, there were 37 teachers in LCPS who were not highly qualified according to the requirements of NCLB. Twenty-eight (or 76 percent) of these teachers were teachers of special education. Federal law requires that all teachers be highly qualified by 2006.

Far too often teachers of students with disabilities are not properly trained or are not credentialed in special education, yet students with disabilities are often the most frequently underachieving subcategory of students in local school divisions. In addition, teachers of special education are often the teacher of record for general education content courses and lack the credential for highly qualified status in general education. Greater emphasis must be placed on securing highly qualified teachers for special education.

RECOMMENDATION

Recommendation 3-10:

Ensure that all teachers are highly qualified by 2006.

The Virginia Department of Education has developed criteria to secure highly qualified status for teachers. LCPS should continue to work with the Virginia Department of Education to ensure that all teachers in Louisa County receive highly qualified status as soon as possible. LCPS should consider alternative delivery models for special education services, particularly at the high school level, such as co-teaching and collaborative instruction with general education staff.

The purpose of the Office of Student Support Services is to coordinate and deliver services which contribute to the holistic development of children, provide support to families, and promote improvement of schools. These services emphasize prevention and intervention support systems, as well as use of appropriate resources. The ultimate

purpose of the Office of Student Support Services is to maximize coordinated efforts that focus upon students' health, social, and emotional development in reducing barriers to learning, while enabling students to achieve optimally.

FINDING

LCPS provides reading specialists at Thomas Jefferson Elementary School and Trevilians Elementary School. Title I reading specialists co-teach and work collaboratively with general education teachers. The reading specialists do not co-teach or work consistently with special education teachers.

Students are served in an intervention model in a pull-out program serving students in small groups. Reading specialists use additional materials and leveled readers to supplement the reading instruction in the general education classroom. During on-site visits, it was reported that collaboration occurs between Title I and general education teachers. This benefits both Title I students and general education students. A part of the division's approach to meeting the needs of all students is to analyze Title I subcategories as a basis for diagnosis of reading difficulties and more specifically address the reading interventions for these students. Students with disabilities are not included in this analysis.

Students with disabilities are served by teachers of special education and do not receive the benefit of instruction, consultation, or collaboration with a reading specialists. While special education teachers are specifically trained to teach students with disabilities, their level in expertise in reading instruction is often lacking and certainly less than that of a certified reading specialist. Students with disabilities could also benefit from the expertise of the reading specialists at Louisa County elementary schools.

RECOMMENDATION

Recommendation 3-11:

Examine the flexibility offered by using Title I and other federal funds to support increased proficiency among all students through shared funding of general revenue or special education funds.

LCPS should consider shared funding of reading specialists to increase the flexibility of instructional staff and increase the proficiency among all students, including those with disabilities. The special education teachers should be included in the school-wide intervention model for reading rather than segregated from the schools' reading initiative. The expertise of certified reading specialists should be utilized for all students.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

3.6 Pupil Personnel Services

The purpose of the Department of Student Services is to coordinate and deliver services which contribute to the holistic development of children, support to families, and improvement of schools. These services emphasize prevention and intervention support systems, as well as use of appropriate resources. The ultimate purpose of the department is to maximize coordinated efforts that focus on students' health, and social, and emotional development in reducing barriers to learning, while enabling students to achieve optimally.

The Department of Pupil Personnel Services includes school guidance and counseling services, psychological services, school nursing, and special education. LCPS provides adequate psychological services and nursing services to students throughout the division.

3.6.1 Guidance and Counseling Services, School-wide Discipline, and Attendance

The American Association of School Counselors recommends that school counselors provide counseling programs in three domains: academic, career, and personal/social. Their services and programs help students resolve emotional, social or behavioral problems and help them develop a clearer focus or sense of direction. Effective counseling programs are important to the school climate and a crucial element in improving student achievement.

FINDING

The LCPS elementary guidance program is not aligned with national standards and state regulations. LCPS does not have a divisionwide elementary guidance curriculum or pacing guide. While guidance counselors have similar themes, there is no consistency of elementary guidance services throughout the division.

Guidance counselors are housed in each school and their responsibilities vary from school to school. Under the direction of the Director of Pupil Personnel, guidance counselors, school psychologists, and social workers meet the first Friday of each month. Meeting topics include information from conferences attended or specific problems and circumstances encountered. Special presentations are also provided in the monthly meetings.

Basic guidance counselor responsibilities at each school include:

- counseling students individually or in groups;
- conducting special groups for improving student skills;
- leading the Character Counts Program
- working with students and their families as needed;

- assisting families in locating community services;
- providing input to administrators, child find committees, and teachers;
- working with social services and Region X; and
- conducting threat assessments and referring to the appropriate agencies as needed.

Some guidance counselors have additional responsibilities which may include (but are not limited to) lunch duty and student scheduling.

The *Regulations Regarding School Guidance and Counseling Programs in the Public Schools in Virginia* affirms that *school guidance and counseling are support services designed to promote the academic mission of public education and exist primarily to aid students' academic achievement in elementary and secondary education*. The Virginia Department of Education Standards of Quality further document that local school divisions *shall make reasonably available, with available resources, to all students the following guidance and counseling services*:

- *academic guidance, which assists students and their parents to acquire knowledge of the curricula choices available to students, to plan a program of studies, to arrange and interpret academic testing, and to seek post-secondary academic opportunities;*
- *career guidance, which helps students to acquire information and plan action about work, jobs, apprenticeships, and post-secondary educational and career opportunities; and personal/social counseling, which assists a student to develop an understanding of themselves, the rights and needs of others, how to revolve conflict and to define individual goals, reflecting their interests, abilities, and aptitudes.*

Elementary guidance services to students in LCPS can be improved if the division developed and implemented a divisionwide elementary guidance curriculum and pacing guide. This curriculum would be most beneficial if aligned with national standards and state regulations.

RECOMMENDATION

Recommendation 3-12:

Develop and implement a divisionwide elementary guidance curriculum consistent with national standards and state regulations.

LCPS should develop and implement a divisionwide elementary guidance curriculum consistent with national and state regulations. The elementary school guidance curriculum should include:

- academic support, including organizational, student, and test-taking skills;
- goal setting and decision-making;
- career awareness, exploration and planning;
- education on understanding self and others, peer relationships, coping strategies and effective social skills;
- communication, problem-solving and conflict resolution;
- substance abuse education; and
- multicultural/diversity awareness.

The elementary school guidance program should also include individual student planning, responsive services, and system support.

FISCAL IMPACT

Based on the knowledge of other divisions implementing the program, the cost for the development of an elementary guidance curriculum is estimated to be \$3,600 annually.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Develop Elementary Guidance Curriculum	(\$3,600)	(\$3,600)	(\$3,600)	(\$3,600)	(\$3,600)

FINDING

LCPH inconsistently follows compensatory attendance policy.

In accordance with Section 221.254 of the Code of Virginia:

any high school student missing nine or more class periods during the semester will be subject to failing the course for the year. Students with attendance problems will meet with an administrator and counselor, who will develop an attendance contract for the remainder of the school year. The office will notify parents on the fifth, sixth, seventh, eighth, ninth, and tenth day of accumulated full day absence. Additionally, parents will be called on the fifth day of absence.

During on-site interviews, it was reported that this procedure is not consistently followed. In some situations, parents are not contacted, nor are chronic absences reported to the school social workers for follow-up. With the requirements of attendance graduation rates of NCLB, it is critical that schools maintain consistent procedures and practices related to school attendance. Further, communication between the school and the social workers is critical in tracking chronic absenteeism.

RECOMMENDATION

Recommendation 3-13:

Ensure that consistent compensatory attendance procedures are implemented at LCHS.

The Department of Pupil Personnel Services should work directly with the administrator and guidance staff at LCHS to establish clear, consistent attendance procedures. Processes for documentation of absences and follow-up initiatives should be clearly documented.

FISCAL IMPACT

This recommendation can be implemented using existing resources.

3.6.2 Special Education

The *Individuals with Disabilities Education Act* (IDEA) is a federal law that gives guidance and direction for providing special education services to students with disabilities. Originally passed in 1975 as the Education for all Handicapped Children Act, IDEA was reauthorized by Congress in 1997 and again in 2004. Many provisions of the IDEA amendments address and clarify procedures for improving education and related services to students with disabilities. IDEA establishes six principles that govern the education of students with disabilities. Exhibit 3-8 summarizes these six basic principles.

IDEA defines special education as specially designed instruction, at no cost to the child's parents, to meet the unique needs of a student with disabilities [20 U.S.C., sec 1401 (25)]. A student is eligible for special education and related services if the student has a disability as identified by IDEA and because of the disability, needs specially designed instruction.

EXHIBIT 3-8 SIX PRINCIPLES GOVERNING THE EDUCATION OF STUDENTS WITH DISABILITIES

- **Zero reject:** A rule against excluding any student.
- **Nondiscriminatory evaluation:** A rule requiring schools to evaluate students fairly to determine if they have a disability and, if so, what kind and how extensive.
- **Appropriate education:** A rule requiring schools to provide individually tailored education for each student based on the evaluation and augmented by related services and supplementary aids and services.
- **Least restrictive environment:** A rule requiring schools to educate students with disabilities with students without disabilities to the maximum extent appropriate for the students with disabilities.
- **Procedural due process:** A rule providing safeguards for students against schools' actions, including a right to sue in court.
- **Parental and student participation:** A rule requiring schools to collaborate with parents and adolescent students in designing and carrying out special education programs.

Source: *Exceptional Lives: Special Education in Today's School*, 2004.

FINDING

LCPS is working with the Virginia Department of Education to document improved educational and functional outcomes for children and youth with disabilities in accordance with IDEA 2004.

IDEA 2004 requires that all states develop and submit to the federal Office of Special Education Programs a performance plan that is designed to advance the state from its current level of compliance with the federal law and to improve the educational and functional outcomes for children and youth with disabilities. In addition, all states are required to submit an annual report in future years documenting the progress toward meeting those goals of improved educational and functional outcomes.

The Virginia State Performance Plan documents specific indicators for improved educational and functional outcomes for children and youth with disabilities in three monitoring priorities. The plan documents baseline and trend data when available, identifies appropriate target goals for each indicator, and specifies planned activities, timelines, and resources for achieving those goals. The timeline for accomplishing the targeted goals is 2010-11. Local education agencies will be required to provide data to the Virginia Department of Education for each indicator in 2006-07 through 2010-11.

Monitoring priorities and indicators of the Virginia Department of Education, Exceptional Student Services include:

- **Monitoring Priority: Free Appropriate Public Education in the Least Restrictive Environment**

Indicator 1: Graduation Rate – Percent of youth with IEPs graduating from high school with a regular diploma compared to percent of all youth in the state graduating with a regular diploma.

Indicator 2: Dropout Rate – Percent of youth with IEPs dropping out of high school compared to the percent of all youth in the state dropping out of high school.

Indicator 3: Participation and Performance on Assessments – Participation and performance of children with disabilities on statewide assessments.

Indicator 4: Rates of Suspension and Expulsion.

Indicator 5: School-Ages Placements: Percent of children with IEPs aged six through 21.

Indicator 6: Preschool Placements – Percent of preschool children with IEPs who received special education and related services in settings with typically developing peers (i.e., early childhood settings, home, and part-time early childhood/part-time early childhood special education settings).

Indicator 7: Preschool Outcomes – Percent of preschool children with IEPs who demonstrate improved academic performance.

Indicator 8: Parent Involvement - Percent of parents with a child receiving special education services who report that schools facilitated parent involvement as a means of improving services and results for children with disabilities.

■ **Monitoring Priority: Disproportionality**

Indicator 9: Racial/Ethnic Disproportionality – Percent of divisions with disproportionate representation of racial and ethnic groups in special education and related services that is the result of inappropriate identification.

Indicator 10: Racial/Ethnic Disproportionality – Percent of divisions with disproportionate representation of racial and ethnic groups in specific disability categories that is the result of inappropriate identification.

■ **Monitoring Priority: Effective General Supervision Part B/Child Find**

Indicator 11: Evaluation Timelines – Percent of children with parental consent to evaluate who were evaluated and eligibility determined within 60 days (or state-established timeline).

Indicator 12: Preschool Transition – Percent of children referred by Part C prior to age 3 who are found eligible for Part B and who have an IEP developed and implemented by their third birthday.

Indicator 13: High School Transition – Percent of youth aged 16 and above with an IEP that includes coordinated, measurable annual IEP goals and transition services that will reasonably enable the student to meet the postsecondary goals.

Indicator 14: High School Outcomes – Percent of youth who had IEPs, are no longer in secondary school, and who have been competitively employed, enrolled in some type of postsecondary school, or both, within one year of leaving high school.

Indicator 15: Effective Correction Action – General supervision system (including monitoring, complaints, hearings, etc.) identifies and corrects noncompliance as soon as possible, but in no case later than one year from identification.

Indicator 16: Due Process Hearing Timelines – Percent of fully adjudicated due process hearing requests that were fully adjudicated within the 45-day timeline or a timeline that is properly extended by the hearing officer at the request of either party.

Indicator 17: Resolution Session Effectiveness – Percent of hearing requests that went to resolution sessions that were resolved through resolution session settlement agreements.

Indicator 18: Mediation Effectiveness – Percent of mediations held that resulted in mediation agreements.

Indicator 19: Reporting Accuracy and Timeliness – State-reported data are timely and accurate.

LCPS is required to work with the Virginia Department of Education to advance its current level of compliance with special education federal and state mandates and to improve the educational and functional outcomes for children and youth with disabilities. The changes in the IDEA 2004 regulations require that local education agencies develop activities, timelines, and data collection elements for documenting and reporting improved educational and functional outcomes for students with disabilities to the Virginia Department of Education. This process began in 2004-05 and will continue under the current state plan through 2010-11.

RECOMMENDATION

Recommendation 3-14:

Develop activities, timelines, and data collection elements for documenting and reporting improved educational and functional outcomes for students with disabilities as required by IDEA 2004 and as directed by the Virginia Department of Education.

LCPS, as all other school divisions in Virginia, should develop activities, timelines, and data collection elements for documenting and reporting improved educational and functional outcomes for students with disabilities. Activities should include staff development and monitoring procedures at the division and school level. Particular emphasis should be placed on the monitoring priority area of free appropriate public education in the least restrictive environment.

FISCAL IMPACT

This recommendation can be implemented with existing staff and resources.

FINDING

LCPS does not have an action plan for special education services. The department initiatives are not clearly communicated within the department or among the schools in the division. The department lacks a clear focus on how to coordinate student services to improve academic performance for students.

Strong leadership and strategic planning are characteristic of effective special education programs. Instructional leadership and strategic planning are important to all levels of the division and should include teachers, program directors, supervisors, principals, and central office administrators. At the division level, the selection of an organizational

approach and instructional delivery model for special education services should be based on a clear and consistent mission and action plan for meeting the needs of all students.

The LCPS Department of Pupil Personnel Services is lacking this clear and consistent mission and action planning.

RECOMMENDATION

Recommendation 3-15:

Develop an annual special education action plan including mission, vision, goals, objectives, activities, evaluation, and a scope and sequence timeline of training and educational support activities for schools.

LCPS should develop an action plan to align special education services with school improvement and the Virginia Department of Education Special Education Improvement Plan. Currently, LCPS special education services are more consistently running parallel to general education initiatives with the exception of some collaborative instruction. LCPS should ensure that students with disabilities are included in special programs and initiatives to improve school performance and participate as a continuum of educational services. The action plan should document how LCPS will align special education with school improvement initiatives within the division. Finally, the plan should designate appropriate staff development for school administrators, and general and special education teachers related to the requirements of IDEA and providing appropriate instruction for students with disabilities.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

LCPS lacks a consistent inclusive education model for students with disabilities.

During on-site interviews, it was reported that schools implement inclusive education in a wide variety of models. While Jouett Elementary School is fully inclusive, other schools provide more limited inclusive opportunities for students with abilities. Inclusive instruction is intended to provide a proportional grouping of typical students to students with disabilities. In reviewing class enrollments, MGT found that collaborative classes had a majority enrollment of students with disabilities. Exhibit 6-9 shows this disproportionality.

Although LCPS is responsive to the federal requirements of inclusive education, the delivery of special education services, particularly at the secondary level, is lacking.

Co-teaching or collaborative teaching is a model that embeds collaborations with general education classrooms and increases the likelihood that students with disabilities will progress in the general education curriculum. Co-teaching typically involves special and general education teachers working together to teach the general education curriculum.

to students who vary widely in their strengths and unique learning needs. According to Turnbull and Turnbull, 2004, co-teachers collaborate to accomplish the following tasks:

- plan and teach together;
- develop instructional accommodations;
- monitor and evaluate student performance; and
- communicate student progress to others.

**EXHIBIT 3-9
LOUISA COUNTY PUBLIC SCHOOLS
MIDDLE SCHOOL COLLABORATIVE CLASSROOM ENROLLMENTS**

SUBJECT	ENROLLMENT	GRADE 6	GRADE 7	GRADE 8
English	General Education	5	1	1
	Special Education	10	14	14
Math	General Education	7	1	4
	Special Education	12	20	7
Social Studies	General Education	3	1	1
	Special Education	19	14	15
Science	General Education	4	1	3
	Special Education	15	13	16

Source: LCPS, Department of Pupil Personnel Services, 2006.

Research suggests that shared teaching has a positive impact on students' learning. In addition, parents of students both with and without disabilities have positive perspectives about co-teaching.

RECOMMENDATION

Recommendation 3-16:

Establish appropriate co-teaching model of inclusive education at secondary schools.

LCPS should establish an appropriate co-teaching model of inclusive education at secondary schools. School administrators should work with the Director of Pupil Personnel Services to ensure that co-teaching is established and effective in increasing the academic performance of students with disabilities.

FISCAL IMPACT

This recommendation can be implemented with existing IDEA funds.

FINDING

LCPS does not consistently implement a divisionwide pre-referral process.

The Department of Pupil Personnel Services is currently participating in staff development provided by the Virginia Department of Education on the Instructional Support Team (IST) process. The IST is one model of an instructional consultation team. While it is similar to other school-based teams, it differs significantly in purpose, focus, and training. The purpose of IST is to improve student and staff performance; the focus is on instructional practice; and training is comprehensive and on-going.

According to LRP Publications, 2004, the three goals of the pre-referral process are:

- enable teachers to teach students more effectively;
- enable students to learn subject material and become more independent learners for life; and
- guard against misidentification of nondisabled students as disabled or identification as disabled under the wrong disabling condition.

LRP Publications further documents that the reauthorization of the Individuals with Disabilities Education Act (IDEA) supports that:

- all students are general education students first;
- students are over-identified as disabled most when there is an underachievement issue;
- up to 15 percent of the IDEA federal funds available to school divisions may be used for general education and pre-referral activities;
- the discrepancy model for identifying students as learning disabled is not based on sound research; and
- IDEA eligibility determination regulations require that school staff wait for students to fail before intervening.

The No Child Left Behind Act (NCLB) requires general educators to use interventions that are grounded in scientifically based research to help students who are not on track to meet the law's requirement that all students be at or above grade level in all core subjects by 2013-14 school year. NCLB requires the pre-referral team to review, establish, and document the scientifically based interventions that the teacher, school, and division have attempted. Each intervention must be documented with baseline data and data points to determine the success or failure of the intervention. A summary of research on the pre-referral process shows many benefits, including:

- reduction of special education referrals for evaluation;
- increased teacher consultation;

- individual student modifications;
- increased teacher training; and
- increased classwide interventions with the use of the following strategies:
 - direct instruction
 - cooperative learning models
 - curriculum-based measurement
 - increased use of computer-assisted and computer-based instruction
 - peer tutoring.

With NCLB requirements for intervention and accountability and the IDEA support for pre-referral process, it is necessary that the general education program become responsible for a functional pre-referral program. According to LRP Publications, 2004, the program must address academic underachievement, academic dysfunctionality, behavioral issues, motivational issues, and emotional issues.

RECOMMENDATION

Recommendation 3-17:

Implement a consistent, divisionwide pre-referral process in the general education program.

LCPS should implement a consistent, divisionwide pre-referral process in the general education program. An effective process should lead to decreased referrals for evaluation for special education services and improved identification of students who are truly disabled. LCPS should ensure that the school administrators are held accountable for the implementation and documentation of pre-referral initiatives are required by NCLB.

FISCAL IMPACT

This recommendation can be implemented with existing resources of IDEA.

FINDING

LCPS does not have an effective electronic system for developing and monitoring Individual Educational Plans (IEPs) of students with disabilities or maintaining compliance with state and federal regulations. The division has purchased the IEP On-line software for this purpose, but the software has not been installed or implemented.

Exhibit 3-10 shows the required content of the IEP as regulated by federal legislation. As shown, the IEP process and documentation for accountability is extensive. Failure to have appropriate IEPs for students with disabilities can result in noncompliance with state and federal law and potential loss of funds to the division.

IEP On-line is organized in an easy to understand and intuitive format that follows the special education process. There are sections within the program, including:

- demographics, including data imported from the student information system;
- referral which includes key information from referral meetings and notes on further evaluation;
- evaluation and eligibility which documents information for determining eligibility, including initial consent, notification, assessment, and justification for committee decisions;
- plans which track IEPs for each student including planning, goals, performance measurements, and objectives. IEP amendments such as extended school year, manifestation conferences, functional behavioral assessment, and behavior intervention plans are also available;
- notes such as a parent contact log;
- reports that provide multiple levels of detailed information including comprehensive state reporting;
- calendars to allow administrators to set division timelines according to state requirements; and
- preferences, such as disability codes, school locations, and withdrawal codes.

RECOMMENDATION

Recommendation 3-18:

Implement an electronic system for the development of Individual Educational Plans and maintaining compliance with special education state and federal requirements.

LCPS should implement an electronic system for the development of Individual Educational Plans and maintaining compliance with special education requirements. The Director of Pupil Personnel Services and designated staff should assume responsibility for this implementation in a timely manner.

FISCAL IMPACT

This recommendation can be implemented with existing budgeting funds for this purpose.

**EXHIBIT 3-10
REQUIRED CONTENT OF THE INDIVIDUAL EDUCATIONAL PLAN
INDIVIDUALS WITH DISABILITIES EDUCATION ACT 1997***

The IEP is a written statement for each student ages 3 to 21. Whenever it is developed or revised, it must contain the following:

- The student's present levels of educational performance including:
 - How the disability of a student (ages 6 through 21) affects his or her involvement and progress in the general curriculum, or
 - How the disability of a preschooler (ages 3 through 5) affects his or her participation in appropriate activities
- Measurable annual goals, including benchmarks, or short-term objectives, related to:
 - Meeting needs resulting from the disability, in order to enable the student to be involved in and progress in the general curriculum
 - Meeting each of the student's other disability-related needs
- The special education and related services and supplementary aids and services that will be provided to the student or on the student's behalf, and the program modifications or supports for school personnel that will be provided as that the student:
 - Can advance appropriately toward attaining the annual goals
 - Be involved in and progress through the general curriculum and participate in extracurricular and other nonacademic activities
 - Be educated and participate with other students with disabilities and with students who do not have disabilities in general education
- The extent, if any, to which the student will not participate with students who do not have disabilities in general education classes and in extracurricular and other nonacademic activities.
- Any individual modifications in the administration of state and divisionwide assessments of student achievement so that the student can participate in these assessments; moreover, if the IEP determines that the student will not participate in a particular state or divisionwide assessment or any part of an assessment, the IEP must state why that assessment is not appropriate for the student and how the student will be assessed.
- The projected date for beginning the services and program modifications and the anticipated frequency, location, and duration of each.
- Transition plans, including:
 - Beginning at age 14 and each year thereafter a statement of the student's needs that are related to transition services, including those that focus on the student's courses of study (e.g., the student participation in advanced-placement courses in an educational program).
 - Beginning at age 16 (or sooner, if the IEP team pledges it is appropriate), a statement of needed transition services, including, when appropriate, a statement of the interagency responsibilities or any other needed links.
 - Beginning at least one year before the student reaches the age of majority under state law (usually at age 18), a statement that the student has been informed of those rights under IDEA that will transfer to the student from the parents when the student becomes of age
- How the student's progress toward annual goals will be measured and how the student's parents will be informed—at least as often as parents of students who do not have disabilities are informed—of the student's progress toward annual goals and the extent to which the progress is sufficient to enable the student to achieve the goals by the end of the school year.

Source: *Exceptional Lives* by Turnbull & Turnbull, 2004.

*Requirements are documented from IDEA 1997 pending the release of federal regulations for IDEA 2004.

FINDING

Special education is a service, not a program. LCPS should not refer to special education classrooms as categorical, such as the educable class, the trainable class, the learning disabilities class, etc.

With the reauthorization of IDEA, the law specifically documents that special education is a service and should no longer be considered a program or classroom. Such terminology diminishes the intent instruction in the least restrictive environment. While the law does support a continuum of service, it does not support the terminology of categorical classrooms.

RECOMMENDATION

Recommendation 3-19:

Discontinue the terminology of categorical special education classrooms and refer to special education as a service in the least restrictive environment which may include more restrictive cross-categorical environments.

LCPS should discontinue out-dated terminology when referring to special education services. The terminology should refer to special education services in the least restrictive environment, ranging from the general education setting to more restrictive settings of cross-categorical environments. Cross-categorical environments are defined as more restrictive settings (i.e., self-contained) for students of various disabilities who can benefit from smaller class size and more direct instruction.

FISCAL IMPACT

This recommendation can be implemented using existing resources.

4.0 PERSONNEL AND HUMAN RESOURCES

4.0 PERSONNEL AND HUMAN RESOURCES

This chapter reviews the personnel and human resources management functions of the Human Resources Department of Louisa County Public Schools (LCPS). The five areas of review include:

- 4.1 Organization and Administration
- 4.2 Personnel Policies and Procedures
- 4.3 Recruitment, Hiring, and Retention
- 4.4 Employee Compensation and Benefits
- 4.5 Teacher Certification and Employee Evaluation

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 human resources Web site. In addition, MGT consultants conducted interviews with all the central office personnel in the Human Resources Department, as well as the superintendent, and 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

The Human Resources Department of Louisa County Public Schools is responsible for facilitating the recruitment, selection, appraisal, and compensation of division personnel. The department accomplishes these goals with a staff of three, consisting of one administrator and two clerical personnel. There are a number of laudable practices in the department, most notably:

- having a well-organized system for personnel records that meets both state records law requirements and federal regulations;
- making the financial commitment necessary to recruit quality teachers and encourage their continued professional development;
- creating and maintaining a competitive salary schedule and providing monetary incentives for critical shortage areas and advanced degrees;
- creating a highly structured and organized system for handling initial certification and certification renewals; and
- creating an appraisal process that is both formative and summative and facilitates improved performance.

In an effort to enhance the overall effectiveness and efficiency of the Human Resources Department, several areas have been identified as recommendations:

- establish a coordinator of human resources position;
- reclassify the executive administrative secretary position as a personnel specialist;
- publish the School Board Policy Manual on the division Web site;
- develop a procedures manual for certified personnel;
- expand the capability of the Human Resources Web site to allow on-line submission of employment applications and references;
- post all human resources forms and handbooks on the Web site;
- analyze the results of recent years' recruitment activities and determine the viability of continuing to include certain institutions that have not proved fruitful historically;
- analyze the data collected on applicants to determine possible areas of improvement in the hiring process;
- conduct a survey of certified and classified employees to determine reasons for attrition;
- develop the current "buddy teacher" program into a true mentoring program;
- review the current insurance rates and benefits package and compare with like divisions to determine if cost savings can be realized; and
- institute a program to reduce the number of leave days taken by LCPS teachers.

INTRODUCTION

Human resources can be described as the organizational function accountable for obtaining and maintaining qualified employees. Fulfilling that mission is a major contributor to an organization's success. The major functions of the LCPS Human Resources Department are as follows:

- interpreting policy and answering employee questions or concerns regarding benefits, payroll, etc.;
- administering employee benefits and insurance;
- processing new hires and terminations;
- maintaining employee files;

- tracking basic personnel data such as vacation, leave of absence, etc.;
- preparing government required reports and distribution of personnel related memorandum;
- conducting some activities to minimize risk to the organization, and initiating performance improvement activities to a limited extent;
- administering a salary program;
- providing basic counsel to individual managers and supervisors about performance related issues among their subordinates; and
- screening and reference checking employment candidates.

The Louisa County Public Schools Human Resources Department provides these and other services for 699 school division employees. As shown in Exhibit 4-1, the largest employee group consists of instructional personnel.

MGT consultants surveyed LCPS central office administrators, principals and teachers, seeking their perceptions of all aspects of divisional operations. These three employee groups were asked to rate four areas of human resources—personnel recruitment, selection, evaluation and risk management--as either needing *some or major improvement* or as *adequate or outstanding*. As shown in Exhibit 4-2, personnel recruitment was rated favorably by all three employee groups, with 62 percent of central office administrators, 61 percent of principals and 52 percent of teachers rating it as *adequate or outstanding*. Ratings for personnel selection were equally favorable among the three groups. Personnel evaluation received mixed reviews with a majority of central office administrators and teachers rating it as *adequate or outstanding*, but 54 percent of principals indicating that it needed *some or major improvement*. Ratings for risk management were also mixed, with 70 and 77 percent respectively, of central office administrators and principals stating that it was *adequate or outstanding*, but only 35 percent of teachers providing the same rating.

The MGT survey also included a section on job satisfaction in which the same employee groups were given eight statements with which they could either *agree/strongly agree* or *disagree/strongly disagree*. As shown in Exhibit 4-3, all three groups see express high rates of job satisfaction, with 92 percent of central office administrators and principals, and 75 percent of teachers stating they *agree or strongly agree* with the statement, "I am very satisfied with my job in Louisa County Schools." Similarly favorable responses were given to all statements except with regards to salaries. In response to the statement, "My salary level is adequate for my level of work and experience," 61 percent of central office administrators, 46 percent of principals, and 69 percent of teachers stated they *disagree or strongly disagree*.

**EXHIBIT 4-1
LOUISA COUNTY PUBLIC SCHOOLS FULL-TIME EMPLOYEES
2005-06 SCHOOL YEAR**

TYPE OF EMPLOYEE	NUMBER OF EMPLOYEES
Administration/Supervisors	31
Regular Classroom Teachers	200
Special Education Teachers	55
Resource Teachers	61
Guidance Counselors	11
Librarians	7
Federal Program Teachers	11
Psychologists	4
School Social Workers	2
Mentor Coordinator	1
Technology Support	8
Other	20
Nurses	5
Instructional Assistant (full-time)	67
Instructional Assistant (part-time)	1
Secretaries/Bookkeepers	35
Custodians	33
Maintenance	9
Transportation/Mechanics	4
Bus Drivers	86
Bus Aides	7
Cafeteria	41
TOTAL NUMBER OF FULL-TIME EMPLOYEES	699

Source: Louisa County Public Schools, Human Resources Department, 2006.

**EXHIBIT 4-2
SURVEY RESPONSES REGARDING
HUMAN RESOURCES SERVICES
LOUISA COUNTY PUBLIC SCHOOLS
2005-06 SCHOOL YEAR**

SCHOOL DIVISION FUNCTION	ADMINISTRATORS		PRINCIPALS		TEACHERS	
	% NEEDS SOME/MAJOR IMPROVEMENT	% ADEQUATE/ OUTSTANDING	% NEEDS SOME/MAJOR IMPROVEMENT	% ADEQUATE/ OUTSTANDING	% NEEDS SOME/MAJOR IMPROVEMENT	% ADEQUATE/ OUTSTANDING
Personnel Recruitment	39	62	38	61	27	52
Personnel Selection	39	62	23	77	24	58
Personnel Evaluation	46	54	54	46	32	61
Risk Management	0	70	8	77	17	35

Source: MGT of America, Louisa County Public Schools Survey Results, 2006.

**EXHIBIT 4-3
SURVEY RESPONSES REGARDING
JOB SATISFACTION
LOUISA COUNTY PUBLIC SCHOOLS
2005-06 SCHOOL YEAR**

PART E: JOB SATISFACTION	(% AGREE + STRONGLY AGREE) / (% DISAGREE + STRONGLY DISAGREE) ¹		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. I am very satisfied with my job in Louisa County Schools.	92/8	92/0	75/11
2. I plan to continue my career in Louisa County Schools.	92/0	85/0	71/8
3. I am actively looking for a job outside of Louisa County Schools.	8/77	30/62	15/69
4. Salary levels in Louisa County Schools are competitive.	46/46	23/77	28/56
5. I feel that my work is appreciated by my supervisor(s).	69/31	93/8	58/26
6. I feel that I am an integral part of Louisa County Schools team.	84/8	100/0	68/19
7. I feel that there is no future for me in Louisa County Schools.	8/85	8/92	6/73
8. My salary level is adequate for my level of work and experience.	38/61	38/46	18/69

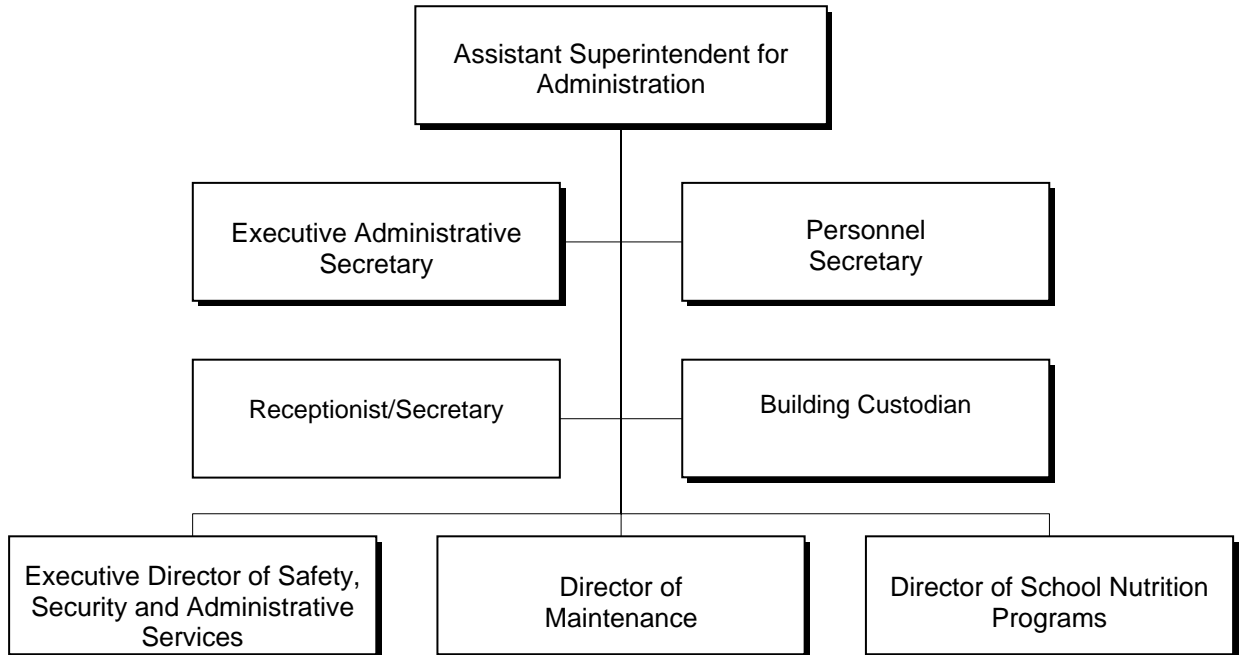
Source: MGT of America, Louisa County Public Schools Survey Results, 2006.

4.1 Organization and Administration

The Human Resources Department (HRD) consists of three full-time personnel, including one administrator and two support staff. As shown in Exhibit 4-4, the current organizational structure for the HRD includes an Assistant Superintendent for Administration, a personnel secretary, an administrative secretary, and a receptionist/secretary. There is a custodial employee assigned full-time to the central administration building who also reports to the Assistant Superintendent.

Within the organizational structure of the division, the Assistant Superintendent for Administration also is the direct supervisor of the directors for school nutrition, maintenance, and transportation/facilities and maintenance.

**EXHIBIT 4-4
ORGANIZATIONAL CHART FOR HUMAN RESOURCES
LOUISA COUNTY PUBLIC SCHOOLS
2005-06 SCHOOL YEAR**



Source: Louisa County Public Schools, Human Resources Department, 2006.

FINDING

The current Assistant Superintendent for Administration was formerly the Director of Human Resources. When the director's position was vacated it was removed from the organizational chart and the Assistant Superintendent retained those duties and responsibilities when he was promoted. The absence of an HR director places additional demands on the clerical staff, resulting in the assumption of duties and responsibilities beyond the scope of their job description. Currently, the assignment of duties and responsibilities for the HRD administrative and clerical staff are as follows:

- **Assistant Superintendent for Administration:** Administers and implements school board personnel policies and regulations; supervises and coordinates the student transportation, food service, and facilities maintenance; assists in preparation of the annual division budget, recruits, interviews and recommends for employment certified and classified personnel, prepare personnel reports for state and federal agencies; oversee the program for teacher licensure and endorsement; administer and implement board policies relating to human resources; serves as the superintendent's designee on student discipline hearings; assists in determining personnel allotment to division schools

- **Executive Secretary for Administration:** Major responsibilities include handling all paperwork related to teacher licensure, the Early Retirement Incentive Program (ERIP), hiring of classified personnel, tuition reimbursement, teacher recruitment, experience verification of new employees, and Highly Qualified (NCLB) qualifications for instructional aides (ParaPro)
- **Personnel Secretary:** Serves as secretary to the Assistant Superintendent; contact person for issues related to classified personnel, sets up disciplinary hearings for students; maintains the employment applicant and recruitment database; serves as the personnel records custodian; assists with processing employment paperwork for job applicants; processes building use applications (verifies insurance and tax-exempt status of applicants)

The duties carried out by the Executive Secretary go beyond the job description and are more like that of a personnel specialist. The Assistant Superintendent kept all of the responsibilities of the human resources director, while assuming additional supervisory duties over three other operational areas. The practical effect of the current organizational structure is that the Assistant Superintendent's focus is mainly with human resources and the other three operational areas are left to the supervision of the directors for those areas.

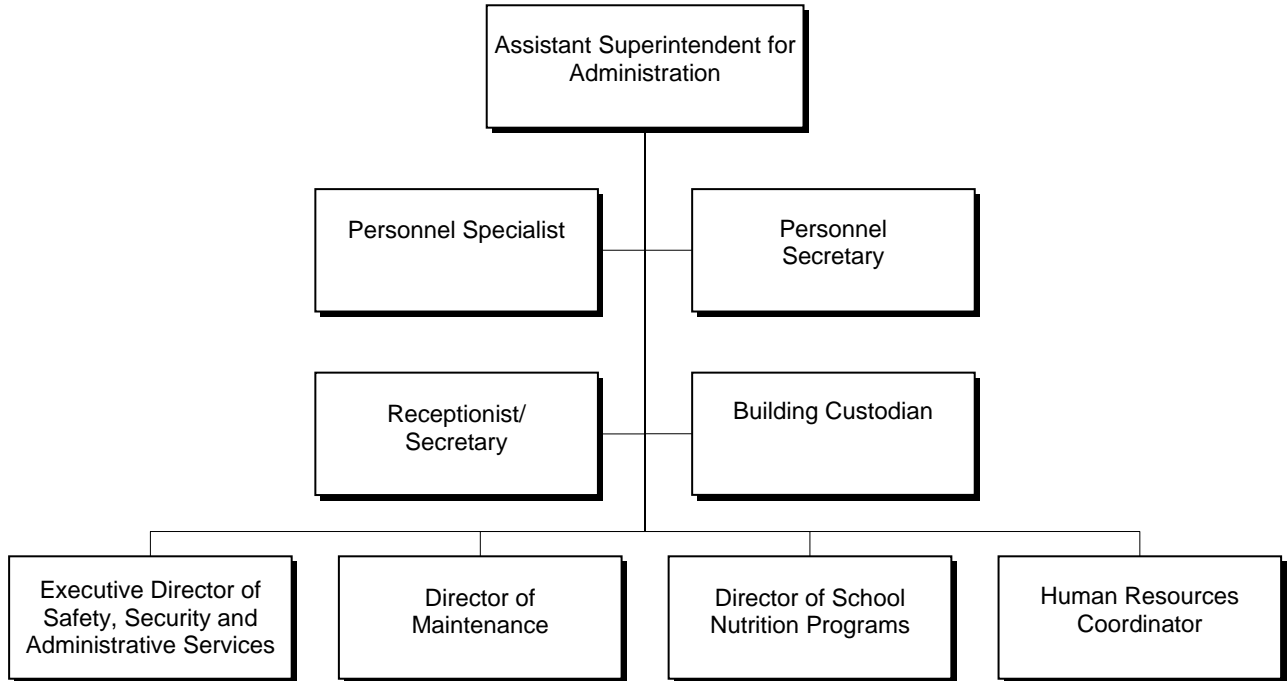
RECOMMENDATIONS

Recommendation 4-1:

Establish a Coordinator of Human Resources position.

In the current organizational structure, the Assistant Superintendent also serves as the director of human resources, in addition to supervising the other three operational areas. The current situation is working well due to the high level of competence and capability of the three other directors, and their ability to effectively oversee their operational areas; however, in terms of organizational effectiveness, the Assistant Superintendent's position should be one that is focused on overseeing all areas of operation, not just human resources. Divisions with similar organizational structures have either a director's or coordinator's position in human resources reporting directly to an assistant superintendent or director. Exhibit 4-5 illustrates the proposed organizational chart. As shown in the exhibit, the Personnel Specialist would report directly to the Human Resources Coordinator.

**EXHIBIT 4-5
PROPOSED ORGANIZATIONAL CHART FOR HUMAN RESOURCES
LOUISA COUNTY PUBLIC SCHOOLS
2006-07 SCHOOL YEAR**



Source: Prepared by MGT of America, 2006.

FISCAL IMPACT

Adding the coordinator position to the department would cost \$51,624, plus 30 percent for fringe benefits (\$15,487), or a total of \$67,111.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-2011
Employ One Human Resources Coordinator	(\$67,111)	(\$67,111)	(\$67,111)	(\$67,111)	(\$67,111)

Recommendation 4-2:

Re-classify the Executive Administrative Secretary position as a Personnel Specialist position.

By reclassifying this clerical position, the individual can assume more of the departmental responsibilities, and the Assistant Superintendent's position can operate more effectively once duties related to human resources are re-aligned. In addition, it would allow the job description to be revised to better fit the expanded duties currently being performed in the position.

FISCAL IMPACT

This position currently has a salary of \$35,619. Reclassifying the position to personnel specialist would entitle a salary increase of \$5,000, to bring the salary up to \$40,619, a typical starting salary for this position. With the additional cost of benefits equaling \$1,300, the total additional cost to the district would be \$6,300 per year.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-2011
Reclassify Executive Assistant Position	(\$6,300)	(\$6,300)	(\$6,300)	(\$6,300)	(\$6,300)

FINDING

The Personnel Secretary in the Human Resources Department serves as the personnel records custodian in the central office of the school division. During the on-site review, MGT consultants reviewed the personnel files under the Personnel Secretary's supervision. The files were kept in fire-rated cabinets which were locked when files were not being accessed. The files were well-organized and sorted by certified and classified personnel, with additional files for substitute teachers and employees who recently separated from service with the division. Separate files with confidential employee information were maintained separately in accordance with federal Health Insurance Portability and Accountability Act (HIPAA). The secretary had an effective system for maintaining the files in an orderly manner and for filing new materials quickly and efficiently. The contents of individual personnel files were well-organized and included the following:

- fingerprint card (or identification form for employees hired before 1995);
- correspondence (evaluation, leave forms, W-4, I-9 form, salary agreements, etc.);
- transcript(s);
- original application;
- copy of professional license (certified staff); and
- contracts

COMMENDATION

The division is commended for having a well-organized filing system that meets both state records law requirements and federal regulations (HIPAA).

4.2 Personnel Policies and Procedures

The National School Boards Association (NSBA) describes board policy as follows:

Like Congress, state legislatures, and city or county councils, school boards establish the direction and structure of their school districts by adopting policies through the authority granted by state legislatures. School board policies have the force of law equal to statutes or ordinances. Policies establish directions for the district; they set the goals, assign authority, and establish controls that make school governance and management possible. Policies are the means by which educators are accountable to the public.

FINDING

The school board policy for Louisa County Public Schools functions in much the same manner as described by the NSBA. Section G of the policy manual contains the guiding policies for all areas of personnel and human resources. Policies are written in concise and precise language and are cross-referenced to applicable state and federal statutes as well as to other related sections of the policy manual. The division has a policy stating that the policy manual will be reviewed annually and updated as needed. Evidence of policy updates can be found throughout the Personnel section. The policies provide instruction on human resource functions such as:

- Acceptable Computer Use
- EEOC/Discrimination
- Personnel Records
- Grievance Procedures
- Reporting Harassment
- Professional Staff Contracts
- Salary Schedules
- Employment Policies
- Professional Development
- Virginia Retirement System
- Teacher Licensure
- Employee Benefits
- Employee Leave
- Substitutes
- Evaluation of Staff
- Staff Assignment/ Transfer
- Outside Employment
- Disciplinary Procedures

RECOMMENDATION

Recommendation 4-3:

Publish the School Board Policy Manual on the division Web site.

As stated by the NSBA, school board policy is “the means by which educators are accountable to the public.” As such, the policy should be readily accessible and available to the public. It is now a common practice for school districts to publish their policy manuals on the Web. In addition to providing access for the public, putting board policy on-line allows all school personnel to have ready access when matters involving policy

arise in the work place. Electronic publication also allows for policy updates to be quickly disseminated to all district policy holders.

FISCAL IMPACT

This recommendation can be accomplished without additional resources.

FINDING

The policies of the school division are executed through procedures implemented by central office and school-based personnel. Certified personnel (teachers) comprise the largest employee group in the district and as such, the majority of school board policies relate to these employees.

The Human Resources Department executes many of these policies on a daily basis, as does the administrative and clerical staff at each of the division's schools; however, there is currently no procedures manual that lists these activities. Written procedures manuals allow for training and cross-training of personnel and serve as a legal guide to carrying out division policy. Such manuals allow for the uniform execution of policy directives across the division.

RECOMMENDATION

Recommendation 4-4:

Develop a procedures manual (employee handbook) for certified personnel.

The district currently publishes a number of procedures manuals including an employee handbook for classified personnel and for bus drivers. The division procedures manual should provide an explanation of what is expected of employees—as well as what they can expect from the organization. A procedures manual provides protection in legal disputes, as courts have typically considered them to be a contractual obligation.

Although school division procedures manuals will differ, depending on size, number of employees and benefits offered, most handbooks should include the following sections:

- **District Overview:** Includes an introduction to the division, with a few paragraphs about its history, growth, goals, mission and leadership philosophy;
- **Legal Issues:** Including, but not limited to Equal Employment Opportunity Policy Statement, Non-Discrimination and Anti-Harassment Policy, Americans With Disabilities Act Policy Statement, Conflict of Interest and Outside Employment Statement, any work confidentiality issues;

- **Compensation and Evaluation:** Discusses performance management and compensation programs, performance evaluation schedule, payment of salary, overtime pay and employee referral programs;
- **Time-Off Policies:** Includes procedures for taking vacations, sick time, personal time, bereavement, jury duty, leave under The Family And Medical Leave Act (FMLA), parental leave and leave of absence without pay;
- **Benefit Information:** Includes information on health insurance, dental insurance, flexible spending accounts, group life insurance, long-term disability, retirement plan, 401(k) plan, and workers' compensation benefits;
- **Job-Related Issues:** Includes information regarding attendance and punctuality, drug and alcohol abuse, appearance and dress code, intolerance of violence in the workplace, responses to accidents and emergencies, internal complaint channels, e-mail and Internet policies, use of company equipment and computer systems, reference checks, smoking policy, and tuition reimbursement programs (if applicable); and
- **Terminating Employment:** Communicates the expectations and procedures in resignations, dismissals, including immediate dismissals and those other than immediate termination, post-resignation/ termination procedures.

FISCAL IMPACT

This recommendation can be accomplished at no additional cost by publishing the handbook on-line.

FINDING

The Human Resources Department's Web contains links to information on professional development offerings, current job postings, directions on applying for employment, an employment application (in Acrobat), employee benefits, the division's Mentor Program, the current teacher salary scale, and a link to send an email to the department to request additional information.

The current site allows applicants to download employment applications; however, since the application is posted in Acrobat, would-be users would need to have this software application on their computer or download it prior to accessing the employment application. An on-line application procedure would allow for more rapid processing of employment applications and verification of references.

RECOMMENDATIONS

Recommendation 4-5:

Expand the capability of the current Human Resources Web site to allow on-line submission of employment applications and submission of employment references.

Web sites are useful tools in providing routine information to both current and prospective employees without their having to contact departmental personnel directly. They also serve as effective employee recruitment vehicles by allowing would-be applicants to gain detailed information about the school division. Giving interested applicants the ability to apply online would streamline the process and allow the department to easily keep a daily tally on the number of applications submitted.

FISCAL IMPACT

The job of creating an online submission and tracking system for applications would be outsourced by the division. A review of vendors resulted in a cost estimate of \$5,500. This cost included \$4,000 for eight site licenses (\$500 each) and \$1,500 for on-site training.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Develop On-line Application Submission System	(\$5,500)	\$0	\$0	\$0	\$0

Recommendation 4-6:

Post all Human Resources forms and handbooks on the Web site.

The Human Resources Department produces numerous forms and informational materials that are used regularly by division employees. By posting these forms and materials on-line, the department's customer service can be more efficient and departmental personnel can be relieved of routine tasks and devote their time to more complex tasks assisting division employees.

FISCAL IMPACT

This recommendation can be implemented without additional resources.

4.3 Recruitment, Hiring, and Retention

Studies on teacher supply and demand indicate that teacher shortages are especially prevalent in inner-city and rural school districts, in fast-growing districts around the country, and in the fields of mathematics, science, bilingual education and special education. States and school districts are employing a variety of strategies to combat teacher shortages, including the use of financial incentives such as college scholarships

and loan-forgiveness programs, signing bonuses, assistance with moving expenses and housing subsidies to entice prospective teachers. The state of Virginia and Louisa County Public Schools' recruitment activities reflect these national trends in the efforts undertaken to obtain an adequate supply of qualified teachers.

4.3.1 Teacher Recruitment

FINDING

The division has a need for approximately 50 new teachers each year due to growth and attrition. In response to this need, LCPS has a recruiting plan that is updated annually. The components of the recruitment efforts are as follows:

- **Recruitment Brochure.** The division has produced an attractive and appealing brochure that is given to prospective applicants. The brochure contains facts about the school division and the life in the community. It also includes an employment application, copy of the current salary scale and information on employee benefits. A copy of the brochure is also available at the HRD Web site.
- **Regional Teacher Recruitment Fair.** LCPS participates in two regional recruitment fairs. Each is a collaborative effort with four neighboring divisions—Albemarle, Charlottesville City, and Orange County—to host the event. The first fair is typically held in March to coincide with the Great Virginia Teach-In, and the second fair is held in June. The first fair focuses on recruiting teachers from out-of-state and outside of the region, and the second is focused on local recruiting. School principals conduct most interviews and the cost of the fairs is shared among the four school divisions.
- **New Teacher Institute.** This is a three-day event to orient new teachers to Louisa County and provide an overview/explanation of the employee benefits. There is a Q&A session on various topics of interest to new teachers as well as “getting acquainted” sessions with the teachers and their principals. Teachers are paid \$300 for attending all three days of the event.
- **Tuition Reimbursement.** The division supports the efforts of its employees to pursue advanced degrees and to obtain certification in new content areas. Certified employees are eligible for up to \$700 in reimbursement annually, and classified employees are also eligible if they are enrolled in an approved program leading to a two or four-year degree from an accredited institution. Certified personnel seeking an endorsement in special education, math, reading or gifted are eligible for full reimbursement of tuition. Other reimbursements include \$1,000 each fiscal year for certified personnel seeking a degree or endorsement in educational administration and supervision, and \$2,100 per year for persons pursuing a doctoral program. This last reimbursement requires an employment service contract, and all reimbursements must have prior administrative approval before payment.

COMMENDATION

Louisa County Public Schools is commended for the financial commitment it makes to recruiting qualified teachers and to encouraging their continued professional development.

FINDING

Division central office and school personnel comprise recruiting teams that visit four to five college recruiting fairs each fall and over 20 events throughout the spring. Exhibit 4-6 shows the recruitment schedule for the 2005–06 school year. The division tracks the cost of the recruitment efforts and the results of the trip in terms of number of teachers interviewed and hired.

RECOMMENDATION

Recommendation 4-7:

Analyze the results of recent year’s recruitment activities and determine the viability of continuing to include certain institutions on the recruitment schedule.

From November to June of this school year, division central office and school-based personnel are scheduled to visit over 29 venues, each with varying degrees of success in terms of recruitment. HRD currently maintains records of the travel costs associated with all recruitment activities, as well as the results of the activities in terms of teachers hired. The department is encouraged to analyze the results of its recruitment visits over the past three years to determine if visiting this number of venues, and/or these particular venues, is cost effective.

**EXHIBIT 4-6
LOUISA COUNTY PUBLIC SCHOOLS
2005-06 TEACHER RECRUITING SCHEDULE**

RECRUITMENT DATES	COLLEGE/UNIVERSITY/FAIR	COST	REG	RECRUITER(S)
November				
November 9, 2005	VASPA Job Fair		x	Moore
November 10, 2005	St. Pauls College	\$115	x	Humphrey
November 16, 2005	CVC Teacher Fair	\$85	x	Moore + 1
November 29, 2005	Slippery Rock	\$100	x	Walkowiak/Phillips
November 30, 2005	MAEE (State College)	\$100	x	Moore
January				
January 26, 2006	Radford/VaTech	\$130	x	Moore
February				
February 9-10, 2006	UVA	\$340	x	Moore/Purcell/Gillian/Unruh/Willis
February 27, 2006	Lynchburg	\$0	x	Willis
February 27, 2006	JMU	\$60	x	Moore
March				
March 7, 2006	University of Mary Washington	\$0	x	Moss
March 17, 2006	Longwood	\$75	x	Moss
March 17, 2006	Kids First		x	Moore/Basham/Willis
March 18, 2006	A Call to Teach		x	Moore/Gillian/Basham/Willis
March 27, 2006	Penn State	\$110	x	Moore
March 28, 2006	Bloomsburg			
March 30, 2006	PERC	\$340	x	Moore
April				
April 3, 2006	Kitztown	\$120	x	Sestito
April 4, 2006	Millersville	\$100	x	Sestito
April 3-4, 2006	Buffalo	\$200	x	Downey (Jen and Lee)
April 5, 2006	Rochester	\$200	x	Downey (Jen and Lee)
April 6-7, 2006	Central NY	\$200	x	Downey (Jen and Lee)
April 14-23, 2006	LCPS SPRING BREAK			
April 19-20, 2006	Coastal Carolina		x	Moore
April 24, 2006	California University of PA	\$100	x	
April 25, 2006	Indiana University of PA	\$100	x	
April 26, 2006	Clarion University of PA	\$100	x	
April 27, 2006	Slippery Rock	\$100	x	
April 28, 2006	Edinboro University of PA	\$100	x	
June				
June 9, 2006	Kids First (tentative)			

Source: Louisa County Public Schools, Human Resources Department, 2006.

FISCAL IMPACT

With each visit consisting of one to four recruiters from the division at an average cost of \$150 per person, scaling the current number of venues back by 10 would result in cost savings of \$6,000 per year, based on four persons visiting each venue.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Scale Back Number of Recruitment Venues	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000

4.3.2 Hiring

School districts should have an efficient and effective process for reviewing applications for employment, screening applicants and hiring new employees. The process should be evident to both the applicant and those in the division involved in the process. The division should create and maintain clearly defined job descriptions on which to base hiring decisions. The division should also analyze staffing patterns and review personnel employment histories to project vacancies due to retirements, and create long range staffing plans to ensure a steady supply of qualified personnel for the division.

FINDING

LCPS has a clearly established procedure for advertising vacancies, submitting application materials, screening applications and interviewing applicants. Vacancy notices are posted at the HRD Web site and in hard copy form at the central administration building and in schools throughout the division. Teacher and administrator application packets are date stamped and recorded as they arrive in the Human Resources Department. School principals have the option of having HRD personnel screen the applications and provide a selected sample for review or leave the entire screening process up to the administrator. Applications are kept on file for one year from the date of receipt. Individuals applying for positions after the one-year period will have to complete a new application packet. A database is maintained on the status of applications including whether the individual was interviewed, hired, or rejected to due lack of qualifications.

RECOMMENDATION

Recommendation 4-8:

Analyze the data collected on applicants to determine possible areas of improvement in the hiring process.

A review of the data maintained on employee applicants will allow the district to analyze its processes and determine areas to target for improvement. For example, if there is a pattern of persons applying for positions for which they are not qualified, there may be a problem with the way the position's qualifications were or were not stated in the advertisement. Repeated failure to obtain a sufficient number of applicants may indicate either that the salary range is insufficient or the job description is unclear.

FISCAL IMPACT

This recommendation can be implemented within existing resources.

4.3.3 Retention

The National Commission on Teaching & America's Future (NCTAF) says in its latest report, *No Dream Denied: A Pledge to America's Children*. "The high demand for teachers is not being driven by an under supply of entering teachers, but by an excessive demand for teacher replacements that is driven by staggering teacher turnover." NCTAF also reports that turnover leads to another critical challenge--creating and sustaining professional learning communities in revolving door schools. "High turnover diminishes the sense of community, continuity, and coherence that is the

hallmark of strong schools." One of the hallmarks of an effective school and school division is its ability to retain a highly skilled work force, especially in the instructional and administrative ranks.

FINDING

As shown in Exhibit 4-7, LCPS has had an average of 41 teachers resign each year for the past three years. This represents roughly a 12 percent turnover in teaching staff each year, a relatively high rate given the size of the district. Interviews were conducted with HRD personnel to gain insight into the possible causes of the high attrition rate. Personnel indicated that nearly 48 percent of all teachers in the division are commuters from neighboring areas. This is due primarily to the limited amount of affordable and desirable housing in the Louisa County area and lifestyle issues related to living in a small, rural community. In exit interviews, most departing employees cite reasons such as higher pay, and/or shorter commuter as primary reasons for leaving the district. These issues appear to be relevant given the findings on the MGT job satisfaction surveys discussed earlier in the chapter.

**EXHIBIT 4-7
CERTIFIED PERSONNEL TURNOVER
LOUISA COUNTY PUBLIC SCHOOLS
2003–05 SCHOOL YEARS**

	2002-2003		2003-2004		2004-2005	
	Resigned	Retired	Resigned	Retired	Resigned	Retired
Teachers	39	5	41	2	43	0
Administrators	1	0	1	0	2	1
Guidance	4	0	0	0	2	0
Speech	0	0	2	0	1	0
Psychology	1	0	0	0	1	0
Social Work	0	0	0	0	1	0
Other Certified	0	0	2	1	2	0
TOTAL	45	5	46	2	52	1

Source: Louisa County Public Schools, Human Resources Department, 2006.

As shown in Exhibit 4-8, among classified personnel, the highest turnover rate is among teaching assistants, with an average of five resigning from the division each year.

**EXHIBIT 4-8
CLASSIFIED PERSONNEL TURNOVER
LOUISA COUNTY PUBLIC SCHOOLS
2003–05 SCHOOL YEARS**

	2002-2003			2003-2004			2004-2005		
	Retired	Resigned	Terminated	Retired	Resigned	Terminated	Retired	Resigned	Terminated
Secretary	1	2	0	0	3	0	3	4	2
Transportation	1	6	0	0	1	0	1	3	0
Assistant	0	9	0	0	5	1	1	15	0
Custodian	0	0	0	0	0	0	1	1	3
Food Service	0	0	0	0	1	0	0	1	0
Other	0	0	0	1	6	2	0	2	0
TOTAL	2	17	0	1	16	3	6	26	5

Source: Louisa County Public Schools, Human Resources Department, 2006.

RECOMMENDATION

Recommendation 4-9:

Conduct a survey of certified and classified employee to determine reasons for attrition.

While lifestyle issues cannot be directly addressed by the division, efforts can be made to create and maintain a work environment that is attractive to employees and will help to reduce attrition. An on-line survey could be developed and administered annually near the end of the academic year to determine employee's intent to remain with the division for the coming year, and if not, the reasons why they plan to depart. Survey results could be used to improve practices and processes in the division that hinder employee satisfaction.

FISCAL IMPACT

This recommendation can be implemented without additional resources by conducting exit interviews with personnel leaving the division.

FINDING

LCPS has a mentor teacher program lead by a teacher on special assignment who provides coordination for the program. The stated goal of the program is "to provide individualized support for teachers as they join the Louisa County Professional staff." Beginning teachers are matched with an experienced peer teacher to provide the new teacher with a support system during his or her first year of teaching. The objectives of the program include:

- providing an orientation for new teachers to help prepare them for the opening of school;
- providing an orientation for mentor teachers to explain their role and responsibilities;
- providing professional and personal support to new teachers through interactions with an experienced peer;
- providing on-going staff development activities that address topics of interest; and
- socializing new teachers into the school, school division and community.

The program features a handbook for mentors and a series of formal gatherings with division mentors and their beginning teachers; however, in reviewing the program, it has all the elements of a "buddy teacher" program, not a true mentor program.

RECOMMENDATION

Recommendation 4-10:

Develop the current “buddy teacher” program into a true mentoring program.

While the current program does possess several of the attributes of a mentoring program, it does not really live up to that title.

The U. S. Department of Education has recently conducted a study on the effective characteristics of strong mentoring and support programs. These characteristics include:

- One-on-one mentoring between a novice and master teacher. Substitutes (although increasingly difficult to come by) free mentor teachers to conduct model lessons and occasional classes for new recruits
- Observation and discussion between the mentors and teachers deepen the knowledge base about what constitutes good teaching. New teachers also visit classrooms of veteran teachers and are observed by mentors for a similar dialogue about the craft of teaching;
- Mentors who are compensated and receive opportunities for their professional growth such as becoming adjunct faculty at college campuses;
- Summer intensive orientation programs and training workshops for first-year teachers conducted before the school year begins. They provide a boost to new teachers who need some extra time and assistance to get started and become comfortable in their classrooms and subject matter;
- Program designs aligned with state standards that include the knowledge and skill sets necessary for novice teachers; and
- An induction program that satisfies licensure and certification requirements and provides assistance with daily classroom issues.

Incorporating these elements into the program would allow it to be much more instructionally focused and provide a more meaningful experience for both beginning teacher and mentor.

FISCAL IMPACT

Stipends for mentor teachers typically amount to \$600 for extra duties related to their work with beginning teachers. Based on an average of 30 beginning teachers per year, the cost of mentor teacher stipends would be \$18,000 per year.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Pay a Stipend for Mentor Teachers	(\$18,000)	(\$18,000)	(\$18,000)	(\$18,000)	(\$18,000)

4.4 Employee Compensation and Benefits

One of the key determinants in a prospective teacher applicant’s decision to work in a school district is starting salary. For young persons coming out of college and entering the workforce for the first time, the ability to earn a livable wage in their chosen professional is highly desirable.

FINDING

Louisa County Public Schools faces challenges similar to other rural districts from around the country in recruiting an adequate supply of highly qualified teachers. One of the key features of its recruitment efforts is its commitment to remaining competitive in terms of starting salaries. As shown in Exhibit 4-9, among comparable districts, Louisa County’s starting salary for teachers is the second highest at \$36,336. Additionally, the division has the shortest number of steps to the top of the salary scale and the highest top salary of all the peer districts, at \$59,655.

As an incentive to recruit more experienced and/or teachers with more extensive educational preparation, as well as reward current teachers who continue their education and remain in the division, LCPS offers supplements for advanced degrees, beginning with a \$1,100 bonus for a Bachelor’s degree, plus 15 hours beyond the degree. Teachers with a Master’s degree receive an additional \$2,200 and \$3,000 for a doctorate degree.

**EXHIBIT 4-9
LOUISA COUNTY PUBLIC SCHOOLS SALARY COMPARISON
2005 – 2006 SCHOOL YEAR**

SCHOOL DIVISION	STARTING SALARY	TOP SALARY	NUMBER OF STEPS
Louisa County	\$36,336	\$59,655	20
Fluvanna County	\$36,721	\$54,882	27
Botetourt County	\$32,771	\$50,157	28
Orange County	\$32,500	\$48,583	37
Powhatan County	\$34,872	\$56,710	31
Shenandoah County	\$32,000	\$53,000	42
District Average	\$34,200	\$53,831	31

Source: The Virginia Department of Education, 2006.

COMMENDATION

Louisa County Public Schools is commended for creating and maintaining a competitive salary scale and providing monetary incentives for critical shortage areas and advanced degrees.

FINDING

LCPS has created a benefits package that complements the salary compensation offered by the division. This package includes:

- **Insurance Coverage.** The division provides \$1,000,000 of professional liability coverage for every employee. In addition, LCPS pays the majority of the monthly medical insurance. Medical coverage includes hospitalization, discounted prescriptions, vision, dental, and major medical.
- **Tuition Reimbursement and Stipends.** Discussed in detail earlier in the chapter, the tuition reimbursement program encourages the pursuit of advanced degrees and additional licensure for teachers and support staff as well.
- **Flexible Spending Plan.** The division's plan allows employees to set aside a portion of their salary to pay for medical and dental expenses not covered by the insurance provider. The money taken out of employee's pay is sheltered, and not subject to federal income tax. This set-aside can be used for insurance deductibles, co-pays for medical services, prescription and eyewear.
- **Direct Deposit.** Offers employees a convenient way to manage finances.
- **Leave.** All full-time employees may earn the following types of leave: sick, professional military, personal (two days annually), sick leave bank, and Family and Medical Leave.
- **Retirement.** All full-time employees are automatically covered by the Virginia Retirement System (VRS). LCPS pays for all employee costs. VRS benefits include:
 - full retirement benefits at age 50, with 30 years of service or at age 65 with five years of service;
 - early retirement (ERIP) with benefits at age 50 with five years or more of service to the division;
 - disability and death benefits;
 - vesting in retirement system after five years of service;
 - life insurance coverage equal to twice the salary.

RECOMMENDATION

Recommendation 4-11:

Reduce the current rates being paid for the insurance coverage and benefits package offered for employees and compare with like divisions.

While salary and benefits costs for employees comprise the largest portion of the division budget, it is crucial to regularly assess the rates being paid by the division and compare them with rates paid by comparably sized organizations. Such monitoring will allow the division to negotiate better rates with insurance carriers in the face of competing carriers with more attractive coverage rates.

FISCAL IMPACT

Based on a five percent reduction of the district's projected expenditure for benefits in the 2006-07 school year of \$8,649,169.00, a five percent savings on this figure should amount to \$432,458. Using the same rate of increase in expenditure over the following four years, the total savings for five years would amount to \$2,162,290.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Reduce Fringe Benefits Rate by Five Percent	\$432,458	\$432,458	\$432,458	\$432,458	\$432,458

FINDING

LCPS offers five types of leave as a benefit to its full-time employees. The cost of employee leave can be felt not only monetarily, but even more importantly, in the loss of instructional time with students. As shown in Exhibit 4-10, LCPS teachers have taken an average of 3,000 sick, personal and vacation days per year for the last three years. Over that same three year period, the number of days taken each year has increased, with the total days for the most recent year amounting to 286 more days than two years earlier.

Based on a 180-day student school year, the 9,006 days of leave taken over the past three years represents over 50 school years. Each of the three years shows an increase in the number of leave days taken during the months surrounding the spring and winter breaks, and Thanksgiving holiday, which indicates that there is probably a degree of discretion on the part of employees as to when they are taking leave.

**EXHIBIT 4-10
LEAVE TAKEN BY TEACHERS
LOUISA COUNTY PUBLIC SCHOOLS
2003-05 SCHOOL YEARS**

Month	2002-2003	2003-2004	2004-2005
January	223	177	300
February	182	262	291
March	333	361	251
April	403	340	337
May	406	355	365
June	123	178	152
July	31	11	10
August	67	60	112
September	210	278	356
October	289	342	362
November	278	343	355
December	308	317	247
TOTAL	2,850	3,021	3,135

Source: Louisa County Public Schools, Human Resources Department, 2006.

RECOMMENDATION

Recommendation 4-12:

Institute a program to reduce the number of leave days taken by LCPS teachers.

District around the country have introduced a number of policies and incentives aimed at reducing the number of leave days taken by employees. Strategies ranging from requiring written requests to take leave to financial rewards for not taking leave, have been implemented with varying degrees of success. The Louisa County Public Schools should review strategies utilized by comparable districts to find ways to reduce the rate of teacher absenteeism.

FISCAL IMPACT

A 10 percent reduction in the number of leave days taken would equal an average of 300 days per year. Times the daily cost of a substitute teacher at \$61, cost savings from the reduction of leave would equal \$18,300 annually, or \$91,500 over a five year period.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Reduce Leave Taken by Ten Percent	\$18,300	\$18,300	\$18,300	\$18,300	\$18,300

4.5 Teacher Certification and Employee Evaluation

4.5.1 Teacher Certification

Accord to the statutes of the Commonwealth of Virginia, “The primary purpose for licensing teachers and other school personnel is to maintain standards of professional competence.” The state issues seven types of professional licenses:

- **Collegiate Professional License.** The Collegiate Professional License is a five-year, renewable license available to an individual who has satisfied all requirements for licensure, including the professional teacher’s assessment prescribed by the Board of Education;
- **Postgraduate Professional License.** The Postgraduate Professional License is a five-year, renewable license available to an individual who has qualified for the Collegiate Professional License and who holds an appropriate earned graduate degree from an accredited institution;
- **Technical Professional License.** The Technical Professional License is a five-year, renewable license available to a person who has graduated from an accredited high school (or possesses a General Education Development Certificate); has exhibited academic proficiency, technical competency, and occupational experience; and has completed nine semester hours of specialized professional studies credit from an accredited college or university;
- **Provisional License.** A three-year, nonrenewable license available to individuals who are employed by a Virginia educational agency;
- **Special Education Conditional License.** A three-year, nonrenewable teaching license issued to an individual employed as a special education teacher in a public school or a nonpublic special education school in Virginia who does not hold the appropriate special education endorsement;
- **Pupil Personnel Services License.** A five-year, renewable license available to an individual who has earned an appropriate graduate degree from an accredited institution with an endorsement for guidance counselor, school psychologist, school social worker, or visiting teacher. This license does not require teaching experience.
- **Division Superintendent License.** The Division Superintendent License is a five-year, renewable license available to an individual who has completed an earned Master’s degree from an accredited institution of higher education.

FINDING

The HRD clerical staff member assigned to oversee the process of teacher licensure is very knowledgeable regarding the process. In an effort to assist teachers working with through issues dealing with licensure, the department has created a series of memorandum to serve as reminders of application due dates, and certificate/license expiration dates. An electronic database is maintained on the certification status of each instructional employee, and notices are sent at the start of the school year, and when the person is nearing an expiration date.

In addition to state licensure, teachers must also be highly qualified, according to standards set by the federal government in the No Child Left Behind legislation. The Human Resources Department sends teachers notification letters regarding their highly qualified status, and identifies the actions they need to take to be in compliance.

COMMENDATION

The Human Resources Department is commended for the highly structured and organized manner in which it handles initial certification and certification renewals.

The department works cooperatively with Curriculum and Instruction in order to identify teachers out of compliance with NCLB and other licensure issues.

4.5.2 Employee Evaluation

Performance evaluations are intended to measure the extent to which an employee's performance meets the requirements of a particular position and to establish goals for the future. They are also a means to open up channels of communication, appraise past performance, recognize good performance, and identify areas that might require improvement. An effective performance evaluation should include some discussion and assessment of the employee's potential for professional and career growth. The key ingredients in a successful evaluation are: (1) identifying job standards; (2) being consistent in measuring and communicating the extent to which whose standards are being met; and, (3) providing opportunities for feedback and clarification.

FINDING

Louisa County Public Schools conducts performance appraisals on all employee groups: administrative, instructional and classified. Each group has performance evaluation forms designed specifically to assess the job performance specific to their roles and responsibilities. Evaluation forms for classified personnel consist of eight categories: quality of work, job knowledge, attitude, attendance/punctuality, personal characteristics, interpersonal relationships, flexibility/adaptability, and quantity of work. Ratings for each category are "E"- Performs Effectively, and "NI"- Needs Improvement. In addition to the evaluation form, there is an accompanying form that explains each of the categories and breaks them out into behavioral objectives.

The appraisal form for administrators and teachers is both formative and summative in nature. Instructional personnel are evaluated in the areas of instructional process,

classroom management, and professional qualities. Formal assessments are conducted on an evaluation cycle. This cycle consists of:

- Teachers (Year 0 – 2): Annual appraisal
- Teachers (Year 3-8): Biennial appraisal
- Teachers (Year 10+): Triennial appraisal

Teachers in need of assistance are placed on a professional improvement plan and provided with support to aid them in their improvement efforts. Monitoring and appraisal occur several times through the year, both formally and informally.

Administrators are evaluated in five domains: planning and assessment, instructional leadership, safety and organization management for learning, communication and community relations, and professionalism. Each domain consists of three to four standards on which the administrator is rated as either “E”- Performs Effectively, or “NI”- Needs Improvement.

COMMENDATION

LCPS is commended on an appraisal process that is both formative and summative and includes a process for facilitating performance improvement.

RECOMMENDATION

Recommendation 4-13

Re-create the appraisal forms in an electronic format.

Placing the appraisal instruments on-line would allow them to become living documents. Employees on an improvement plan could easily download the form and update it based on the improvement activities that he or she has engaged in. With the inclusion of an Excel format, the electronic version would also allow administrators to review the overall performance of all employees under their supervision to note if there are any consistent patterns of high or low performance.

In moving to an online environment, adequate security measures would need to be in place, such as access codes, to ensure the confidentiality of the information.

FISCAL IMPACT

The recommendation could be implemented using the current technology staff in the school division.

5.0 FINANCE AND PURCHASING

5.0 FINANCE AND PURCHASING

In this chapter the findings, commendations, and recommendations for finance and purchasing related activities of the Louisa County Public Schools (LCPS) are presented. The major sections of the chapter include:

- 5.1 Fiscal Services Department
 - 5.1.1 Accounting Functions
 - 5.1.2 Budget Management
 - 5.1.3 Payroll Functions
 - 5.1.4 Grants Management
 - 5.1.5 Risk Management
- 5.2 External Auditing
- 5.3 Site-Based Financial Management Activities
- 5.4 Other areas

CHAPTER SUMMARY

Recommendations contained in this chapter are essentially focused on changes that would lead to improving the school district, the superintendent and staff's ability to more effectively manage LCPS's financial resources. Among these recommendations are the following key suggestions that should assist the superintendent and school board as they continue to consider all aspects of financial management:

- document accounting, purchasing, payroll and other policies and procedures of the Fiscal Services Department and of School Activity Funds;
- evaluate and reconsider the Early Retirement Incentive Program;
- enhance payroll processes by improving the payroll system and acquiring a Personnel Control System;
- improve controls over spreadsheets; and
- improve budget documents by providing explanations and justifications for expenditures that require significant increases over the prior year.

The education of more than 4,400 students is the major responsibility of LCPS; however, this cannot be accomplished without the financial resources entrusted to the school system by the citizens of the county and the state and by the federal government. In order to help ensure financial resources are protected and spent appropriately, a financial foundation, which includes: a strategic plan, written policies and procedures; an accounting information system; revenue and spending forecasts and budgets; systems of internal control; and support system that enhances the ability of school administrators and teachers to carry out their responsibilities, must exist.

INTRODUCTION

Financial management and purchasing activities of a school district encompass a variety of functions that are distributed throughout the organization. These activities include general financial management (payroll, accounts payable, general ledger, financial reporting), risk management, auditing, grants management, budgeting and purchasing.

Louisa County Public Schools (LCPS) is one of 132 public school divisions or districts in the Commonwealth of Virginia and is a component unit of Louisa County. Overall, the division’s financial management and purchasing activities are effectively managed by a Director of Finance and staff. In addition, a few financial management activities are performed by the county’s Finance Department.

One of the intentions of this review of financial management is to explore some of the concerns expressed in responses to a survey conducted by the MGT review team at the onset of this review. Several respondents to the survey indicated that financial management functions needed improvement and that funds may not be managed wisely to support education in the school district. Although in general, survey responses were more positive than what we have found in other school division in the Commonwealth.

Exhibit 5-1 provides a summary of survey responses related to financial management and purchasing functions of the school district. The exhibit shows how satisfied LCPS administrators, principals, and teachers who responded to the survey are with certain financial management functions. These are very positive survey results when compared to responses received in other school surveys conducted by MGT. In another survey question (not shown in the exhibit), administrators, principal and teachers who responded to a question about how school funds were managed, 93 percent, 77 percent and 43 percent, respectively, believed funds were managed wisely. These are also very high marks when compared to responses received in other school district surveys. (See Appendix A for of responses from other school districts.)

**EXHIBIT 5-1
SURVEY RESPONSES
FOR FINANCIAL MANAGEMENT AND PURCHASING AREAS
PERCENT OF RESPONSES INDICATING IMPROVEMENTS NEEDED**

PROGRAM FUNCTION	ADMINISTRATORS	PRINCIPALS	TEACHERS
Budgeting	38%	8%	51%
Strategic Planning	15%	0%	38%
Financial Management	15%	8%	30%
Purchasing	8%	0%	17%
Risk Management	0%	8%	17%
Administrative Technology	15%	15%	7%
Grants Administration	31%	31%	17%

Source: MGT Survey of Louisa County Public Schools, March 2006.

Financial management is a key component of an educational organization. At a minimum it must provide the following capabilities:

- an integrated mechanism that translates the goals and objectives of a school system into financial terms;

- effective and reliable financial control and efficient processing of day-to-day financial activities;
- a financial structure to support efficient management of the school systems financial resources and other assets;
- useful and timely financial information provided to the Director Superintendent, assistant superintendents, administrative staff, principals, the School Board and City Council members;
- planning and budget development processes that will result in a plan and a budget that communicates to the School Board, city officials and the community the resources to be spent, where resources will be allocated and the value to be gained from the allocation.

Funds to finance public education in Virginia come from many sources, and financing of public schools in Virginia is generally based on a formula or index. The Commonwealth of Virginia uses a local composite index to distribute state aid. The local composite index is an indicator of a locality's ability to pay for public education. The local composite index is derived from local true values of real estate and public service corporation property values, adjusted gross income, and local retail sales per local average daily membership and population. The index is then weighted against the same values on a statewide basis. The higher a locality's local composite index, the greater a locality's ability is deemed to be to fund public education.

The following exhibits, based on data obtained from the Virginia Department of Education's Web site, show how LCPS compares to selected peer school divisions regarding certain financial indicators for the 2003-04 school year. Exhibit 5-2 shows how LCPS compares to selected peer schools regarding the sources of their funding. The LCPS receives less state funding and more local (county) funding than its peers. This is due to the relative wealth, as indicated by the local composite index, of Louisa County compared to the other county school divisions used for comparative purposes in this report. One factor contributing to the county's elevated composite index is the presence of the North Anna Power Plant as a major contributor to county tax revenue. As can be seen in the exhibit, the financial challenges this places on Louisa County to fund its schools is significant when compared to other districts. This is further compounded by the fact that, although wealthy according to the local composite index, the county has the highest percentage of economically disadvantaged students of any of its peers. This is indicated in Exhibit 5-3.

**EXHIBIT 5-2
RECEIPTS BY FUND SOURCE
PEER SCHOOL DIVISIONS
2004 FISCAL YEAR**

SCHOOL DIVISION	SALES AND USE TAX	STATE FUNDS	FEDERAL FUNDS	LOCAL FUNDS	OTHER FUNDS	LOANS, BONDS, ETC.
Louisa County	9.01%	23.62%	6.41%	55.88%	3.61%	1.46%
Fluvanna County	7.71%	42.99%	5.49%	42.18%	1.64%	0.00%
Botetourt County	9.43%	37.38%	4.37%	44.11%	4.71%	0.00%
Orange County	8.33%	33.86%	8.37%	46.11%	3.32%	0.00%
Powhatan County	6.96%	31.04%	3.18%	46.49%	2.04%	10.28%
Shenandoah County	9.54%	42.22%	6.29%	37.69%	4.28%	0.00%
District Average	8.50%	35.18%	5.69%	45.41%	3.27%	1.96%

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

**EXHIBIT 5-3
STUDENTS AS A PERCENT OF POPULATION
AND PERCENT ECONOMICALLY DISADVANTAGED
2004-05 SCHOOL YEAR**

SCHOOL DIVISION	TOTAL STUDENT POPULATION	STUDENT POPULATION PER 1,000 GENERAL POPULATION	PERCENT ECONOMICALLY DISADVANTAGED	TOTAL NUMBER OF SCHOOLS
Louisa County	4,408	172	34.1%	5
Fluvanna County	3,395	169	9.9%	5
Botetourt County	4,831	158	14.5%	11
Orange County	4,298	166	24.5%	8
Powhatan County	4,209	188	11.9%	4
Shenandoah County	5,954	170	26.3%	9
District Average	4,516	171	20.2%	7

Source: Virginia Department of Education, Web site, 2006, United States Census Bureau, 2000 Census Data, www.schoolmatters.com.

Exhibit 5-4 shows total spending on instruction and on administration per pupil for the 2003-04 school year. LCPS spent about two percent less than the average of these peers and about seven percent less than the largest spender, Botetourt County Schools on instruction per pupil. LCPS spent more for administrative purposes than any of the peer school divisions; about 35 percent more. Some of this disparity may be due to LCPS having misclassified some positions and functions as administrative, when they were more related to program and other instructional functions once adjusted, these figures should be closer to the norm in subsequent years.

**EXHIBIT 5-4
DISBURSEMENTS PER PUPIL FOR
INSTRUCTION AND ADMINISTRATION
PEER SCHOOL DIVISIONS
2004 FISCAL YEAR**

SCHOOL DIVISION	INSTRUCTION PER PUPIL ¹	ADMINISTRATION PER PUPIL ²
Louisa County	\$5,343	\$226.87
Fluvanna County	\$5,307	\$161.37
Botetourt County	\$5,742	\$145.11
Orange County	\$5,543	\$153.96
Powhatan County	\$5,237	\$220.73
Shenandoah County	\$5,378	\$102.76
District Average	\$5,425	\$168.47

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

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.

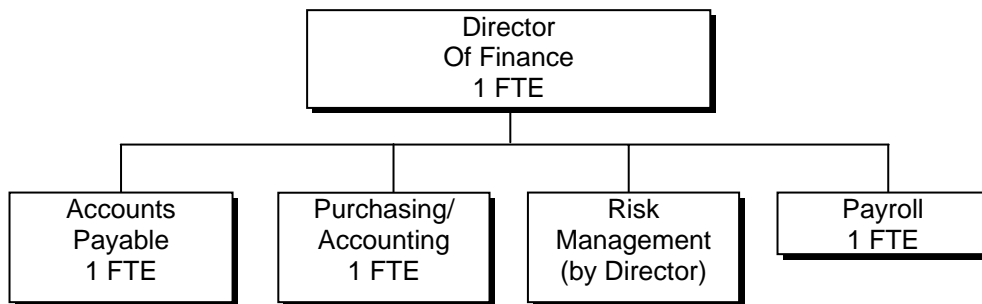
As can be seen in Exhibit 5-4, there is quite a variation in administration costs per pupil within the peer group, and as stated previously, some of the difference may be due to how certain staffing costs and other expenditures are classified. Nevertheless, based on our review of the certain administrative areas, LCPS has observably fewer employees in the typical administrative areas such as fiscal services, human resources and technology support than noted in other school divisions we have reviewed.

5.1 Fiscal Services Department

Exhibit 5-5 shows the staffing for the LCPS Finance Division. The Fiscal Services Department is headed by an experienced Director with more than 25 years of service with governmental organizations. Organizationally the department is directly under the Superintendent as one of several departments under his purview.

As indicated in Exhibit 5-5, in addition to the Director of Finance, the Fiscal Services Department has three full-time staff members. Each is cross-trained in numerous functions that are the responsibility of this department. Among the basic financial management activities of the school system, which are a function of this department, are payroll, accounts payable, general ledger, financial reporting, purchasing, and budgeting. Also, risk management activities are coordinated by Director of Finance.

**EXHIBIT 5-5
LOUISA COUNTY PUBLIC SCHOOLS
FISCAL SERVICES DEPARTMENT**



Source: Louisa County Public Schools, 2006.

There are other LCPS financial activities that are the responsibility of the county. Those functions include: handling of banking activities (cash management), providing a third signature on checks and coordinating external audit activities.

Another component of the financial management of the LCPS is the site-based portion. Each school within the system has a budget to spend certain funds called student activity funds. The responsibilities for this activity mainly reside with the principal and bookkeeper of each school.

Another activity that is typically found in a fiscal services department is risk management. Risk management usually entails numerous activities related to medical and other insurance, workers' compensation programs and work safety educational programs. Functions related to this activity are found mainly in the LCPS Fiscal Services Departments and with the county.

The Fiscal Services Department accounting functions are supported by a financial management software package, Bright Accounting System. In addition, each school uses another accounting software package called MANATEE.

External audits of the school system are included as part of the County's annual audit. Audits of school activity funds are conducted each year as a separate audit from the county's annual audit, but by the same public accounting firm. There is no internal auditor for Louisa County or LCPS.

FINDING

Documentation of policies and procedures for many processes and activities conducted in sections of Fiscal Services Department are not comprehensive. Interviews of

department staff indicated most functions were performed without any or very limited written procedures. Most staff learned their duties from another department employee or the director. The review team did find limited written procedures for some activities, however, they were little more than printed screens of the financial management system with comments added by the staff member with primary responsibility. There were some written procedures found at schools, but these too were rather limited in scope.

There are many areas that typically have written procedures to help ensure functions are carried out in a consistent manner, to help ensure staff can confidently substitute when others are on vacation and to provide information to successor employees upon the retirement or other departure of current staff. Procedures are needed in areas such as:

- Cash Collections;
- Purchase Orders;
- Travel Approval and Advances;
- Travel Reimbursement (Out-of-Town);
- Travel Reimbursement (Local Mileage);
- Payroll Time Report;
- Extra Pay for Extra Duties;
- Substitute Service Report;
- Leave time accounting;
- Overtime/Compensation Time for Non exempt employees;
- Compensatory Time for Exempt Employees;
- Long Distance Telephone Log;
- Cellular Phone;
- Postage Order Form;
- Grants Budget / Approvals;
- Budget Transfers;
- Capital Assets (Equipment Purchase Form) and Classification;
- Capital Asset Inventory;
- Third Party Billing;
- Prepayment of Conference Registration and Hotel Bills;
- Standard Mileage Table and Rates;
- Payment Vouchers;
- School Construction Projects;
- Workers' Compensation;
- Risk Management; and
- Procurement Review.

As a result of the lack of complete documentation, the department and schools are at risk to the loss of institutional knowledge that resides in key personnel, who may leave the system due to retirement, extended sick leave or other events that may substantially impair other employees' abilities to complete all the duties required to maintain accounting, payroll, payables and school activity funds activities. Too much historical knowledge and other critical process and regulatory information reside in the heads of too few key personnel, some of whom are near retirement. There is no evidence of any knowledge management or succession planning program in place or planned for at this time. This should be a major concern to the LCPS's administration.

A notable exception where written procedures were noted was in the payroll area. There is a Payroll Manual located in that section.

RECOMMENDATION

Recommendation 5-1:

Create, adopt, and implement formal financial policies and procedures manuals that can be used to train new employees, cross-train current employees, and provide guidelines and checklists to help ensure all work is performed as required.

This manual or manuals should cover all areas and functions performed by staff in this department and at schools. Effective practices for finance related functions in school districts require written, approved policies and procedures to ensure adequate internal controls, facilitate training and ensure critical knowledge does not walk out the door when incumbent staff retire or leave the department for any reason. This will be a long and arduous task, nevertheless it needs to be initiated and completed with a sense of urgency.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The workload on staff in the Fiscal Services Department is currently at a level that seems to indicate additional staff may be needed. Certain activities are not conducted adequately, such as monitoring and tracking grants. Little, if any, time appears available to develop written procedures, or for staff development opportunities. Performance evaluations are not consistently prepared, and there appears to be generally higher stress levels than one would expect in a financial services department. The current staff is doing what appears to be an outstanding job, but the department is understaffed.

RECOMMENDATION

Recommendation 5-2:

Hire the equivalent of one FTE by adding a position and hiring one entry level accounting clerical person.

An additional crossed-trained FTE would provide relief in many functional areas in the Fiscal Services Department. An additional 2,000 hours per year of staff time would provide time for training, developing and writing procedures, and enhancing reporting of financial information to school system department heads. It would also allow for additional separation of duties, which is frequently a difficult internal control to maintain in a small department.

FISCAL IMPACT

This recommendation would require the resources for salary and fringe benefits for one entry level FTE. Current salary for this position is \$28,007, plus 30 percent fringe benefits of \$8,402, bringing total compensation to \$36,409 annually.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Increase Fiscal Services Department by One FTE	(\$36,409)	(\$36,409)	(\$36,409)	(\$36,409)	(\$36,409)

FINDING

The Fiscal Services Department has numerous payroll, accounting, purchasing and insurance and other records, vouchers, check stocks and other documents that should be maintained in a secure environment. Many records such as payroll and medical are supposed to be kept confidential. Access to this department's offices and storage area is not controlled. There is no controlled entrance other than the front door of the building. Two staff members sit in an open area adjacent to a hallway leading to other offices. Records are not secure, other than what is in a vault, and at times, especially lunch period, there are few people in the area to notice (or challenge) any visitors.

RECOMMENDATION

Recommendation 5-3:

Store all financial paperwork in secured, fire-rated cabinets.

This would help ensure check stock is secure, access to confidential records is enhanced, and staff will not be interrupted by people lost or irate employees or family members. Cabinets should remain locked at all times when they are not being accessed by financial services personnel. Also, consideration should be given to enhancing physical security to the entire LCPS administration building.

FISCAL IMPACT

The implementation of this recommendation would involve a one-time cost of \$4,500 to purchase three four-drawer cabinets costing \$1,500 each. This price represents the lowest available, based on a review of national suppliers. The division is advised to also compare the price using eVA to see if lower prices are available.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Purchase Three Fire-Rated Cabinets	(\$4,500)	\$0	\$0	\$0	\$0

FINDING

Professional development and other training opportunities are rare within this department. The director regularly attends user group meetings sponsored by the school system's financial software vendor. Most staff interviewed agreed that the training opportunities are quite limited. Fiscal Services staff work extensively with spreadsheets, but have learned no more than basic skills. Legal, medical records management, grant management, payroll laws, human resource management, computer applications, accounting and budgeting are among the many areas where training opportunities are needed and are readily available.

RECOMMENDATION

Recommendation 5-4:

Budget funds for and require Fiscal Services Department staff to attend professional development classes or other training (such as Web-based or self paced) programs.

FISCAL IMPACT

A modest amount of \$500 for each of the five employees should be ample to provide professional development opportunities. Training opportunities often are free but frequently require travel to places where they are provided by federal, state, or other local governments and schools or by private providers.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Provide Funding for Professional Development in the Fiscal Services Department	(\$2,500)	(\$2,500)	(\$2,500)	(\$2,500)	(\$2,500)

5.1.1 Accounting and Payroll Functions

FINDING

Many organizations rely on spreadsheets as an important tool in their financial reporting, tracking, monitoring, analysis, and operational processes. LCPS is no exception, data and reports of all kinds are maintained by Fiscal Services Department staff and school bookkeepers. As a result, spreadsheets are an integral part of the information framework for the school system. Because of the ease of use and flexibility, they are ubiquitous and unfortunately in most organizations unsecured, undocumented and contain errors in data and/or formulas.

The review team only noted the extensive use of spreadsheets and did not conduct any tests or request documentation or review security procedures. This is meant only as a general observation.

According to a recent study by PriceWaterhouseCoopers, the use of spreadsheets and more importantly the lack of controls over spreadsheets—has been a contributing factor to financial reporting errors at a number of companies. Recent federal legislation—the Sarbanes-Oxley Act of 2002—although not targeted at government organizations, increased the focus on an organization’s internal controls. Section 404 of that legislation discusses controls related to the development and maintenance of spreadsheets.

RECOMMENDATION

Recommendation 5-5:

Adopt steps recommended by PriceWaterhouseCoopers for the evaluation of spreadsheet controls.

PriceWaterhouseCoopers recommends five high-level steps¹:

1. Inventory spreadsheets
2. Evaluate the use and complexity of spreadsheets
3. Determine the necessary level of controls for key spreadsheets
4. Evaluate existing (as is) controls for each spreadsheet
5. Develop action plans for remediation of control deficiencies.

The Director of Finance should appoint a team of staff within the department and school bookkeepers to inventory all spreadsheets used for financial and payroll activities within the school division. After that, the director and the team should evaluate the use of spreadsheets, determine the level of controls, evaluate the existing controls for each one used by LCPS staff performing finance-related activities, and develop a remediation plan. The Director of Finance should share this recommendation and the improvement process with other county departments to help ensure spreadsheet controls are adequate throughout Louisa County.

FISCAL IMPACT

These steps could be performed by existing LCPS staff and would require no additional financial resources.

5.1.2 Budget Management

Most budget related activities at the central office level are coordinated by Superintendent, the Assistant Superintendent and the Director of Finance. The budget calendar indicates a well-developed planning cycle that permits inputs from all interested parties. The budget process begins in October with guidelines and budget packages being distributed to managers and principals and is supposed to be completed in March with the adoption of the budget by the School Board. After adoption by the the School Board, the budget must be adopted by the Louisa County Board of Supervisors to become the official approved school budget.

¹ PriceWaterhouseCoopers, “The Use of Spreadsheets: Considerations for Section 404 of the Sarbanes-Oxley Act, July 2004.

FINDING

The calendar begins early in the prior school year to permit opportunities for input from all interested parties, and includes workshops to help iron out differences. Each department head and principal participates in the process by working with their staff to determine their needs for the next year.

COMMENDATION

The county and the school system are commended for taking a “bottom-up” approach to the development of its annual budget. The process is inclusive and provides workshops that should provide a forum to reach agreement on often difficult decisions.

FINDING

The superintendent’s proposed budget for the 2006-07 fiscal year is almost 18 percent larger than the prior year’s adopted budget. The anticipated increase in students is less than two percent. The budget request document prepared by the LCPS administration contains no explanations or other detailed description of spending needs, so decision makers and other readers, including taxpayers, can understand why expenditures are increasing so dramatically. Nor does it refer to any long or short-term planning strategy. A sample of budgeted items that have significant increases is shown in Exhibit 5-6.

**EXHIBIT 5-6
SELECTED ITEMS FROM SUPERINTENDENT’S
PROPOSED FY 2006-07 OPERATING BUDGET**

SUMMARY BY ACCOUNT	SCHOOL BOARD ADOPTED 2005-2006 BUDGET	SUPERINTENDENT’S PROPOSED 2006-2007 BUDGET	PERCENT CHANGE
Classroom Instruction	\$19,738,486	\$23,438,290	+18.74%
Guidance	654,128	763,613	+16.74%
Personnel Services	272,650	344,785	+26.46%
Transportation Administration	176,524	234,385	+32.78%
Building and Grounds	3,416,314	4,249,667	+24.39%
Media	605,508	777,412	+28.39%

Source: LCPS Superintendent’s Proposed FY2006-2007 Operating Budget and Capital Improvement Budget, p. 63-64.

In addition to specific accounts with significant increases, other School Operating Fund categories showed large increases such as, Fringe Benefits increasing by more than 27 percent and debt service by more than 26 percent. Readers are left wondering what are the factors driving such large increases, why is it expected to cost an additional \$1,000 to educate each student in 2006 compared to last year and why is the state going to send about \$2 million more to LCPS next year. Each increase may have a plausible explanation, but without written, detailed justifications only the preparers know.

RECOMMENDATION

Recommendation 5-6:

Include a narrative with the budget document so readers understand what is happening, why are cost increasing, what are the driving forces behind changes over the prior year, and how does the budget tie to a strategic plan or long-term goals.

By implementing this recommendation, readers will not be left wondering what factors are driving any increases or decreases in the budget.

FISCAL IMPACT

This recommendation can be implemented within existing LCPS resources.

FINDING

Although the budget calendar and budget process are sound systems on paper, the budget process is not carried out as envisioned. The final budget approval, which should be weeks before the beginning of the school, has been delayed in recent years because of the inability of the Board of Supervisors and the School Board to reach agreement. Continued problems and lack of agreement between the Board of Supervisors and the School Board are creating an atmosphere where there is little trust and a feeling that the School Board and its administration are “playing games” with the budget. Lack of detailed explanations and justifications, as discussed in the previous finding, contributes to the apparent lack of trust.

RECOMMENDATION

Recommendation 5-7:

Hire a professional facilitator to help resolve the continuous conflict between these two sides and restore trust in the budgetary process.

By spending time up front the different groups can help streamline the decision-making process to help ensure a more timely budget approval process. By working together to define goals and roles, each side should be better able to see other points of view, have a better understanding of fiscal constraints and of state and local educational mandates, and help restore trust in one another and in the process.

FISCAL IMPACT

The fiscal impact will depend on the proposals received, but should be no more than \$5,000.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Hire a Professional Facilitator	(\$5,000)	0	0	0	0

5.1.3 Payroll Functions

Work hours, leave hours, substitute days and other data are manually recorded and time sheets are signed by authorized individuals and sent to the payroll section of the Fiscal Services Department to be entered into the payroll system. There are two payrolls per month, on the 15th and on the last day of the month. The Administrative Payroll Clerk enters data into the payroll system from 400 timesheets each pay period. Once payroll data are entered by the payroll clerk, checks are prepared or direct deposit funds sent to the appropriate bank.

In addition to payroll processing, this section pays premiums and other payments to vendors who are providing healthcare and other benefits and deferred compensation programs from amounts withheld from employee salaries or from retired employees who remit checks for benefits to which they are still eligible, such as some medical and dental insurance.

FINDING

Only about 75 percent of LCPS employees use direct deposit. Studies have shown that organizations that use direct deposit not only obtain cost savings from the elimination of check stock and reduced processing fees, but achieve efficiency savings as well. The Electronic Payments Association states the benefits of direct deposits as:

- fewer checks to store and print;
- facsimile signature security isn't necessary because not signature is required;
- lost and stolen checks are eliminated;
- financial institution service charges typically are reduced;
- potential for errors is reduced;
- account reconciliations simplified;
- the potential for fraud is reduce;
- administration costs can be lowered due to elimination of manual check preparation;
- organization report savings of more than 40 cents in processing costs for each paper check converted to direct deposit; and
- productively can be increased due to employees spending less time away from work to cash or deposit payroll checks.

Some employees can save money by not having to pay check cashing fees. This would also reduce the number of checks having to be taken to the County Treasurer for signature.

RECOMMENDATION

Recommendation 5-8:

Make direct deposit mandatory for all LCPS employees.

Based on an estimated 200 payroll checks that are currently being prepared per pay period, the potential savings would be as much as \$160 per month. For a 10-month instructional calendar, savings would equal \$1,600 annually.

FISCAL IMPACT

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Make Direct Deposit Mandatory for All Employees	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600

FINDING

The LCPS payroll functions are lacking in important internal controls. The payroll system is antiquated and requires manual steps, and offline spreadsheets. There is no position control system (PCS) to help ensure only properly authorized and budgeted positions are paid and are paid the authorized amount. The system produces reams of paper time-sheets and lists that require manual entries and reviews. The entire payroll process is intensively manual and requires many hours of labor to prepare two payrolls per month.

RECOMMENDATION

Recommendation 5-9:

Update the current payroll system to include a position control system and consider going to one period per month.

An updated payroll system and a PCS would enhance internal controls and reduce the work effort required to prepare each semi-monthly payroll. Consider going to one payroll per month except for employees who are required to be paid more frequently according the Federal Labor Standard Act (FLSA).

FISCAL IMPACT

The cost of enhancements to the payroll and PCS system can not be estimated and would depend on whether the current system can be modified or if there is an existing new version or if new software is needed. There would be productivity savings associated with the installation of new systems. Reducing the number of payrolls each month should reduce direct cost involved with the payroll preparation and time required to prepare the midmonth payroll.

5.1.4 Grants Management

FINDING

The management of grants is not centralized and there is no accountability mechanism to track and monitor grants.

Federal, state, and local grants provide revenues to school districts. The effective management of grant and other federal dollars is essential for all school districts in order to maximize the dollars available and the types of activities the school division can provide.

The Fiscal Services Department is responsible for the fiscal aspects of grants management for federal, state and local grants that the district may receive. Responsibilities include:

- setting up budgets and accounts in the accounting system (typically includes working with the grant administrator to determine the necessary accounts and distribution of funds among accounts);
- preparing cash requests and or expenditure reimbursement reports;
- preparing any necessary journal entries to ensure that expenditures are recorded in the proper accounts; and
- preparing any necessary reports for the granting agency, including periodic expenditure reports, as well as final expenditure reports.

Fiscal responsibility generally falls to the Director of Finance to oversee needed activity to establish budgets and ensure funds are spent appropriately. The bulk of grant-related activities are preformed by the individual grant administrators in the departments and schools that actually receive a grant award and spend funds to support their programs. LCPS receives about \$3,000,000 per year in federal money, of which, less than \$100,000 are grants.

RECOMMENDATION

Recommendation 5-10:

Distribute reports on the status of each grant on a timely basis and establish a mechanism to remind grant administrators of closing dates of grants at least three months prior to the close of the grant.

The reminder should alert grant managers of the impending deadlines, with sufficient time to utilize the grant funds or apply for an extension.

FISCAL IMPACT

The implementation of this recommendation would have no cost and should help ensure no net revenues from grants and other sources of funding are lost due to not spending in conformity with grant requirements.

5.1.5 Risk Management

A well managed school division limits its exposure to financial losses through adequate insurance coverage for employees, students and assets. This is accomplished through the purchase of insurance and education/orientation programs designed to promote employee and student safety and good health. The cost of insurance is a significant financial burden and should be monitored closely. The risk management function includes monitoring losses, evaluating and acquiring insurance and evaluating using self insurance for certain risks. The Director of Fiscal Services is responsible for the administration of the school division's risk management program

FINDING

LCPS insures itself against loss or damage to real and personal property and motor vehicles and loss due to criminal acts. In addition, it has a general liability policy, property and electronic data processing equipment coverage and a school board legal liability policy. All of the general liability and the property and casualty insurance coverage are through the Virginia Association of Counties. In addition, it has a workers' compensation insurance program through the School System of Virginia Group Self Insurance program.

The largest expense item under the risk management banner is the employee health insurance program. Premiums for this LCPS paid employee benefit program run about \$200,000 per month. Anthem Blue Cross Blue Shield, the LCPS health insurance provider, submits to the School Board an annual report and utilization management analysis each year. This report can be a tool for helping an organization more effectively manage its group health care costs. The most recent report for the renewal period of July 1, 2006 was reviewed.

The annual report provided by the insurance company highlighted several areas of concern with regard to the health insurance program costs that should be noted by LCPS administration and others in efforts to control health insurance costs. Percentage change year to year indicated changes ranging from decreases of 23 percent to increases of 20 percent, and the variance between LCPS results compared to the provider's norm was also significant in many areas, especially inpatient professional care and pharmaceuticals. Exhibit 5-7 shows a summary of the comparison provided by the health insurance provider. Nevertheless, the service provider's letter that accompanied the analysis indicated a three percent decrease in the medical rates for the upcoming fiscal year. For example, the monthly premium for an employee only will drop from \$425.32 to \$412.60.

**EXHIBIT 5-7
LOUISA COUNTY AND SCHOOLS
COMPARISON OF GROUP HEALTH COSTS
2004 and 2005 SCHOOL YEARS**

COSTS	TOTAL GROUP PRIOR YEAR	TOTAL GROUP CURRENT YEAR	PERCENTAGE CHANGE PRIOR YEAR TO CURRENT YEAR	ANTHEM NORM	PERCENTAGE VARIANCE CURRENT YEAR TO NORM
Total Claims Expense	\$3,047,818	\$3,337,251	+9.5%		
Annual Expense per Employee	\$4,053	\$4,409	+8.8%		
Annual Expense per Member	\$2,474	\$2,674	+8.1%		
Expense per Day Inpatient Facility Expense	\$2,904	\$2,246	-22.7%	\$2,156	+4.1%
Expense per Member Outpatient Facility	\$494	\$464	-6.2%	\$566	+18.1%
Expense per Member Inpatient Professional	\$129	\$154	+19.2	\$120	+28.4%
Cost per member Outpatient Professional	\$638	\$650	+1.9%	\$759	-14.3%
Cost per Member Pharmacy	\$461	\$518	+12.5%	\$426	+21.8%

Source: Anthem Blue Cross Blue Shield Annual Report and Utilization Management Analysis, for Louisa County and Louisa County Schools, February 1, 2006.

COMMENDATION

Louisa County and LCPS obtained a decrease in their health insurance rates.

FINDING

LCPS generally has a centralized risk management program and centralized oversight over its various risk management functions. Certain staff and certain departments perform certain functions, but Director of Finance coordinates most activities with the County to help ensure there is a coordinated effort and monitoring.

The external auditor noted in the county's annual audit that the county and LCPS have a risk management program that is committed to logical, systematic and continuous identification of loss exposures. For a risk management program to be most effective, all interrelated processes should be provided with central oversight. This does not imply that

one employee has to perform all the various functions. The central management of a risk management program eliminates redundant processes and ensures all efforts are coordinated and accomplished according to division policy. It is essential that the interrelated tasks of safety, insurance coverage, and management of loss data be coordinated by a central management staff member.

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

- asbestos management plan;
- security and threat assessments plans;
- crisis management;
- integrated pest management;
- blood borne pathogen exposure control plan;
- security patrols or guards;
- CPR training;
- sexual harassment prevention training;
- substitute teacher safety training;
- new teacher orientation;
- bus driver training;
- safe and drug free schools; and,
- business and continuity plans.

COMMENDATION

Centralizing most risk management activities, with the exception of claims tracking, in the Fiscal Services Department provides the level of central oversight that risk management programs should have.

5.2 External Auditing

Elected and appointed governing bodies are accountable to the citizens of a jurisdiction as are the appointed department heads to the governing body. Financial statements are one of the accountability tools that an organization prepares and presents to its citizens and other government officials to show how well it has handled the public money entrusted to it. Audits of a school district's finances help ensure public finance functions are conducted with the utmost integrity and the financial statements are prepared according to established government accounting standards and conform to all applicable federal, state and local laws.

Each year LCPS has its finances audited as part of the audit of Louisa County conducted by an independent auditor. The County School Board results are reported as a discrete component unit of the county. The independent auditor's report for the most recent two annual reports were reviewed and indicated that the county's basic financial statements fairly presented its financial position. Robinson, Farmer, Cox Associates of Charlottesville was the independent auditor for each report reviewed. Each report also included a discussion of the internal controls and compliance with certain provisions of laws, regulations, contracts, and grants. In the two most recent auditor reports, for which

the auditor's opinion was available, no material weaknesses in internal control over financial reporting or instances of noncompliance were noted.

FINDING

According Louisa County officials, Robinson, Farmer, Cox Associates has been auditing the county's financial statements for more than 25 years and has recently entered into a contract to conduct the annual audit for the next two years.

Government Auditing Standards (the Yellow Book) require that the audit organization and the auditors that work on the audit should be "free both in fact and appearance from personal, external and organizational impairments to independence." There are problems with using the same firm year after year to conduct annual audits including creating the possibility of declining level of independence. As relationships form and parties become more comfortable with one another complacency may result. Additionally, even if independence is not impaired, the appearance of a lack of independence is just as important. No evidence of impairment of independence was found or is implied.

The Government Finance Officers Association (GFOA) currently recommends local governments have a policy requiring the independent auditor be replaced at the end of a contract period. GFOA further recommends that multi-year contracts "of at least five years", with auditing firm be established. These can be a series of single-year contracts or a single multi-year contract. According to the GFOA recommendation, multi-year contracts help ensure continuity and can help reduce costs. The length of the contract, which used to be seen as a positive to help ensure continuity and reduce costs, is now being questioned in wake of accounting scandals of recent years. The lengthy relationship between and audit firm or and individual auditor although independent in fact may be detrimental to the "appearance" of independence.

Recent federal legislation, the Sarbanes-Oxley Act of 2002, mandates no more than five-year engagements for certain entities. It requires auditors of public interest entities to rotate off engagements every five years. This includes publicly traded entities, government retirement plans, entities subject to grant program oversight, financial institutions and others.

According to LCPS and county officials, the current audit firm understands local government and public school operations and provides outstanding auditing service for local governments in Virginia

RECOMMENDATION

Recommendation 5-11:

Encourage Louisa County officials to regularly compete the audit contract in a full and open competition.

It is very important to smaller-governmental organizations that may have limited number of potential bidders, to ensure the individuals and partner-in-charge assigned to the audit are changed periodically to enhance independence and the appearance of independence. Having the same audit firm year after year is not the best situation, but can be managed by rotating key audit personnel. Incumbent firms can generally do audit work for less money because they already know the entity's business and so there would be less start-up costs associated with a new contract.

FISCAL IMPACT

The implementation of this recommendation would have no fiscal impact.

5.3 Site-Based Financial Management Activities

Although most financial activities are handled by the central administration in the Fiscal Services Department, certain funds are distributed to the individual schools to spend according to an approved budget. These funds are called Public School Activity Funds (PSAF).

School boards are responsible for administering the regulations established by the State Board of Education. School activity fund revenues may be generated from a number of sources including athletics, concessions, publications, club activities, gifts, fund-raising drives, and other activities. The principal of each school has been assigned the responsibility for managing the activity funds for activities on their campuses and for maintaining required records. The school bookkeeper works closely with the principal to issue purchase orders, ensure goods ordered are received, prepare checks, make deposits of money into a bank account(s) established for each school, and account for all activity funds.

The LCPS division has a fiduciary responsibility to properly administer student activity funds, which in the case of LCPS are comprised of student fees and fines, field trip fees, admission fees to athletic events and shows, fundraisers for various student organizations, vending machine commission, donations, and miscellaneous sales.

Each school uses the MANATEE Accounting Software to maintain the financial records for their activity funds.

LCPS activity funds are audited each year by an independent auditor. Activity fund audit reports were reviewed for the 2003-04 and 2004-05 school years. The auditor's report noted several conditions regarding the proper handling of receipts and checks.

FINDING

The review could find no uniform accounting manual for use by school bookkeepers to help ensure consistent handling of receipts, disbursements, purchase orders, and supporting documentation and to enhance internal control over this very decentralized procedure. The bookkeeper at the high school developed the foundation of such a manual when she was preparing to be on leave.

RECOMMENDATION

Recommendation 5-12:

Develop a manual of accounting policies and procedures for the school activity funds.

FISCAL IMPACT

This recommendation can be implemented within existing LCPS resources.

5.4 Other Areas

The LCPS has an early retirement program that provides any LCPS employee who is a member of the Virginia Retirement System (VRS) the opportunity to retire under a retirement incentive program. An employee opting for the Early Retirement Incentive Program (ERIP) may do so at any time after achieving eligibility for retirement, which is age 50 with five years or more of LCPS service. An employee electing early retirement under this program is paid an annual supplement for up to seven years equal to 20 percent of his or her annual salary at the time of retirement. In return for the 20 percent supplement, the retiree must contract with LCPS to work 20 days per year if a 10 month contract employee, 22 days per year if an 11 month contract employee, and 24 days per year if a 12 month contract employee.

FINDING

The review team could find little documentation on this program within the department. We could find nothing mentioned about the performance of services. According to Fiscal Services staff, retirees contract to provide 20 days of service for the 20 percent supplement up to a maximum of \$12,000 per year.

Examples provided to the review team include retired administrators receiving more than \$500 per day to do busy work. Most retired teachers contract as substitutes where they receive five or six times as much pay as the regular substitutes and they don't even have to substitute teach. They can choose to file or have department heads find other work for them. Such incentives may or may not have achieved their intended results which we assume is to cut short working careers and replacing senior staff with newly hired, less expensive employees. MGT was not provided any documentation on how or if this program has achieved savings for the division.

It appears this program may be less of an incentive to early retire and more of a bonus at the end of work to provide the equivalent of almost an additional year and a half's salary over a seven-year period in exchange for 140 days of work over that same period. We could find no evidence to show if this program had ever been evaluated.

Other Virginia school divisions have similar programs. Alexandria's City Public School's plan lets retired employees work up to 20 percent of their regular work year; not the 20 days as in LCPS. Richmond City Public Schools is phasing out its current program and moving to a "transition plan". It pays 30 percent of the final salary over 4 years (7.5

percent per year) and has no work requirement. Roanoke City Public Schools has a plan similar to LCPS, but it is only for a five-year period. Many others have no such program.

According to budget documents, this program is costing the LCPS in excess of \$280,000 this year. That is about one percent of the local funding requirement or about \$64.00 per student.

RECOMMENDATION

Recommendation 5-13:

Revise or eliminate the Early Retirement Incentive Program (ERIP).

If this program is indeed not fully encouraging early retirement and saving the division money, it should be eliminated or revised. A phasing out of this program would certainly have the intended effects because some employees would opt for the ERIP before it expires.

The fiscal impact provided below is based on an estimated savings if the program was eliminated immediately, but current employees were grandfathered. Also, it is based on an average of most recent years budgeted amounts and does not reflect any actual program information. The estimated savings reflects an increase in costs for additional substitute hours or other temporary workers.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Revise or Eliminate the ERIP	\$0	\$30,000	\$60,000	\$90,000	\$120,000

6.0 FACILITIES USE AND MANAGEMENT

6.0 FACILITIES USE AND MANAGEMENT

In this chapter the findings and recommendations for facilities use and management of Louisa County Public Schools are presented. The major sections of the chapter include:

- 6.1 Management of Facilities Operations
- 6.2 Capital Improvement Planning
- 6.3 Maintenance Services and Operations
- 6.4 Custodial Services
- 6.5 Energy Management

CHAPTER SUMMARY

Facilities use and management issues in Louisa County Public Schools currently center on the identified and generally agreed upon need for an additional elementary school. While there is agreement regarding the need, there has been conflict between the division and the Board of Supervisors regarding the projected cost, the capacity and the most appropriate site. The portion of this chapter dealing with capital improvement and planning addresses these issues and the long term need for a comprehensive facilities plan for this growing school division. The remaining sections of this chapter verify a division that has systems in place that are not often found in similar circumstances. Since the re-organization of the facilities department the division has implemented a strong work order process, identified departmental goals, strengthened the purchasing procedures, implemented a preventative maintenance program and have provided staff training geared toward the identified goals. The facilities department enjoys an excellent reputation and the support of staff that is not often seen.

Specific areas of improvement where recommendations are provided include:

- Long-term facility planning;
- Development of performance objectives;
- Implementation of a value engineering process;
- Development of custodial staffing formulas; and
- Energy management processes.

INTRODUCTION

The purpose of facilities management services in school divisions centers on providing a safe, secure, and educationally stimulating environment for the division's students. Typical functions include:

- maintenance of facilities and grounds;
- custodial services (often in a combined role with school administration);
- capital planning including the development of a long range facilities plan;
- demographics including enrollment forecasts and school capacities;

- development of educational specifications for school facilities;
- completion of minor facility upgrades/enhancements;
- contracting of services for major facility upgrades/enhancements;
- oversight of long range plan implementation; and
- energy management.

Depending on the size of the school division, the above functions may be completed entirely with division employees or the majority of the services can be provided on a contracted basis. Louisa County Public Schools is organized so that the maintenance and operations functions listed above are provided through the maintenance department with the exception that custodians are directly supervised by their school principal. The capital planning and construction aspects of the facility functions are managed primarily through the office of the assistant superintendent with reliance on architectural partners and other consultants for much of the long-range planning, enrollment forecasting, and development of the long-range plan. The division is committed to a construction management process for the completion of capital projects.

6.1 Management of Facilities Operations

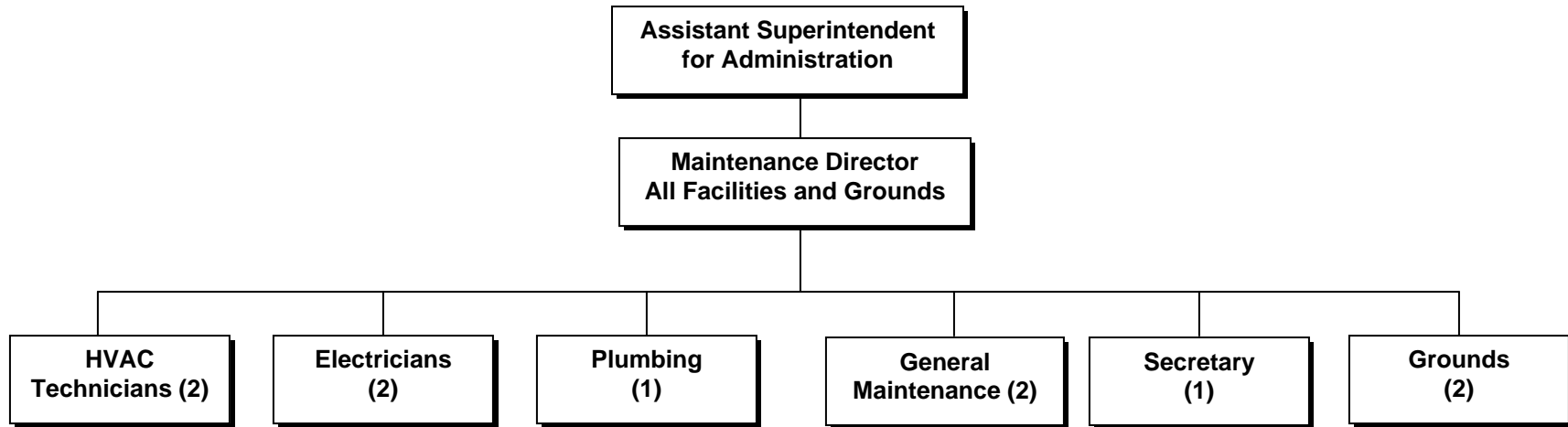
The management function for facilities operations typically coordinates all the physical resources in the division. It should effectively integrate facilities with all other aspects of institutional planning. As such, plant operation and maintenance staff should be involved in design and construction activities, and capital planning personnel (whether in-house or contracted) should be knowledgeable about operations and maintenance activities. To be effective, facilities managers must also be involved in division strategic planning activities.

School Facility Operations in Louisa County Public Schools is managed by the Maintenance Director who reports to the Assistant Superintendent for Administration. Maintenance staff report directly to the director. Maintenance staff consists of:

- HVAC Technicians (2)
- Electricians (2)
- Plumbers (1)
- General Maintenance (2)
- Grounds (2)
- Secretary (1)

Exhibit 6-1 below shows the current organizational chart for the Louisa County maintenance department.

**EXHIBIT 6-1
MAINTENANCE DEPARTMENT
ORGANIZATIONAL CHART**



Source: Louisa County Public Schools, Maintenance Department, 2006.

Custodians are directly supervised by school principals with assistance from the Maintenance Director

FINDING

Over the past two year LCPS has re-organized the maintenance department moving to a more centralized process, a new director and a reduction in staff. There is a general satisfaction with facilities operations which is reflected in the survey of division staff. All staff categories indicated by an approximate two-thirds majority that the maintenance of facilities is good or excellent.

COMMENDATION

Louisa County Public Schools is commended for restructuring the maintenance department and creating an atmosphere of service throughout the division.

6.2 Capital Improvement Planning

The primary mission for capital improvement planning is to provide facilities that meet the needs of students at the lowest possible cost. To accomplish this, the goals for capital improvement typically include:

- establishing a policy and framework for long range facilities planning;
- providing valid enrollment projections on which to base estimates of future needs for sites and facilities;
- selecting and acquiring proper school sites and to time their acquisition to precede actual need;
- determining the student capacity and educational adequacy of existing facilities and to evaluate alternatives to new construction;
- developing educational specifications that describe the educational program and from which the architect can design a functional facility that matches the needs of the curriculum;
- securing architectural services to assist in planning and constructing facilities;
- developing a capital planning budget that balances facility needs, expenditures necessary to meet those needs, and how expenditures will be financed; and
- developing and satisfactorily carrying out the goals of a facilities master plan.

The above processes in Louisa County Public Schools have been conducted by division staff with the assistance of architectural firms for facility planning and the University of

Virginia for enrollment projections. This results in a regularly updated fine-year plan that centers on improvements to existing facilities but also includes new construction/renovations as appropriate. During the past five years major construction improvements have included:

- high school renovation;
- construction of a connector between the original high school building and the present high school; and
- construction of an administrative building.

The current five-year plan includes upgrades at each school and a new elementary school based on enrollment and growth estimates.

FINDING

The recommendation for a new elementary school has become controversial based primarily on the following:

- The Board of Supervisors have recommended a new school with a capacity of 725. There is no general agreement on the most appropriate capacity.
- The Board of Supervisors have established a total budget of \$16,000,000. The division and their consultants believe the facility cannot be completed for this amount.
- The division established a site selection committee that ultimately recommended three possible sites. The Board of Supervisors selected a different site from those recommended.

Exhibit 6-1 below provides an overview of 2005 elementary school construction costs nationally and for region 3 (Delaware, DC, Maryland, Virginia, West Virginia) as reported in School Planning and Management's 2006 construction report.

**EXHIBIT 6-2
2006 SCHOOL CONSTRUCTION REPORT
ELEMENTARY SCHOOL CAPACITIES / CONSTRUCTION COSTS**

REGION	MEDIAN CAPACITY	SQ. FT. PER STUDENT	\$ PER SQ. FT.	MEDIAN BUILDING SQ. FT.	MEDIAN BUILDING COST
Nationally	600	120	\$152.94	77,000	\$11,440,000
Three	790	105	\$173.08	90,000	\$13,000,000

Source: School Planning & Management, 2006 School Construction Report.

Applying the above median figures to Louisa County's planned facility for 725 students the total construction cost would be \$13,169,625 (725 capacity x 105 sq. ft. per student x \$173. per sq. ft.). Applying an additional 25% over construction costs for FFE (fees, furnishings, equipment) the total is just over \$16,000,000. Construction cost increases over the past year will likely cause this total to increase significantly.

RECOMMENDATION

Recommendation 6-1:

Move quickly to begin the construction of a new elementary school and then develop a division master plan to address the long term space needs, desired school size, building capacities, enrollment capacities, building conditions, demographic analysis and enrollment projections, retention or disposal of each facility/property, and land acquisition, as required to provide a full, detailed, priority ranked, long-range division master plan.

The need for a new elementary school is well documented and generally accepted by all stakeholders. The delays related to arguments over costs are resulting in cost increases during this time of rapidly increasing construction costs. The \$16,000,000 budget appears to be low so all possible cost saving measures should be undertaken (see recommendation 7-2 below) but the budget should include a contingency for current cost inflation. To delay further will only cause the total to increase even more. In order minimize the possibility of future disagreement over the size, need and cost of facilities it will be important to involve all division stakeholders in a comprehensive, data-driven, thoroughly researched, and well documented facility study. This will provide the division with the information and support that will be necessary to implement meaningful facility improvements. In addition to an analysis of need, the study will need to engage staff and community in establishing facilities priorities for the division.

FISCAL IMPACT

While planning consultants vary in how much they charge for these services, a reasonable estimate based on similar services in similar size divisions is \$150,000. This may be lower in Louisa County as much of the information is currently available (enrollment projections, facility inventory, etc.). It is recommended that an RFP be prepared to ascertain the exact cost for this study. The RFP process would also allow the division to establish the criteria for doing the study. The Request for Proposal should contain the following elements:

- Review of mission statement, division goals and objectives, and current and projected programs and services
- Determination of appropriate school size
- Solicitation of public input
- Development of standards for ranking building needs
- Assessment of all facilities and sites

- Completion of a facilities inventory
- Analysis of demographics and enrollment projections
- Analysis of boundary revision that may result in increased efficiency (this has not been conducted in Louisa County in over 20 years)
- Development of capacity formulas
- Review of all buildings for educational suitability and technology readiness
- Development of a prioritized master plan

Recommendation	2006-07	2007-08	200809	2009-10	2010-11
Development of a Division Master Plan	(\$150,000)	\$0	\$0	\$0	\$0

FINDING

The planning process for the new elementary school is at the stage where inclusion of a value engineering process could be beneficial with efforts to determine the lowest possible cost. Before finalizing plans with the construction manager, the division may consider implementation of a value engineering process with their current elementary school facility plans. Value Engineering is a process that usually involves a team of professionals separate from the design architects that review the proposed documents to determine if alternative systems or methods can reduce the total costs without sacrificing quality. The team typically consists of an experience architect, appropriate engineering professionals and educational program specialists. Data has shown that value engineering typically results in savings in the range of two to five percent.

The division has utilized a construction management approach for construction of recent projects that has proven to be very successful. The division utilized an agency model of construction management where each of the trades are bid and awarded individually and the construction manager manages each sub-contractor. The construction manager then utilized best practices in construction methods, quality control methodologies, can project scheduling. The construction manager also utilizes value engineering techniques which should not be confused with the value engineering recommended above which occurs during the design phase. Over the course of the recent construction projects (high school and administrative budgets) it was determined that the construction manager process resulted in an overall savings of \$400,000.

COMMENDATION

Louisa County Public Schools is commended for implementing a successful program of construction management with recent projects.

6.3 Maintenance Services and Operations

The primary mission for division maintenance and operations is to provide for a physical environment that enhances teaching and learning. Typical goals for maintenance and operations include:

- extending the life of facilities and maximize their potential use;
- maximizing the facility staff productivity;
- improving procedures;
- selecting the most cost-effective methods for operations;
- reducing and eliminating fire hazards;
- improving and maintaining the aesthetics of facilities;
- managing an automated and integrated work control system that allows for the analysis and audit of the operation and its functions;
and
- to ensure the safety and security of buildings and people.

Maintenance and operations in Louisa County Public Schools are managed by the Maintenance Director. In addition to the director the staff consists of two electricians, one plumber, two groundskeepers, two HVAC technicians, two general maintenance workers and one secretary. In addition to the staff functions, the division contracts maintenance services as needed.

The maintenance services department has overall goals and goals for each team. The department wide goals are to maximize:

- student, staff and public safety
- student learning and achievement
- instruction
- operational efficiency
- cost effectiveness
- minimal impact on the environment

The specific goals for each team are to develop and maintain safe, comfortable & environmentally friendly spaces with emphasis in the following areas:

Electric Team

- instructional and educational spaces
- food preparation spaces
- athletic facilities
- support facilities
- exterior thoroughfares & walkways

General Maintenance Team

- instructional and educational spaces
- athletic facilities
- support facilities
- interior passageways
- exterior thoroughfares & walkways
- security & safety systems
- roofing systems

Grounds & Exterior Team

- playing fields and surfaces
- walkways, drives & parking areas
- exterior painting
- lawns & landscaping
- building facades
- signage & safety markings
- playgrounds
- seating & table areas
- vehicles & equipment

Heating, Ventilation – Air Conditioning Team

- instructional and educational spaces
- eating and food preparation spaces
- athletic spaces
- office and conference spaces
- entrance and egress spaces
- support staff spaces

Plumbing Team

- instructional and educational spaces
- food preparation spaces
- athletic locker rooms & field houses
- restrooms
- water supply systems
- drainage & waste control systems

Electric Team

- instructional and educational spaces
- food preparation spaces
- athletic facilities
- support facilities
- exterior thoroughfares & walkways

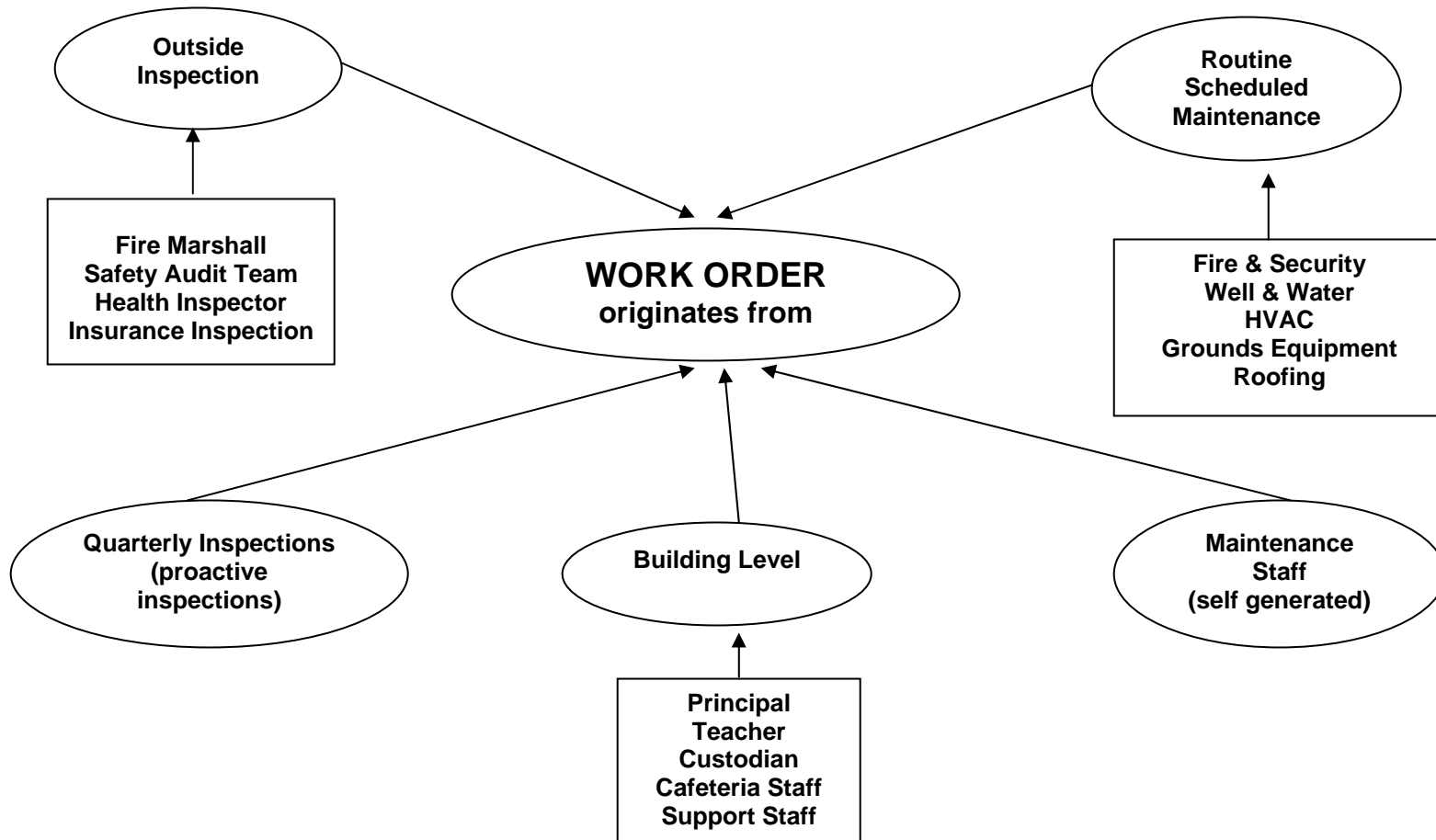
FINDING

Louisa County Public Schools has instituted an on-line work order tracking system that is available divisionwide so each school can keep track of the status of work orders submitted. Work orders are submitted via e-mail by each school or department to the maintenance services office where job tasks are assigned and included with the order. As tasks are completed the disposition and costs are recorded and included with the file. Each user then has the ability to track the progress of work orders.

Interviews with principals and other school staff indicated a high degree of satisfaction with the current system.

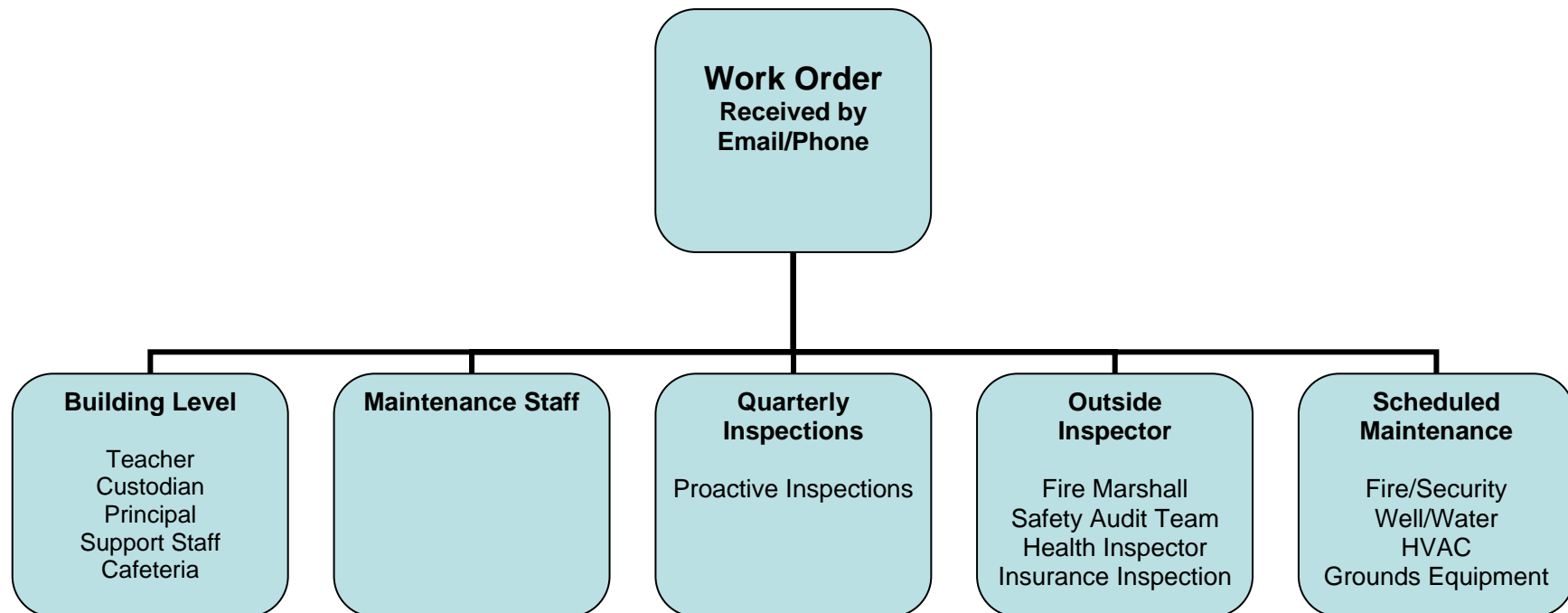
Exhibits 6-3 through 6-5 provide an overview of the work order origination process, the methods of receipt and the dissemination and tracking system.

**EXHIBIT 6-3
LOUISA COUNTY PUBLIC SCHOOLS
WORK ORDER ORIGATION PROCESS**



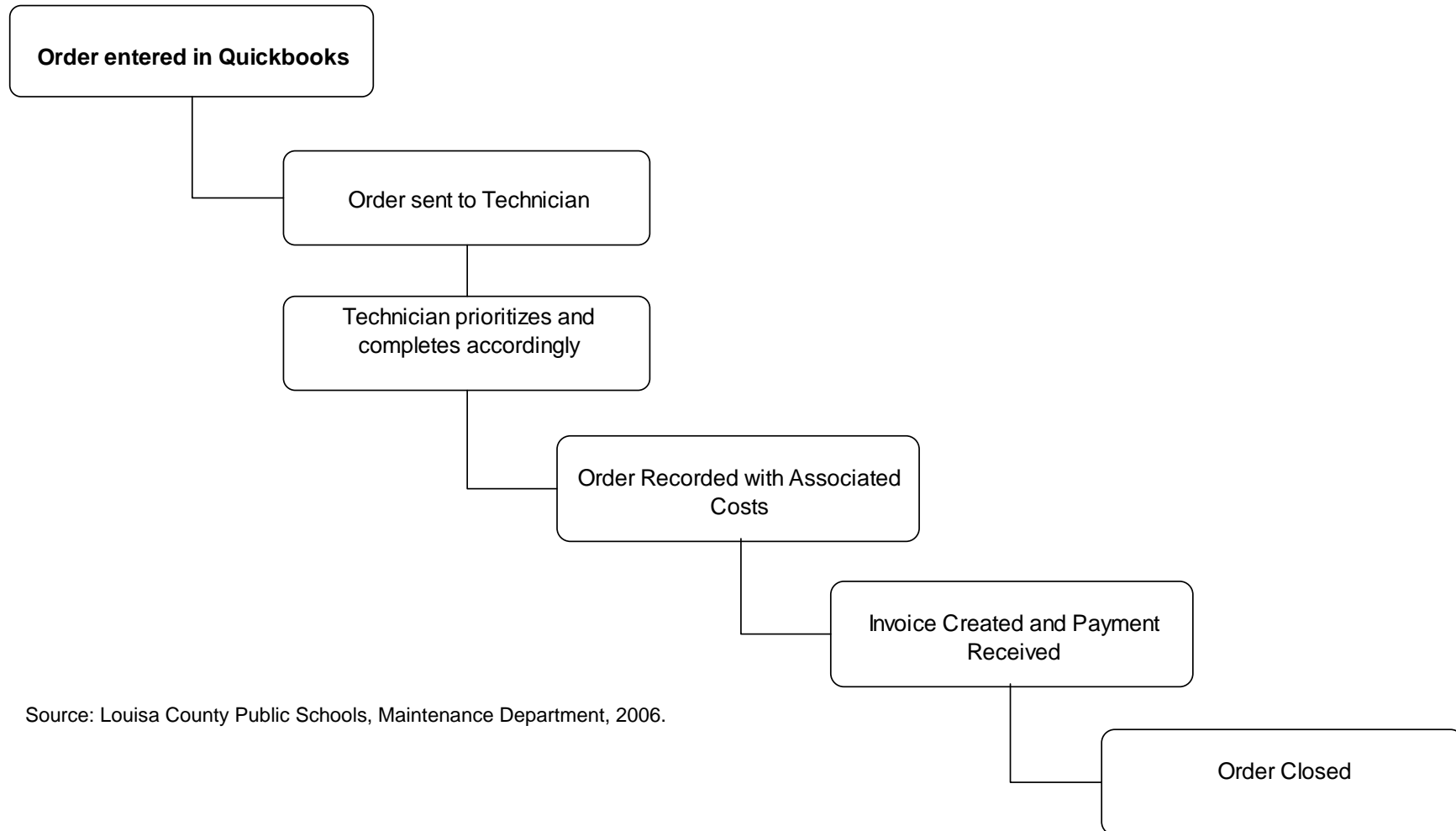
Source: Louisa County Public Schools, Maintenance Department, 2006.

**EXHIBIT 6-4
LOUISA COUNTY PUBLIC SCHOOLS
WORK ORDER FLOW CHART
METHODS OF RECEIPT**



Source: Louisa County Public Schools, Maintenance Department, 2006.

**EXHIBIT 6-5
LOUISA COUNTY PUBLIC SCHOOLS
WORK ORDER FLOW CHART
DISSEMINATION AND TRACKING**



Source: Louisa County Public Schools, Maintenance Department, 2006.

COMMENDATION

Louisa County Public Schools is commended for instituting an on-line work order system that is well received by the customer and is not often seen in divisions of this size.

FINDING

Louisa County Public Schools has developed and instituted an organized staff training that is geared toward the identified goals of the department and each team. Training programs conducted over the past year have included:

- Building code official endorsement – Phase I;
- Safety training;
- Indoor air quality and mold remediation;
- HVAC controls;
- Virginia educational facility planners annual conference;
- Lock repair, pinning and design;
- QuickBooks software; and
- Small waterworks system.

In addition, the division provides tuition reimbursement for staff members that choose to take additional courses. This type of regular training geared to established goals ensures that the staff will be prepared to provide the most efficient services possible.

COMMENDATION

Louisa County Public Schools is commended for instituting a regular program of maintenance staff training.

FINDING

As a part of the regular maintenance operations the division has instituted an aggressive program of preventative maintenance. The program includes the following components:

- Roofing inspections and scheduled repairs
- Filters and belts
- Hood cleaning (contracted)
- Elevator services (contracted)
- Grease trap cleaning and pumping (contracted)
- Lawn and grounds equipment
- Chemical treatments
- Safety and security
- Quarterly walkthroughs at all facilities

The preventive maintenance schedule and check offs is prominently displayed in the department office as a reminder and incentive to keep the process current.

COMMENDATION

Louisa County Public Schools is commended for instituting a regular program of preventative maintenance.

FINDING

Along with the staff training the division conducts annual evaluations of the maintenance staff. There are not, however, established performance standards to measure the evaluations against.

RECOMMENDATION

Recommendation 6-2:

Establish performance standards to be used in the annual evaluation of maintenance staff and as a standard to measure overall department efficiency.

Louisa County Public Schools maintenance department has the majority of systems in place to operate a highly efficient and successful program of operations. The completion of performance standards with which to measure individual and departmental success, along with the current program of identifying goals and providing training, will “close the loop” within the department.

FISCAL IMPACT

This recommendation can be completed with current resources.

6.4 Custodial Services

Custodial services in Louisa County Public Schools are directly supervised by each building principal with assistance from the Maintenance Director. Each school has a head custodian with additional custodians based on the size of the school. Exhibit 6-6 below provides an overview of custodial staffing at each school.

**EXHIBIT 6-6
LOUISA SCHOOLS CUSTODIAL STAFFING
2005-06 SCHOOL YEAR**

SCHOOL	SQUARE FOOTAGE	CUSTODIAL STAFFING	SQUARE FT./ CUSTODIAN
Louisa County High School	244,386	9	27,154
Louisa County Middle	143,860	7	20,551
Trevilians Elementary	68,984	5	13,797
Thomas Jefferson Elementary	87,044	5	17,408
Jouett Elementary	61,387	5	12,277
TOTAL	605,761	31	19,541

Source: Louisa County Public Schools and MGT Analysis, 2006.

FINDING

Custodial staffing in Louisa County Public Schools ranges from a high of 27,154 square feet per custodian at Louisa County High School to 12,277 at Jouett Elementary.

In previous performance reviews, MGT has seen school districts assign an average of between 12,600 to 23,000 square feet per custodian. Based on these averages and industry standards, MGT has determined that the best practice for custodial cleaning staff is approximately 19,000 gross square feet per custodian plus .5 FTE for elementary schools, .75 FTE for middle schools, and 1.0 FTE for high schools to cover head custodian duties. Exhibit 6-7 below shows the staffing level that would be required at each school utilizing this best practice standard.

**EXHIBIT 6-7
LOUISA COUNTY PUBLIC SCHOOLS
CUSTODIAL STAFFING UTILIZING BEST PRACTICE STANDARDS**

SCHOOL	TOTAL SQUARE FOOTAGE	CUSTODIANS AT BEST PRACTICE STANDARD*	CURRENT CUSTODIANS	DIFFERENCE
Louisa County High School	244,386	14	9	(5)
Louisa County Middle	143,860	8.25	7	(1.25)
Trevilions Elementary	68,984	4.5	5	.5
Thomas Jefferson Elem.	87,044	5	5	-
Jouett Elementary	61,387	4	5	1
Total	605,761	35.75	31	

Source: MGT Analysis

*Rounded to the nearest .5 position

RECOMMENDATION

Recommendation 6-3:

Custodial staffing should be re-evaluated to assure that assignments are based on a square footage basis to the degree possible.

Custodial staffing in Louisa County Public Schools is not currently based on an established factor. Rather, the current assignment of custodian is based only on the history of “what has been done in the past”. As the division grows and adds more square footage it will be important to assign custodians on a basis that is seen as fair among all schools and staff.

FISCAL IMPACT

There is no immediate fiscal impact to this recommendation of determining custodial standards. The division, if fact, may be commended for operating at an overall level that exceeds best practice standards.

FINDING

Louisa County Public Schools has adopted and implemented the Honors School and University program for custodial training. This program includes regular training guides, manuals, and video programs in each of the following sections:

- routine cleaning
- hard floor care
- carpet care
- restrooms / locker rooms / showers
- proportioning systems
- working smart

In addition, the division has developed custodial guidelines and expectations that are associated with regular inspections and has been turned into a good natured competition among the custodial staffs.

COMMENDATION

Louisa County Public Schools is commended for instituting a regular program of custodial training and inspections.

6.5 Energy Management

Efficient energy management is a vital tool for the distribution of the division's utilities. Energy audits and other sources of data are essential to control energy costs. Such data will help to determine priorities and will help to monitor and evaluate the success of a program. While the purpose of the energy management program is to minimize waste and reduce costs, the program also should ensure comfort in occupiable spaces and encourage energy awareness across the division.

Energy management strategies implemented in Louisa County Public Schools include:

- night setbacks for lighting and HVAC
- ballast and tube replacement
- water conservation flush modules
- consolidated deliveries
- thermostats added
- direct digital control

FINDING

While Louisa County Public Schools has implemented portions of energy management practices, they do not have an aggressive, comprehensive energy management program fully in place. Therefore, the division is not taking advantage of possibly significant opportunities to save energy dollars by having an aggressive energy management program. If implemented properly, an energy management program will provide substantial energy savings, without sacrificing comfort, and better information on which

to make capital improvement decisions based on the knowledge gained through better understanding of each facility's energy use patterns.

Common energy management programs include the following components:

- coordinating with utilities to ensure best rates;
- monitoring utility use for irregularities which may indicate leaks;
- preparing and distributing facility checklists during holiday periods;
- checking heating, ventilating, and air conditioning units in schools and portable classrooms;
- training staff in thermostat operation;
- consulting on design of new schools;
- overseeing scheduling of times of operation for HVAC equipment at all schools;
- checking all utility meters;
- checking utility bills for accuracy; and
- conducting education programs for building users.

The division has entertained proposals from energy management consulting firms but has not adopted or implemented an overall program.

RECOMMENDATION

Recommendation 6-4:

Institute an aggressive energy management program throughout all schools and facilities.

An aggressive energy management program will consist of three fundamental components. They are:

- *Supply side efficiency*: Purchasing energy at the lowest available dollars;
- *Operating efficiency*: Operating the equipment that consumes energy as efficiently as possible; and,
- *Demand side efficiency*: Upgrading existing equipment with more energy efficient equipment when it is cost effective to do so.

Items to be included in an aggressive energy program may include:

- researching billing irregularities;
- researching energy efficient lighting retrofits;
- researching energy saving office equipment;
- energy education programs for staff and students;
- energy use and tracking software; and
- incentive rebate programs for school that reduce energy consumption.

FISCAL IMPACT

Recent energy management firm proposals often estimate an annual savings of \$1.00 per square foot. Assuming a start-up and study cost of \$65,000, a total division square footage of 605,000 square feet, 50 percent rebate to the schools, and a conservative savings of \$50. per square foot due to the fact that the division has implemented some of the programs, the fiscal impact is shown below.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Institute an Energy Management Program	(\$65,000)	\$151,000	\$151,000	\$151,000	\$151,000

7.0 TRANSPORTATION

7.0 TRANSPORTATION

The transporting of children is an essential function and responsibility of any school division. Throughout the school year, school buses move millions of students living in hamlets, towns, cities and rural areas to and from school. School buses are considered one of the safest modes of transportation. It is extremely rare for fatal crashes involving occupants to occur, especially considering the rate in which school buses operate (8.8 billion student trips annually). In perspective, this is equivalent to the populations of Florida, Massachusetts and Oregon riding a school bus twice every day, almost always without a serious incident.

This chapter portrays the major findings, commendations, and recommendations for the transportation in Louisa County Public Schools (LCPS). The five major sections of this chapter are:

- 7.1 Organization and Staffing
- 7.2 Planning, Policies and Procedures
- 7.3 Training and Safety
- 7.4 Vehicle Maintenance
- 7.5 Transportation Facilities

CHAPTER SUMMARY

The Transportation Department in LCPS provides efficient and effective student transportation services. The department is compliant with most VDOE policies and procedures. The department is effective in controlling costs, training drivers, maintaining buses, maintaining its commercial fleet, and delivering students to and from their destinations. During MGT's onsite visit, consultants discovered some areas that could be improved. Making recommended improvements outlined in this chapter will increase efficiency and operational integrity.

Noteworthy accomplishments of the Transportation Department in the areas of staffing structure and vehicle maintenance are:

- The Department has done an outstanding job incorporating an efficient management structure to support effective communication across the department to enhance the operational and safety needs of the division.
- The Department's mechanical staff has adopted and implemented the VDOE State requirements for scheduled maintenance on all school division vehicles and buses. The adherence to these schedules ensures that all vehicles are safe and ready to transport students.

MGT found that the division needs improvement in the areas of technology as it pertains to upholding bus maintenance records and record storage; to acquire a new space for a bus maintenance shop and parking facility and to improve the use of technology throughout the system. Specifically:

- The discipline structure for addressing inappropriate student behavior in and around school buses is conducted primarily by school principals. As a result, consequences for student conduct vary widely from school to school. Inconsistency in this process makes it difficult for drivers and transportation staff to effectively manage student behavior on the school bus.
- The Louisa County Public Schools in an effort to maintain the highest levels of driver and substitute driver training must implement policies and practices for retraining drivers at a minimum of once every five years. This additional training supplements the current training program to ensure all drivers and substitute drivers are aware of current practices and kept abreast of all policies regarding the division's transportation program.
- The Transportation Director, Shop Foreman and mechanics need to begin recording all bus maintenance records into a computerized system for accurately recording and storing all bus service records. Currently, all records are paper-based and stored in metal file cabinets at the bus garage. The current provision regarding records retention and storage leaves the division susceptible to the loss of these important documents. LCPS Transportation Department has serious challenges providing current data and information to staff, students and parents. Although the Department possesses the technology, it is not being used to its full extent in an effort to maximize operational efficiency in the areas of routing and maintenance.
- LCPS does not have adequate maintenance facilities to efficiently meet efficiently the operation requirements of the division transportation system. The maintenance facility only has the capacity to accommodate two buses and one motor vehicle at a time. This inadequacy leads to inefficient practices and creates additional vehicle service issues on the mechanical staff and transportation staff.

INTRODUCTION

LCPS geographic configuration is mainly rural with continuing growth and development in the east and west sectors of the county. With a 2004-05 student population of 4,321 students, the LCPS School Board anticipates minimum growth during the next ten years. In 2004-05, the division provided transportation on a daily basis for approximately 2,979 students traveling to and from five school centers, attending field trips, after school activities and shuttles to other locations. Among those served were 37 special education students, who, because of their varying disabilities or special needs, required special arrangements to school sites throughout the county.

LCPS provides bus transportation, free of charge, to all qualified students to and from school within the student's attendance area. Transportation is also provided between the home or school and other educational facilities operated by LCPS in which the student is enrolled. Students may be required to meet a bus at an assigned stop, not to exceed the

distance of .2 miles for middle and high school students and .1 mile for elementary students, on a state maintained road. LCPS is in compliance with the Code of Virginia, Section 22.1-176 which states, in part, "County School Boards may provide transportation of pupils, but nothing herein contained shall be construed as requiring such transportation."

To get an initial understanding of staff attitudes towards school transportation, MGT conducted a survey of LCPS administrators, principals, teachers as part of this efficiency review. MGT also surveyed five peer divisions to be used as an aggregate comparison with the data that was gathered from LCPS. The three staff groups were asked to rate punctuality of student arrival and departure, to and from school.

Exhibit 7-1 provides the survey results. As Exhibit 7-1 indicates, zero percent of administrators, eight percent of principals, and 14 percent of teachers stated that the transportation function *needs some or major improvement*. Conversely, 92 percent of administrators, 77 percent of principals and 71 percent of teachers stated that transportation services are *adequate or outstanding*. Data for peer divisions were comparable to the LCPS data, with the exception of principals who had a more negative opinion of the rate of punctuality at their schools.

**EXHIBIT 7-1
TRANSPORTATION COMPARISON SURVEY
RESPONSES OF ADMINISTRATORS, PRINCIPALS AND TEACHERS
LOUISA COUNTY PUBLIC SCHOOLS**

RESPONDENT GROUP	% INDICATING NEEDS SOME OR MAJOR IMPROVEMENT	% INDICATING ADEQUATE OR OUTSTANDING
LCPS Administrators	0%	92%
Peer Administrators	8%	56%
LCPS Principals	8%	77%
Peer LCPS Principals	18%	68%
LCPS Teachers	14%	71%
Peer Teachers	17%	60%

Source: MGT Survey, February 2005.

The most recent data available from the Virginia Department of Education (VDOE) is for the 2002-03 school year. Therefore, comparative analysis of LCPS and five peer school divisions will use reports on pupil transportation from 1998-99 to 2002-03, as provided by VDOE. The remaining information and data has been gathered from the LCPS Transportation Department.

Exhibit 7-2 provides a five-year overview of the total number of students transported in each school division. It is important to note that the totals given are the total number of riders (morning and afternoon runs) using school transportation services. As shown in the exhibit, the peer school division average in 1998-99 was 3,659 and increased to 3,841 in 2002-03; an increase of 182 students. On the contrary, during the same five-year period, LCPS student totals decreased by 184; from 3,349 students in 1998-99 to 3,165 in 2002-03.

Yearly transportation costs for LCPS and comparison peer divisions are shown in Exhibit 7-3. In 1998-99, the peer school division average cost was \$1,515,113. It increased 53

percent to \$2,324,657 by 2002-03. Mirroring the same trend as the peer divisions, an increase from \$1,841,599 to \$2,703,490 resulted in a 47 percent increase for LCPS.

It is important to note that these increases correspond to similar increases throughout the nation for school transportation services. Higher costs for parts and supplies, more expensive buses, rising personnel costs, and higher fuel costs directly impact school transportation expenses.

**EXHIBIT 7-2
FIVE-YEAR TOTAL OF STUDENTS TRANSPORTED YEARLY COMPARED TO
PEER DIVISIONS
LOUISA COUNTY PUBLIC SCHOOLS
1998-99 THROUGH 2002-03**

SCHOOL DIVISION	1998-99	1999-00	2000-01	2001-02	2002-03
Botetourt	4,175	4,152	3,960	4,151	4,108
Fluvanna	2,957	2,654	3,007	3,017	3,196
Orange	3,253	3,256	3,561	3,671	3,776
Powhatan	3,058	3,462	3,601	3,646	3,938
Shenandoah	5,164	5,119	5,433	5,597	4,861
Louisa County	3,349	2,951	3,348	2,724	3,165
PEER SCHOOL DIVISION TOTAL	21,956	21,594	22,910	22,806	23,044
PEER SCHOOL DIVISION AVERAGE	3,659	3,599	3,818	3,801	3,841

Source: Commonwealth of Virginia, Department of Education, 2005.

*Note: Numerical entries are totals for students transported morning and afternoon runs.

**EXHIBIT 7-3
FIVE-YEAR TRANSPORTATION COSTS COMPARED TO PEER DIVISIONS
LOUISA COUNTY PUBLIC SCHOOLS
1998-99 THROUGH 2002-03**

SCHOOL DIVISION	1998-99	1999-00	2000-01	2001-02	2002-03
Botetourt	\$1,552,379	\$1,839,396	\$1,899,166	\$1,749,127	\$1,876,499
Fluvanna	\$873,283	\$1,162,634	\$1,533,569	\$1,250,736	\$1,572,933
Orange	\$1,649,434	\$1,708,778	\$1,852,242	\$2,016,388	\$2,396,094
Powhatan	\$1,420,273	\$1,867,419	\$2,715,836	\$1,896,607	\$3,031,966
Shenandoah	\$1,753,715	\$1,916,133	\$2,162,246	\$2,321,775	\$2,366,958
Louisa County	\$1,841,599	\$2,157,792	\$2,443,696	\$2,979,023	\$2,703,490
PEER SCHOOL DIVISION TOTAL	\$9,090,683	\$10,652,152	\$12,606,755	\$12,213,656	\$13,947,940
PEER SCHOOL DIVISION AVERAGE	\$1,515,113	\$1,775,359	\$2,101,126	\$2,035,609	\$2,324,657

Source: Commonwealth of Virginia, Department of Education, 2005.

Student transportation services are drastically influenced by how efficiently regular and special education students are transported. Exhibit 7-4 (regular students transported) and Exhibit 7-5 (special education students transported) provide comparisons with peer divisions.

**EXHIBIT 7-4
REGULAR STUDENTS TRANSPORTED COMPARED TO PEER DIVISIONS
LOUISA COUNTY PUBLIC SCHOOLS
1998-99 THROUGH 2002-03**

SCHOOL DIVISION	1998-99	1999-00	2000-01	2001-02	2002-03
Botetourt	4,122	4,093	3,902	4,093	4,054
Fluvanna	2,947	2,647	3,000	3,010	3,189
Orange	3,208	3,200	3,500	3,600	3,700
Powhatan	3,010	3,405	3,548	3,585	3,879
Shenandoah	5,093	5,073	5,377	5,541	4,778
Louisa County	3,305	2,913	3,308	2,695	3,132
PEER SCHOOL DIVISION TOTAL	21,685	21,331	22,635	22,524	22,732
PEER SCHOOL DIVISION AVERAGE	3,614	3,555	3,773	3,754	3,789

Source: Commonwealth of Virginia, Department of Education, 2005.

As shown in the exhibits, LCPS transported 3,349 students in 1998-99; 3,305 students, or 99 percent, were regular students and 44 students, or one percent, were special education students. In 2002-03, the division transported 3,165 students; 3,132 student, or 99 percent, were regular students and 33 students, or one percent, were special education students. In comparison, the peer division average shows a similar trend in the same years. By 2002-03, LCPS special education student transportation requirements had remained constant at one percent. Over a five-year period, the number of special education students transported in LCPS decreased by 25 percent while increasing 15 percent in the peer comparison divisions.

**EXHIBIT 7-5
SPECIAL EDUCATION STUDENTS TRANSPORTED
COMPARED TO PEER DIVISIONS
LOUISA COUNTY PUBLIC SCHOOLS
1998-2003 SCHOOL YEARS**

SCHOOL DIVISION	1998-99	1999-00	2000-01	2001-02	2002-03
Botetourt	53	59	58	58	54
Fluvanna	10	7	7	7	7
Orange	45	56	61	71	76
Powhatan	48	57	53	61	59
Shenandoah	71	46	56	56	83
Louisa County	44	38	40	29	33
PEER SCHOOL DIVISION TOTAL	271	263	275	282	312
PEER SCHOOL DIVISION AVERAGE	45	44	46	47	52

Source: Commonwealth of Virginia, Department of Education, 2005.

Exhibit 7-6 shows the cost per mile rate for regular and special education students. Out of the six peer divisions, two (Botetourt and Orange) had costs per mile for regular students below the peer average of \$2.25, while Powhatan was slightly above average and Shenandoah was 46 percent higher at \$3.28. All peer divisions for special education student cost per mile all exceeded the peer average of \$2.58, with the exception of Botetourt. LCPS transported regular students at a cost of \$1.63 per mile or 28 percent below the average, and special education students at a cost of \$2.10 per mile or 19 percent below the average.

**EXHIBIT 7-6
COST PER MILE FOR REGULAR AND SPECIAL EDUCATION STUDENTS
COMPARED TO PEER DIVISIONS
LOUISA COUNTY PUBLIC SCHOOLS
2002-03 SCHOOL YEAR**

SCHOOL DIVISION	REGULAR STUDENTS COST PER MILE	SPECIAL EDUCATION STUDENTS COST PER MILE
Botetourt	\$1.41	\$1.41
Fluvanna	\$2.77	\$2.77
Orange	\$2.07	\$3.30
Powhatan	\$2.31	\$2.64
Shenandoah	\$3.28	\$3.28
Louisa County	\$1.63	\$2.10
PEER SCHOOL DIVISION TOTAL	\$13.47	\$15.50
PEER SCHOOL DIVISION AVERAGE	\$2.25	\$2.58

Source: Commonwealth of Virginia, Department of Education, 2005.

The numbers of deadhead miles in 2002-03 are compared in Exhibit 7-7. Deadhead miles are classified as mileage spent moving to begin a route or spent going to pickup a student prior to initiating transportation service. Deadhead mileage can occasionally be extensive and can, therefore, add significantly to student transportation costs. LCPS is slightly above its peer comparison group in deadhead miles (200,896) and the cost of those miles (\$327,419). When Fluvanna is removed from the calculations (its deadhead mileage/cost downwardly skew the average), LCPS is almost on par with average deadhead mileage and is 13 percent lower than the average deadhead cost.

**EXHIBIT 7-7
DEADHEAD MILES COMPARED TO PEER DIVISIONS
LOUISA COUNTY PUBLIC SCHOOLS
2002-03 SCHOOL YEAR**

SCHOOL DIVISION	DEADHEAD MILES	COST
Botetourt	162,586	\$228,985
Fluvanna	466	\$1,288
Orange	317,700	\$657,596
Powhatan	224,200	\$516,816
Shenandoah	44,750	\$146,747
Louisa County	200,896	\$327,419
PEER SCHOOL DIVISION TOTAL	950,598	\$1,878,853
PEER SCHOOL DIVISION AVERAGE	158,433	\$313,142
PEER SCHOOL DIVISION AVERAGE (WITHOUT FLUVANNA)	190,026	\$375,513

Source: Commonwealth of Virginia, Department of Education, 2005.

Exhibit 7-8 shows that LCPS, for the 2002-03 school year, had 14 spare buses, which was 15 percent of its entire fleet ratio. The peer group average during the same time was 10 spares, or 13 percent of the fleet average. The 2005-06 bus inventory listing provided by the Transportation Department shows there are currently 112 buses in the inventory.

**EXHIBIT 7-8
PUPILS, BUSES AND SPARE BUSES COMPARED TO PEER DIVISIONS
LOUISA COUNTY PUBLIC SCHOOLS
2002-03 SCHOOL YEAR**

SCHOOL DIVISION	PUPILS	BUSES	SPARE BUSES	PERCENT SPARES	SPECIAL ARRANGEMENT STUDENTS
Botetourt	4,132	57	17	23%	24
Fluvanna	3,196	60	6	15%	0
Orange	3,776	72	10	12%	0
Powhatan	3,967	67	2	3%	29
Shenandoah	4,861	81	12	13%	0
Louisa County	3,201	81	14	15%	36
PEER SCHOOL DIVISION TOTAL	23,133	418	61	-	89
PEER SCHOOL DIVISION AVERAGE	3,856	70	10	13%	14.83

Source: Commonwealth of Virginia, Department of Education, 2005.

7.1 Organization and Staffing

The LCPS Transportation Department has an established organizational chart, structured to accomplish daily operations. As shown in Exhibit 7-9, Director reports to the Assistant Superintendent for Administration. The Executive Director and Transportation Assistant are responsible for the operational core function of ensuring that students are transported to and from school in a safe and timely fashion. When the director is absent, the Transportation Assistant is next in the line of authority. The staffing levels shown are based on division precedent and are not the result of a staffing formula.

There are 83 full-time drivers, as well as 38 substitutes and seven staff aides. All of the key positions shown on the chart are qualified bus drivers and may be summoned to serve as a substitute when needed. The department has an active recruiting program and does have enough regular drivers for its planned routes and other transportation activities.

The transportation drivers and substitute drivers are experienced at their positions and carry out the duties and functions of their job responsibilities in an organized and professional manner. In a focus group interview session conducted by MGT, drivers and substitute drivers expressed a strong interest in seeing the training program enhanced to provide continuous support to all drivers. The initial training received by drivers and substitute drivers is commendable, but ongoing training for senior drivers is essentially conducted in a classroom setting and is not a true evaluation of real-time driving skills. The Executive Director and Transportation Assistant, both present during the focus group, indicated there were efforts underway to add these new components to the training program. Curriculum for the program and accompanying evaluation criteria have not yet been developed.

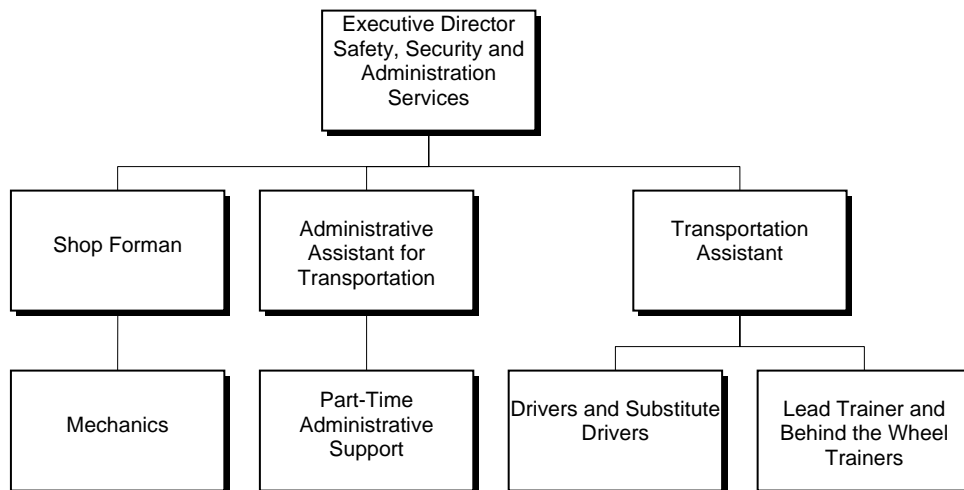
Administrative staff throughout the department are well-trained and provide excellent service to the director, staff, drivers and mechanics. The primary role of the Administrative Assistant is to manage and maintain the operation during the course of the work day. The administrative staff are in charge of direct communication with drivers during the work day as well as coordinating substitute driver assignments, route changes or updates, scheduling and assigning buses for curricular and extra-curricular activities as well as the operational management of the transportation department.

The Transportation Assistant is in charge of training for all drivers and substitute drivers. In conjunction with a state-certified lead trainer and four “behind-the-wheel” trainers, the Transportation Assistant coordinates schedules and oversees all activities associated with division-wide transportation training. The Transportation Assistant is knowledgeable on State-approved training techniques and takes the necessary steps in providing a high-quality training program.

The Shop Foreman and three mechanics are responsible for the maintenance and safety of all division vehicles. Buses are on routine maintenance schedules based on VDOE-required schedules. The shop facility is orderly, but outdated and does not provide adequate space for the efficient operation of the maintenance program. The shop foreman is the lead mechanic and supervises the other three mechanics. Mechanics were knowledgeable about the equipment and carried out their duties in a professional manner.

The LCPS Transportation Department is well-managed and operationally sound. There are established lines of communication and reporting to maximize the unit's effectiveness. Staff take pride in their organization and serve the division well.

**EXHIBIT 7-9
ORGANIZATIONAL STRUCTURE - TRANSPORTATION OPERATIONS
LOUISA COUNTY PUBLIC SCHOOLS
2004-05 SCHOOL YEAR**



Source: Louisa County Public Schools, Transportation Department, 2006.

The department is constantly evaluating the communication process and has made significant strides in promoting effective models. The organizational structure allows the appropriate staff to focus on their area of expertise which reduces decision time and increases productivity. The effort by all staff to follow organizational protocol and openly communicate about the operational and tactical objectives of the department is a direct benefit to the division.

COMMENDATION

The LCPS Transportation Department is commended for having an established organizational structure which supports the highest level of communication and ensures operational effectiveness and administrative oversight.

7.2 Planning, Policies, and Procedures

Student discipline is a growing area of concern throughout the division. A steady rise in violent activity at our nation's schools has raised concerns by parents, community members and organizations about how school divisions handle these incidents. Most importantly how do we protect our children?

Louisa County Public Schools has adopted a policy regarding student conduct and behavior. Each year, students and parents are given materials explaining the expectations and consequences of student conduct and behavior. The focus of the policy is to be fair and equitable to all students in matters concerning safety and discipline.

Within the division however, administrators, staff and drivers are having difficulty deciding what is equitable and how to apply equity in a fair and consistent manner. A detailed process for establishing and following guidelines which help all parties understand the final actions of the decision maker is important. Student management is everyone's responsibility and to do this effectively, a systemic process for resolution is imperative.

FINDING

The LCPS Transportation Department has policies and processes in place for managing student conduct and discipline. The division provides each parent and student a "Parent Handbook and Code of Behavior" booklet at the beginning of each school year. The expectations for student behavior are clearly defined throughout the manual: on pages 10 and 11, specific rules for school bus conduct are discussed; on pages 12 and 13 there is an explanation of the disciplinary and appeals process.

When a student violates a rule on a school bus, the driver completes a standard student discipline form and the transportation department delivers this to the appropriate school staff or principal. The principal interviews the student in question and applies the appropriate disciplinary actions. Principals sometimes exhibit a lack of consistency across the schools in applying equal measures of discipline for the same types of infractions. Transportation staff should play a larger role in the managing of student

behavior on school buses. Input from the transportation staff on issues of safety and risk should be taken into consideration when principals are making important disciplinary decisions.

There are procedures in place to handle complaints waged by students, parents, and the general public. If the complaint is about a driver, it is normally investigated by the school principal who then seeks to resolve the issue. The director's assistant maintains a complaint file after review by the director. Depending on the issue, the complaint might be referred to in the annual evaluation. If the issue is minor, such as a dispute over a pick-up time, it is resolved and the complaint is discarded. A review of several driver records confirmed that both complaints and commendations are maintained therein.

RECOMMENDATION

Recommendation 7-1:

Modify the existing discipline process for managing student behavior on school buses to include provisions for more direct input from the transportation staff.

The Executive Director of Safety, Security and Administration, in conjunction with LCPS staff and school principals, should modify the existing student discipline process for managing student behavior on school buses to include provisions for more direct input from the transportation staff. The division's schools and transportation department must continue to examine the student discipline process in an effort to find effective models for obtaining the highest levels of collaboration between all parties. An inclusive model where all parties have the opportunity for comment and input should be jointly developed by students, parents, drivers, principals and counselors to protect the interests of all students. By modifying the process to include a broader set of individuals and information, division personnel will be able to execute the decisions regarding inappropriate student behavior in more fair and equitable fashion.

FISCAL IMPACT

This recommendation can be accomplished using existing division resources.

7.3 Training and Safety

LCPS transportation training and safety programs are the responsibility of the director and the five certified driver trainers. These positions have a stated goal to monitor all safety issues related to pupil transportation, investigate all accidents, and file accidents reports with VDOE. The Transportation Assistant along with the Certified Trainers are also responsible for the planning, integration, and implementation of all training for personnel assigned to the department.

The LCPS Transportation Department training program for initial driver induction is commendable; however, the training program lacks adequate specialized training for transportation staff on a continuous basis. Additional training for both trainers and drivers is essential. Long-term drivers have, in some cases, gone considerable lengths of time without an appropriate driving evaluation. Staff indicated a willingness to attend additional training in specialized areas, if available. The Transportation Assistant and

driver trainers should design and develop a solution of maintaining an active and responsive program to keep its personnel highly trained.

Exhibit 7-10 shows training offered, whether it is required by law, employee satisfaction, certification, or pay differential. LCPS transportation staff development consists of training that is conducted or provided for all personnel in the LCPS Transportation Department. The Director of Transportation is aware that well-trained bus drivers and staff contribute to operational and cost efficiencies.

**EXHIBIT 7-10
TRANSPORTATION-RELATED STAFF DEVELOPMENT TRAINING
LOUISA COUNTY PUBLIC SCHOOLS
2004-05 SCHOOL YEAR**

TRAINING OFFERED	REQUIRED BY LAW	EMPLOYEE SATISFACTION	CERTIFICATION	ANY PAY DIFFERENTIAL
CPR & First Aid	Yes	Moderate	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	No	No
Safety	Yes	High	Yes	No
DMV Regulations	Yes	High	No	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

Source: LCPS Transportation Department, November 2005.

*Training hosted by Virginia Department of Education at away locations for two or more days.

RECOMMENDATION

Recommendation 7-2:

Develop additional ongoing and specialized training to meet the needs of all transportation staff.

Curriculum is available through the VDOE and can be easily tailored to fit the requirements of any program. An effort on behalf of the department to address this deficiency is critical to the improvement of the overall training program. LCSD experiences high ratings in the majority of professional development opportunities offered. The expectation for high-quality programs has been established and staff are capable of delivering quality programs. Developing and implementing ongoing and specialized training as part of the LCPS training program will improve the overall safety and performance of the department.

FISCAL IMPACT

This recommendation can be carried out with current division funds.

7.4 Vehicle Maintenance

Vehicle maintenance responsibilities are performed by three full-time mechanics. The Shop Foreman is a qualified lead mechanic, and if required, may augment or support mechanic responsibilities in operational situations, providing a total of four mechanics when needed. The Shop Foreman has been in his position of responsibility for over 25 years and reports to the Executive Director of Safety, Security and Administration.

In order to accurately track and report vehicle information, LCPS has invested in a Vehicle Maintenance Information System (VMIS) but is currently using only a portion of the total application functionality. The software is designed to automate a number of paper-based processes in an effort to streamline maintenance record collection. The staff keeps records on the type of repairs and cost data to adequately capture which bus was repaired, what was repaired, who repaired it, where was it repaired, and what the cost of the repair was. The VMIS was designed and installed to collect this data and to reduce the work load associated with the annual state reporting process. The system is capable and configured to provide LCSD with this functionality.

FINDING

LCPS transportation staff are manually entering a majority of the transportation data into state provided read only systems to meet state reporting requirements. Once the information is input into the VMIS system, an electronic file transfer to the state transportation servers is initiated, dramatically reducing the time and cost for preparing these reports. At present, these reports are being created in a number of different data systems. Staff are knowledgeable regarding the reporting requirements but the manual process for capturing, editing and reporting this data is a significant burden to the department.

The staff members have a reluctance to use the system because of the lack of a training. Each staff member must be trained to use the system properly for maximum efficiency to be realized.

In LCPS, the Transportation Maintenance program has a paper-based vehicle information maintenance system. This does not conform to Commonwealth of Virginia School Review Procedures as they relate to transportation. While the system captures the state-required records for school bus maintenance and are accurate and reflect the VDOE-established procedures for vehicle tracking, the efficiency of this system as well as the ability to provide accurate and timely information are compromised.

The LCPS Transportation Department Vehicle Maintenance Information System (VMIS) does not meet the Commonwealth highly-effective guidelines, which indicate employing several technological innovations as well as indicators to manage the fleet. A comprehensive computerized vehicle information management system should be available on-line to more efficiently manage the LCPS transportation fleet.

The records system in LCPS is extremely vulnerable to loss and/or damage. The transportation records are stored in file cabinets in the shop foreman's office. The Shop Foreman possesses knowledge concerning each of the transportation and non-transportation vehicles. Yet, with a paper-managed system there is a chance of loosing

pertinent information. Record retrieval would be extremely difficult and would greatly effect the maintenance and repair schedules for the transportation vehicles.

RECOMMENDATION

Recommendation 7-3:

Implement and extend the use of the current Vehicle Maintenance Information System (VMIS).

LCPS implementation of the current vehicle maintenance information system is critically important. A VMIS system implementation in LCPS would eliminate several risk factors related to records retention and storage.

FISCAL IMPACT

This recommendation can be accomplished using existing funds.

FINDING

Virginia Department of Education requires each school division to perform regularly-scheduled maintenance on division buses and vehicles. For example, each school bus must be inspected at 30, 60 and 90 day intervals in a variety of mechanical areas to ensure the safe and orderly operation of all buses and to meet state requirements. VDOE has specific schedules for oil changes, tire rotations, brake inspection, etc. in which all divisions must comply. All repairs are documented in the corresponding State forms and submitted annually to the state. A copy of the appropriate documents is available on the VDOE web site for easy downloading. Each division is evaluated on annual bases through a state wide reporting structure on the accuracy and effectiveness in meeting these requirements.

The LCPS Transportation Department has adopted and/or implemented all State-required vehicle maintenance schedules. The service and inspection intervals are well-documented and available for review. Scheduling the service appointments is joint effort between transportation administrative and mechanical personnel. Service schedules are posted in all driver areas and spare buses are provided during service time to minimize route interruption. As mentioned in Recommendation 7-3, implementation of an electronic VIMS would greatly improve this process but overall the transportation mechanical staff does an outstanding job in managing and maintaining a quality vehicle maintenance system.

The system developed is thorough and meets all necessary state scheduling and reporting requirements. The staff has placed an emphasis on this area of the operation and as a result, annual improvement by the department in this area has been achieved. Focus on automation of these areas will bring additional benefit to the division.

COMMENDATION:

LCPS Transportation Department is commended for the implementation of all VDOE State-required vehicle maintenance schedules.

7.5 Transportation Facilities

FINDING

The current maintenance facility does not have the capacity to meet the division’s future needs. As a result, the Transportation Department is facing some critical decisions.

The current facility configuration is limiting the ability of the Division to operate in the most efficient manner possible. While conducting an on-site evaluation of the current maintenance facility MGT found that certain maintenance functions cannot be performed because of facility limitations. These limitations include major maintenance capabilities, as well as routine daily service activities. The current facility has a number of antiquated features which hinder the performance of these duties. The division maintenance staff is severely limited by age and functionality of the current facility.

The mechanical staff can work on only three buses and one other non-bus vehicle at any given time. If repairs are delayed, partially repaired buses occupy space used for normal maintenance activities further impacting fleet repair schedules and driving up costs.

The facility lacks appropriate staff accommodations and as a result there is considerable overcrowding throughout the complex. The department does not have adequate space for driver training sessions or staff meetings. Training equipment has to be set up and taken down prior to each session and there is not adequate or secure storage for the training equipment.

The condition of the facility continues to deteriorate and will soon need extensive modification and repairs to meet the needs of the transportation department. Consideration to other options should be examined.

LCPS would benefit from a comprehensive analysis to establish the most effective options in developing a new transportation and bus maintenance facility. Considerations should include future capacity, overall utilization of the new facility, and what existing properties might be available. The LCPS Transportation Department will increase operational effectiveness by providing an updated facility for use by both driver and maintenance staff.

RECOMMENDATION

Recommendation 7-4:

Expand and upgrade the current transportation department’s facility.

Including the need for an updated transportation facility within the facilities master plan will benefit the division in its efforts to provide the most operationally efficient transportation program possible.

FISCAL IMPACT

Expanding and upgrading the current facility would cost approximately \$225,000. this cost is base on expansion of the current facility by 1,500 square feet at \$150 per square foot.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-2011
Update Transportation Facility	(\$225,000)	\$0	\$0	\$0	\$0

8.0 NUTRITION SERVICES

8.0 NUTRITION SERVICES

In this chapter the findings and recommendations for the overall organization of the Nutrition Services Department are presented. The major sections of this chapter include:

- 8.1 Organization and Management of Nutrition Services
- 8.2 Security Issues
- 8.3 Student Meal Participation
- 8.4 Food Quality and Nutrition Services Competition

CHAPTER SUMMARY

Louisa County Public Schools has a comprehensive Nutrition Services Department and participates in both the National School Breakfast Program and National School Lunch Program.

The division has a high percentage of students eligible for free and reduced meals and this percentage is reflected in the breakfast and lunch participation rates. While the division uses direct certification for families receiving public assistance, some families may be unaware of the program availability. Educating these parents on program availability and assisting them in completing the requirement documentation could further increase the participation rates, and increase revenue to the division from federal reimbursements.

Overall, the LCPS Nutrition Services program is well-received and popular. Site visits found few operational issues overall. The Director of Nutrition Services has made a concerted effort to streamline costs and has successfully raised student participation in the program. Areas of commendation noted in the report include:

- maintaining competitive pricing for school meals;
- increasing and maintaining school lunch participation rates;
- maintaining high levels of breakfast and lunch participation among free/reduced qualified students;
- implementing and maintaining health-conscious meal choices; and
- enforcing rules pertaining to vending and competition sales during the school day.

There are also several areas that the Nutrition Services Department could enhance both its financial viability and the quality of its service to students. Among the recommendations targeting these and other nutrition-related areas are the following:

- creating a lead worker position in the kitchen at each school site;
- increasing the MPLH rate at each school;

- developing a comprehensive policies and procedures manual for nutrition services;
- assigning an Alternative Education Program staff member the responsibility of picking up the boxed lunches from the high school;
- repairing the kitchen drainage system in four schools to ensure that slip hazards are minimized;
- researching the benefits of joining a food cooperative with other small school divisions;
- implementing a policy for lunch money submissions during non-service times or through an on-line deposit process with the current point-of-sale system used in the division;
- installing an access key pad to the TJES kitchen door and provide the nutrition services manager with an access code;
- ensuring that student photos used in the point-of-sale system are updated annually;
- implementing a system to prevent product theft from the service line;
- implementing a policy allowing early arriving students to proceed to the cafeteria for breakfast;
- providing families with assistance in completing free/reduced meal eligibility forms; and
- implementing a la carte offerings at the secondary schools.

INTRODUCTION

MGT administered on-line surveys to central office administrators, school-based administrators and teachers to determine their perceptions of the quality, efficiency and effectiveness of the Nutrition Services Department. For the sake of clarity, survey responses that indicated a “don’t know” or “neutral” response were omitted. The Nutrition Services Department is generally regarded favorably within the Louisa County Public Schools (LCPS). Sixty-two percent of administrators *agree or strongly agree* that nutrition services provides nutritious and appealing meals and snacks, with only eight percent *disagreeing or strongly disagreeing*. These high percentages correlate with administrators who took the survey at other divisions; however, principals and teachers who work at LCPS tend to disagree with this perception, with only 31 and 29 percent respectively agreeing with the statement. This result may be due to the fact that principals and teachers are generally aware of the daily menu offerings at their schools. By contrast, principals (58 percent) and teachers (43 percent) surveyed in other divisions had a more favorable opinion of the food offerings at their school.

LCPS administrators (85 percent), principals (61 percent), and teachers (49 percent) regard nutrition services to be adequate or outstanding, as opposed to needing some or major improvement. When compared to other divisions, there is, again, a direct correlation to administrators' perceptions of the nutrition services, with an adequate or outstanding response of 67 percent while 18 percent believed there was a need for some or major improvement. In other divisions, principals (65 percent) rated their nutrition services favorably, but the opinion of teachers (47 percent) was almost evenly divided, which is comparable to that of LCPS.

There are some exceptions to the generally favorable impression of Nutrition Services. MGT surveys show that 23 percent of administrators are divided on the question of the Nutrition Services Department encouraging student participation through customer satisfaction surveys. School personnel disagree that Nutrition Services carry out surveys as well. Principals (8 percent) and teachers (7 percent) either *disagree or strongly disagree* that surveys are conducted; however, this fact is not due to unwillingness on nutrition service's part to conduct a survey. Since the advent of Family Educational Rights and Privacy Act (FERPA), it has been problematic to conduct student surveys because parental permission must be secured for each student before he or she may participate in the study. Comparison with other divisions was not possible as there were no responses given by those divisions regarding nutrition service surveys. It should be noted, however, that LCPS does conduct a food tasting survey on occasion.

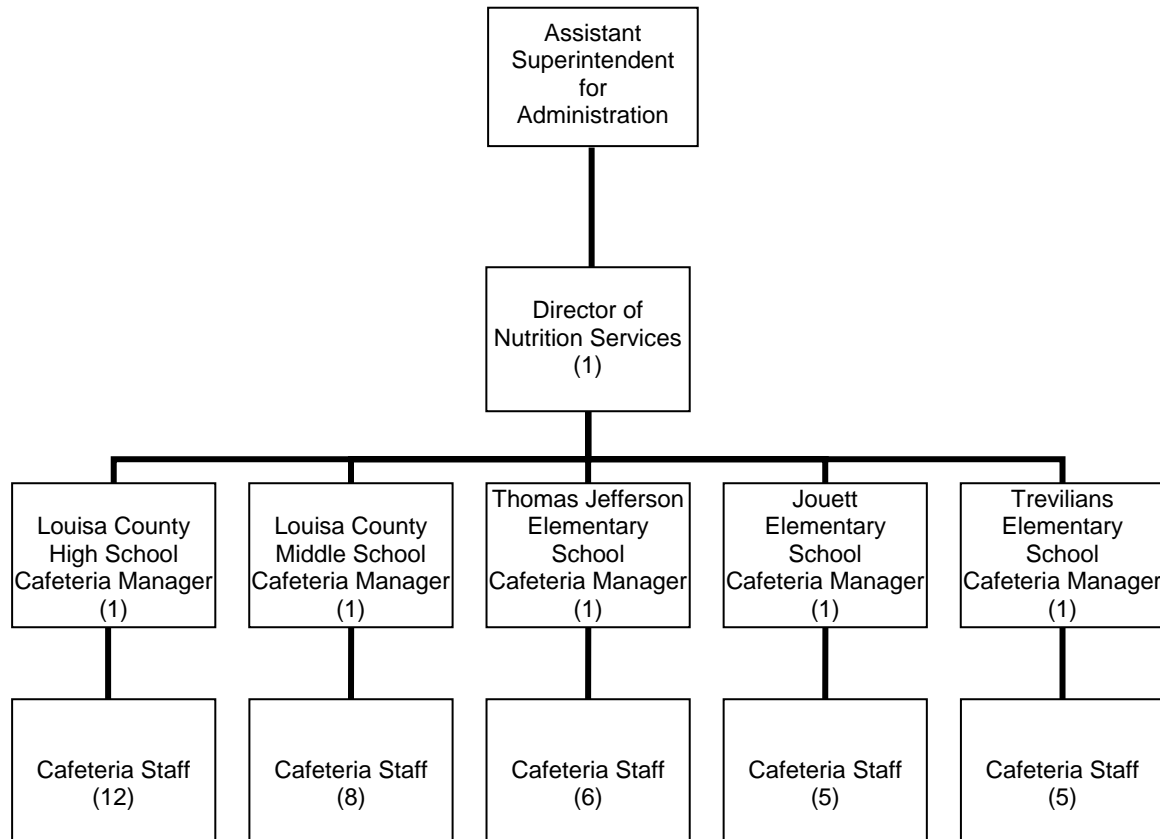
8.1 Organization and Management of Nutrition Services

FINDING

A need exists for a lead staff manager to carry out duties of the food service manager whenever a manager is absent. Each of the five schools in the division has a nutrition service manager; however, an area of concern raised among all nutrition service staff involved the void in management services whenever the food service manager is absent. Furthermore, staff duties are not clear and extra help in management-related duties is needed during busy periods.

LCPS Nutrition Services has a chain of command with a top-down structure and limited scope. The current organizational structure is detailed in Exhibit 8-1. As shown in the exhibit, the director's position reports directly to the Assistant Superintendent for Administration and food service managers report directly to the director. Nutrition service workers report directly to managers at their school. When the manager is absent or is temporarily away during peak serving times, the kitchen operations do not run as smoothly.

**EXHIBIT 8-1
ORGANIZATIONAL CHART FOR NUTRITION SERVICES
LOUISA COUNTY PUBLIC SCHOOLS
2005-06 SCHOOL YEAR**



Source: Louisa County Public Schools, Nutrition Services Department, 2006.

RECOMMENDATION

Recommendation 8-1:

Create a kitchen lead position at each school site.

The creation of a lead position would provide continuity in operations should the kitchen manager be absent or need extra help. This person should be authorized to act on the kitchen manager's behalf and prepared to carry out his or her duties.

FISCAL IMPACT

A small pay increase should accompany the position, commensurate with the expected increase in responsibilities. The position should be created from one of the existing 7-hour shift positions. LCPS is currently comprised of five schools but intends to build an additional elementary that will open in fall, 2006. Taking this new school into account, the division can expect a total expenditure of \$12,510 to create a kitchen lead at each school site. This amount is based on a wage increase of \$1.00 per hour, plus \$0.44 in

benefits, for eight hours a day times 180 days per school year, for a total of \$2,074 per lead worker. The cost of creating the position at the five schools currently operating in LCPS is \$10,370 per year. When the new elementary school comes on-line in 2008, the cost increases to \$12,444.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Create A Kitchen Lead Position At Six School Sites	(\$10,370)	(\$10,370)	(\$12,444)	(\$12,444)	(\$12,444)

FINDING

LCPS uses an industry productivity standard of meals per labor hour rate (MPLH) to determine and measure nutrition service productivity. MPLH is calculated by comparing the number of meals served in a given period with the labor hours used to prepare and serve those meals in the same time period. Exhibit 8-2 shows the MPLH benchmarks for each of the LCPS schools and the number of nutrition staff hours over or under the benchmark. As shown in the exhibit, the MPLH for all LCPS schools are below the benchmark, indicating below average levels of productivity and added costs to the division.

**EXHIBIT 8-1
LOUISA COUNTY SCHOOL DIVISION
MEALS PER LABOR HOUR (MPLH) RATES
OCTOBER 2006**

SCHOOL	TOTAL MEAL EQUIVALENT	MPLH RATE	MPLH BENCHMARK	STAFF HOURS OVER/(UNDER) BENCHMARK
Jouett Elementary	519	12	17	(5)
Thomas Jefferson Elementary	668	14	18	(4)
Trevilians Elementary	530	12	17	(5)
Louisa County Middle	956	16	21	(5)
Louisa County High	945	13	21	(8)
DIVISION AVERAGE	724	13	18	(5)

Source: Louisa County Public Schools, Nutrition Services Department, 2006.

RECOMMENDATION

Recommendation 8-2:

Reduce nutrition services staff hours while maintaining current salary levels until LCPS reaches the MPLH benchmark for its schools.

By reducing staff hours at all LCPS schools, the division would be in line with industry standards as indicated in the *Cost Control for School Food Services, Third Edition, 2000*. The implementation of this recommendation would provide the division with a more efficient Nutrition Services Department.

FISCAL IMPACT

In order to determine the cost savings from reducing nutrition staff hours, MGT consultants took the average hourly wage for nutrition service workers at each of the five division schools and multiplied that figure by the number of hours each school was below its MPLH benchmark. The total savings for all five schools was \$318.74. When this figure is multiplied by 180-day school year, the total annual savings equals \$57,373.20.

EXHIBIT 8-3 LOUISA COUNTY SCHOOL DIVISION REDUCTION IN STAFF HOURS AND LABOR COSTS

SCHOOL	AVERAGE HOURLY WAGE	HOURS BELOW MPLH BENCHMARK	REDUCTION IN LABOR COSTS*
Jouett Elementary	\$12.84	5	\$64.20
Thomas Jefferson Elementary	\$12.84	4	\$51.36
Trevilians Elementary	\$10.10	5	\$50.50
Louisa County Middle	\$11.72	5	\$58.60
Louisa County High	\$11.76	8	\$94.08
TOTAL REDUCTION	N/A	N/A	\$318.74

Source: Created by MGT of America, based on data provided by Louisa County Public Schools Nutrition Services Department, 2006.

*Note: Reduction in labor costs represent the average hourly wage times the number of hours below MPLH benchmark.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Reduce Nutrition Staff Hours to Meet MPLH Benchmark	\$57,373	\$57,373	\$57,373	\$57,373	\$57,373

FINDING

LCPS has a written vision and mission statement. According to Nutrition Services staff, the LCPS Nutrition Services vision statement is:

All children will have the opportunity to make educated, healthful choices that will enhance their academic and physical performance and promote lifelong health.

The LCPS Nutrition Services mission statement and goals are as follows:

Mission:

The School Nutrition staff is committed to developing effective and comprehensive nutrition services that result in children making educated, healthful choices.

Goals:

- Ensure nutritional integrity and accountability, and to enhance the nutrition education of all students.
- Increase student knowledge of the relationship between nutrition and personal health.
- Ensure that school meals are nutritionally sound and of high quality.

Monthly training is provided using the ServSafe textbook and the Hazard Analysis and Critical Control Point (HACCP) training manual. LCPS also sends staff to ServSafe training seminars during the summer months. Nutrition services' standard operating procedures are posted throughout the kitchen sites; however, they are not assembled in a procedures book.

A well-developed procedures manual provides nutrition service workers and managers alike with clear directives on all aspects of kitchen operations. The manual should be comprehensive and organized in a way to facilitate easy reference when questions concerning operational procedures arise. Exhibit 8-4 provides an illustration of the manual contents of one school division that is typical of most procedures manuals.

RECOMMENDATION

Recommendation 8-3:

Develop a comprehensive policies and procedures manual for nutrition services staff.

The development of a manual should eliminate any confusion regarding kitchen operations and ensure that all employees are fully aware of all regulations and procedures. The implementation of this recommendation should allow a best practice in this area and increased efficiency in the department.

FISCAL IMPACT

This recommendation can be implemented using existing nutrition services staff.

**EXHIBIT 8-4
SAMPLE TABLE OF CONTENTS FOR
NUTRITION SERVICES PROCEDURES MANUAL**

Chapters	
Section 1:	Introduction
Section 2:	Regulations and Policies
Section 3:	Organizational Charts
Section 4:	Menu Planning
Section 5:	Safety/Sanitations
Section 6:	Kitchen Operations
Section 7:	Purchasing/Ordering
Section 8:	Nutrition Education
Section 9:	Promotions/Marketing
Section 10:	Training
Section 11:	Calendars
Section 12:	Forms

Source: Pinellas County Public Schools
Food Service Department (Florida),2006.

FINDING

The high school kitchen staff is responsible for providing meal service to the Alternative Education Program. During the breakfast and lunch service times, the staff boxes up meals for the students which are ordered daily from the Alternative Education Program. The kitchen manager then transports the boxed lunches to the alternative school site. This practice causes the manager to be gone during a critical preparation period. It is also an inefficient use of staff time.

Having the kitchen manager leave in the middle of service times creates a disruption to the operations at the high school. The division should revise this practice by having a staff member from the Alternative Education Program assigned to carry out this task. At one elementary school, certain special education meals were boxed in advance of the service period and placed on a cart. A staff member would then pick up the meals and deliver them to their destination. This process involved no departure from the service area by the nutrition services staff.

RECOMMENDATION

Recommendation 8-4:

Assign a staff member from the Alternative Education Program the responsibility of picking up the boxed lunches from the high school.

By using the meal delivery model employed at the elementary school, the process of sending meals to the Alternative Education Program would be less disruptive to the kitchen operations at the high school.

FISCAL IMPACT

There is adequate staffing for the alternative program to provide one person to pick up the boxed lunches; therefore, this recommendation can be implemented within current resources.

FINDING

While kitchen equipment was found to be in working order, there are potential slip hazards due to the current drainage configuration associated with some of the three-bay sinks and dishwashers. Several instances were observed where the pipe ended prematurely and the drain did not recess into the floor, thus causing water to splash onto the floor in the vicinity of the drain. This was particularly the case with the dishwashers in four of the five kitchens visited. The exception was Louisa County Middle School, which had a similar set-up, but the actual drain was recessed into the floor, so there was little chance that water could splash onto the floor; however, there was no grate across the top of the recession which, theoretically, could cause someone to trip or slip. This scenario is unlikely due to the location of the drain (nearly underneath the dishwasher). This was not noted on the health inspection reports. While it may be permissible, the hazard exists.

RECOMMENDATION

Recommendation 8-5:

Repair the drainage systems in four schools to ensure that slip hazards are minimized.

Nutrition services should contact the Maintenance Department to investigate the drainage configuration at the elementary schools and at the high school. LCPS should devise strategies for containing water “splash-back” for the purpose of minimizing slip hazards.

FISCAL IMPACT

This recommendation can be implemented using existing LCPS maintenance staff.

FINDING

Due to its size, LCPS does not have the buying power that larger school divisions have when purchasing food and does not participate in a purchasing cooperative to negotiate lower food costs. The only method used by LCPS is to evaluate price lists on a monthly basis and identify the best prices for frequently used items.

Many smaller districts throughout the country participate in food purchasing cooperatives. Cooperative procurement for school nutrition service is the process by which two or more school food authorities (SFAs) join together to establish an organization (separate legal entity) that has administrative responsibility for purchasing food and/or nonfood supplies for members for meals served under the National School Lunch Program and/or School Breakfast Program regulations. The division should benefit through cost savings, meeting bid law requirements, and receiving items that meet Child Nutrition Program requirements.

In Allegany County, Maryland, for example, the district belongs to a 12-county purchasing cooperative. All purchases are made through the cooperative with the exception of milk, bread and fresh produce. If ten five-school divisions join the cooperative, the comparison can then be made to the buying power of a 50-school division.

RECOMMENDATION

Recommendation 8-6:

Join or create a food cooperative with other small school divisions.

The nutrition services manager should research the availability of purchasing cooperatives in the area. If a cooperative does not exist, consideration should be made toward forming one with other regional divisions.

FISCAL IMPACT

Based on the most recent full-year food product costs of \$623,514, the division should be able to realize a 10 percent savings of \$62,351 per year ($\$623,514 \times 10\%$).

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Join or Create a Food Cooperative with Other Small School Divisions	\$62,351	\$62,351	\$62,351	\$62,351	\$62,351

FINDING

There is a high volume of cash transactions throughout the division. Students bring their deposits to breakfast or lunch with them. This practice directly impacts the flow of the service lines. Service lines become stationary as students search their pockets and count out money to the cashier, which is then input into the students account in the Café Terminal point-of-sale system.

This practice causes significant delays during the middle school breakfast period, due to high participation rates, and at the elementary schools, especially when serving the youngest students.

RECOMMENDATION

Recommendation 8-7:

Implement a policy for lunch money submission during non-service times or handled through an on-line deposit process with the current point-of-sale system used by the division.

The implementation of this recommendation will improve line flow, especially during service days with a high level of participation; however, cash collection at the service line cannot be completely discontinued; but neither should it be a regular occurrence, particularly at the elementary levels.

FISCAL IMPACT

The division needs to contact the point-of-sale vendor to determine any costs that may be associated with implementing the on-line deposit process.

8.2 Security Issues

FINDING

A recent upgrade to the security system has created a concern at Thomas Jefferson Elementary School (TJES). Recently, a key-pad alarm system was installed; however, no keypad was placed at the kitchen entrance, and the kitchen manager was not provided with a key to the door to allow entry to the kitchen from the outside. Nutrition services staff does not have access to their work area, and upon arrival, they must wait for custodial staff to open the doors so they can enter the building. This situation has interfered with some delivery schedules as well. The delivery companies have had to alter their delivery schedule in order to accommodate the situation at TJES. In addition, the new delivery times interrupt and delay the food preparation time for the lunch service. As a result, staff has to abandon their food preparation duties in order to receive shipments.

RECOMMENDATION

Recommendation 8-8:

Install an access key pad to the Thomas Jefferson Elementary School kitchen door and provide the kitchen manager with the access code.

Limited access to their workspace is a great inconvenience for kitchen staff. This practice reduces productivity and is impacting the schedules of outside vendors. The implementation of this recommendation should correct the current inefficiency.

FISCAL IMPACT

A comparison of nationally recognized security firms revealed an average cost for a keypad of \$150. A discussion with the current security firm would determine if there would be additional costs for installation.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Install Access Keypad in Kitchen	(\$150)	\$0	\$0	\$0	\$0

FINDING

There is a minor theft issue at the middle and high school levels. A good number of students do not protect their PIN numbers used for the point-of-sale system, and there have been occurrences where a student will enter a PIN which belongs to another student who qualifies for the Free Lunch Program. When that student then attempts to use his or her PIN, the system indicates that the student has already received a reimbursable meal for the day. Nutrition Services then has to void the sale and the student still gets his or her lunch, but the school will not receive reimbursement for that meal. A loss of \$2.23 for that lunch may not seem very excessive, but when considering the overall loss, if this practice continues over time, the deficit the division sustains could become substantial. Not only is the division losing the money for the free-qualified student, but also the reimbursement from the “paid” student committing the theft.

Even if an average of one lunch is stolen per week, the problem may become exacerbated from its present levels, and can become significant over time. Exhibit 8-5 gives an example of the loss should the problem persist. Calculations were made based on one meal per week loss. Granted, the theft rate is not to this point yet, but the calculations are presented as an example of what could happen over time. Only the middle and high school locations are represented here, because the issue does not exist at the elementary level at this time.

**EXHIBIT 8-5
LOUISA COUNTY SCHOOL DIVISION
MEAL REIMBURSEMENT LOSSES**

SCHOOL	FREE MEAL LOSS (1 MEAL PER WEEK)	PAID REIMBURSEMENT LOSS	TOTAL ANNUAL LOSS (2.46 x 36 WEEKS)
Louisa County Middle	\$2.23	\$0.23	\$88.56
Louisa County High	\$2.23	\$0.23	\$88.56
Annual Loss Rate			\$177.12

Source: MGT Analysis, 2006.

The Café Terminal system has built-in photo identification capability; however, student photos are not updated on an annual basis, and therefore, are not a reliable source for student identification. The schools all have web cameras located at the cash register which allow cashiers to take an image of the student as they come through the line, but this can be time-consuming, particularly because the image has to be uploaded to the point-of-sale system. It is not feasible for cashiers to be responsible for updating this system. For example, students at the secondary level often times will not stand still for a photograph, or are not dressed to provide positive identification (e.g., wearing a hat, hood or sunglasses).

RECOMMENDATION

Recommendation 8-9:

Ensure that student photos used in the point-of-sale system are updated on an annual basis using school photos.

Updating or adding photographs of students to the system should not be the cashiers' responsibility. This is a time-consuming process, and causes disruption to the service lines. When pictures are taken for school ID photos, the digital images should be uploaded to the system at the division office level. The Technology Director has indicated that the division is looking into a new application integration system (AIS) that will integrate the different systems the division uses. This may facilitate the recommendation. Further discussion of this new system may be found in the Technology chapter of this report.

FISCAL IMPACT

Discussion of the pricing for the system to uplink mentioned in the recommendation is found in the Technology chapter of this report. While the theft issue is minor at this point, potential revenue protection could be significant, as was presented in Exhibit 8-3.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Annual Losses Due to Service Line Theft	\$177	\$177	\$177	\$177	\$177

FINDING

The line of sight for cashiers is obstructed at the high school for the ninth grade lunch line. The ninth graders eat in the commons area on the main level, and the service line is situated so that the cashier cannot fully monitor the line. The view to the area where the milk is dispensed is blocked as it is situated behind the partition that separates the two cafeteria lines. As a result, there have been some instances where students are taking containers of milk without paying for it. It is unknown how wide-spread the problem is, but during the site visit, evaluators observed at least one student putting an extra milk container in the pocket of his sweatshirt.

RECOMMENDATION

Recommendation 8-10:

Implement a system to monitor service lines for product theft.

This recommendation may be implemented either by installing convex security mirrors so that the cashier can monitor the milk case, or by stationing an aide to monitor the milk cases.

FISCAL IMPACT

Purchase of a convex security mirror can be accomplished for a one-time fee of \$40 per mirror.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Purchase Two Convex Security Mirrors For The Ninth Grade Service Line	\$80	\$0	\$0	\$0	\$0

8.3 Student Meal Participation

FINDING

LCPS uses different scales for elementary and secondary meal prices, which is a standard industry practice. LCPS charges \$1.00 for breakfast for both elementary and secondary and \$1.75 (elementary) to \$2.00 (secondary) for lunches. Staff meals are set at \$2.50. The current meal pricing structure for full-priced meals is detailed in Exhibit 8-6 below.

**EXHIBIT 8-6
SCHOOL MEAL PRICES FOR LCPS
2005-06**

BREAKFAST		LUNCH	
ELEMENTARY	SECONDARY	ELEMENTARY	SECONDARY
1.00	1.00	1.75	2.00

Source: Louisa County Public Schools, Nutrition Services Department, 2006.

Louisa County's breakfast rates are slightly higher, on average, than the peer divisions identified. In all cases, LCPS meals are either equivalent or higher in price when compared to their peers. Exhibit 8-7 below shows the comparison between the peer divisions and Louisa County, average rates for both LCPS and peer divisions, and the difference in rate between LCPS and the average.

**EXHIBIT 8-7
SCHOOL MEAL PRICES FOR LOUISA AND PEERS
2005-06**

SCHOOL DIVISIONS	BREAKFAST			LUNCH		
	ELEMENTARY	MIDDLE	HIGH	ELEMENTARY	MIDDLE	HIGH
Louisa	\$1.00	\$1.00	\$1.00	\$1.75	\$2.00	\$2.00
Fluvanna	\$0.75	N/A	\$0.75	\$1.75	\$2.00	\$2.00
Botetourt	\$0.75	\$0.75	\$0.75	\$1.50	\$1.75	\$1.75
Orange	\$0.85	\$0.85	\$0.85	\$1.60	\$1.75	\$1.75
Powhatan	\$0.75	\$0.75	N/A	\$1.50	\$1.70	\$1.70

**EXHIBIT 8-7 (CONTINUED)
SCHOOL MEAL PRICES
2005-06**

SCHOOL DIVISIONS	BREAKFAST	LUNCH	SCHOOL DIVISIONS	BREAKFAST	LUNCH	SCHOOL DIVISIONS
Shenandoah	\$1.00	\$1.00	\$1.00	\$1.50	\$1.50	\$1.50
DIVISION AVERAGE	\$0.73	\$0.87	\$0.87	\$1.60	\$1.78	\$1.78
DIFFERENCE	\$0.27	\$0.13	\$0.13	\$0.15	\$0.22	\$0.22
PERCENT OF DIFFERENCE	37%	15%	15%	1%	12%	12%

Source: Louisa County Public Schools, Virginia Department of Education, MGT Analysis, 2006.

Based on the above data, the division's meal prices are higher than those of the peer divisions. LCPS' prices for breakfast are 37 percent higher than the average price of all divisions in the identified peer group. The percentage of difference for lunch ranges from one to twelve percent. Despite the higher prices, LCPS has not experienced a lack of participation due to its meal prices, and they have helped to offset expenses.

COMMENDATION

LCPS Nutrition Services has maintained competitive pricing for school meals.

FINDING

LCPS has a high Free/Reduced eligibility rate (37.57%) which exceeds the state average (33.31%). Exhibit 8-8 shows a comparison between LCPS and the state average.

**EXHIBIT 8-8
FREE/REDUCED ELIGIBILITY COMPARISON
2004-05 SCHOOL YEAR**

ELIGIBILITY TYPE	LOUISA COUNTY PUBLIC SCHOOLS	VIRGINIA
Free	27.93%	26.15%
Reduced	9.64%	7.16%
TOTAL ELIGIBILITY	37.57%	33.31%

Source: Virginia Department of Education, SY2004-05 Free and Reduced Price Students Lunch Program Eligibility Report.

LCPS has a substantially higher free/reduced rate when compared to the peer divisions. Exhibit 8-9 shows that when LCPS is combined with the free/reduced rate for the peer divisions, the division averages a 13.71 percent higher free/reduced rate than the

aggregate total. When LCPS is taken out of the average, then that percentage increases to 16.45 percent.

**EXHIBIT 8-9
FREE/REDUCED ELIGIBILITY COMPARISON
2004-05 SCHOOL YEAR**

DIVISION	PERCENT FREE	PERCENT REDUCED	PERCENT OF TOTAL FREE/REDUCED
Louisa	27.93%	9.64%	37.57%
Fluvanna	15.66%	4.81%	20.48%
Botetourt	9.83%	4.89%	14.72%
Orange	22.47%	7.10%	29.57%
Powhatan	8.78%	3.98%	12.76%
Shenandoah	20.96%	7.10%	28.06%
AVERAGE	17.61%	6.25%	23.86%
DIFFERENCE	10.32%	3.39%	13.71%
DIFFERENCE EXCLUDING LOUISA	12.39%	4.06%	16.45%

Source: Virginia Department of Education, SY2004-2005 Free and Reduced Price Students Lunch Program Eligibility Report.

School Breakfast and Lunch participation rates are usually proportionate to free/reduced eligibility rates. Where the free/reduced qualified rates are higher, participation is generally higher. LCPS has experienced historically-high participation in the school lunch program. In order to calculate participation accurately, a benchmark date was set. The month of October was used to mark the changes in participation over the past three years. Data were compiled beginning with October 2003 to produce a three-year trend. Exhibit 8-10 details the Average Daily Participation (ADP) with factoring considered for Average Daily Attendance (ADA).

As shown in the exhibit, a 25.39 percent overall increase in lunch participation is evident. Of particular note is the increase in high school participation (13.34%), which tends to be lower, due to teenage eating habits and programs such as early release and work study. The only exception to the overall increase is Jouett Elementary, which has dropped by a nearly four percent over the three year tracking.

**EXHIBIT 8-10
AVERAGE DAILY LUNCH PARTICIPATION
BASED ON AVERAGE DAILY ATTENDANCE
LOUISA COUNTY PUBLIC SCHOOLS
2003 THROUGH 2005 SCHOOL YEARS**

SCHOOLS	OCTOBER 2003 TOTAL ADP/ADA	OCTOBER 2004 TOTAL ADP/ADA	OCTOBER 2005 TOTAL ADP/ADA	TOTAL ADP CHANGE
Jouett Elementary	66.22%	62.44%	62.48%	(-3.74%)
Thomas Jefferson Elementary	67.46%	69.44%	68.80%	1.34%
Trevilians Elementary	67.03%	71.64%	71.40%	4.37%
Louisa County Middle	68.81%	70.59%	78.89%	10.08%
Louisa County High	45.43%	52.03%	58.77%	13.34%
OVERALL INCREASE		11.19%	14.20%	25.39%

Source: Louisa County Public Schools, Nutrition Services Department, MGT Analyses, 2006.

*Total number is rounded to the nearest hundredth.

COMMENDATION

LCPS Nutrition Services has been highly effective in increasing and maintaining school lunch participation rates.

FINDING

LCPS has historically high levels of participation in its lunch program. Participation rates are extremely important as they are the measurement used in determining how much a school gets reimbursed for the meals it serves. The purpose of the National School Breakfast Program and National School Lunch Program is to provide nutritionally-balanced, low-cost or free lunches to all children who have economic need. As mentioned previously, LCPS has a high percentage of students who qualify for free/reduced lunches. This percentage reflects the demographic of the students participating in the lunch program on a daily basis. As shown in exhibit 8-11, the highest percentage rate for free lunch participation is at Thomas Jefferson Elementary (47.38%), followed by Trevilians Elementary (39.54%). Overall, just over half of the participating students are paying full price for their meals. The remainder qualifies for free or reduced lunches.

**EXHIBIT 8-11
AVERAGE DAILY LUNCH PARTICIPATION
BASED ON AVERAGE DAILY ATTENDANCE
LOUISA COUNTY PUBLIC SCHOOLS
OCTOBER 2005**

SCHOOL	PAID PERCENT ADP	REDUCED PERCENT ADP	FREE PERCENT ADP
Jouett Elementary	50.49%	9.80%	33.72%
Thomas Jefferson Elementary	35.02%	17.09%	47.68%
Trevillians Elementary	48.47%	11.99%	39.54%
Louisa County Middle	53.38%	11.13%	35.50%
Louisa County High	59.42%	10.61%	29.97%
DIVISION AVERAGE	49.36%	12.12%	37.28%

Source: Louisa County Public Schools, Nutrition Services Department, MGT Analysis, 2006.

According to the October 2005 data, there are just over 50 percent of students paying full price for meals. This correlates with the high free/reduced rate for the County. Because of the high free/reduced rate, it is important to monitor the ADP as it relates to eligibility, in order to ascertain that the program is reaching the students who need it most. Exhibit 8-12 details the Average Daily Participation as it relates to eligibility status.

As shown in the following table, there are high participation rates across the free- and reduced-lunch eligibility groups. 75.16 percent of all students who are qualified to receive free meals and 71.08 percent of all students who are qualified to receive reduced meals are participating in the school lunch program. At Louisa County Middle, Thomas Jefferson Elementary and Trevillians Elementary, nearly all eligible free meal students are participating (over 80% participation). When only considering the students who pay full price, there is an average of 52.01 percent participation. Only Thomas Jefferson Elementary and Louisa County High School fall below the 50 percent participation mark for full-priced students.

**EXHIBIT 8-12
AVERAGE DAILY PARTICIPATION
AS A PERCENT OF ELIGIBILITY
LOUISA COUNTY PUBLIC SCHOOLS
JANUARY 2006**

SCHOOL	PAID ADP AS PERCENT OF ELIGIBILITY	REDUCED ADP AS PERCENT OF ELIGIBILITY	FREE ADP AS PERCENT OF ELIGIBILITY
Jouett Elementary	52.57%	46.51%	56.74%
Thomas Jefferson Elementary	45.60%	77.88%	81.29%
Trevillians Elementary	54.44%	85.45%	81.15%
Louisa County Middle	59.53%	77.78%	83.49%
Louisa County High	47.91%	67.80%	73.14%
DIVISION AVERAGE	52.01%	71.08%	75.16%

Source: Louisa County Public Schools Nutrition Department, MGT Analysis, 2006.

COMMENDATION

LCPS Nutrition Services has maintained consistently high levels of participation, particularly with regard to free/reduced lunches.

FINDING

The Division offers breakfast at all five school locations. Participation is acceptable, with the exception of the high school. Exhibit 8-13 shows the average breakfast participation for the Division. With the high school factored in, the average participation, as shown in the exhibit, is 28.74 percent. High school programs traditionally have low breakfast participation due to the demographics of the students. When factoring out the high school, the overall breakfast participation climbs to 34.29 percent.

**EXHIBIT 8-13
AVERAGE DAILY BREAKFAST PARTICIPATION
BASED ON AVERAGE DAILY ATTENDANCE
LOUISA COUNTY PUBLIC SCHOOLS
OCTOBER 2005**

SCHOOL	AVERAGE DAILY PARTICIPATION (WITH AVERAGE DAILY ATTENDANCE)
Jouett Elementary	33.72%
Thomas Jefferson Elementary	40.06%
Trevillians Elementary	36.61%
Louisa County Middle	26.75%
Louisa County High	6.55%
DIVISION AVERAGE	28.74%
AVERAGE EXCLUDING LCHS	34.29%

Source: Louisa County Public Schools, Nutrition Services Department, MGT Analysis, 2006.

The importance of nutritional balance for students cannot be overemphasized. Students who receive regular, nutritionally-balanced meals perform better in test-taking and in daily class work. Breakfast programs tend to target the free/reduced eligible students. Exhibit 8-14 shows the current free and reduced price student participation rates at all of the schools. The rates shown are for the free and reduced price student participation rates as they pertain to actual participation compared with those who are actually eligible.

As shown in the exhibit, approximately 46 percent of LCPS students who are qualified for free breakfast and nearly 14 percent of reduced-qualified students are eating at school. Over 68 percent of the students participating at the middle school level are free/reduced-qualified students. For the high school, that number climbs to over 76 percent. While the actual numbers are low compared to average daily attendance, it is apparent that the program is reaching the students to which it is primarily targeted.

**EXHIBIT 8-14
BREAKFAST AVERAGE DAILY PARTICIPATION BY ELIGIBILITY
OCTOBER 2006**

SCHOOL	FREE		REDUCED		PAID	
	FREE % OF ADP	FREE % ELIGIBLE	RED. % OF ADP	RED. % ELIGIBLE	PAID % OF ADP	PAID % ELIGIBLE
Jouett Elementary	39.22	56.74	9.80	46.51	50.49	23.04
Thomas Jefferson Elementary	55.80	55.40	19.57	51.92	24.64	18.68
Trevillians Elementary	55.72	58.64	12.44	45.45	31.84	18.34
Louisa County Middle	55.08	43.93	13.67	32.41	31.25	11.82
Louisa County High	63.10	17.15	13.10	9.32	23.81	2.14
DIVISION AVG	53.78	46.37	13.72	37.12	32.40	14.80

Source: Louisa County Public Schools, Nutrition Services Department, MGT Analysis, 2006.

COMMENDATION

LCPS has maintained high levels of participation as it pertains to free/reduced-qualified students in the breakfast program.

FINDING

While student participation rates are commendable, the breakfast program at the middle school does not provide enough time for students to be served and eat breakfast. During the site visit, approximately 300 students were served breakfast. By the first bell, there were approximately 75 students remaining in line waiting to be served, and an additional 75 still sitting to eat. Staff was on hand to distribute late passes to children still eating in order to gain admittance to class without penalty.

Current school policy requires that students remain outside the school until 7:50 AM. This includes students who are bused as well as students who are dropped off by parents. Students simultaneously converge on the cafeteria, which creates an extremely long service line. Kitchen staff did an excellent job of moving the students through the line, but nearly half of the students observed during the breakfast period were late for their first class. Although the evaluators did not interview any faculty regarding this matter, it is not difficult to imagine that late-arriving students disrupt the classroom and deny the late student a portion of their educational instruction time.

Research has shown that students who receive balanced, nutritional meals perform better in school. In particular, "schools that offer breakfast programs see increases in academic test scores, daily attendance, and class participation."¹ In the Morbidity and Mortality Weekly Report from the Centers for Disease Control and Prevention (CDC), the author summarizes research by stating:

¹ Powell, C.A. et al. "Nutrition and Education: A Randomized Trial of the Effects of Breakfast in Rural Primary School Children." *American Journal of Clinical Nutrition* 68(4) (1998): 873-79.

Healthy eating patterns in childhood and adolescence promote optimal childhood health, growth, and intellectual development; prevent immediate health problems, such as iron deficiency anemia, obesity, eating disorders, and dental caries; and may prevent long-term health problems, such as coronary heart disease, cancer and stroke. School health programs can help children and adolescents attain full educational potential and good health by providing them with the skills, social support, and environmental reinforcement they need to adopt long-term, healthy eating behaviors.²

The importance of receiving balanced nutrition cannot be overstated; however the disruption to class time is of equal concern.

RECOMMENDATION

Recommendation 8-11:

Implement a policy allowing early arriving students to proceed to the cafeteria for breakfast.

An earlier start to breakfast service, even by 10 minutes, will alleviate congestion and eliminate the problem of students coming late to class every day. Building security can still be maintained by posting a monitor at the access points to the building that need to be controlled. The staff is already present in the school at that time. There will be a reduction in line length as well as more time for students to eat breakfast and then clear the cafeteria to provide room for more students. It will also increase the likelihood of student participation if they know that they will have time to eat the breakfast they purchase without being late to class.

FISCAL IMPACT

This recommendation can be implemented using existing resources since there is sufficient staff to provide security and meal service.

FINDING

There is difficulty with reaching some students who are potentially qualified for free/reduced meals. If a family receives state aid, then the children are automatically qualified through direct certification. Others, however, have to complete federal forms to qualify; which are sent home with students at the beginning of each school year. Although these forms only ask for basic financial/household information, they may be somewhat complicated to a person not familiar with filling out forms or providing personal financial details.

² Centers for Disease Control and Prevention. Guidelines for school health programs to promote lifelong healthy eating. MMWR 1996;45(No. RR-9): 1.

RECOMMENDATION

Recommendation 8-12:

Provide assistance to families for completing eligibility forms.

Strategies to accomplish this could include an orientation meeting each year with specialists on hand to assist in filling out the forms. One form will qualify the entire family, so this would only need to be carried out at kindergarten registration, or secondary school orientation at the start of the year.

Another solution might be to create an instruction sheet that accompanies the form (although the federal government already provides this, the terminology used can sometimes be difficult to understand). By employing these two strategies, the Division can increase its outreach to eligible students who are not currently participating in the free/reduced meal program.

FISCAL IMPACT

This recommendation can be implemented within existing resources.

FINDING

A growing trend in schools is meal choice, particularly at the secondary levels. LCPS students have the option of getting a main entrée or a side salad. If students do not like the entrée for the day, they will tend to bring food from home, or skip lunch entirely.

Many divisions provide for some choice in the entrée provided and/or provide an á la carte menu. The primary targets of this practice are students who receive no reduction in cost for their meals and are, therefore, not tied to the guidelines as stipulated by the National School Lunch Program. Á la carte items are not considered “full meals” and therefore are not reimbursable unless combined with a minimum of two other meal components, such as milk and a vegetable. Free/reduced students would also be able to include one of the alternative items as a choice in lieu of the scheduled entrée for the school day. In either situation, if students are offered more choices, the participation rate is likely to increase further.

RECOMMENDATION

Recommendation 8-13:

Implement á la carte offerings at the secondary level.

A common offering for an á la carte choice is a corn dog. Richmond Restaurant Service (RRS) offers turkey meat corn dogs which are prepared by baking. Based on the price lists for RRS, these corn dogs cost \$15.79 for a box of 72 corn dogs, or about \$.22 per corn dog. Adding an approximate charge for labor to heat the items and serve, the cost per serving can be estimated at \$.30 each. If corn dogs were to be offered as an á la carte item at the secondary level and sold for \$1.50, an estimated profit of \$86.40 could be made off of each box. Using that formula, if two boxes are sold per day (or 144 corn

dogs, less than one percent of the student body at the high school) then the annual profit achieved could be as much as \$31,000. A secondary benefit to offering more choice on the school lunch menu is the likelihood that participation rates will increase and, consequently, the profit margin of all schools who participate. Exhibit 8-15 provides some sample products for á la carte offerings using the pricing list provided for RRS products. These items are only intended to be examples of what could be offered in an á la carte line.

**EXHIBIT 8-15
SAMPLE PRODUCTS FOR Á LA CARTE SERVICE**

ITEM	PURCHASE/ PREPARATION COST	SAMPLE PRICE	PROFIT PER UNIT
Corn Dogs	\$0.30	\$1.50	\$1.20
Chicken Sandwich	\$0.50	\$1.75	\$1.25
Quesadillas, Chicken	\$0.60	\$1.50	\$0.90

Source: Richland Restaurant Services, MGT Analysis, 2006.

Exhibit 8-16 provides an example of daily sales of the three items offered in Exhibit 8-13, and the associated profit. This will assume a daily participation rate of one percent for each item (approximately 160 items each), at the high school level only. This will account for a three percent overall raise in participation rates. The formula for profit will equal profit x participation (160) x 180 school days.

**EXHIBIT 8-16
PROPOSED SALES FOR Á LA CARTE ITEMS**

ITEM	PROFIT PER UNIT	ASSUMED PARTICIPATION PER DAY (1% OF STUDENT BODY)	NET ANNUAL PROFIT
Corn Dogs	\$1.20	160	\$34,560
Chicken Sandwich	\$1.25	160	\$36,000
Quesadillas, Chicken	\$0.90	160	\$25,920
TOTAL	N/A	N/A	\$96,480

Source: Richland Restaurant Services, MGT Analysis, 2006

The potential for raising revenue through increased participation is limited only to the number of students that will participate. The calculations above assume only a three percent increase in participation at the high school level in á la carte sales, with a calculated similar increase at the middle school level. The possible participation at the middle school level, if implemented, can be calculated at 50 percent of that of the high school level (due to a smaller student body size) and will bring the potential revenue to \$144,720.

FISCAL IMPACT

This recommendation can be implemented using existing resources. The additional labor necessary to implement the recommendation is accounted for in Exhibit 8-16; however, the division should be able to implement these additional offerings using existing staffing levels, due to the low MPLH rate. Food costs will be directly offset by student sales. Increased revenue levels are estimates only and depend on the items and pricing set by LCPS Nutrition Services. Increased revenues do not account for items sold as part of a reimbursable meal.

Recommendation	2006-07	2007-08	2008-09	2009-10	2010-11
Implement A la Carte Offerings at the Secondary Schools	\$144,720	\$144,720	\$144,720	\$144,720	\$144,720

8.4 Food Quality and Nutrition Services Competition

FINDING

LCPS has implemented a food-based menu planning tool that uses “meal patterns” and requires specific food components in specific quantities that meet minimum nutritional requirements. Foods are only fried if an immediate shortage is apparent, such as when chicken is offered as an entrée. In an effort to reduce sodium content, a variety of seasonings are used in lieu of salt (French fries, for example). All items sold meet minimum nutritional standards.

The division uses portion control utensils and monitors menus carefully to ensure compliance with state regulations and nutritional standards. The division uses the “offer versus serve³” method when serving breakfast and lunch. Students may decline two of the five choices offered for lunch, or decline one of four for breakfast. By employing this practice, there are fewer occurrences of plate waste and has possibly increased the student participation rate.

COMMENDATION

LCPS Nutrition Services has implemented and maintained health-conscious meal choices.

FINDING

Virginia law and division policy prohibit the operation of vending machines during school hours. During the site visits, all vending machines were turned off and had operation hours clearly posted. The vending machines in the cafeterias serve only juice drinks. These are set with timers so as not to run during the school day; however, in interviews conducted with nutrition service workers during site visits, MGT consultants were informed that when there is a power outage, the timers incorrectly reset on the vending

³ Offer versus Serve is provided as an option for students participating in the National School Breakfast and Lunch program.

machines, and the machines will operate during hours which have been determined to be non-operation hours.

Historically, the school administration has not ensured that the vending machines are checked following a power outage and reset. Currently, the nutrition services manager has to go to the two schools with vending and ensure that they are shut off during the school day, in the event of a power outage. This is not an efficient use of staff time.

RECOMMENDATION

Recommendation 8-14:

Ensure that vending machines are reset following power outages.

There is a sufficient number of staff at each of the schools to ensure that the responsibility for resetting the vending machine timers after a power outage does not fall to any personnel outside of the school.

FISCAL IMPACT

This recommendation can be implemented using current resources. The school administration should take responsibility for making sure that the vending is shut off during required times, rather than having this responsibility fall solely to the nutrition services manager.

**9.0 TECHNOLOGY
MANAGEMENT AND USE**

9.0 TECHNOLOGY MANAGEMENT AND USE

This chapter reviews administrative and instructional technology use in the Louisa County Public Schools (LCPS). The four major sections are:

- 9.1 Technology Planning
- 9.2 Technology Plan Activity Implementation and Timelines
- 9.3 Data and Application Services Integration
- 9.4 Infrastructure and Web Development

CHAPTER SUMMARY

When evaluating the administrative technology resources of a school system, MGT examines the infrastructure that supports the administrative applications; the applications and the degree to which they satisfy user needs; the manner in which the infrastructure supports the overall operations of the school system; and the organizational structure within which the administrative technology support personnel operate.

MGT analyzes all areas that play a part in the effectiveness of technology in the classroom. In particular, this includes reviewing the technology plan, organizational structure, infrastructure responsible for employing hardware, selecting software, and accessing outside resources. Additional critical factors assessed are staff development for teachers, school-level technology support and maintenance, and the equitable distribution of technology among schools.

Among other recommendations made for improving the operation of the department are:

- Involve the Louisa County Public Schools Technology Planning Team in the monitoring and implementation of the LCPS Technology Services Plan.
- Develop a proposal detailing the activities within the technology plan and a timeline for implementation of these activities.
- Develop application and data integration services to extend the functionality of districtwide systems and reduce the amount of redundant data entry.
- Develop a staff professional development and retention plan that supports the goals and objectives of the division.

INTRODUCTION

The Department of Technology is responsible for the planning, implementation, instructional support and maintenance of the technology and the technology infrastructure of Louisa County Public Schools. The Director of Technology is responsible for the technical and instructional needs of LCPS and reports directly to the Superintendent. There is one network specialist, four technicians, and four technology specialists who report directly to the director.

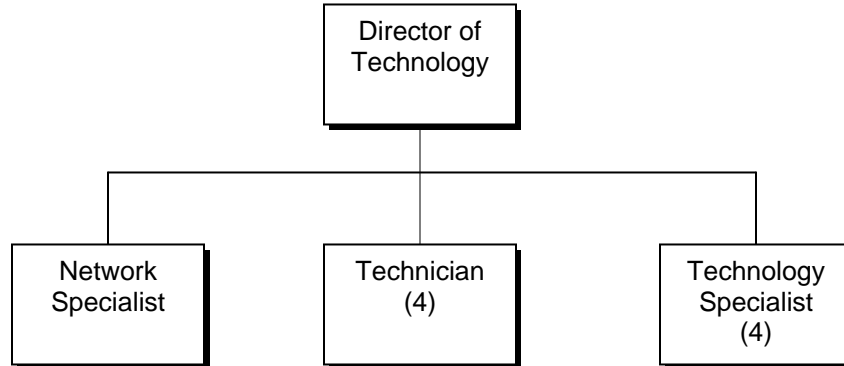
The network specialist and technicians are responsible for the installation, repair, maintenance, inventory, licensing, upgrades, and troubleshooting of the following:

- computer networking and telecommunications;
- administrative, classroom, and lab computers, as well as monitors, printers, hand-held and other external devices;
- software for network or individual computers;
- system operations for maintenance and transportation ;
- high-speed internet access for students and staff;
- virus removal and prevention; and
- On-line State testing.

The Technology Specialists provide support for the effective use of instructional, communications and informational technologies by students, teachers, and other staff. This support includes the following:

- creation, training, and management of staff network, voicemail, and email accounts;
- scheduling workshops to aid staff in meeting state-required Technology Standards for Instructional Personnel (TSIPs);
- training and collaboration with teachers to plan and deliver instruction which integrates technology;
- training for specific groups based on specific needs and acquisition of new technologies;
- assistance in developing and maintaining school-based web pages; and
- research, evaluation, and recommendation of educational and productivity software and new technologies.

**EXHIBIT 9-1
LOUISA COUNTY PUBLIC SCHOOLS
ORGANIZATIONAL STRUCTURE FOR THE TECHNOLOGY DEPARTMENT
2005-06 SCHOOL YEAR**



Source: Louisa County Public Schools, Technology Department, 2006.

The Department of Technology maintains the following equipment for the division in the schools, administrative offices, and satellite locations:

- 2200 computers
- 23 servers
- networked printers
- Network switches
- Network routers
- District connectivity – Fiber

Several questions on the MGT survey of central administrators, principals, and teachers relate to technology development and implementation at Louisa County Public Schools (LCPS). Exhibits 9-2, 9-3, and 9-4 reviews some of the relevant survey responses. As the exhibit shows, there is an overall high level of satisfaction within the district regarding the amount technology usage, although teachers were, generally, the least satisfied group in this regard. Although the survey did not specifically ask about technology-related staff development, responses to general staff development questions insinuate that they could be driven by concerns with technology training. Although most respondents were generally satisfied with LCPS administrative technology and the technology they use in completing their job responsibilities, a significant minority was either dissatisfied or neutral when asked if they felt that there were “bottlenecks” in the administrative process that caused time delays. In addition, there seems to be a consistently higher level of dissatisfaction relative to data processing services than any other specific technology area surveyed.

**EXHIBIT 9-2
COMPARISON SURVEY RESPONSES
WITHIN LOUISA COUNTY PUBLIC SCHOOLS**

SURVEY STATEMENT OR FUNCTIONAL AREA	(% Good + Excellent) / (% Fair + Poor) ¹		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
The Division's job of providing adequate instructional technology.	92/8	100/0	67/30
The Division's use of technology for administrative purposes.	92/8	92/8	45/31
Staff development opportunities provided by Louisa County Public Schools for teachers.	100/0	100/0	84/15
Staff development opportunities provided by Louisa County Public Schools for school administrators	100/0	100/0	30/9

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

**EXHIBIT 9-3
COMPARISON SURVEY RESPONSES
WITHIN LOUISA COUNTY PUBLIC SCHOOLS**

SURVEY STATEMENT OR FUNCTIONAL AREA	(% Agree + Strongly Agree) / (% Disagree + Strongly Disagree) ²		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
I have adequate equipment and computer support to conduct my work.	93/0	100/0	72/18
Most administrative practices in Louisa County Public Schools are highly effective and efficient.	93/8	100/0	44/28
Most of Louisa County Public Schools' administrative processes (e.g., purchasing, travel requests, leave applications, personnel) are highly efficient and responsive.	92/0	84/0	64/13
Major bottlenecks exist in many administrative processes, which cause unnecessary time delays.	8/62	15/69	29/33

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

**EXHIBIT 9-4
COMPARISON SURVEY RESPONSES
WITHIN LOUISA COUNTY PUBLIC SCHOOLS**

SURVEY STATEMENT OR FUNCTIONAL AREA	(% Needs Improvement + Needs Major Improvement) / (% Adequate + Outstanding) ³		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
Data Processing	8/92	8/93	11/45
Administrative Technology	15/85	15/85	7/48
Instructional Technology	8/93	8/93	31/68
Instructional Support	23/76	15/84	38/58
Staff Development	8/92	0/100	24/76

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

Ten years ago, technology was seen as something peripheral in school districts; indeed in many organizations, including private businesses. Now, technology is a fundamental aspect of almost every organization.

In order to achieve the full potential of any technology arrangement, thorough planning is essential. This not only applies to school systems, but to each individual school. Each entity should have a technology plan that is closely aligned with its curricula. Similarly, a school system's technology plan should be designed to help the school system achieve its educational goals.

The value of planning cannot be overstated. It is the only way that educational enterprises can adequately address the five most critical factors related to the use of technology, as outlined below:

- **Training.** Professional development is critical for all staff and is especially important for teachers since they are responsible for creating an effective learning environment for students. Unless serious attention is given to which type of training will be provided, how it will be delivered, when and how frequently it can be made available, and to whom it is directed, effective training will not be achieved. The price of inadequate training is a considerable loss in the "payoff" on the investment in educational technology resources.
- **Equity.** Despite a school division's best intentions, there often is a variance in the level of technology resources available at each school. Unfortunately, technology can widen the gap between the "haves" and "have-nots" if such an imbalance is not corrected. Without careful planning by both the division and the school, the possibility of technological inequity is multiplied.

- **Rapid Change.** Advances in technology occur on a daily basis. Therefore, careful consideration is critical when selecting hardware and software components to avoid premature obsolescence. If the implementation and ongoing operation of the technology resources are not monitored carefully, the school system or school will not effectively manage this rapid change.
- **Funding.** The lack of funding is one of the greatest barriers to the effective use of technology in the classroom. Part of this is due to the fact that school systems do not recognize that there are funds available to support technology which have historically been used for other purposes (e.g., textbook funds are now frequently used to purchase instructional software). Unless planning addresses how all elements of technology and technology support are funded, this barrier will have a considerably greater impact than it should.
- **Credibility.** A plan that outlines how technology resources will be acquired, deployed, and used will assist in developing credibility within the community. Both the School Board and the public want to see tax dollars spent in an effective manner. Only through planning is it possible to demonstrate that proposed strategies have been well conceived, acquisitions of technology resources have been carefully considered, and that every aspect of the implementation is cost effective.

Technology plans are designed to address the specific requirements and preferences of the organization. While numerous plans may contain similar elements, no two plans will be identical. Likewise, while there are no set methods when developing a technology plan, there are guidelines that can help a school district develop a plan that is fitting to its circumstances.

9.1 Technology Planning

FINDING

Louisa County Public Schools developed a District Technology Committee for the purpose of developing the Five-Year Technology Plan. The team was composed of technology staff, teachers, instructional technology resource teachers and members from across the division. The members included:

- the division's Director of Technology;
- a division instructional supervisor;
- faculty representatives from each of the division's schools;
- a parent representative; and
- student representatives.

This committee represents the entire school system and includes individuals who have a good understanding of technology. Drafts of the plan were distributed to every school media center and to the Louisa County Schools Administrative Offices. The Committee

completed the Technology Plan in 2003 and meets on a semi-annual basis to review the plan and analyze progress.

RECOMMENDATION

Recommendation 9-1:

Absorb the Louisa County Public Schools Technology Planning Team in the monitoring and implementation of the LCPS Technology Services Plan.

The Technology Planning Team is composed of a group of well-qualified individuals. Since the completion of the plan, the committee meets twice a year to review and update it. Meeting on a semi-annual basis is insufficient to implement and monitor a plan of this magnitude. The committee should meet quarterly or monthly if possible. Managing this plan in a more diligent fashion will produce operational efficiencies across the division, which should result in the coordination of planning activities, the recommendation of plan-based expenditures, and the review of instructional technologies and their impact on student achievement.

FISCAL IMPACT

This recommendation can be implemented using existing resources.

9.2 Technology Plan Activity Implementation and Timelines

FINDING

An overall lack of coordination and oversight of the technology plan minimizes the effectiveness of the plan in directing divisionwide technology initiatives. The technology plan should be the guiding document for all technology activities of the division and as such needs to be reviewed, monitored and evaluated on a regular basis. As described in finding 9.1, plan oversight is a key component to this effort but a list of detailed activities with associated costs and timelines is also critical to an effective plan.

The LCPS Technology Department has documented the appropriate information to construct these detailed plans, but has not assembled this information into a coherent fashion reflecting the immediate and long-range needs of the division. The lack of detail in the current technology plan limits the ability of the division to perform at the most efficient level, further underscoring the need for this effort.

RECOMMENDATION

Recommendation 9-2:

Construct a detailed technology activity and implementation plan to identify timelines and expenditures associated with the activities described in the “Five-Year Technology Plan.”

The plan should reflect a detailed explanation and specific time range for each of the annual activities listed under plan section “Recommended Implementation Timeline.”

Extending the “Goal” section of the plan to provide a longitudinal representation of all activities across all goals would be an effective model for presenting this granular data. Following this model will ensure information can be made readily available for key decision makers throughout the division.

9.3 Data and Application Services Integration

FINDING

In today’s education environment, data and the use of data have become more and more critical to the success of students. Teachers, Administrators and Parents have all become accustomed to accessing information in real time, analyzing this information, and making decisions based upon this information. This continual use of data drives the number of applications being used at any one time to access this data. This 24/7 access requires data and applications to interface in new and more efficient ways.

Nationally, a group known as the School Interoperability Frameworks (SIF) has taken the lead in developing a set of data standards and the accompanying application protocols to facilitate the exchange of data between applications. These standards and protocols are widely accepted by the educational industry and have been integrated into a growing number of systems around the country.

The standards and protocols create a dynamic application interface that allows for the immediate transfer of data from one database or application to another based on a secured data encrypted connection and the appropriate security credentials. These databases and applications can instantly access information from one another reducing redundant data entry and improving the data quality of all participating systems.

Product manufactures in an effort to streamline this process have developed “Agents” which, when uploaded into the application, allow for the access of external applications to specific sets of data. These agents are available, depending on the application, from either the manufacturer or third-party developers. It takes a highly-skilled technologist with experience in database architecture and engineering to configure and manage these agents. In the case of highly-complex systems, additional external resources will be required for a successful implementation.

Data, and the use of applications to examine this data, are growing in number every year. School divisions across the country will need to adopted methodologies for integrating data and application systems to support continued student success. Without these integration points, divisions will continue to see costs rise for supporting and managing data systems.

There are a number of related applications and data services within Louisa County Public Schools. This type of data is stored on a number of systems used for student information, transportation, food service and administration. Each of these systems has become dependent on the other for information. These dependencies are causing the technology department to develop new processes for handling data and managing applications. Unfortunately, the demand has far outpaced the ability for the department to deliver a sound technology solution. The director of technology has committed to remedying some of the data and application services backlog by summer 2006.

However, the solution has not been fully designed, engineered or architected and will require external resources to support a successful and timely implementation.

Once implemented, these systems will significantly reduce the number of employee hours related to redundant data entry and improve the accuracy of the data across these systems.

RECOMMENDATION

Recommendation 9-3:

Request assistance in the development, design, engineering, and architecture of a comprehensive data and application integration system (AIS).

The system should initially focus on the integration of the student information system with the transportation and food services systems, additional second-tier systems will be addressed in future phases of any project. Approximate, one-time costs for consulting services for the integration of these systems is \$50,000 dollars. Annual maintenance of the integration system should not exceed \$5,000 dollars.

The majority of applications used by LCPS are SIF-compatible, allowing for the use of SIF agents to reduce the costs and accelerate the implementation timeline of the project. Locating the appropriate and available agents will be an important aspect of the project and may require external resources.

FISCAL IMPACT

The costs for these activities have been included in the division technology plan as well as the technology department's annual budget request; therefore, no additional resources are required to implement this recommendation.

FINDING

The International Society for Technology in Education (ISTE) is an internationally-recognized, non-profit organization committed to advancing the effective use of technology in K-12 education. ISTE has developed a Technology Support Index rubric to assist school systems in determining their needs in a variety of technology support areas. In the index, school systems are divided into one of four categories for various areas of technology usage and support.

These categories are:

- emergent (beginning support capability);
- islands (isolated areas of effective support);
- integrated (very good support provided in most areas); and
- exemplary (excellent support in most areas).

The Technology Support Index classifies integrated school divisions as having an organizational structure where the instructional technology support functions and technical support functions report *differently*, but each unit is organized and there is communication between units. In contrast, divisions functioning at an exemplary level

have an organizational structure where all of the technology functions report through the *same* unit in the organization, providing for a logical chain of command and communication structures.

Louisa County Public Schools is operating primarily in the island category, (i.e., technical support functions and instructional technology support functions report similarly, but each unit is separate in function and does not effectively support one another).

MGT interviews revealed a high level of understanding of the skills required to maintain and support critical, division-wide systems by administrative and instructional staff. There is concern about the division's inability to retaining highly qualified staff to perform these important tasks. Lack of long term employee retention has strained the limited resources available to the department. Two of the most common responses contributing to the problem are compensation competition and a local area need for highly-trained staff. These factors are making competition in the information technology market an obstacle to obtaining and retaining highly-qualified staff. One approach to retaining staff is the effect of engaging professional development, which leads to industry certification. Of the staff interviewed, one carried industry certifications or credentials. Most training has come on the job and without the knowledge of industry standards and best practices. Staff felt this was affecting their ability to perform their jobs effectively.

LCPS staff did indicate that professional development, specifically professional development that leads to industry certification, could be a contributing factor to employee satisfaction and long-term retention. Staff showed considerable pride in their work effort and felt given the limited resources were doing an above average job in most areas. All staff felt the additional training from industry certification would increase productivity across the department and provide a more favorable work environment.

LCPS technology staff will need to obtain industry certifications if they are to be proficient in the tasks related to maintaining systems such as those mention in Section 9.3. These higher-level skills are necessary to address the technology support demands of the division now and into the future.

Certification processes can vary and are offered through a number of channels, including on-line venues, community college courses as well as vendor-provided offerings. These courses are rigorous and provide the latest industry knowledge on all technology disciplines. LCPS staff need to obtain and maintain industry certification in critical database and application programming areas to meet the growing technology demands of the district. The skills associated with these certifications will ensure the technology staff have the knowledge and understanding to perform these functions.

For Louisa County Public Schools to continue to provide the necessary and appropriate levels of technology service and support to the division, the rate of staff retention must be addressed. This constant transition of staff has created inconsistency in the delivery of services and has a negative impact on the effectiveness of the department.

The Louisa County Public Schools, through an enhanced professional development and certification process can improve their information technology staff retention rates. Several individuals have been with the division for a number of years, but the majority of employees interviewed averaged less than three years in their current positions. Reasons for leaving the LCPS included a lack of professional development and industry

certification. LCPS has budgeted zero dollars in the technology department for professional development for the last three fiscal years. The long-term impact of this action will be detrimental to the division as a whole, particularly in the area of technology service and support.

RECOMMENDATION

Recommendation 9-4:

Provide additional professional development opportunities for all technology staff to achieve higher levels of staff retention.

The director, in collaboration with the division human resources staff, will develop an individual employee professional growth plan for all technology department staff, which will include external professional development and industry certification, where appropriate.

FISCAL IMPACT

Below is a sample recommended model for implementing a professional development and certification program. The initial implementation costs for specific training are indicated by the left-most number in each row. For example, Exhibit 9-5 shows that, \$4000 would be the initial cost for Database Design training; \$500 represents the on-going costs to maintain certification in subsequent years.

Total estimated costs for implementation of a professional development and certification systems are \$7,000 dollars annually.

9.4 Infrastructure and Web Development

Infrastructure is the underlying system of cabling, communications lines, hubs, switches and routers that connect the various parts of a Wide Area Network (WAN). It is similar in nature to a human skeleton or a road network—it accomplishes no work on its own, but enables other systems to operate.

Infrastructure is the most important of all technology resources. With a firm infrastructure, most users will have the means to access people and information throughout their organization and beyond, resulting in increased efficiency and effectiveness. Without an effective infrastructure, users lack ability to accomplish the responsibilities of their job.

Web sites have become one of the primary vehicles used by a growing number in the private sector for a variety of ways, including promoting the services or products offered, identifying the locations of regional offices, providing testimonies from satisfied customers, or delivering other messages intended to inform the public. Likewise, governments are turning to Web sites for providing the information and services they are obligated to make available to their constituents. Further, Web sites are becoming extraordinarily important resources for all levels of education.

FINDING

The Network Administration Section of LCPS Department of Technology controls the division's networks and servers. This group of one director and five technicians is responsible for managing the WAN and related elements, for instance:

- servers;
- switches;
- wireless access point; and
- routers

Interviews conducted with principals and staff in the schools indicated that the network was working effectively for them. The division has made a substantial investment in high-speed fiber bandwidth to the majority of their schools and is working diligently on a plan to connect the remaining buildings to the fiber ring. Once completed, this state-of-the-art infrastructure will provide the capacity for future division needs. The technology department is responsible for managing the network effectively, including installing the appropriate levels of security and protection to minimize intrusion. The department has established the appropriate acceptable use policies as well as additional policies dealing with computer and internet access. These policies are having a positive effect on the effective use of technology in LCPS.

The management installation and design of this system have contributed significantly to the increase in student and staff productivity throughout the division. The technology department has developed guidelines and policies for the management of the network and is continually updating these guidelines and policies as part of their management practices. Individual staff members have been assigned network management responsibilities and carry out these tasks in an efficient and professional manner.

COMMENDATION

Louisa County Public Schools is commended for the installation of a fiber-based network throughout the division.

10.0 FISCAL IMPACT

10.0 SUMMARY OF POTENTIAL SAVINGS AND COSTS

Based on the analyses of data gleaned from interviews with both divisional personnel, parents and the community at large, surveys, state and division documents, and first-hand observations in Louisa County Public Schools (LCPS), the MGT team developed 34 commendations and 76 recommendations. Twenty-five recommendations are accompanied by fiscal implications.

As shown below in Exhibit 10-1, full implementation of the recommendations in this report would general a gross savings of more than \$4.6 million over a five-year period, with a net cost of nearly \$800,000. It is important to note that nearly two-thirds of the recommendations made in the report have no specific fiscal impacts, but are expected to result in net cost savings to the division, depending on how the division opts to implement them. It should also be noted that costs and savings presented in this report reflect 2005-06 dollars and do not include increases over time due to salary or inflation adjustments.

**EXHIBIT 10-1
SUMMARY OF ANNUAL SAVINGS AND COSTS**

CATEGORY	YEARS					TOTAL FIVE-YEAR SAVINGS (COSTS)
	2006-07	2007-08	2008-09	2009-10	2010-11	
TOTAL SAVINGS	\$738,199	\$919,199	\$949,199	\$979,199	\$1,028,539	\$4,614,335
TOTAL (COSTS)	(\$209,290)	(\$144,290)	(\$146,364)	(\$146,364)	(\$146,364)	(\$792,672)
TOTAL NET SAVINGS (COSTS)	\$526,769	\$772,769	\$802,769	\$832,769	\$882,109	\$3,821,663
ONE-TIME SAVINGS (COSTS)						(\$390,230)
TOTAL FIVE-YEAR NET SAVINGS (COSTS) INCLUDING ONE-TIME SAVINGS (COSTS)						\$3,431,433

Exhibit 10-2 provides a chapter-by-chapter summary for all costs and savings. Exhibits 10-3 and 10-4 break out the costs and savings into operating and capital funds, respectively.

It is important to note that only the 25 recommendations with fiscal impact are identified in this chapter. The remaining 51 recommendations to improve the efficiency and effectiveness of Louisa County Public Schools are included in chapters 2 through 9 of this report.

MGT recommends that LCPS give each of the recommendations serious consideration and develop plans to proceed with their implementation and a system to monitor subsequent progress.

**EXHIBIT 10-2
CHAPTER-BY-CHAPTER SUMMARY OF POTENTIAL SAVINGS (COSTS)**

CHAPTER REFERENCE		Annual SAVINGS (COSTS)					Total Five Year SAVINGS	One-Time SAVINGS (COSTS)
		2006-07	2007-08	2008-09	2009-10	2010-11		
CHAPTER 3: EDUCATIONAL SERVICE DELIVERY								
3-1	Reorganize the Division of Instruction and decrease the number of teachers on special assignment over the next five years. (p. 3-9)	\$15,220	\$15,220	\$15,220	\$15,220	\$34,560	\$95,440	\$0
3-12	Develop and implement a districtwide elementary guidance curriculum consistent with national standards and state regulations. (p.3-34)	(\$3,600)	(\$3,600)	(\$3,600)	(\$3,600)	(\$3,600)	(\$18,000)	\$0
CHAPTER 3 SUBTOTAL SAVINGS (COSTS)		\$11,620	\$11,620	\$11,620	\$11,620	\$30,960	\$77,440	\$0
CHAPTER 4: PERSONNEL AND HUMAN RESOURCES								
4-1	Establish a Coordinator of Human Resources position. (p. 4-7)	(\$67,111)	(\$67,111)	(\$67,111)	(\$67,111)	(\$67,111)	(\$335,555)	\$0
4-2	Re-classify the Executive Administrative Secretary position as a Personnel Specialist position. (p. 4-8)	(\$6,300)	(\$6,300)	(\$6,300)	(\$6,300)	(\$6,300)	(\$31,500)	\$0
4-5	Expand the capability of the current Human Resources Web site to allow on-line submission of employment applications and submission of employment references. (p. 4-12)	\$0	\$0	\$0	\$0	\$0	\$0	(\$5,500)
4-7	Analyze the results of recent year's recruitment activities and determine the viability of continuing to include certain institutions on the recruitment schedule. (p. 4-14)	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000	\$30,000	\$0
4-10	Develop the current "buddy teacher" program into a true mentoring program. (p. 4-19)	(\$18,000)	(\$18,000)	(\$18,000)	(\$18,000)	(\$18,000)	(\$90,000)	\$0
4-11	Reduce current rates being paid for the insurance coverage and benefits package offered for employees and compare with like divisions. (p. 4-22)	\$432,458	\$432,458	\$432,458	\$432,458	\$432,458	\$2,162,290	\$0
4-12	Institute a program to reduce the number of leave days taken by LCPS teachers. (p. 4-23)	\$18,300	\$18,300	\$18,300	\$18,300	\$18,300	\$91,500	\$0
CHAPTER 4 SUBTOTAL SAVINGS (COSTS)		\$365,347	\$365,347	\$365,347	\$365,347	\$365,347	\$1,826,735	(\$5,500)

EXHIBIT 10-2 (Continued)
CHAPTER-BY-CHAPTER SUMMARY OF POTENTIAL SAVINGS (COSTS)

CHAPTER REFERENCE		Annual SAVINGS (COSTS)					Total Five Year SAVINGS	One-Time SAVINGS (COSTS)
		2006-07	2007-08	2008-09	2009-10	2010-11		
CHAPTER 5: FINANCE AND PURCHASING								
5-2	Hire the equivalent of one FTE by adding a position and hiring one entry level accounting clerical person. (p. 5-8)	(\$36,409)	(\$36,409)	(\$36,409)	(\$36,409)	(\$36,409)	(\$182,045)	\$0
5-3	Store all financial paperwork in secured, fire-rated cabinets. (p. 5-9)	\$0	\$0	\$0	\$0	\$0	\$0	(\$4,500)
5-4	Budget funds for and require Fiscal Services Department staff to attend professional development classes or other training (such as Web-based or self paced) programs. (p. 5-10)	(\$2,500)	(\$2,500)	(\$2,500)	(\$2,500)	(\$2,500)	(\$12,500)	\$0
5-7	Hire a professional facilitator to help resolve the continuous conflict between these two sides and restore trust in the budgetary process. (p. 5-13)	\$0	\$0	\$0	\$0	\$0	\$0	(\$5,000)
5-8	Make direct deposit mandatory for all LCPS employees. (p. 5-15)	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$8,000	\$0
5-13	Revise or eliminate the Early Retirement Incentive Program. (p. 5-23)	\$0	\$30,000	\$60,000	\$90,000	\$120,000	\$300,000	\$0
CHAPTER 5 SUBTOTAL SAVINGS (COSTS)		(\$37,309)	(\$7,309)	\$22,691	\$52,691	\$82,691	\$113,455	(\$9,500)
CHAPTER 6: FACILITIES USE AND MANAGEMENT								
6-1	Move quickly to begin the construction of a new elementary school and then develop a division master plan to address the long term space needs, desired school size, building capacities, enrollment capacities, building conditions, demographic analysis and enrollment projections, retention or disposal of each facility/property, and land acquisition, as required to provide a full, detailed, priority ranked, long-range Division master plan. (p. 6-6)	\$0	\$0	\$0	\$0	\$0	\$0	(\$150,000)
6-4	Institute an aggressive energy management program throughout all schools and facilities. (p. 6-18)	(\$65,000)	\$151,000	\$151,000	\$151,000	\$151,000	\$539,000	\$0
CHAPTER 6 SUBTOTAL SAVINGS (COSTS)		(\$65,000)	\$151,000	\$151,000	\$151,000	\$151,000	\$539,000	(\$150,000)
CHAPTER 7: TRANSPORTATION								
7-4	Expand and upgrade the current Transportation Department's facility. (p. 7-15)	\$0	\$0	\$0	\$0	\$0	\$0	(\$225,000)
CHAPTER 7 SUBTOTAL SAVINGS (COSTS)		\$0	\$0	\$0	\$0	\$0	\$0	(\$225,000)

**EXHIBIT 10-2 (Continued)
CHAPTER-BY-CHAPTER SUMMARY OF POTENTIAL SAVINGS (COSTS)**

CHAPTER REFERENCE		Annual SAVINGS (COSTS)					Total Five Year SAVINGS	One-Time SAVINGS (COSTS)
		2006-07	2007-08	2008-09	2009-10	2010-11		
CHAPTER 8: NUTRITION SERVICES								
8-1	Create a kitchen lead position at six school sites. (p. 8-4)*	(\$10,370)	(\$10,370)	(\$12,444)	(\$12,444)	(\$12,444)	(\$58,072)	\$0
8-2	Reduce nutrition services staff hours while maintaining current salary levels until LCPS reaches the MPLH benchmark for its schools. (p. 8-6)*	\$57,373	\$57,373	\$57,373	\$57,373	\$57,373	\$286,865	\$0
8-6	Join or create a food cooperative with other small school divisions. (p. 8-10)*	\$62,351	\$62,351	\$62,351	\$62,351	\$62,351	\$311,755	\$0
8-8	Install an access key pad to the TJES kitchen door and provide the kitchen manager with the access code. (p. 8-12)*	\$0	\$0	\$0	\$0	\$0	\$0	(\$150)
8-9	Ensure that student photos used in the point-of-sale system are updated on an annual basis using school photos. (p. 8-13)*	\$177	\$177	\$177	\$177	\$177	\$885	\$0
8-10	Implement a system to monitor service lines for product theft. (p. 8-14)*	\$0	\$0	\$0	\$0	\$0	\$0	(\$80)
8-13	Implement à la carte offerings at the secondary level. (p. 8-22)*	\$144,720	\$144,720	\$144,720	\$144,720	\$144,720	\$723,600	\$0
CHAPTER 8 SUBTOTAL SAVINGS (COSTS)		\$254,251	\$254,251	\$252,177	\$252,177	\$252,177	\$1,265,033	(\$230)
TOTAL SAVINGS		\$738,199	\$919,199	\$949,199	\$979,199	\$1,028,539	\$4,614,335	\$0
TOTAL (COSTS)		(\$209,290)	(\$144,290)	(\$146,364)	(\$146,364)	(\$146,364)	(\$792,672)	(\$390,230)
TOTAL NET SAVINGS (COSTS)		\$528,909	\$774,909	\$802,835	\$832,835	\$882,175	\$3,821,663	(\$390,230)
TOTAL FIVE-YEAR NET SAVINGS (COSTS) INCLUDING ONE-TIME SAVINGS (COSTS)							\$3,431,433	

**EXHIBIT 10-3
SUMMARY OF POTENTIAL OPERATING FUND SAVINGS (COSTS)**

CHAPTER REFERENCE		Annual SAVINGS (COSTS)					Total Five Year SAVINGS (COSTS)	One-Time SAVINGS (COSTS)
		2006-07	2007-08	2008-09	2009-10	2010-11		
CHAPTER 3: EDUCATIONAL SERVICE DELIVERY								
3-1	Reorganize the Division of Instruction and decrease the number of teachers on special assignment over the next five years. (p. 3-9)	\$15,220	\$15,220	\$15,220	\$15,220	\$34,560	\$95,440	\$0
3-12	Develop and implement a districtwide elementary guidance curriculum consistent with national standards and state regulations. (p.3-34)	(\$3,600)	(\$3,600)	(\$3,600)	(\$3,600)	(\$3,600)	(\$18,000)	\$0
CHAPTER 3 SUBTOTAL SAVINGS (COSTS)		\$11,620	\$11,620	\$11,620	\$11,620	\$30,960	\$77,440	\$0
CHAPTER 4: PERSONNEL AND HUMAN RESOURCES								
4-1	Establish a Coordinator of Human Resources position. (p. 4-7)	(\$67,111)	(\$67,111)	(\$67,111)	(\$67,111)	(\$67,111)	(\$335,555)	\$0
4-2	Re-classify the Executive Administrative Secretary position as a Personnel Specialist position. (p. 4-8)	(\$6,300)	(\$6,300)	(\$6,300)	(\$6,300)	(\$6,300)	(\$31,500)	\$0
4-5	Expand the capability of the current Human Resources Web site to allow on-line submission of employment applications and submission of employment references. (p. 4-12)	\$0	\$0	\$0	\$0	\$0	\$0	(\$5,500)
4-7	Analyze the results of recent year's recruitment activities and determine the viability of continuing to include certain institutions on the recruitment schedule. (p. 4-14)	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000	\$30,000	\$0
4-10	Develop the current "buddy teacher" program into a true mentoring program. (p. 4-19)	(\$18,000)	(\$18,000)	(\$18,000)	(\$18,000)	(\$18,000)	(\$90,000)	\$0
4-11	Reduce current rates being paid for the insurance coverage and benefits package offered for employees and compare with like divisions. (p. 4-22)	\$432,458	\$432,458	\$432,458	\$432,458	\$432,458	\$2,162,290	\$0
4-12	Institute a program to reduce the number of leave days taken by LCPS teachers. (p. 4-23)	\$18,300	\$18,300	\$18,300	\$18,300	\$18,300	\$91,500	\$0
CHAPTER 4 SUBTOTAL SAVINGS (COSTS)		\$365,347	\$365,347	\$365,347	\$365,347	\$365,347	\$1,826,735	(\$5,500)

EXHIBIT 10-3 (Continued)
SUMMARY OF POTENTIAL OPERATING FUND SAVINGS (COSTS)

CHAPTER REFERENCE		Annual SAVINGS (COSTS)					Total Five Year SAVINGS (COSTS)	One-Time SAVINGS (COSTS)
		2006-07	2007-08	2008-09	2009-10	2010-11		
CHAPTER 5: FINANCE AND PURCHASING								
5-2	Hire the equivalent of one FTE by adding a position and hiring one entry level accounting clerical person. (p. 5-8)	(\$36,409)	(\$36,409)	(\$36,409)	(\$36,409)	(\$36,409)	(\$182,045)	\$0
5-4	Budget funds for and require Fiscal Services Department staff to attend professional development classes or other training (such as Web-based or self paced) programs. (p. 5-10)	(\$2,500)	(\$2,500)	(\$2,500)	(\$2,500)	(\$2,500)	(\$12,500)	\$0
5-7	Hire a professional facilitator to help resolve the continuous conflict between these two sides and restore trust in the budgetary process. (p. 5-13)	\$0	\$0	\$0	\$0	\$0	\$0	(\$5,000)
5-8	Make direct deposit mandatory for all LCPS employees. (p. 5-15)	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$8,000	\$0
5-13	Revise or eliminate the Early Retirement Incentive Program. (p. 5-23)	\$0	\$30,000	\$60,000	\$90,000	\$120,000	\$300,000	\$0
CHAPTER 5 SUBTOTAL SAVINGS (COSTS)		(\$37,309)	(\$7,309)	\$22,691	\$52,691	\$82,691	\$113,455	(\$5,000)
CHAPTER 6: FACILITIES USE AND MANAGEMENT								
6-4	Institute an aggressive energy management program throughout all schools and facilities. (p. 6-18)	(\$65,000)	\$151,000	\$151,000	\$151,000	\$151,000	\$539,000	\$0
CHAPTER 6 SUBTOTAL SAVINGS (COSTS)		(\$65,000)	\$151,000	\$151,000	\$151,000	\$151,000	\$539,000	\$0

EXHIBIT 10-3 (Continued)
SUMMARY OF POTENTIAL OPERATING FUND SAVINGS (COSTS)

CHAPTER REFERENCE	Annual SAVINGS (COSTS)					Total Five Year SAVINGS (COSTS)	One-Time SAVINGS (COSTS)	
	2006-07	2007-08	2008-09	2009-10	2010-11			
CHAPTER 8: NUTRITION SERVICES								
8-1	Create a kitchen lead position at six school sites. (p. 8-4)*	(\$10,370)	(\$10,370)	(\$12,444)	(\$12,444)	(\$12,444)	(\$58,072)	\$0
8-2	Reduce nutrition services staff hours while maintaining current salary levels until LCPS reaches the MPLH benchmark for its schools. (p. 8-6)*	\$57,373	\$57,373	\$57,373	\$57,373	\$57,373	\$286,865	\$0
8-6	Join or create a food cooperative with other small school divisions. (p. 8-10)*	\$62,351	\$62,351	\$62,351	\$62,351	\$62,351	\$311,755	\$0
8-8	Install an access key pad to the TJES kitchen door and provide the kitchen manager with the access code. (p. 8-12)*	\$0	\$0	\$0	\$0	\$0	\$0	(\$150)
8-9	Ensure that student photos used in the point-of-sale system are updated on an annual basis using school photos. (p. 8-13)*	\$177	\$177	\$177	\$177	\$177	\$885	\$0
8-10	Implement a system to monitor service lines for product theft. (p. 8-14)*	\$0	\$0	\$0	\$0	\$0	\$0	(\$80)
8-13	Implement à la carte offerings at the secondary level. (p. 8-22)*	\$144,720	\$144,720	\$144,720	\$144,720	\$144,720	\$723,600	\$0
CHAPTER 8 SUBTOTAL SAVINGS (COSTS)		\$254,251	\$254,251	\$252,177	\$252,177	\$252,177	\$1,265,033	(\$230)
TOTAL SAVINGS		\$738,199	\$919,199	\$949,199	\$979,199	\$1,028,539	\$4,614,335	\$0
TOTAL (COSTS)		(\$209,290)	(\$144,290)	(\$146,364)	(\$146,364)	(\$146,364)	(\$792,672)	(\$10,730)
TOTAL NET SAVINGS (COSTS)		\$528,909	\$774,909	\$802,835	\$832,835	\$882,175	\$3,821,663	(\$10,730)
TOTAL FIVE-YEAR NET SAVINGS (COSTS) INCLUDING ONE-TIME SAVINGS (COSTS)							\$3,810,933	

**EXHIBIT 10-4
SUMMARY OF POTENTIAL CAPITAL FUND SAVINGS (COSTS)**

CHAPTER REFERENCE		Annual SAVINGS (COSTS)					Total Five Year SAVINGS (COSTS)	One-Time SAVINGS (COSTS)
		2006-07	2007-08	2008-09	2009-10	2010-11		
CHAPTER 5: FINANCE AND PURCHASING								
5-3	Store all financial paperwork in secured, fire-rated cabinets. (p. 5-9)	\$0	\$0	\$0	\$0	\$0	\$0	(\$4,500)
CHAPTER 5 SUBTOTAL SAVINGS (COSTS)		\$0	\$0	\$0	\$0	\$0	\$0	(\$4,500)
CHAPTER 6: FACILITIES USE AND MANAGEMENT								
6-1	Move quickly to begin the construction of a new elementary school and then develop a Division master plan to address the long term space needs, desired school size, building capacities, enrollment capacities, building conditions, demographic analysis and enrollment projections, retention or disposal of each facility/property, and land acquisition, as required to provide a full, detailed, priority ranked, long-range Division master plan. (p. 6-6)	\$0	\$0	\$0	\$0	\$0	\$0	(\$150,000)
CHAPTER 6 SUBTOTAL SAVINGS (COSTS)		\$0	\$0	\$0	\$0	\$0	\$0	(\$150,000)
CHAPTER 7: SPECIAL PROGRAMS								
7-4	Expand and upgrade the current Transportation Department's facility. (p. 7-15)	\$0	\$0	\$0	\$0	\$0	\$0	(\$225,000)
CHAPTER 7 SUBTOTAL SAVINGS (COSTS)		\$0	\$0	\$0	\$0	\$0	\$0	(\$225,000)
TOTAL SAVINGS		\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL (COSTS)		\$0	\$0	\$0	\$0	\$0	\$0	(\$379,500)
TOTAL NET SAVINGS (COSTS)		\$0	\$0	\$0	\$0	\$0	\$0	(\$379,500)
TOTAL FIVE-YEAR NET SAVINGS (COSTS) INCLUDING ONE-TIME SAVINGS (COSTS)							(\$379,500)	

APPENDIX A:
SURVEY RESULTS

APPENDIX A
SURVEY RESULTS

EXHIBIT A-1
COMPARISON SURVEY RESPONSES
WITHIN LOUISA COUNTY SCHOOLS

PART A OF SURVEY	ADMINISTRATOR RESPONSES (%)	PRINCIPAL RESPONSES (%)	TEACHER RESPONSES (%)
1. Overall quality of public education in the Louisa County Schools is:			
Good or Excellent	100	100	86
Fair or Poor	0	0	14
2. Overall quality of education in the Louisa County Schools is:			
Improving	92	100	74
Staying the Same	8	0	15
Getting Worse	0	0	6
Don't Know	0	0	5
3. Grade given to the Louisa County Schools teachers:			
Above Average (A or B)	93	92	89
Below Average (D or F)	0	0	1
4. Grade given to the Louisa County Schools school level administrators:			
Above Average (A or B)	85	100	61
Below Average (D or F)	0	0	15
5. Grade given to the Louisa County Schools central office administrators:			
Above Average (A or B)	93	84	61
Below Average (D or F)	8	0	12

**EXHIBIT A-2
COMPARISON SURVEY RESPONSES
WITHIN LOUISA COUNTY SCHOOLS**

PART B	(%A + SA) / (%D + SD) ¹		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. The emphasis on learning in this school division has increased in recent years.	100/0	92/0	78/4
2. Our schools are safe and secure from crime.	92/8	93/8	69/15
3. Our schools effectively handle misbehavior problems.	77/15	92/0	39/39
4. Our schools have sufficient space and facilities to support the instructional programs.	8/92	23/69	26/61
5. Our schools have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	85/8	100/0	73/16
6. Our schools can be described as "good places to learn."	92/0	100/0	87/3
7. There is administrative support for controlling student behavior in our schools.	92/8	100/0	52/31
8. Most students in our schools are motivated to learn.	85/0	85/0	59/21
9. Lessons are organized to meet students' needs.	70/8	92/0	83/4
10. The curriculum is broad and challenging for most students.	100/0	92/0	76/11
11. There is little a teacher can do to overcome education problems due to a student's home life.	38/62	15/84	18/63
12. Teachers in our schools know the material they teach.	85/0	92/0	94/1
13. Teachers in our schools care about students' needs.	92/0	92/0	94/1
14. Teachers expect students to do their very best.	100/0	85/0	87/3
15. The school division provides adequate technology-related staff development.	93/8	92/8	80/8
16. Principals and assistant principals in our schools care about students' needs.	100/0	100/0	78/9
17. In general, parents take responsibility for their children's behavior in our schools.	31/46	70/16	28/45
18. Parents in this school division are satisfied with the education their children are receiving.	77/8	85/0	58/5
19. Most parents seem to know what goes on in our schools.	31/46	85/0	33/37
20. Parents play an active role in decision-making in our schools.	15/46	39/15	19/42
21. This community really cares about its children's education.	54/23	70/15	47/17
22. The food services department encourages student participation through customer satisfaction surveys.	23/23	8/31	7/36
23. The school division requests input on the long range technology plan.	46/23	54/0	31/27
24. Funds are managed wisely to support education in this school division.	93/0	77/0	43/22
25. Sufficient student services are provided in this school division (e.g., counseling, speech therapy, health).	77/23	77/0	58/23
26. School-based personnel play an important role in making decisions that affect schools in this school division.	92/0	100/0	43/28
27. The school division provides adequate technical support.	85/8	84/0	66/14
28. Students are often late arriving to and/or departing from school because the buses do not arrive to school on time.	0/92	8/77	14/71
29. The food services department provides nutritious and appealing meals and snacks.	62/8	31/38	29/38

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

**EXHIBIT A-3
COMPARISON SURVEY RESPONSES
WITHIN LOUISA COUNTY SCHOOLS**

PART C	(%G + E) / (%F + P) ¹		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. Board of Education members' knowledge of the educational needs of students in Louisa County Schools.	38/62	70/31	48/33
2. Board of Education members' knowledge of operations in Louisa County Schools.	62/38	62/38	50/32
3. Board of Education members' work at setting or revising policies for Louisa County Schools.	62/31	85/15	47/33
4. The School District Superintendent's work as the educational leader of Louisa County Schools.	84/15	100/0	59/36
5. The School District Superintendent's work as the chief administrator (manager) of Louisa County Schools.	84/15	100/0	66/30
6. Principals' work as the instructional leaders of their schools.	84/15	100/0	60/39
7. Principals' work as the managers of the staff and teachers.	84/15	100/0	64/35
8. Teachers' work in meeting students' individual learning needs.	77/23	92/8	89/12
9. Teachers' work in communicating with parents.	46/54	85/15	77/23
10. Teachers' attitudes about their jobs.	62/39	85/16	63/37
11. Students' ability to learn.	85/15	92/8	77/22
12. The amount of time students spend on task learning in the classroom.	85/8	92/8	74/26
13. Parents' efforts in helping their children to do better in school.	38/62	62/38	23/75
14. Parents' participation in school activities and organizations.	8/92	38/61	15/83
15. How well students' test results are explained to parents.	54/39	70/31	43/46
16. The cleanliness and maintenance of facilities in Louisa County Schools.	69/31	77/23	66/33
17. How well relations are maintained with various groups in the community.	39/62	77/15	44/32
18. Staff development opportunities provided by Louisa County Schools for teachers.	100/0	100/0	84/15
19. Staff development opportunities provided by Louisa County Schools for school administrators.	100/0	100/0	30/9
20. The school district's job of providing adequate instructional technology.	92/8	100/0	67/30
21. The school district's use of technology for administrative purposes.	92/8	92/8	61/15

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

**EXHIBIT A-4
COMPARISON SURVEY RESPONSES
WITHIN LOUISA COUNTY SCHOOLS**

PART D: WORK ENVIRONMENT	(% A + SA) / (% D + SD) ¹		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. I find Louisa County Schools to be an exciting, challenging place to work.	85/8	100/0	74/8
2. The work standards and expectations in Louisa County Schools are equal to or above those of most other school districts.	92/0	100/0	72/11
3. Louisa County Schools officials enforce high work standards.	92/0	100/0	72/12
4. Most Louisa County Schools teachers enforce high student learning standards.	93/0	92/0	85/4
5. Louisa County Schools teachers and administrators have excellent working relationships.	77/0	92/0	49/25
6. Teachers who do not meet expected work standards are disciplined.	38/8	77/16	22/28
7. Staff who do not meet expected work standards are disciplined.	54/8	77/16	19/21
8. I feel that I have the authority to adequately perform my job responsibilities.	84/8	92/0	86/10
9. I have adequate facilities in which to conduct my work.	85/8	93/0	81/15
10. I have adequate equipment and computer support to conduct my work.	93/0	100/0	72/18
11. The workloads are equitably distributed among teachers and among staff members.	62/15	85/0	42/37
12. No one knows or cares about the amount or quality of work that I perform.	30/61	0/100	22/56
13. Workload is evenly distributed.	46/31	85/8	32/38
14. If there were an emergency in the schools, I would know how to respond appropriately.	92/0	92/8	86/6
15. I often observe other teachers and/or staff socializing rather than working while on the job.	15/61	8/77	13/68

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

**EXHIBIT A-5
COMPARISON SURVEY RESPONSES
WITHIN LOUISA COUNTY SCHOOLS**

PART E: JOB SATISFACTION	(%A + SA) / (% D + SD) ¹		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. I am very satisfied with my job in Louisa County Schools.	92/8	92/0	75/11
2. I plan to continue my career in Louisa County Schools.	92/0	85/0	71/8
3. I am actively looking for a job outside of Louisa County Schools.	8/77	30/62	15/69
4. Salary levels in Louisa County Schools are competitive.	46/46	23/77	28/56
5. I feel that my work is appreciated by my supervisor(s).	69/31	93/8	58/26
6. I feel that I am an integral part of Louisa County Schools team.	84/8	100/0	68/19
7. I feel that there is no future for me in Louisa County Schools.	8/85	8/92	6/73
8. My salary level is adequate for my level of work and experience.	38/61	38/46	18/69

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

**EXHIBIT A-6
COMPARISON SURVEY RESPONSES
WITHIN LOUISA COUNTY SCHOOLS**

PART F: ADMINISTRATIVE STRUCTURE/PRACTICES	(% A + SA) / (% D + SD) ¹		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
1. Most administrative practices in Louisa County Schools are highly effective and efficient.	93/8	100/0	44/28
2. Administrative decisions are made promptly and decisively.	93/8	92/0	40/29
3. Louisa County Schools administrators are easily accessible and open to input.	85/8	77/0	49/32
4. Authority for administrative decisions is delegated to the lowest possible level.	38/31	46/38	21/24
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	84/0	100/0	58/25
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	8/62	15/69	29/33
7. The extensive committee structure in Louisa County Schools ensures adequate input from teachers and staff on most important decisions.	77/0	92/0	37/31
8. Louisa County Schools has too many committees.	15/69	15/77	44/27
9. Louisa County Schools has too many layers of administrators.	0/85	0/100	22/45
10. Most of Louisa County Schools administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	92/0	84/0	64/13
11. Central office administrators are responsive to school needs.	92/8	85/15	52/19
12. Central office administrators provide quality service to schools.	92/8	93/8	55/17

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

**EXHIBIT A-7
COMPARISON SURVEY RESPONSES
WITHIN LOUISA COUNTY SCHOOLS**

PART G: SCHOOL DISTRICT/PROGRAM FUNCTION	% NEEDS SOME IMPROVEMENT + NEEDS MAJOR IMPROVEMENT / % ADEQUATE ¹ + OUTSTANDING		
	ADMINISTRATORS	PRINCIPALS	TEACHERS
a. Budgeting	38/61	8/85	51/27
b. Strategic planning	15/85	0/92	38/36
c. Curriculum planning	0/100	0/100	35/62
d. Financial management and accounting	15/77	8/85	30/39
e. Community relations	62/38	39/61	49/44
f. Program evaluation, research, and assessment	46/54	8/92	33/45
g. Instructional technology	8/93	8/93	31/68
h. Pupil accounting	8/77	15/77	26/38
i. Instructional coordination/supervision	15/85	8/92	29/60
j. Instructional support	23/76	15/84	38/58
k. Federal Programs (e.g., Title I, Special Education) coordination	38/62	62/38	49/43
l. Personnel recruitment	39/62	38/61	27/52
m. Personnel selection	39/62	23/77	24/58
n. Personnel evaluation	46/54	54/46	32/61
o. Staff development	8/92	0/100	24/76
p. Data processing	8/92	8/93	11/45
q. Purchasing	8/93	0/92	17/52
r. Plant maintenance	0/92	0/100	20/49
s. Facilities planning	23/70	16/77	25/37
t. Transportation	8/93	0/100	16/65
u. Food service	8/85	38/61	39/49
v. Custodial services	61/38	39/61	30/64
w. Risk management	0/70	8/77	17/35
x. Administrative technology	15/85	15/85	7/48
y. Grants administration	31/62	31/38	17/32

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

**EXHIBIT A-8
COMPARISON SURVEY RESPONSES
WITHIN LOUISA COUNTY SCHOOLS**

PART H: OPERATIONS	ADMINISTRATORS (%)	PRINCIPALS (%)	TEACHERS (%)
1. The overall operation of Louisa County Schools is:			
Highly efficient	0	46	6
Above average in efficiency	69	46	40
Average in efficiency	23	8	40
Less efficient than most other school districts	8	0	10
Don't know	0	0	4
2. The operational efficiency of Louisa County Schools could be improved by:			
Outsourcing some support services	23	31	15
Offering more programs	54	62	29
Offering fewer programs	0	0	3
Increasing the number of administrators	31	31	10
Reducing the number of administrators	0	0	15
Increasing the number of teachers	85	92	79
Reducing the number of teachers	0	0	0
Increasing the number of support staff	62	92	65
Reducing the number of support staff	0	0	0
Increasing the number of facilities	77	77	68
Reducing the number of facilities	0	0	0
Rezoning schools	15	15	5
Other	0	0	9

*Percentages may add up to over 100 percent due to rounding.

**EXHIBIT A-9
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS ADMINISTRATORS AND
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

PART A OF SURVEY	LOUISA COUNTY SCHOOLS ADMINISTRATORS (%)	OTHER SCHOOL DISTRICT ADMINISTRATORS (%)
1. Overall quality of public education in the school district is: Good or Excellent Fair or Poor	100 0	85 14
2. Overall quality of education in the school district is: Improving Staying the Same Getting Worse Don't Know	92 8 0 0	69 20 2 3
3. Grade given to teachers: Above Average (A or B) Below Average (D or F)	93 0	78 1
4. Grade given to school administrators: Above Average (A or B) Below Average (D or F)	85 0	77 3
5. Grade given to school district administrators: Above Average (A or B) Below Average (D or F)	93 8	77 5

**EXHIBIT A-10
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS ADMINISTRATORS AND
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

PART B	(% A + SA) / (% D + SD) ¹	
	LOUISA COUNTY SCHOOLS ADMINISTRATORS	OTHER SCHOOL DISTRICT ADMINISTRATORS
1. The emphasis on learning in this school division has increased in recent years.	100/0	83/6
2. Our schools are safe and secure from crime.	92/8	65/16
3. Our schools effectively handle misbehavior problems.	77/15	54/24
4. Our schools have sufficient space and facilities to support the instructional programs.	8/92	26/62
5. Our schools have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	85/8	63/17
6. Our schools can be described as "good places to learn."	92/0	84/5
7. There is administrative support for controlling student behavior in our schools.	92/8	68/12
8. Most students in our schools are motivated to learn.	85/0	65/12
9. Lessons are organized to meet students' needs.	70/8	56/10
10. The curriculum is broad and challenging for most students.	100/0	70/8
11. There is little a teacher can do to overcome education problems due to a student's home life.	38/62	20/58
12. Teachers in our schools know the material they teach.	85/0	69/6
13. Teachers in our schools care about students' needs.	92/0	80/4
14. Teachers expect students to do their very best.	100/0	74/7
15. The school division provides adequate technology-related staff development.	93/8	n/a
16. Principals and assistant principals in our schools care about students' needs.	100/0	84/4
17. In general, parents take responsibility for their children's behavior in our schools.	31/46	42/34
18. Parents in this school division are satisfied with the education their children are receiving.	77/8	57/16
19. Most parents seem to know what goes on in our schools.	31/46	36/39
20. Parents play an active role in decision-making in our schools.	15/46	35/24
21. This community really cares about its children's education.	54/23	63/15
22. The food services department encourages student participation through customer satisfaction surveys.	23/23	n/a
23. The school division requests input on the long range technology plan.	46/23	n/a
24. Funds are managed wisely to support education in this school division.	93/0	67/18
25. Sufficient student services are provided in this school division (e.g., counseling, speech therapy, health).	77/23	57/26
26. School-based personnel play an important role in making decisions that affect schools in this school division.	92/0	48/24
27. The school division provides adequate technical support.	85/8	n/a
28. Students are often late arriving to and/or departing from school because the buses do not arrive to school on time.	0/92	8/56
29. The food services department provides nutritious and appealing meals and snacks.	62/8	62/14

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

**EXHIBIT A-11
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS ADMINISTRATORS AND
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

PART C	(% G+ E) / (% F + P) ¹	
	LOUISA COUNTY SCHOOLS ADMINISTRATORS	OTHER SCHOOL DISTRICT ADMINISTRATORS
1. Board of Education members' knowledge of the educational needs of students in the school district.	38/62	40/51
2. Board of Education members' knowledge of operations in Louisa County Schools.	62/38	36/58
3. Board of Education members' work at setting or revising policies for the school district.	62/31	44/48
4. The school district Superintendent's work as the educational leader of the school district.	84/15	78/18
5. The school district Superintendent's work as the chief administrator (manager) of the school district.	84/15	77/20
6. Principals' work as the instructional leaders of their schools.	84/15	70/29
7. Principals' work as the managers of the staff and teachers.	84/15	74/25
8. Teachers' work in meeting students' individual learning needs.	77/23	62/32
9. Teachers' work in communicating with parents.	46/54	49/41
10. Teachers' attitudes about their jobs.	62/39	44/47
11. Students' ability to learn.	85/15	74/20
12. The amount of time students spend on task learning in the classroom.	85/8	49/34
13. Parents' efforts in helping their children to do better in school.	38/62	29/56
14. Parents' participation in school activities and organizations.	8/92	27/59
15. How well students' test results are explained to parents.	54/39	36/44
16. The cleanliness and maintenance of facilities in the school district.	69/31	70/30
17. How well relations are maintained with various groups in the community.	39/62	60/35
18. Staff development opportunities provided by the school district for teachers.	100/0	63/32
19. Staff development opportunities provided by the school district for school administrators.	100/0	53/43
20. The school district's job of providing adequate instructional technology.	92/8	54/43
21. The school district's use of technology for administrative purposes.	92/8	53/46

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

**EXHIBIT A-12
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS ADMINISTRATORS AND
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

PART D: WORK ENVIRONMENT	(% A + SA) / (% D + SD) ¹	
	LOUISA COUNTY SCHOOLS ADMINISTRATORS	OTHER SCHOOL DISTRICT ADMINISTRATORS
1. I find the school district to be an exciting, challenging place to work.	85/8	81/8
2. The work standards and expectations in the school district are equal to or above those of most other school districts.	92/0	75/7
3. School district officials enforce high work standards.	92/0	73/12
4. Most school district teachers enforce high student learning standards.	93/0	62/8
5. School district teachers and administrators have excellent working relationships.	77/0	54/14
6. Teachers who do not meet expected work standards are disciplined.	38/8	26/33
7. Staff who do not meet expected work standards are disciplined.	54/8	37/34
8. I feel that I have the authority to adequately perform my job responsibilities.	84/8	79/15
9. I have adequate facilities in which to do my work.	85/8	71/21
10. I have adequate equipment and computer support to do my work.	93/0	70/22
11. The workloads are equitably distributed among teachers and among staff members.	62/15	29/28
12. No one knows or cares about the amount or quality of work that I perform.	30/61	16/70
13. Workload is evenly distributed.	46/31	32/46
14. The failure of school district officials to enforce high work standards results in poor quality work.	92/0	78/7
15. I often observe other teachers and/or staff socializing rather than working while on the job.	15/61	16/58

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

**EXHIBIT A-13
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS ADMINISTRATORS AND
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

PART E: JOB SATISFACTION	(% A + SA) / (% D + SD) ¹	
	LOUISA COUNTY SCHOOLS ADMINISTRATORS	OTHER SCHOOL DISTRICT ADMINISTRATORS
1. I am very satisfied with my job in the school district.	92/8	77/12
2. I plan to continue my career in the school district.	92/0	83/6
3. I am actively looking for a job outside of the school district.	8/77	8/78
4. Salary levels in the school district are competitive (with other school districts).	46/46	45/40
5. I feel that my work is appreciated by my supervisor(s).	69/31	75/13
6. I feel that I am an integral part of the school district.	84/8	74/11
7. I feel that there is no future for me in the school district.	8/85	10/77
8. My salary level is adequate for my level of work and experience.	38/61	42/45

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

**EXHIBIT A-14
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS ADMINISTRATORS AND
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

PART F: ADMINISTRATIVE STRUCTURE/PRACTICES	(% A + SA) / (% D + SD) ¹	
	LOUISA COUNTY SCHOOLS ADMINISTRATORS	OTHER SCHOOL DISTRICT ADMINISTRATORS
1. Most administrative practices in the school district are highly effective and efficient.	93/8	54/23
2. Administrative decisions are made promptly and decisively.	93/8	44/33
3. School district administrators are easily accessible and open to input.	85/8	65/18
4. Authority for administrative decisions is delegated to the lowest possible level.	38/31	28/44
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	84/0	52/18
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	8/62	40/37
7. The extensive committee structure in the school district ensures adequate input from teachers and staff on most important decisions.	77/0	50/20
8. The school district has too many committees.	15/69	37/32
9. The school district has too many layers of administrators.	0/85	19/64
10. Most administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	92/0	54/25
11. Central office administrators are responsive to school needs.	92/8	76/8
12. Central office administrators provide quality service to schools.	92/8	77/6

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

**EXHIBIT A-15
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS ADMINISTRATORS AND
ADMINISTRATORS IN OTHER SCHOOL DISTRICTS**

PART G: SCHOOL DISTRICT/PROGRAM FUNCTION	% NEEDS SOME IMPROVEMENT + NEEDS MAJOR IMPROVEMENT / % ADEQUATE + OUTSTANDING ¹	
	LOUISA COUNTY SCHOOLS ADMINISTRATORS	OTHER SCHOOL DISTRICTS ADMINISTRATORS
a. Budgeting	38/61	47/45
b. Strategic planning	15/85	44/42
c. Curriculum planning	0/100	30/50
d. Financial management and accounting	15/77	36/53
e. Community relations	62/38	39/53
f. Program evaluation, research, and assessment	46/54	34/50
g. Instructional technology	8/93	48/41
h. Pupil accounting	8/77	25/48
i. Instructional coordination/supervision	15/85	30/50
j. Instructional support	23/76	32/51
k. Federal Programs (e.g., Title I, Special Education) coordination	38/62	24/52
l. Personnel recruitment	39/62	47/42
m. Personnel selection	39/62	46/48
n. Personnel evaluation	46/54	47/49
o. Staff development	8/92	48/49
p. Data processing	8/92	38/45
q. Purchasing	8/93	34/53
r. Plant maintenance	0/92	43/48
s. Facilities planning	23/70	38/48
t. Transportation	8/93	21/65
u. Food service	8/85	18/67
v. Custodial services	61/38	37/54
w. Risk management	0/70	20/54
x. Administrative technology	15/85	42/49
y. Grants administration	31/62	24/49

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

**EXHIBIT A-16
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS PRINCIPALS AND
PRINCIPALS IN OTHER SCHOOL DISTRICTS**

PART A OF SURVEY	LOUISA COUNTY SCHOOLS (%)	OTHER SCHOOL DISTRICTS (%)
1. Overall quality of public education in the school district is: Good or Excellent Fair or Poor	100 0	89 11
2. Overall quality of education in the school district is: Improving Staying the Same Getting Worse Don't Know	100 0 0 0	78 15 7 1
3. Grade given to teachers: Above Average (A or B) Below Average (D or F)	92 0	85 1
4. Grade given to school administrators: Above Average (A or B) Below Average (D or F)	100 0	91 1
5. Grade given to school district administrators: Above Average (A or B) Below Average (D or F)	84 0	73 7

**EXHIBIT A-17
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS PRINCIPALS AND
PRINCIPALS IN OTHER SCHOOL DISTRICTS**

PART B	(% A + SA) / (% D + SD) ¹	
	LOUISA COUNTY SCHOOLS	OTHER SCHOOL DISTRICTS
1. The emphasis on learning in this school division has increased in recent years.	92/0	89/4
2. Our schools are safe and secure from crime.	93/8	81/9
3. Our schools effectively handle misbehavior problems.	92/0	74/14
4. Our schools have sufficient space and facilities to support the instructional programs.	23/69	30/59
5. Our schools have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	100/0	75/14
6. Our schools can be described as "good places to learn."	100/0	92/3
7. There is administrative support for controlling student behavior in our schools.	100/0	89/6
8. Most students in our schools are motivated to learn.	85/0	77/12
9. Lessons are organized to meet students' needs.	92/0	86/6
10. The curriculum is broad and challenging for most students.	92/0	86/7
11. There is little a teacher can do to overcome education problems due to a student's home life.	15/84	19/69
12. Teachers in our schools know the material they teach.	92/0	90/4
13. Teachers in our schools care about students' needs.	92/0	92/3
14. Teachers expect students to do their very best.	85/0	89/4
15. The school division provides adequate technology-related staff development.	92/8	n/a
16. Principals and assistant principals in our schools care about students' needs.	100/0	98/1
17. In general, parents take responsibility for their children's behavior in our schools.	70/16	51/31
18. Parents in this school division are satisfied with the education their children are receiving.	85/0	73/9
19. Most parents seem to know what goes on in our schools.	85/0	43/36
20. Parents play an active role in decision-making in our schools.	39/15	60/20
21. This community really cares about its children's education.	70/15	72/14
22. The food services department encourages student participation through customer satisfaction surveys.	8/31	n/a
23. The school division requests input on the long range technology plan.	54/0	n/a
24. Funds are managed wisely to support education in this school division.	77/0	67/19
25. Sufficient student services are provided in this school division (e.g., counseling, speech therapy, health).	77/0	56/36
26. School-based personnel play an important role in making decisions that affect schools in this school division.	100/0	61/24
27. The school division provides adequate technical support.	84/0	n/a
28. Students are often late arriving to and/or departing from school because the buses do not arrive to school on time.	8/77	18/68
29. The food services department provides nutritious and appealing meals and snacks.	31/38	58/26

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

**EXHIBIT A-18
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS PRINCIPALS AND
PRINCIPALS IN OTHER SCHOOL DISTRICTS**

PART C	(%G+ E) / (%F + P) ¹	
	LOUISA COUNTY SCHOOLS	OTHER SCHOOL DISTRICTS
1. Board of Education members' knowledge of the educational needs of students in the school district.	70/31	39/57
2. Board of Education members' knowledge of operations in the school district.	62/38	41/56
3. Board of Education members' work at setting or revising policies for the school district.	85/15	50/47
4. The school district Superintendent's work as the educational leader of the school district.	100/0	81/17
5. The school district Superintendent's work as the chief administrator (manager) of the school district.	100/0	81/17
6. Principals' work as the instructional leaders of their schools.	100/0	89/11
7. Principals' work as the managers of the staff and teachers.	100/0	94/6
8. Teachers' work in meeting students' individual learning needs.	92/8	80/20
9. Teachers' work in communicating with parents.	85/15	68/32
10. Teachers' attitudes about their jobs.	85/16	64/36
11. Students' ability to learn.	92/8	84/16
12. The amount of time students spend on task learning in the classroom.	92/8	72/27
13. Parents' efforts in helping their children to do better in school.	62/38	35/64
14. Parents' participation in school activities and organizations.	38/61	33/66
15. How well students' test results are explained to parents.	70/31	51/47
16. The cleanliness and maintenance of facilities in the school district.	77/23	65/34
17. How well relations are maintained with various groups in the community.	77/15	66/32
18. Staff development opportunities provided by the school district for teachers.	100/0	68/31
19. Staff development opportunities provided by the school district for school administrators.	100/0	63/37
20. The school district's job of providing adequate instructional technology.	100/0	46/52
21. The school district's use of technology for administrative purposes.	92/8	54/45

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

**EXHIBIT A-19
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS PRINCIPALS AND
PRINCIPALS IN OTHER SCHOOL DISTRICTS**

PART D: WORK ENVIRONMENT	(% A + SA) / (% D + SD) ¹	
	LOUISA COUNTY SCHOOLS	OTHER SCHOOL DISTRICTS
1. I find the school district to be an exciting, challenging place to work.	100/0	88/5
2. The work standards and expectations in the school district are equal to or above those of most other school districts.	100/0	83/6
3. School district officials enforce high work standards.	100/0	81/9
4. Most school district teachers enforce high student learning standards.	92/0	81/7
5. School district teachers and administrators have excellent working relationships.	92/0	76/7
6. Teachers who do not meet expected work standards are disciplined.	77/16	48/31
7. Staff who do not meet expected work standards are disciplined.	77/16	54/25
8. I feel that I have the authority to adequately perform my job responsibilities.	92/0	80/13
9. I have adequate facilities in which to do my work.	93/0	74/19
10. I have adequate equipment and computer support to do my work.	100/0	65/27
11. The workloads are equitably distributed among teachers and among staff members.	85/0	68/21
12. No one knows or cares about the amount or quality of work that I perform.	0/100	19/68
13. Workload is evenly distributed.	85/8	45/35
14. The failure of school district officials to enforce high work standards results in poor quality work.	92/8	96/2
15. I often observe other teachers and/or staff socializing rather than working while on the job.	8/77	12/77

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

**EXHIBIT A-20
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS PRINCIPALS AND
PRINCIPALS IN OTHER SCHOOL DISTRICTS**

PART E: JOB SATISFACTION	(% A + SA) / (% D + SD) ¹	
	LOUISA COUNTY SCHOOLS	OTHER SCHOOL DISTRICTS
1. I am very satisfied with my job in the school district.	92/0	83/8
2. I plan to continue my career in the school district.	85/0	88/4
3. I am actively looking for a job outside of the school district.	30/62	8/78
4. Salary levels in the school district are competitive (with other school districts).	23/77	40/48
5. I feel that my work is appreciated by my supervisor(s).	93/8	74/15
6. I feel that I am an integral part of the school district.	100/0	74/12
7. I feel that there is no future for me in the school district.	8/92	8/81
8. My salary level is adequate for my level of work and experience.	38/46	32/58

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

**EXHIBIT A-21
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS PRINCIPALS AND
PRINCIPALS IN OTHER SCHOOL DISTRICTS**

PART F: ADMINISTRATIVE STRUCTURE/PRACTICES	(% A + SA) / (% D + SD) ¹	
	LOUISA COUNTY SCHOOLS	OTHER SCHOOL DISTRICTS
1. Most administrative practices in the school district are highly effective and efficient.	100/0	69/18
2. Administrative decisions are made promptly and decisively.	92/0	62/21
3. School district administrators are easily accessible and open to input.	77/0	71/15
4. Authority for administrative decisions is delegated to the lowest possible level.	46/38	36/38
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	100/0	77/12
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	15/69	40/39
7. The extensive committee structure in the school district ensures adequate input from teachers and staff on most important decisions.	92/0	60/21
8. The school district has too many committees.	15/77	35/34
9. The school district has too many layers of administrators.	0/100	27/57
10. Most administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	84/0	57/26
11. Central office administrators are responsive to school needs.	85/15	65/20
12. Central office administrators provide quality service to schools.	93/8	63/18

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

**EXHIBIT A-22
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS PRINCIPALS AND
PRINCIPALS IN OTHER SCHOOL DISTRICTS**

PART G: SCHOOL DISTRICT/PROGRAM FUNCTION	% NEEDS SOME IMPROVEMENT + NEEDS MAJOR IMPROVEMENT / % ADEQUATE ¹ + OUTSTANDING	
	LOUISA COUNTY SCHOOLS	OTHER SCHOOL DISTRICTS
a. Budgeting	8/85	49/48
b. Strategic planning	0/92	38/53
c. Curriculum planning	0/100	40/59
d. Financial management and accounting	8/85	35/60
e. Community relations	39/61	37/61
f. Program evaluation, research, and assessment	8/92	32/65
g. Instructional technology	8/93	60/39
h. Pupil accounting	15/77	27/66
i. Instructional coordination/supervision	8/92	40/58
j. Instructional support	15/84	44/55
k. Federal Programs (e.g., Title I, Special Education) coordination	62/38	32/57
l. Personnel recruitment	38/61	47/48
m. Personnel selection	23/77	41/57
n. Personnel evaluation	54/46	40/58
o. Staff development	0/100	43/57
p. Data processing	8/93	39/51
q. Purchasing	0/92	37/58
r. Plant maintenance	0/100	55/43
s. Facilities planning	16/77	51/43
t. Transportation	0/100	43/54
u. Food service	38/61	35/65
v. Custodial services	39/61	47/52
w. Risk management	8/77	23/63
x. Administrative technology	15/85	48/49
y. Grants administration	31/38	34/49

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

**EXHIBIT A-23
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS TEACHERS AND
TEACHERS IN OTHER SCHOOL DISTRICTS**

PART A OF SURVEY	LOUISA COUNTY SCHOOLS (%)	OTHER SCHOOL DISTRICTS (%)
1. Overall quality of public education in the school district is: Good or Excellent Fair or Poor	86 14	74 25
2. Overall quality of education in the school district is: Improving Staying the Same Getting Worse Don't Know	74 15 6 5	53 27 16 4
3. Grade given to teachers: Above Average (A or B) Below Average (D or F)	89 1	83 1
4. Grade given to school administrators: Above Average (A or B) Below Average (D or F)	61 15	59 11
5. Grade given to school district administrators: Above Average (A or B) Below Average (D or F)	61 12	38 21

**EXHIBIT A-24
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS TEACHERS AND
TEACHERS IN OTHER SCHOOL DISTRICTS**

PART B	(% A + SA) / (% D + SD) ¹	
	LOUISA COUNTY SCHOOLS	OTHER SCHOOL DISTRICTS
1. The emphasis on learning in this school division has increased in recent years.	78/4	71/13
2. Our schools are safe and secure from crime.	69/15	53/28
3. Our schools effectively handle misbehavior problems.	39/39	37/48
4. Our schools have sufficient space and facilities to support the instructional programs.	26/61	28/62
5. Our schools have the materials and supplies necessary for instruction in basic skills programs such as writing and mathematics.	73/16	54/31
6. Our schools can be described as "good places to learn."	87/3	74/11
7. There is administrative support for controlling student behavior in our schools.	52/31	55/29
8. Most students in our schools are motivated to learn.	59/21	55/29
9. Lessons are organized to meet students' needs.	83/4	79/9
10. The curriculum is broad and challenging for most students.	76/11	77/11
11. There is little a teacher can do to overcome education problems due to a student's home life.	18/63	35/46
12. Teachers in our schools know the material they teach.	94/1	88/4
13. Teachers in our schools care about students' needs.	94/1	91/3
14. Teachers expect students to do their very best.	87/3	88/4
15. The school division provides adequate technology-related staff development.	80/8	n/a
16. Principals and assistant principals in our schools care about students' needs.	78/9	83/7
17. In general, parents take responsibility for their children's behavior in our schools.	28/45	27/53
18. Parents in this school division are satisfied with the education their children are receiving.	58/5	53/14
19. Most parents seem to know what goes on in our schools.	33/37	29/50
20. Parents play an active role in decision-making in our schools.	19/42	36/38
21. This community really cares about its children's education.	47/17	49/27
22. The food services department encourages student participation through customer satisfaction surveys.	7/36	n/a
23. The school division requests input on the long range technology plan.	31/27	n/a
24. Funds are managed wisely to support education in this school division.	43/22	28/46
25. Sufficient student services are provided in this school division (e.g., counseling, speech therapy, health).	58/23	53/34
26. School-based personnel play an important role in making decisions that affect schools in this school division.	43/28	35/33
27. The school division provides adequate technical support.	66/14	n/a
28. Students are often late arriving to and/or departing from school because the buses do not arrive to school on time.	14/71	17/60
29. The food services department provides nutritious and appealing meals and snacks.	29/38	43/34

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

**EXHIBIT A-25
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS TEACHERS AND
TEACHERS IN OTHER SCHOOL DISTRICTS**

PART C	(%G+ E) / (%F + P)¹	
	LOUISA COUNTY SCHOOLS	OTHER SCHOOL DISTRICTS
1. Board of Education members' knowledge of the educational needs of students in the school district.	48/33	24/64
2. Board of Education members' knowledge of operations in the school district.	50/32	29/55
3. Board of Education members' work at setting or revising policies for the school district.	47/33	27/58
4. The school district Superintendent's work as the educational leader of the school district.	59/36	49/40
5. The school district Superintendent's work as the chief administrator (manager) of the school district.	66/30	50/38
6. Principals' work as the instructional leaders of their schools.	60/39	63/36
7. Principals' work as the managers of the staff and teachers.	64/35	67/32
8. Teachers' work in meeting students' individual learning needs.	89/12	79/20
9. Teachers' work in communicating with parents.	77/23	75/24
10. Teachers' attitudes about their jobs.	63/37	50/49
11. Students' ability to learn.	77/22	64/35
12. The amount of time students spend on task learning in the classroom.	74/26	60/37
13. Parents' efforts in helping their children to do better in school.	23/75	21/76
14. Parents' participation in school activities and organizations.	15/83	23/75
15. How well students' test results are explained to parents.	43/46	38/52
16. The cleanliness and maintenance of facilities in the school district.	66/33	52/47
17. How well relations are maintained with various groups in the community.	44/32	43/44
18. Staff development opportunities provided by the school district for teachers.	84/15	61/38
19. Staff development opportunities provided by the school district for school administrators.	30/9	32/22
20. The school district's job of providing adequate instructional technology.	67/30	47/51
21. The school district's use of technology for administrative purposes.	61/15	45/31

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

**EXHIBIT A-26
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS TEACHERS AND
TEACHERS IN OTHER SCHOOL DISTRICTS**

PART D: WORK ENVIRONMENT	(% A + SA) / (% D + SD) ¹	
	LOUISA COUNTY SCHOOLS	OTHER SCHOOL DISTRICTS
1. I find the school district to be an exciting, challenging place to work.	74/8	69/12
2. The work standards and expectations in the school district are equal to or above those of most other school districts.	72/11	63/14
3. School district officials enforce high work standards.	72/12	63/15
4. Most school district teachers enforce high student learning standards.	85/4	78/8
5. School district teachers and administrators have excellent working relationships.	49/25	45/26
6. Teachers who do not meet expected work standards are disciplined.	22/28	25/39
7. Staff who do not meet expected work standards are disciplined.	19/21	23/36
8. I feel that I have the authority to adequately perform my job responsibilities.	86/10	81/12
9. I have adequate facilities in which to do my work.	81/15	69/23
10. I have adequate equipment and computer support to do my work.	72/18	54/36
11. The workloads are equitably distributed among teachers and among staff members.	42/37	40/43
12. No one knows or cares about the amount or quality of work that I perform.	22/56	24/58
13. Workload is evenly distributed.	32/38	36/43
14. The failure of school district officials to enforce high work standards results in poor quality work.	86/6	87/7
15. I often observe other teachers and/or staff socializing rather than working while on the job.	13/68	18/66

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

**EXHIBIT A-27
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS TEACHERS
AND TEACHERS IN OTHER SCHOOL DISTRICTS**

PART E: JOB SATISFACTION	(% A + SA) / (% D + SD) ¹	
	LOUISA COUNTY SCHOOLS	OTHER SCHOOL DISTRICTS
1. I am very satisfied with my job in the school district.	75/11	70/15
2. I plan to continue my career in the school district.	71/8	76/8
3. I am actively looking for a job outside of the school district.	15/69	11/74
4. Salary levels in the school district are competitive (with other school districts).	28/56	33/53
5. I feel that my work is appreciated by my supervisor(s).	58/26	65/21
6. I feel that I am an integral part of the school district.	68/19	59/20
7. I feel that there is no future for me in the school district.	6/73	12/73
8. My salary level is adequate for my level of work and experience.	18/69	20/69

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

**EXHIBIT A-28
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS TEACHERS AND
TEACHERS IN OTHER SCHOOL DISTRICTS**

PART F: ADMINISTRATIVE STRUCTURE/PRACTICES	(% A + SA) / (% D + SD) ¹	
	LOUISA COUNTY SCHOOLS	OTHER SCHOOL DISTRICTS
1. Most administrative practices in the school district are highly effective and efficient.	44/28	34/36
2. Administrative decisions are made promptly and decisively.	40/29	36/36
3. School district administrators are easily accessible and open to input.	49/32	39/35
4. Authority for administrative decisions is delegated to the lowest possible level.	21/24	15/29
5. Teachers and staff are empowered with sufficient authority to effectively perform their responsibilities.	58/25	55/27
6. Major bottlenecks exist in many administrative processes which cause unnecessary time delays.	29/33	45/19
7. The extensive committee structure in the school district ensures adequate input from teachers and staff on most important decisions.	37/31	29/39
8. The school district has too many committees.	44/27	43/13
9. The school district has too many layers of administrators.	22/45	53/15
10. Most administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient and responsive.	64/13	35/28
11. Central office administrators are responsive to school needs.	52/19	27/34
12. Central office administrators provide quality service to schools.	55/17	27/31

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

**EXHIBIT A-29
COMPARISON SURVEY RESPONSES
LOUISA COUNTY SCHOOLS TEACHERS AND
TEACHERS IN OTHER SCHOOL DISTRICTS**

PART G: SCHOOL DISTRICT/PROGRAM FUNCTION	% NEEDS SOME IMPROVEMENT + NEEDS MAJOR IMPROVEMENT	/ % ADEQUATE ¹ + OUTSTANDING
	LOUISA COUNTY SCHOOLS	OTHER SCHOOL DISTRICTS
a. Budgeting	51/27	65/16
b. Strategic planning	38/36	47/24
c. Curriculum planning	35/62	52/41
d. Financial management and accounting	30/39	49/23
e. Community relations	49/44	53/38
f. Program evaluation, research, and assessment	33/45	42/38
g. Instructional technology	31/68	53/40
h. Pupil accounting	26/38	29/39
i. Instructional coordination/supervision	29/60	38/48
j. Instructional support	38/58	48/45
k. Federal Programs (e.g., Title I, Special Education) coordination	49/43	36/40
l. Personnel recruitment	27/52	40/35
m. Personnel selection	24/58	42/37
n. Personnel evaluation	32/61	41/48
o. Staff development	24/76	42/52
p. Data processing	11/45	21/34
q. Purchasing	17/52	33/30
r. Plant maintenance	20/49	41/37
s. Facilities planning	25/37	41/28
t. Transportation	16/65	32/46
u. Food service	39/49	41/47
v. Custodial services	30/64	44/49
w. Risk management	17/35	22/32
x. Administrative technology	7/48	24/34
y. Grants administration	17/32	21/32

¹ Percent responding *Needs Some Improvement* or *Needs Major Improvement* / Percent responding *Adequate* or *Outstanding*. The *neutral* and *don't know* responses are omitted.