

# Legislative Budget Board Update

AUGUST 2021

## LBB REPORT SUMMARY

- The Legislative Budget Board School Performance Review Team conducted a review of district operations during calendar year 2019. Analysis of the review findings was completed during late fall of 2019. The finalized report included 94 recommendations with companion sub-recommendations in five major categories:
  - Strengthening spending practices and improving financial monitoring
  - Reorganization and realigning of staff, departments, and functions
  - Standardization of programs and services
  - Improvement of communication, planning, and procedures
  - Improvement of board operations

## COMPLETED RECOMMENDATIONS BY CATEGORY

- District Organization, Planning, and Governance
  - Recommendation 1: Modify the district’s organizational structure to decrease the superintendent’s supervisory responsibilities and streamline the number of executive leadership positions.
  - Recommendation 2: Systematize the district process for developing, reviewing, and implementing School Improvement Plans.
  - Recommendation 6: Develop and implement procedures that establish a timeline and framework to review and update all board policies systematically.
- Educational Service Delivery
  - Recommendation 11: Develop and implement districtwide structures that support a consistent and systematic approach for supervising and supporting campus principals.
  - Recommendation 12: Develop comprehensive processes for principal placement and retention and instructional transitions at the campus level.
  - Recommendation 14: Implement a process for continuous evaluation of the structure, staffing, instructional delivery, and resources of the district’s supports for its English learner students.
  - Recommendation 15: Implement systemic approaches to master scheduling, including improved training and oversight.
  - Recommendation 16: Develop, implement, and evaluate a strategic plan for a long-term, comprehensive system of the district’s wraparound services initiatives.
  - Recommendation 17: Increase academic and financial oversight of in-district charter campuses.
- Financial Management
  - Recommendation 27: Increase the annual revenue of the alternative certification program to meet operating expenses or eliminate the program and seek partnerships with other certifying organizations to meet Houston ISD’s ongoing needs.
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**COMPLETED RECOMMENDATIONS BY CATEGORY (CONTINUED)**

- Recommendation 28: Resume regular weekly staff meetings with department managers to exchange information, inform staff, and seek opportunities to increase efficiencies and collaboration across teams.
- Asset and Risk Management
  - Recommendation 29: Enhance controls of cash and investment management processes.
  - Recommendation 31: Analyze property insurance needs based on construction projects and increasing property values and present a plan to the board to control increasing premium costs.
- Purchasing and Contract Management
  - Recommendation 33: Develop procurement processes for greater productivity and efficiency, ensure that purchases are tracked, and increase communication and training to purchasing end users
  - Recommendation 34: Evaluate vendor management procedures to ensure that practices are transparent and equitable and provide the best value for the district.
  - Recommendation 35: Develop and implement efficient auditing guidelines and financial controls for purchasing card processing to safeguard district assets and ensure that all transactions follow district procedures
  - Recommendation 38: Review the efficiency of each warehouse function and implement processes to make the most productive use of warehouse services.
- Human Resources Management
  - Recommendation 39: Reorganize the Human Resources Department and adhere to best practices for an effective and equitable span of control.
  - Recommendation 42: Strengthen controls over ad hoc stipends and extra-duty pay.
  - Recommendation 44: Develop recruiting strategies for campuses that have high turnover among staff, and standardize procedures for hiring, integrating new staff, and exit interviews districtwide.
- Facilities Use and Management
  - Recommendation 46: Develop an accurate facility utilization rate for each campus and ensure that campuses maintain industry-standard utilization rates.
  - Recommendation 52: Revise the process for the design and construction document reviews, and mandate that specific departments have representation during the design and construction phases of projects.
  - Recommendation 54: Assess the work order needs and evaluate the ability of a digital system to improve service quality provided by the Facilities Services Department.
- Safety and Security Management
  - Recommendation 58: Consolidate the safety functions and form a districtwide safety and security committee to address safety issues.
  - Recommendation 59: Restructure the police chief 's reporting relationship so that the position reports only to the superintendent.

- **COMPLETED RECOMMENDATIONS BY CATEGORY (CONTINUED)**

- Recommendation 60: Charge specific positions with reassessing, maintaining, and regularly updating key district documents, such as memorandums of understanding and service expectations.
- Recommendation 61: Develop and institute data-driven performance measures and information sources for the Houston ISD Police Department.
- Information Technology Management
  - Recommendation 66: Retrain and monitor key IT processes and use a semiannual maturity model assessment as part of the system of key performance indicators.
  - Recommendation 71: Combine Educational Technology and Instructional Technology into one organization, based in the Academic Department.
- Nutrition Services Management
  - Recommendation 72: Analyze participation rates monthly, develop and implement strategies to increase participation, and develop board policies that address challenges to participation.
  - Recommendation 73: Hold principals accountable for ensuring that all competitive foods sales on campuses comply with United States Department of Agriculture regulations.
  - Recommendation 74: Develop guidelines for meal scheduling to assist principals.
  - Recommendation 75: Develop and implement procedures and systems to provide oversight and consistent management of campus cafeteria operations.
  - Recommendation 76: Use productivity data to manage staffing in accordance with industry standards.
  - Recommendation 77: Develop an annual plan for nutrition education and menu displays in campus cafeterias.
  - Recommendation 78: Develop a plan to improve catering and adult-only meal operations to a financially accountable position.
  - Recommendation 80: Use the contracted consultant's report to eliminate inefficiencies and decrease costs at the Nutrition Services Department.
- Transportation Management and Fleet Operations
  - Recommendation 81: Reorganize Transportation Department functions and develop strategies to improve recruitment and retention of staff.
  - Recommendation 83: Explore options to achieve greater inclusion and promote the use of the least restrictive environment on buses.
  - Recommendation 84: Establish processes to strengthen Transportation Department internal and external communications and solicit feedback from stakeholders.
  - Recommendation 85: Enhance transportation training for drivers and students and address safety concerns at the terminals and on school buses.
  - Recommendation 86: Develop a bus replacement plan that includes industry-standard criteria and decrease the number of spare and surplus school buses in the district's inventory.

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## COMPLETED RECOMMENDATIONS BY CATEGORY (CONTINUED)

- Recommendation 87: Develop and implement processes to monitor service center productivity and vendor performance to decrease the district's number of out-of-service vehicles.
- Community Involvement
  - Recommendation 88: Consolidate the Office of Communications and the Strategic Engagement and Outreach Department to streamline the district's communications functions.
  - Recommendation 89: Develop and implement written procedures to update campus and department websites with consistent and current information.
  - Recommendation 90: Update the affiliation agreement between the district and the Houston ISD Foundation to reflect actual practices and promote accountability and transparency to the public.
  - Recommendation 91: Review the different ways that donations are reported to the district and develop a unified plan to accept and track campus donations.
  - Recommendation 92: Update procedures to manage partnerships with external organizations and develop a system to track all district partnerships.
  - Recommendation 93: Ensure the efficient communication of staff and department changes to the Information Center to maintain an updated and cohesive central directory.
  - Recommendation 94: Develop guidelines to train parent and community volunteers.

## PROGRESS SUMMARY

- 50 out of 94 total recommendations, 53.19% have been completed. Out of the recommendations under the administration's purview 56.8% are presently complete.
- 1 out of 94 recommendations will not be fully implemented as it would lead to additional costs to the district budget instead of reductions.
  - Recommendation 37: Revise travel procedures for more efficient travel processing.
- 37 out of 94 recommendations are presently in progress and in various phases of implementation.
- 6 out of 94 recommendations, recommendations 3-5 and 7-9, are recommendations under the purview of the Board of Trustees. These recommendations are not reported in the progress metric shared above.

## RECOMMENDATIONS BY PHASE

<b>Phase 1</b>	<b>Spring and Summer 2020</b>
<ul style="list-style-type: none"> <li>February-July 2020</li> <li>Recommendations: 1, 12, 14, 28-29, 31, 33-34, 41-42, 44, 71, 77-78, 88, 90, 94</li> </ul>	
<b>Phase 2</b>	<b>Fall/Winter 2020-2021</b>
<ul style="list-style-type: none"> <li>August 2020-February 2021</li> <li>Recommendations: 2, 6, 17, 32, 35, 38, 58, 66, 68, 70, 79, 83, 87, 91, 92</li> </ul>	
<b>Phase 3</b>	<b>Spring/Summer 2021</b>
<ul style="list-style-type: none"> <li>March-July 2021</li> <li>Recommendation: 11, 15, 18-19, 21, 22-24, 30, 36, 45, 48-51, 55, 60-61</li> </ul>	
<b>Phase 4</b>	<b>Fall/Winter 2021-2022</b>
<ul style="list-style-type: none"> <li>August 2021-February 2022</li> <li>Recommendations: 10, 25-26, 40, 47, 53, 62-64, 67, 74</li> </ul>	
<b>Phase 5</b>	<b>Spring/Summer 2022</b>
<ul style="list-style-type: none"> <li>March-August 2022</li> <li>Recommendations: 13, 57, 60, 61, 65, 69, 79, 82</li> </ul>	

**Notes:**

- Does not include recommendations completed by January 2020 (16, 27, 39, 46, 52, 54, 59, 72, 73, 75, 76, 80, 81, 84, 85, 86, 89, 93)
- Does not include 3-5 and 7-9 as they follow under the purview of the Board of Education
- Does not include 37 which cannot be fully implemented without the district incurring additional costs
- Does not include recommendation #56 whose projected completion date is 01/25
- Does not include recommendation #43 whose projected completion date is 06/23
- Does not include recommendation #20 which whose timing will depend on the timing of a new bond