



MANAGEMENT AND OPERATIONAL REVIEW

EVERETT PUBLIC SCHOOLS

FALL 2010

Washington Association of School Administrators
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Washington Association of School Administrators

I. INTRODUCTION

The Washington Association of School Administrators (the Association) was contacted in the summer of 2010 by the Everett Public Schools regarding the possibility of carrying out an evaluative study of the district utilizing the management review format developed by the Association. The prospect of a management review was shared with the district board of directors which agreed with the described project. The superintendent, the administrative cabinet, and representatives of the Association met in person and in conference calls to discuss the interests of the school district and the particular areas of emphasis the district would wish to highlight. An agreement was reached to carry out the study to be conducted in October 2010.

A management review is intended to provide an objective look at the current operational effectiveness of a district in identified program areas and to produce a report that the district can utilize in planning for the future. The Association has developed the approach over a period covering almost 20 years and has carried out over 80 studies in Washington and other states. A review may be designed to address all major district programs or may be focused upon a narrower program area. In this case, the Everett Public Schools was interested in covering 15 major areas of program and operations in the school system.

The overall objective of a review is to provide expert assessment of school district management—the results are designed to be both an analysis of what is and a blueprint for what can be. The review team is comprised of experienced administrative and educational practitioners—they provide an objective view, which is backed up by years of training and experience. The combination of several outside authorities provides a synergistic effect in examining the district and presenting recommendations for improvements. A management review report will present views and recommended directions for a school district with neutrality. The ultimate objective of the review is to assist with overall district efficiency and strengthened classroom performance.

II. THE FOUR PHASES OF A MANAGEMENT REVIEW

PREPARATION

The initial portion of the review is that of planning. A plan is developed in concert with the school district administration that includes the specific goals and objectives sought. A team is cooperatively selected and orientation for the team members provided. A meeting is held with key school district personnel to provide accurate input for the team and an introduction to what the review will involve for district employees.

ANALYSIS

The analysis phase involves the on-site activity by the review team. Information is collected in the form of relevant school district policies, reports, documents, etc. In addition, interviews are conducted with administrators, staff members, board members, students, and citizens. Where possible, there are observations of actual activities within the school system.

EVALUATION

An evaluation of the documentation, interviews, observations, and other information takes place next. This involves the members of the team in collective discussion and independent writing. The review is captured in a report that provides a comprehensive description of district functions with specific findings and recommendations.

REPORTING

The final report is presented personally to the superintendent and board of directors if desired. The recommendations for improvement are explained clearly; the report, in its entirety, provides a springboard for planning and positive direction for the school system. Each report is prepared in such a way that the positive strengths of the school district stand out.

III. EXECUTIVE SUMMARY

This summary is provided to highlight some of the major points of the study. It is the practice in a management review to acknowledge things which are exemplary and to be candid about issues which appear negative. In this case, the clear impression received by the review team in the study is one of superior performance. This summary covers only a small part of the information reported by the review team. The summary immediately below should be read in conjunction with the main report which follows. There are many more observations and recommendations in the main body of the report than can be mentioned in this brief summary.

- Everett Public Schools is one of the largest school systems in the state—the 12th largest out of 295 by a recent OSPI listing. It is a complex organization with a large staff of employees and a budget in the range of \$200 million.
- The school district is well served by qualified administrative staff. The district, however, is affected by having administrative services divided between several sites. It should be a district priority to bring these services together to help reduce lost time and increased costs caused by the separation of facilities.
- The school district Human Resources program is well organized and efficient. There is planning evident in recruiting and retaining quality employees, in attending to employee rights and responsibilities, and in concentrating on strengthening communication within and outside the school district.
- The school district has a history of working from a strategic plan. Under the leadership of the superintendent and board of directors, there is a broad effort underway to create a new plan. This work has included hundreds of staff hours and stakeholder involvement. In more focused planning, the work done on building-level school improvement plans is excellent.
- The Communications program, per se, has been in place for many years. The background includes strong efforts at learning what staff members and stakeholders think as well as providing information about the school district. Budget cuts have placed a strain on some activities. The school district is working hard at building trust between different levels—staff organizations, community, and media.
- The governance work of the school district is centered on the board of directors, superintendent, and district level- and building-level administrators. There is clear evidence of superior leadership and focus upon students. The board has been working hard at being informed and providing support for the improvement of instruction. The entire district, however, is presently being distracted by damaging behavior at the board level, most often attributed to one member. It is imperative that this be addressed as it is distracting and damaging to the entire school system and community.
- One of the most frequently mentioned attributes of public officials that is valued by the staff, community, and media is “transparency”—providing clear, candid, and timely information. The board of directors and superintendent recently implemented a system to produce district documents relating to governance electronically. This system opens information about the work of the board, administration, and staff to everybody. It is an extremely valuable asset.

- The Everett Public Schools is well managed fiscally. The budget is prepared carefully, and this past year, a committee of stakeholders was impaneled to provide input to the process. The budget is solid, monitored carefully, and reported honestly and completely. The supportive services of accounting, payroll, purchasing, etc. are well organized and efficient. There are some considerations offered regarding organization, software, planning, and communications.
- There are considerations offered in the processing of cash and its depositing.
- The Maintenance, Operations, and Facilities programs are well managed. The school district has reduced some of the staffing levels, but so far, the quality of care seems adequate. It may be wise to review supervisory levels in case that work is spread too thin.
- The Everett Public Schools presently contracts with Durham Transportation Services, a private company, for the majority of student transportation. The program is well administered, safe, and responsive to school district needs. There are considerations possible in communication, shifting transportation services for homeless students, formation of a Safety Committee, and automating field-trip applications.
- The Everett Public Schools Nutrition program provides exemplary food services for its students. This is one of the most efficient in the state and operates “in the black.” Supervisory staff time has been reduced somewhat, but people seem still very satisfied with quality and level of service.
- The chief work of the school district is Teaching and Learning. The work in this area is supported by district-level departments and personnel, principals, teachers, and other support staff. As with other programs in the school district, this is one of the best organized and student focused in the state. The support given toward increasing graduation rates exemplifies the extremely hard work going on generally.
- There are considerations offered in terms of district-level working relationships, building cultural competence, district-level organization, and further emphasis upon addressing the damaging behavior at the board of directors’ level.
- The Special Services Department serves approximately 2,300 students with Special Education needs. As with other areas in the school district, it is well organized, staffed with hard working people, and accomplishing positive results with students. Morale seems good. Reductions in supervisory time appear to have slowed down response to building requests, but people are satisfied with the responses. There are considerations offered regarding response time, professional development, and new teaching materials in math.
- The school district has historically provided strong support financially for use of technology. There is a detailed and up-to-date technology plan for the district. It seems important to reinforce the concern for supporting technology updating (hardware and infrastructure) recognizing that needs and costs will be rising. There is still need for further staff training in use of technology in certain areas.

IV. MAJOR AREAS IDENTIFIED FOR STUDY IN THE EVERETT SCHOOL DISTRICT MANAGEMENT REVIEW

ADMINISTRATIVE SERVICES

- Personnel/Employee Relations
- Planning and Evaluation
- Communications
- Governance

BUSINESS AND OPERATIONS

- Accounting and Payroll
- Budgeting
- Cash Management
- Data Processing
- Purchasing
- Auditing
- Maintenance/Operations
- Transportation
- Food Services

TEACHING AND LEARNING

- Instruction and Assessment
- Special Programs
- Technology

V. EVERETT PUBLIC SCHOOLS MANAGEMENT REVIEW TEAM

GOVERNANCE

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VI. THE LOGISTICS OF THE REVIEW

During the course of study, the review team examines a number of documents and reports. The list below indicates the kind of documents involved in providing information:

- F-195 and supporting F-196 for most recent two years.
- School district policies and procedures.
- School district strategic plan.
- Collective bargaining agreements (for certificated and classified employees).
- District organization chart (with names of administrators) if available.
- Job descriptions.
- State fiscal audit reports for most recent three years.
- Board minutes for most recent two years.
- District newsletters, other major communication reports for most recent two years (e.g., district annual report would be an example).
- Employee handbooks.
- Student handbooks (high school, middle school and elementary as available).
- Athletic rules/regulations (if separate from handbooks).
- Records retention schedule for the district (if modified from the state).
- Samples of the regular (monthly) financial reports provided to the superintendent and the board.
- Technology plan for the school district.
- Sample school improvement plan.
- District improvement plan.
- Requisition form (if used).
- Purchase order form.
- Personnel change form.
- District forms as available used in the processes of budget planning and human resources planning and coordination (as the district feels appropriate and pertinent).
- S275 Report and respective report for classified personnel.
- Recent reports, audits, and monitoring information concerning Special Education.
- IEP forms, procedures.
- Report of any complaints/grievances concerning Special Education.

SCHEDULING

The district was asked to prepare meeting and interview schedules for each team member.

The school district took responsibility for determining who would be scheduled for interviews. The following kinds of individuals were included:

- Superintendent
- Board members
- District-level administrators (from major program areas—academic, support, fiscal, etc.)
- District-level supervisors
- Principals
- Teachers
- Para-professionals
- Building-level employees
- Parents
- General citizens
- Other non-school district officials (e.g., city, county)

There were 22 members of the review team. There were 12 opportunities for each person to be scheduled for interviews. Some of the interviews involved more than one person and there were additional discussions held beyond the schedule. The number and breadth of people involved provided a representative group.

VII. THE REPORT

A. ADMINISTRATIVE SERVICES

The Everett Public Schools has a student enrollment of approximately 19,000 students. There are presently four high schools, five middle schools, and 17 elementary schools. The most recent report of school districts in the state by the Office of Superintendent of Public Instruction (OSPI) lists Everett as the 12th largest school district in the state (i.e., 11 school districts were larger and 283 were smaller. The total annual budget for the school district is around \$200 million. The staffing figures for the prior year indicate a total of 1,732 full-time equivalent (FTE) employees. A relevant consideration for a school district in terms of administration is the percentage of the of the overall budget spent on administrative costs. The most recent breakdown of those figures from OSPI indicates that Everett Public Schools spent 11.9 percent of the budget on administration—the range for the 30 largest school districts was from 12 percent to 12.9 percent. Thus, Everett was slightly lower than the average of other large school districts. A reciprocal measurement would be the percentage of the budget spent on instruction. While it would be preferable for administrative costs to be lower than the average, it would be positive for the percentage spent on instruction to be higher. In the case of Everett, the percentage of the budget for instruction was at almost 51 percent while the average for the other districts was approximately 48 percent. That would indicate that Everett comparatively spent slightly less on administration and proportionately somewhat more on instruction than the average. (The school district was just slightly higher in its percentage spent on Special Education for the 30 districts.) It is important to note that Everett Public Schools has made cuts in administrative staffing, which were not yet reflected in the figures described above. Presumably, an even smaller percentage of the budget will be spent on administration in the current budget year.

It is evident from the figures above that administering an organization of this magnitude is a challenging task. A part of this review was to form a picture of the efficiency and effectiveness of the administrative work within the system. The conclusion is that the school district is being administered carefully and with effectiveness. That is reflected in the effort, which is evident in the work being done by the administrative team and the results in the educational program. The quality of administrative services provided deserves recognition.

A factor which affects administrative services and virtually all programs in the school district is the separation of various offices for support of programs in the school district—i.e. the Educational Service Center (Colby Avenue), the Special Services Offices at View Ridge (Alder Street), the Longfellow Building (Oakes Avenue), and the Maintenance Center (Everett Avenue). This characteristic was noted by all 22 of the people involved in the review as doubtless it is evident to students, staff members, and patrons of the school district. It is certainly not a new problem nor one which can be easily or quickly addressed. Communication and coordination are less effective than might be true with services centralized and there is a significant loss of time. Addressing this challenge should be an extremely high priority, but doing so in the era of budget strain and reduction may require creativity.

Comment on administrative services is included throughout other sections of the report.

B. HUMAN RESOURCES—PERSONNEL/EMPLOYEE RELATIONS

The Everett Public Schools commissioned a management review in 2001, which included scrutiny of the area of Personnel and Employee Relations. It was instructive to examine that report and determine how the present operation seemed to compare to what was described in the earlier report. There were several recommendations from that earlier report, which were pertinent. One was that it seemed desirable for the human resources operations to be more closely tied to the superintendent's office rather than working through a deputy superintendent. That has been accomplished in that the position of deputy superintendent has been discontinued. The executive director of human resources is a cabinet member and presently reports directly to the superintendent. The department was encouraged to focus upon becoming more user-friendly and to respond to personnel changes more quickly. Those concerns have been addressed in listening to and observing what is being done in this area.

Another area of concern dealt with the consistency of employee evaluation and the willingness to address evidences of deficient performance. A good deal of time has been spent in training those in supervisory positions to provide a consistent and active approach to addressing deficiencies.

OBSERVATION 1

It appears that a good deal of work has been done in updating job descriptions from the period of the 2001 management review. A person was employed for the purpose of assisting in this work. It is intended that a software program(s) will be utilized to assist with keeping job descriptions up to date.

OBSERVATION 2

There is very detailed attention paid to the process for employing people in the school district. The concept of "position control" has emerged as a critical consideration for school districts. Given the large majority of the district's budget is dedicated to paying for personnel costs, the ability to exert control over the tasks associated with employment are of great importance. The Everett Public Schools has developed a number of careful procedures to assist with the various activities involved. The following practices appear to be institutionalized in support of this work:

- The school district has wording in collective bargaining agreements, which prescribe the opportunities to be afforded to present employees to seek different positions. Those steps are set out and followed by the Human Resources office to ensure that inside applicants receive the chance to pursue a different position as they are entitled.
- A second effort is ongoing in the form of recruitment of potential new employees when openings will need to be filled from people outside the district. There are publications and materials provided by the district directly to people, available at meetings, and at other outlets for recruiting potential applicants.
- A third dimension is represented by the equal opportunity and affirmative action work undertaken in the school district. The present workforce undergoes regular analysis in comparison to the available workforce and targets are set for protected classifications. The district monitors its progress in seeking the targets set and those are adjusted as experience determines. It appears that there is a good faith and effective effort to achieve a workforce, which is representative of demographics within the area.

- An initial step in filling positions is focused on submission of a Personnel Action Form, which is evaluated as to budget capacity and other criteria. An approved form may then proceed to posting as per prescribed contractual terms and a screening process (termed “WinOcular” system) that result in determining a pool of applicants. There are steps for the interview and assessment functions, reference checks, and providing an administrative and/or supervisory recommendation. The system appears to have the necessary safeguards in terms of seeking appropriate, qualified applicants and proceeding in a way, which protects against making unsupported fiscal decisions.

OBSERVATION 3

There is a proven system in place for analyzing the requirements for various positions in terms of certification/endorsement as well as the requirement that the district meet the criteria for Highly Qualified Teacher staff. The district provides a report on any staff members assigned to out of endorsed areas with the steps being taken to support the staff in the specific subject area. In addition, the number of teachers not meeting the Highly Qualified criteria is reported along with the steps taken to provide training and required notification. The number of staff members out of endorsement and/or not meeting the Highly Qualified standard appears to be small for a school district of this size (21 teachers and 30 teachers respectively), and it appears that the district is taking appropriate steps to support these assignments.

OBSERVATION 4

School districts are required to meet a variety of requirements related to equal opportunity, protection from harassment, due process, wage/working provisions, non-discrimination, and background checks. A part of the responses to these requirements was alluded to above in the note regarding the filling of positions. In addition, there appears to be proper office procedures, staff notification, training, and follow up to demonstrate a good-faith effort to satisfy the regulations. There is notification to new and present employees of their rights and available responses to concerns as well.

OBSERVATION 5

The certificated employees of the district who are covered by the Everett Education Association contract; employees who are not part of a union; and employees who are part of a union, which is a trust participant, are covered by Everett School Employee Benefit Trust Agreement. This agreement is both a VEBA trust and a self-insurance program. The trust obtains insurance coverage on behalf of the covered employees for medical insurance, prescription drug coverage, dental benefits, basic life and accidental death/dismemberment, long-term disability, voluntary short-term disability/supplemental life, and long-term care benefits. This is almost a unique approach in the state and was begun in 1985. It appears to offer unusually competitive rates to employees and a substantial positive advantage for the school district. There is a small number of staff employed to operate the trust, but it appears to function effectively even through the “crunch” times of open enrollment.

OBSERVATION 6

The collective bargaining process is important for all school districts and Everett is no

exception. It appears clear from the detail contained in collective bargaining agreements that there has been a long history of extended negotiations—usually such detail results from a significant amount of time spent at the bargaining table. It is the pattern of the school district to use the services of a paid negotiator who is accompanied by a team of school district administrative/supervisory personnel. It appears that the collective bargaining process has functioned adequately in the sense that agreements have been reached. It also appears that in terms of labor relations with the Everett Education Association, there have been some serious issues as noted by employees and covered in the media. It is not within the scope of this report to delve into any specific issues, but it appears justified to offer a brief recommendation.

RECOMMENDATION

The atmosphere between the board of directors and administration with the education association is of importance to the entire system and community. It appears that there is an important opportunity available at this point in time. A superintendent still new in his tenure along with an array of challenges for the district to confront (educational and fiscal) offer the ingredients for seeking a strengthening of this atmosphere. There are positive signs as witnessed by the resolution of bargaining between the district and EEA at an unusually early time. It seems worthwhile to offer support to efforts to improve communication and trust between these parties. That will be enhanced by the continuing investment of time as seems to be going on now. A reason for alluding to this here is that investing time requires support from those involved with both parties—the board/administration and the members of the EEA. Building trust may take time and some risk, but it certainly seems a worthwhile goal.

OBSERVATION 7

There is a clear structure dedicated to observing the requirements of the bargaining agreements. The administrative staff has tools to assist in administering the contracts and there are guidelines and staff identified to help where needed.

OBSERVATION 8

From a general standpoint, there appears to be a service orientation prevalent in the system. It seemed generally apparent from people that they see the school district structure as oriented to help and to do so in as timely a manner as can be achieved. This seems important to note since there have been some cutbacks in staffing, but people appear to feel that service or responsiveness have been maintained.

OBSERVATION 9

There are clear guidelines in place for responding to grievances, but the most current experience does not seem to reflect an extraordinary incidence of such complaints.

OBSERVATION 10

The area of professional development for staff members is a logical topic under Human Resources. It is also pertinent under the area of Teaching and Learning. The Human Resources Department provides organizational support for a variety of professional

development learning opportunities throughout the year. Some of the classes and trainings are related to specific subject areas (e.g., math), specific grade levels (e.g., Kindergarten), research (e.g., using brain research), schools (e.g., an elementary school), and to grade-level areas (e.g., high school). The array of opportunity looks varied and impressive. One of the variables in terms of utilization and the relationship of training to improving instruction is related to how/whether teachers are applying their additional paid time in utilizing this training. This study did not offer adequate opportunity to evaluate professional development from this vantage point. A review of the collective bargaining agreement indicated that there is a division of how additional teacher time is spent in terms of direction—some time is directed by the school or district and some is self-directed by employees.

RECOMMENDATION

The continuing rise in achievement standards and the school district's commitment to improving student learning makes it important to strengthen the impact of professional development. From a general standpoint, it would be beneficial for the schools and district to have more ability to direct training to help ensure it occurs where most needed. This is obviously a sensitive topic since it relates to collective bargaining, but it seems valid nonetheless.

OBSERVATION 11

There is a good deal of staff training directed at meeting legal requirements and/or requirements of program implementation. Some examples include training in handling blood borne pathogens, safety, first aid, Medicaid billing, hazardous materials, use of important software, due process, discipline, leadership, etc. There are training opportunities offered in these kinds of categories each year—some are required, some are discretionary. The school district appears well positioned to cover training of this kind and is proactive in seeing that it is done. (Some of the training is directed toward new employees, and it appears to be well planned.)

In summary, the Human Resources program in the Everett Public Schools is one of the best organized and efficient seen in the course of the Management Review program.

C. PLANNING AND EVALUATION

This area is focused primarily upon general planning and evaluation of broad district progress. Schools and school districts are subject to a variety of requirements that relate to planning and evaluation. This study included review of only part of the activity that is included in the work of planning and evaluation. Each school is required to create an annual school improvement plan. These school-level plans are based in part on evaluation and data (e.g., classroom-based testing, standardized tests of various kinds including the state measurements of student progress, specialized tests such as those administered as part of the National Assessment of Educational Progress, and others). The testing information helps schools in evaluating the effectiveness of present programs and points to plans for next steps or needed improvements. These plans in turn provide information for the school-district level where the district-level staff and the board of directors evaluate what is being learned at the schools and for the district level as a whole. Beyond these kinds of evaluation and planning activities is the work—which looks both short term and long term—in Everett. This is reflected in a large-scale district/community strategic planning initiative.

OBSERVATION 1

The ability of individual teachers and schools to plan effectively is directly related to access to accurate and timely information about student progress. Schools in Everett are involved in carrying out a variety of testing, studying the results, and adjusting instruction accordingly. This is not exactly uniform across the school district, but clearly there is commitment throughout the system to be doing this work on a consistent, thorough basis. (Two of the efforts are the State of the Schools Review and the Review of Evidence, which are intended to support the planning efforts.)

OBSERVATION 2

The central office administrators have immediate attention given to schools that have gone into AYP status (i.e., have fallen below federal Annual Yearly Progress levels for students). A well-articulated plan was developed with the site administration and teacher leadership team. This plan focused on interventions, useful data, and actions steps, which are developed and implemented. The use of in-district sequestering of the building team at the Lively Center was used for these building teams to work and have assistance from Central Office staff in the development of their plan. The school improvement plans were impressive as they had areas of intervention identified as “school actions, grade actions, and classroom actions.” Interviewees from the school, mid-management, and cabinet levels were able to articulate the AYP improvement plan for each building. This speaks of the clear articulation of the need and planned improvement action steps. Two of the schools moved out of AYP status for the first year, and holding the performance for a second year will move them completely out of the status. (It appears from OSPI reports that Everett Public Schools moved from 13 schools having some level of AYP non-compliance to nine schools the following year.)

OBSERVATION 3

The school district is also engaged in work at curriculum alignment and implementation and has a department for that purpose. While this topic would be most logically mentioned in the

area of the report on teaching and learning, it has a relationship here since the ability for effective instructional planning and evaluation to be done is affected by this work. It appears that the school district is well along with alignment of curricula to required standards and, where there is more to be done, work is underway (e.g., mathematics).

There is a descriptive chart of the school district's testing activity at the following site.

<http://docushare.everett.k12.wa.us/docushare/dsweb/Get/Document-23321/2010-11%20District%20&%20State%20Asmt%20Calendar.pdf>

OBSERVATION 4

The school district also has a strategic plan oriented to the current school year, which has a series of levels of objectives and actions aimed at strengthening instruction and learning. These statements are directing the work of the school district during the school year and reflect the areas of need that can be tied to school improvement plans. Beyond that, the school district has embarked upon creating a new overall strategic plan; and it is being developed through five community engagement sessions, four board work study sessions, and further visioning work involving the community (October 22–23). Following that, the key components for a new strategic plan will be assembled, and a new plan will be ready for launching in 2011.

RECOMMENDATION

It is not yet possible to see the final strategic plan, but there are two recommendations, which seem worthy of mention based upon experience with school districts in the state generally. First, it seems helpful if the strategic plan can continue to form an umbrella for school improvement plans—the degree to which the board of directors and community line up behind those plans will significantly aid in their success. Secondly, the need for annual evaluation and modification of the plan where needed is essential. It is unlikely that this will not be accounted for considering the pattern of the district, but seems important enough to underscore. Long-range or strategic plans will be viable if they are responsive to changing needs.

D. COMMUNICATIONS

The Communications program in the school district has a strong history of effort at both gathering information from the community and providing it for the community as well. As with most school district departments, there have been budget cutting changes. There has been a reduction in staffing and the ability to gather information is particularly strained. Unfortunately, the budget strains have come at a time when the importance of clear communication seems particularly crucial. Despite the strain of reduced budget, the communications is excellent in effort and quality.

OBSERVATION 1

Presently, the school district utilizes a variety of approaches to providing information:

- A community newsletter entitled Everett Schools is distributed three times a year.
- Newsletters to staff members on a variety of topics.
- A school district calendar.
- In addition, the school district produces an electronic newsletter called “Newslinks,” which goes to all staff members of the school district. A variety of information is provided including information about the work of the board of directors, the district-level departments, school information, and so on.
- The school district provides an email link, “InTouch,” for people who wish to receive information; it is currently used by staff members, community members in general, volunteers, and parents. There are approximately 12,000 subscribers for this service.
- The district has begun using social networking—Facebook and Twitter—to reach audiences who are using these methods for information and to capitalize upon the friend-to-friend leverage that such social networking provides. The district has found Twitter to be especially helpful as a way to quickly reach media outlets who have signed up to follow district news.
- The district sends senior citizen school neighbors personalized letters twice a year. These letters, coming from either a school principal, or most recently, from the new superintendent, explain highlights of activities at the neighborhood school, opportunities for volunteering, and ways to be involved in education.
- Coordinated through the Communications Department, the superintendent annually meets face-to-face with approximately 200 “Key Communicators”—those community members and parents considered being respected and credible. These breakfast and lunch meetings allow the superintendent to give an update on key district issues and the attendees an opportunity to discuss or ask for more information.

RECOMMENDATION 1

The school district appears to be providing solid coverage of information related to schools and the school district. It may be helpful to consider how it might be possible to strengthen the stream of information flowing into the school district. The “InTouch” network certainly would offer, and perhaps does offer, an opportunity for people to provide feedback.

RECOMMENDATION 2

In the past, the school district provided information for targeted audiences that might have unique interests. One example might be younger citizens with no children in school. Other strata might be the business community, which is a key element in the school district's group of stakeholders. It will probably be difficult to replicate such efforts with less available staff, but there may be merit in giving thought to the possibilities.

OBSERVATION 2

Over the past two years there have been instances in which the media has been critical of the school district's actions and responsiveness in providing information to media representatives. The incidents giving rise to that criticism are not specifically germane to this study. However, the subject of district responsiveness to questions and the concept of transparency are important.

RECOMMENDATION

There are new people involved in the school district at the board, administrative, and staff level. Based upon what was learned in the course of this review, there is a very strong interest in the school district to provide information in a timely and responsible manner. That interest has been the subject of discussion and action, but there is need to consider what more can be done to support the interest. The following thoughts are offered for discussion—the degree to which they are appropriate is for the school district to decide.

- Continue to seek out opportunity to meet with and understand the timing of information needs for the media representatives, while providing the most effective avenues of seeking information for the media as possible. This involves building trust based upon responses that are found acceptable (i.e., responding to information about events, problems, and news that requires care on the part of both parties).
- The school district may give consideration as to how to respond to inquiries from media sources in a consistent fashion with the “chain of command,” regarding information being made clear. (It is important that the people with the correct information be involved and that those who are not completely informed refer the questions responsibly.) In other words, be attentive that people within the school system understand who should be the spokesperson for the school district and who should support that spokesperson with information.

Parts of this discussion are:

- When should the board president be the spokesperson?
- When should the superintendent be the spokesperson?
- When should the director of communications be the spokesperson?
- When should a principal be the spokesperson?

While these questions may be clear to some, it appeared somewhat fuzzy in talking to people during the review experience.

- Whenever possible, it would be helpful if questions or requests for information be

examined for just what degree of candor is possible. The most positive position for the school district is to provide as much information as is permissible under the law and in as timely a fashion as is practical—in other words, seek the highest level of disclosure the school district can defensibly provide. Some incidents or topics require more confidentiality than others.

E. GOVERNANCE

This portion of the review is primarily focused upon the work of the board of directors, the superintendent, and administrative and supervisory employees. There are two relatively new board members (just under a year of service at the time of the review), a superintendent just into his second year, and new people in some other building-level administrative positions. One perspective to consider with regard to governance is the degree to which the school system seems to be “organized” (i.e., the degree of impression one receives in the school district offices and in the schools that people know what they are doing, work is being done, people are helpful, the schools feel safe, etc.). While it may seem too subjective to be of value, for people who have worked with school districts for over 40 years, it seems possible to sense this kind of quality. The Everett Public Schools gives much evidence of being well organized; having people employed who know their jobs, and being very conscious of how well the school system seems to be functioning. Governance is in part the work that contributes that sense of direction and purpose. This management review process has been in operation for almost 20 years and many school districts have been involved in studies. The Everett Public Schools gives evidence of strong administrative leadership among the very best of those involved in such studies.

There is a history of cohesive boards of directors over past years. A skeptic might say this is a manifestation of being “in-grown,” insensitive to the school system generally and the community as well. The record in the past does not support that skeptical view. It seems clear that the board and the school system have been among the leaders in the state in seeking improvement in instruction and overall student achievement. The record of work done with instruction, curriculum alignment, assessment, graduation rate, etc. supports that. There has also been a history of cooperative, trusting relationships between boards and superintendents. The picture of the past has a very positive tone. There have been issues over the past two years, which have affected the work of the district. A serious conflict in connection with the use of a camera in a classroom and criticism by some at the confidential nature of the recent superintendent search, have been the subject of criticism in the media. For some, particularly in the media, this has raised a question as to how committed the school district is to “transparency.”

The positive accomplishments of the school district over time, combined with criticisms related to the issues mentioned above, form a backdrop for the beginning tenure of a new superintendent and two new board members. The following points, for example, were among many which emerged in discussions with board members and others:

- Board members in almost every instant were positive about the work being done in the school district.
- Board members and others look forward to building on the success of improving the graduation rate by reaching lower in the grade levels and helping students at risk of dropping behind academically.
- People generally feel that the programs and facilities in the school district are of high quality.
- The excellence of the Human Resources program, the emphasis on academics, the atmosphere of wanting to serve and to help all were reiterated by many people.
- While there were references to past issues, there were many positive comments

recognizing the effort of the board to provide more information about what is going on in the school district and to build bridges in terms of communication with staff, community, and the media.

- The new superintendent has significantly increased contact and information with the board and instituted a new level of accountability for him and the staff.
- The work done in district goal setting for the short term and the significant commitment of time and resources to staff and community involvement in creating a new strategic plan are viewed as very positive.
- The superintendent's efforts to meet with stakeholders in the community have been sincerely appreciated as witnessed by the work with the Hispanic community, NAACP, etc.

OBSERVATION 1

The superintendent, in his second year of work in the school district, considers the work done in support of the board of directors to be a primary, critical responsibility. This attitude can be observed in discussions, in examining the quality of preparation for board meetings, in the nature of materials produced for the work of the board, and in the timeliness of addressing board actions and directions. As mentioned in an earlier section of this report, the school district is not heavily staffed in district-level administration from a comparative standpoint. A concrete illustration of that is the elimination of a deputy superintendent role. The new superintendent is now without someone serving in that function. There are a number of impacts that circumstance causes, and one is in terms of the workload supporting the board of directors. Presently, the superintendent must see to the work supporting the board while also maintaining the activity of monitoring the programs of the school system, supervising a significant number of administrators and supervisors, and making the daily decisions needed to help keep the system moving. There is merit to considering how the board of directors is impacting that part of the superintendent's work.

RECOMMENDATION

The current fiscal situation facing school districts in Washington includes serious strain on budgets. The predominant tendency is to look for ways to cut expenses; and there is pressure to look particularly at the administrative staff. The Everett Public Schools has made cuts in the administrative portion of the budget. The district may find it prudent, however, to consider the possibility of restoring a deputy superintendent position. There appears to be an impractical work level for the superintendent at present.

The superintendent has supported an approach of providing all the information requested for the board's work. In most instances, requests are logically connected to the topics on the board's agenda. A variable, however, is the amount of additional information that may be requested by the board during its work or from an individual board member. A superintendent is in an awkward position when responding to a request by an individual board member. The initial reaction for most superintendents is to gather whatever is requested. In recent months, there has been an inordinate amount of such requests, primarily from one board member. This is known to the board of directors as a whole. It is imperative, however, that it be commented upon in this report. There must be some

method instituted to govern the number/volume of such requests. The superintendent and his office staff simply cannot keep up with day-to-day responsibilities and respond to the volume of extra requests or demands for clarification not shared by other board members as has been experienced in recent months. The present Board/Superintendent Protocol contains wording, which would provide for the board president to determine in discussion with the superintendent when requests are such that the work of the superintendent and/or staff is disrupted. If this has been adequately addressed by the time this report is received, then the point is moot. If not, it should be taken care of.

OBSERVATION 2

One of the facets of governance in regards to the role of the board of directors is how it functions as a body. This is primarily connected to the climate and conduct of board meetings, the chief forum for board deliberations. There is evidence in school district documents, in press coverage of meetings, and in numerous personal reports gathered during this study that the present atmosphere surrounding the board is seriously hampered by acrimonious comment, discussion, and harshness. It appears to be initiated by one Board member. This situation is recognized throughout the school system and by people from the community. It is inconsistent with the principles of civility the board and staff seek to support among students and in the school district. It is damaging morale among the staff and distracting those working with the governance of the schools generally. One serious aspect of this problem is the harm that can occur to the effectiveness of an individual board member. Any person elected to a school board of directors legitimately brings with them their personal views, criticisms, advocacies, etc. The board as a whole must acknowledge those and respect the views of a new member. The ability of a new board member to be effective in advocating for certain views or advancing criticisms/challenges, however, can be dramatically affected by his or her demeanor and approach. Additionally, an individual board member to be effective should balance personal priorities with the overall work the board must address. A board as a whole can tend to marginalize a person who exhibits continued attacks or aggressive behavior. If that occurs, the new board member may lose the chance to be influential in the long-term work of the board. In a very real sense, rather than effectively representing the citizens who elected the board member, the ability to serve effectively can be seriously compromised. The board, on the other hand, in order to proceed with the work of the district may feel forced to adopt a permanent posture of working around the person due to past acrimony—this can minimize the positive contributions the person might otherwise have been able to make in the future. Thus, everybody's performance is diminished.

RECOMMENDATION

The board and superintendent have subscribed to a comprehensive description of how they will work in carrying out their contribution to the work of the school system. Excerpts from this protocol are pertinent:

“A healthy climate for communication requires trust, respect, and a fundamental belief in the goodwill among team members. Messages are open, honest, and tactful. We work to minimize misunderstanding and reduce conflict. We strive for mutual understanding and support.

As a leadership team, we make the following commitments to minimize misunderstandings and reduce conflict by:

- Supporting each other constructively and courteously.
- Maintaining confidentiality.
- Focusing our discussions on issues, not personalities, keeping the tone and demeanor of discussions professional by avoiding defensiveness and personalized anger.
- Encouraging constructive disagreement.
- Upholding the integrity of every individual.
- Pursuing thorough understanding.
- Expressing our opinions and positions on issues honestly and openly while being sensitive to others' opinions, demonstrating that we have recognized others' points of view.
- Respecting the limited resource of staff time in making individual and whole-board requests for information and committing that individual requests for information will be shared with all board members.”

It seems absolutely clear from the work done in this review that the principles quoted above are in need of support. This problem may currently be the most serious challenge facing the school district. The primary function of the school system is to help each student achieve the best education he or she can. The board of directors is the entity with the heaviest responsibility to see that the mission is achieved, and presently its work is being impaired.

OBSERVATION 3

The governance work of a school district is fueled by information. A characteristic of school districts is a preponderance of printed information. This presents a challenge in the work of the board, specifically regarding the topics to be addressed at a meeting. In many districts, it is a challenge to prepare enough background for the board on all agenda topics, reduce these to printed documents, and deliver them to the board in timely fashion—and it is a challenge for board members to find adequate time to review the usually large packet. The following information describes an effective use of technology designed to help with these challenges.

“Everett Public Schools is leveraging the Internet through BoardDocs to enhance governance and provide a tool for better communication with the public. This eGovernance tool replaces the old method of compiling, printing, binding, and distributing numerous copies of paper meeting documents. By making meeting agendas and supporting documents available on the Internet, we distribute documents associated with a public meeting more quickly, broadly, and efficiently.”

This approach, in the form utilized in the Everett Public Schools, provides all of the pertinent information for a board meeting on the school district website in electronic form. The process is extremely helpful and user friendly. Additionally, the candor and detail

provided in terms of background, recommendation, and rationale are superb. This process exemplifies the frequently mentioned concept of “transparency” at a new level. The board, superintendent, and staff should be complimented.

OBSERVATION 4

In a management review, there is interest in the vehicle or tools that a board and superintendent use in providing leadership for the school system. In Everett, the following statement is made to guide this work: The board seeks to guide the district through four interconnected sets of priority-setting tools, which are updated periodically.

- Strategic Plan and Related Action Items
- Superintendent’s Goals
- Annual Goals for the Board of Directors
- Annual Operation Budget

There has been mention of the strategic planning process earlier. It is worthy of note, however, that there are emphases placed on the other three items mentioned. A superintendent functions best when there are both generic responsibilities assigned (e.g., the job description), as well as priority goals for each year. That is the case in Everett; and they are well developed in terms of task and accountability. It is also important for a board of directors to have its goals as well—this is not the case in many school systems, but the Everett School Board has done a quality job in describing its priorities. And, finally, the budget is identified, which in a real sense is the ultimate, controlling plan for the school district. It is properly viewed as a major tool for the board in carrying out its responsibilities.

OBSERVATION 5

In a number of instances, this report has referred to the “new” superintendent. That may be a disservice for a person well into the second year of work. The style and how the superintendent is perceived are developed over time; and so, the impressions gained during the review process may still be in an initial stage. A number of statements recurred frequently. Many people commented upon the superintendent’s intensity of focus on student achievement—it seems clear that this is an authentic value for the superintendent and influences his approach to his work. Another quality, which was frequently mentioned, was the almost unbelievable work ethic. Many people spoke of the long hours put in and the practice of using every available minute to be working and accomplishing things. Many people commented upon the effort the superintendent is making to be visible—in the schools and in the community. Despite the sometimes frenetic work schedule, people seem to generally consider the superintendent approachable. Those who work most closely with the superintendent at the district level, describe the work pace to have been stepped up a notch. That is not to say people did not work hard in the past—it is rather a reflection of a somewhat slimmed down district-level staff working very hard to accomplish growing levels of results. One thing which seems very much to permeate the entire system is the priority of strengthening student achievement—that is the common mission. The review included discussions with district-level administrators and supervisors as well as principals. At the district level, the meetings for communication, planning, and coordination are usually held

weekly and are lengthy—they can take the majority of a day in some cases. For principals, there are monthly leadership team meetings, which include the superintendent. There are also periodic visits to building principals from cabinet-level administrators responsible for administration in two areas of the school district. Overall, there seems to be an effective meeting/contact structure, which may border on seeming “too much” at times—that is often the case when the top administrative level is seeking to communicate and collaborate.

The overall perception regarding the superintendent is very positive. The highly energetic, focused approach generated very few critical comments, but to be thorough they are mentioned below:

- The superintendent’s visits to schools seem in some cases to be too short, almost “cameo” appearances. (There are 26 schools in the school district—it is hoped that the superintendent would visit all schools, and where possible, to spend enough time to gain a sense of how the work is going there. This is unquestionably a challenge in terms of time.)
- The work pace of the superintendent, and his communications or contacts at hours beyond the work day, has caused at least one person to wonder if it is done for effect. (The superintendent has practiced almost a “24/7” approach to his work for many years. While it might occur to someone that it is being done for “show,” the many years of such effort would argue for authenticity.)
- The superintendent lives and breathes the Everett Public Schools. He identifies with every positive and negative comment encountered. He speaks of the school district and his work very personally. One person commented that it might be interpreted as arrogance. (This quality would be in the eye of the beholder. The personal identification with the work of the schools is viewed by most, including board members, as positive.)

F. BUSINESS AND OPERATIONS

The Everett Public Schools, as alluded to above, is a relatively large and complex organization. The annual budget is in the range of \$200 million and the fiscal structure needed to deal with the various component funds requires a sound plan. The school district has for several years gone to extra lengths in terms of providing examination and display of its financial program. The district has reported in its Comprehensive Annual Financial Report a level of display, which is unusual in depth and information. The approach to accounting is in conformity with generally accepted accounting principles as specified by the Governmental Accounting Standards Board. The intent of this approach is to provide assurance for the community regarding: (1) the safeguarding of assets against loss from unauthorized use or disposition, and (2) the reliability of financial records for preparing financial statements and maintaining accountability for assets. The school district board of directors adopts annual budgets for all governmental funds, establishing the level of budgetary control at the fund level. The system is based on an encumbrance accounting system. Cash which is not being utilized is invested through the Snohomish County Treasurer. There is both an annual budgeting process and long-term projection of likely financial conditions to assist with needed future adjustments or likely changes. The school district protects against accidental losses through coverage in the Washington Schools Risk Management Pool (for property and liability coverage) for workers' compensation through the Puget Sound Workers' Compensation Trust and for unemployment costs through the Educational Service District 189 Unemployment Cooperative Pool.

As required by law, the school district is audited each year by the Office of the State Auditor. The most recent audit available indicated the school district to be in compliance with regulations—these audits concentrate on (1) internal controls, (2) financial statements, (3) federal program compliance, and (4) compliance with applicable state and local regulations. Organizationally, the executive director for Finance and Operations reports directly to the superintendent. In this department, there are administrators for Business Services, Information Systems and Technology, and staff members working with accounting, payroll, fiscal systems, and technology operations.

These functions are obviously extremely important in any school district. The educational efforts of a school system can only be implemented when the financial foundation is sound.

GENERAL COMMENTS

Finance and payroll procedures appear to be sound and comprehensive, with the acknowledgement that this review was not a performance audit. Each office visited seems to have clearly defined procedures and processes in place. There are no glaring organizational issues with respect to recent position reductions and/or reassignment of duties.

The current financial and human resource/payroll systems (IFAS) seem adequate to meet the needs of the district. It would be of value for the district to evaluate the functionality and adequacy of the financial and human resource/payroll system as it relates to the software release the district is currently operating on. The software currently installed at the district is an older version of the IFAS product. A project plan could be developed and prioritized to allow the district to upgrade to the most current version. This would help ensure continued support from the software company, as well as allow the district to take advantage of any

new functionality and improvements in the operating software.

The relationship and working environment between Human Resources and Finance was exceptional and was one of the greatest organizational strengths observed. The executive directors, managers, supervisors, and other staff appear to have a good vision of what goes on in the departments. The open communication and mutual respect was very apparent. There appears to be a clear delineation of responsibilities and internal controls in place with adequate checks and balances. One of the major contributions of this atmosphere is the support of careful position control. As will be pointed out elsewhere, approximately 85 percent of most school district budgets are committed to personnel costs—hence, position control is absolutely critical. This permits a careful decision-making process that is sound for the educational needs of the school district while keeping the budget within the proper limits.

The overall staffing of the departments seems to be consistent with other districts of similar size in Washington. Support service costs as a percentage of the budget were 12.2 percent in 2008–09. This compares to the statewide average of 13.8 percent. There did not appear to be any single area where cuts could be easily identified or made without affecting current levels of service. Since there will be continuing pressure to find budget reductions, the district could look at ways of implementing efficiencies through the use of technology, which will result in reduced costs over time.

It was evident that the trust level among departments and individual employees is high. Through a variety of interviews, employees volunteered how easy it is to connect with one another. When asked why, a common theme of employee tenure was revealed. Employees know one another and have worked with one another over many years. In that time, they have learned one another's styles and process needs. One thought in this regard would be to celebrate this shared sense of the value of trust. It may be of merit to consider being intentional in supporting this quality of the district through visible displays of this philosophy. In addition, there seems to be an evident passion shared among employees generally around students and public education. A person mentioned that they enjoyed working with "really smart people doing what's best for kids."

COMMUNICATION CLIMATE

OBSERVATION

The administrators and office staff at the school sites visited had very positive remarks and feedback when discussing the finance and operations organization. Communication and service levels were reported to have improved greatly over the last two years. Procedures and policies also seem to be well communicated and understood by school personnel. The online business information manual is very informative and comprehensive; and the personalized budget reports have been greatly appreciated by school staff. There appears to be a much improved attitude, a feeling of being part of the team, and a heightened level of trust, which seems to be associated with the new superintendent. As always, the school environment can be very hectic at times and the staff needs support and guidance in the financial arena.

RECOMMENDATION

It was evident that staff members would welcome district administrators and staff visits

on a more frequent basis. This requires a challenging balancing act of job responsibilities but would enhance two-way communications between the sites and central administration and help build the culture of teamwork. Onsite visits along with regularly scheduled professional development on finance, payroll procedures, and policies would be valuable in overall effectiveness and efficiency of staff.

BUDGET DEVELOPMENT AND MONITORING PROCESSES

OBSERVATION 1

It was indicated that in the past, the budget process used for developing the General Fund budget would have been strengthened from timely and appropriate opportunities for dialogue between those responsible for management of the programs and those who complete the recommended budget plan. In interviews with central and building staff as well as a community member, the recent formation of a budget advisory task force was greatly appreciated. The information sharing and transparency of the budget process have thus been made stronger. There was reportedly a significant amount of time spent on preparing members of the committee and having them assist in the budget recommendations to the superintendent and board. The process was of substantial benefit, but involved a heavy load of information to be covered and lengthy staff contributions.

RECOMMENDATION

Outreach to staff, community, and parents should be encouraged and pursued with a well defined plan for transition of information and members. An objective might be streamlining the process and possibly developing a dual track—one for new members that need more information and time to understand the complexities of school funding and finance and another track for veteran members and staff who have a better understanding of school programs and funding. This would provide the opportunity for those needing more information to have the assistance they need while preventing overkill to those with a better understanding. This may also help keep people engaged in the process. A well-defined procedure and calendar will also ensure that the budget recommendations are timely, can be well communicated and discussed by all members of the staff and community, and provide ample time for administrative and board review prior to adoption. The school district is presently engaged in a large-scale effort to develop a new strategic plan. It would be important to support alignment of the budget to the new strategic plan of the district. This would include development of key performance indicators and a balanced picture of priorities and help ensure that budget allocations align with the priorities of the district. These efforts would also assist in the prioritization of budget reductions.

OBSERVATION 2

The budget projection and monitoring process is performed on a routine basis and reported out to the administration and board. The finance and budget staff has developed a multi-year budget projection to help improve budget planning as state and federal agencies, businesses, and individuals struggle through the current economic recession. The present budget plan seems to be well thought out and has the district in a good financial position to address the projected state budget shortfall.

Enrollment is projected to level off with a gradual uptrend beginning in 2012. When comparing actual to projected October 1 enrollment, the variance has ranged between .2 percent and 1.3 percent for 2003–2009. The actual variance has been both positive and negative and within a tolerable range over time.

The board has passed a policy with fund balance goals of 2.5 percent and 5 percent of expenditures for the unreserved and total fund balance, respectively. The unreserved fund has averaged over 3 percent and total fund balance has averaged over 6.5 percent of expenditures the last four years. There has been a decline in both percentages over that span.

Salary and benefits as a percentage of general fund expenditures have ranged from 84.22 percent to 85.63 percent of budget for the period of 2005–2010.

RECOMMENDATION

As the district develops and updates its long-term budget plan, the use of fund balance and one-time funds should be carefully designed and well communicated. The state has provided additional levy capacity on a temporary basis and the federal government has provided one-time stimulus funding to help offset state reductions and save jobs. The use of these funds for ongoing employee costs and contracts would be best avoided when possible. There should also be a well communicated plan on how and when fund balance will be used to balance the operating budget, as this could affect the board's fund balance goals and cause additional or greater funding shortfalls in the future. Some boards of directors have included a description of how fund balance will be used and under what conditions—for example:

"Annually, the Board of Directors shall approve a budget for the operation of the District after recommendation of and consultation with the Superintendent. It shall include an agreed upon an unreserved fund balance that will be accessed only upon approval by the Board for the following reasons:

Uninsured emergency situations; Unbudgeted program/service changes as approved/directed by the Board; Possible restoration of unanticipated reduced revenues; Emergencies defined as legal settlements and/or agreements and government mandates; and other unexpected situations that impact District finances.

Use of the unreserved fund balance is restricted to emergent situations as defined above and approved by the Board. The fund reserve may be used to maintain a positive cash flow. At least monthly, along with standard financial status reports, the Superintendent

shall provide information on the status of the reserve fund account.”

The salaries and benefits as a percentage of general fund expenditures has fluctuated over the past 10 years and should be monitored with a goal of staying within the 84–85 percent range.

OBSERVATION 3

There is change in the Everett Public Schools in terms of ethnic and socioeconomic demographics. One challenge for the school system is to be responsive to that on a continuing basis. Part of that response will be anticipated in the new strategic plan. The need for cultural competency training and tools will doubtless become increasingly important.

RECOMMENDATION

One element that is related to this subject is connected to fee waivers (planners, uniforms). It would appear there may be variations among schools as to how these are implemented, perhaps contributing to an impression of inequity. A district-wide structure for things such as fee waivers and support for those to be funded may be a helpful tool.

OBSERVATION 4

The staffing process for administrative and instructional support, as well as for classroom teachers at the schools could be examined for consistency. The staffing levels seemed to be compared to the previous year’s level and adjusted based on discussions with the principal. Enrollment and contractual goals are used for some staffing levels, but it was not clear that allocation models are being used for administrative and instructional support staff.

OBSERVATION 5

The extreme pressure on staff time and the need to focus upon educational efforts may raise questions about cost benefits. An example may be in the comments related to the Lost Library and Textbooks initiative. This would have a very positive objective, but the time invested might be compared to the value of the results to see if it is practical for the future.

RECOMMENDATION

The refinement of staffing and allocation models may help the district gain efficiencies and a more equitable allocation of staffing and funding across the district’s schools. If not now employed, the use of demographics, mobility of students, number and size of programs, free and reduced lunch percentages, number of students transported, etc., could be considered when determining the level of support staff at each site. Any employee contract limits or goals would need to be considered as well.

PAYROLL

OBSERVATION

The Payroll and Human Resources personnel appeared to very knowledgeable on how the human resource/payroll system works. The Payroll manager sends out a monthly newsletter to all employees keeping them up to date on emerging payroll issues and processes. The working environment and relationship between Human Resources and Finance was very collegial. The executive directors, managers, supervisors, and other staff appeared to have a good vision of what goes on in the departments.

The use of system support analysts in the implementation of the IFAS systems appears to have worked well. They are reported to have become an invaluable resource and knowledge base for IFAS and the business processes associated with the systems. They assist with the training and on-going support of the system and the coordination of system upgrades. The segregation of duties and internal controls appeared to be in place based on a limited review. Edit reports were in place to review all the changes made during the current payroll cycle and a trial payroll is run by an independent person for review prior to the actual running of the payroll cycle.

RECOMMENDATION

It is recommended that the project plan for the upgrade of the IFAS system to the most current version be updated with the appropriate allocation of both technical and departmental staff. It would be helpful for the plan sponsors (administrators) to provide support and take an active role in the successful implementation of the software upgrade within a reasonable timeframe. The improved functionality should provide operational efficiencies in the long run and allow for ongoing support from the vendor. The district could also consider eliminating the mailing of earnings statements and require employees to print their own stubs. This would be an immediate cost savings. This could require additional costs to the district for security upgrades if the employees are allowed to access employee self service from home and/or print their earnings statements from a remote (home) location. It is also recommended that consideration of changes/upgrades involve both the finance and technology perspectives, now that the two departments are functioning together.

CASH MANAGEMENT

OBSERVATION—INVESTING

School districts inside Washington State are required to invest through their particular county. The Everett Public Schools has developed a strong collaborative relationship with Snohomish County's treasurer and investment staff. Rates charged to the district by the county are lower than those paid by King County districts. The lower rates save the district money, an important advantage in tough economic times. The Snohomish County Treasurer's office has a strong customer sensitivity perspective, including their efforts to ensure that district resources are well managed. County staff provides valuable information to district staff regarding best practices for investing in various funds. The district is able to collaboratively work with county staff to best utilize appropriate vehicles for managing investments and cash.

RECOMMENDATION

District leaders should commend Snohomish County for its attention to and support of district investments and banking needs.

RISK MANAGEMENT

OBSERVATION

Risk Management encompasses many aspects of district organization and behavior. Reducing risk includes management of systems and programs in context of reducing theft, loss of funds, injuries, and other potential liabilities. The district is a member of the Washington Schools Risk Management Pool. The pool has a strong financial position and has a track record of adequate financial strength to support the district. The Pool provides training to district employees over a variety of subjects that reduce risk. The Pool works with district leaders to address risk related events. The efficiency gained through pooling provides the district with outside resources at an efficient cost.

The district has a process in place to control theft. Schools take control of onsite inventory seriously. That ownership attitude saves the district money.

An equipment replacement program exists. The program regularly alerts district leaders of the need to replace aging equipment that could affect the safety and welfare of employees, students, and the public.

The district has a Safety Committee. Members work with the Risk Pool to stay informed about risk issues. The Safety Committee provides training to pertinent employees and oversees keeping risk and safety policies and procedures up to date. Employees take the policies and procedures seriously, resulting with the district experiencing a lower than average number of risk related problems.

The district has an employee wellness program with an explicit goal of helping employees take care of their health, supporting other employees, and reducing on the job injuries. The program is an excellent example of a culture committed to making the Everett Public Schools a great place to work and serve the educational needs of children.

The Maintenance Department prioritizes work orders along a risk perspective. That decision model assists with reducing risk and controlling costs.

For sports, if a student gets hurt, the coach and trainer decide on the severity of the injury. Coaches decide whether a student can play based upon safety and health guidelines. Coaches file injury reports.

RECOMMENDATION

Addressing risk related issues can become a second-tier issue during tough budget cycles. The district is encouraged to maintain emphasis on reducing risk through constant attention.

The district is also encouraged to continue to attend to reducing on the job injuries and accidents. In cases where claims have been filed, settlement should be a top priority of district management. Quick attention and action, addresses cause as well as maintains morale, and a sense of the district treating employees fairly and with respect.

ADDITIONAL CASH MANAGEMENT INFORMATION

OBSERVATION

The Business Manual, ASB procedures and cash handling processes both at schools and within the accounting department are diligently followed. Significant accounting office resources are dedicated to managing cash.

RECOMMENDATIONS

While important to safeguard both the cash and the staff handling the cash, evaluation of the cost-benefit of some activities is encouraged. For example, it appears high schools assessed \$300,000 in fines with a \$15,000 collection rate. There may of course be a variety of approaches to this topic including more uniform collection processes or possibly discontinuing some collection efforts. Some possibilities related to this include:

- Consider elimination of cash counting both at schools and within the central kitchen. A single cash count at the site, with daily delivery to the bank could be considered if judged to be an adequate safeguarding of cash.
- Instead of requiring each office manager to do individual school banking, the district could consider central kitchen's armored car services for picking up and depositing all school cash.
- The district might consider allowing schools to process refunds.
- It might be worthwhile to consider bidding banking services since this doesn't appear to be something Snohomish County does for Snohomish school districts. Bank of America fees at \$8.00 per account are expensive compared to the recent bid secured by King County.
- It might be worthwhile to consider use of procurement cards within ASB.

PURCHASING

OBSERVATION

Purchasing and contract management are overseen by one employee, a standard and useful practice. That central, singular control ensures a district-wide perspective and process. Customers of the purchasing and contracts process all noted a strong sensitivity toward making purchasing and contracting process and procedures simple and useful. The integration of the fiscal system with purchasing procedures allows for efficiency with lessened opportunity to incorrectly expend the wrong funds or overspend the right funds. Customers noted a clear understanding of the contracting process; no one interviewed lacked understanding of how to approach the contracting process or expressed ambiguity over what must be done to complete a successful contract. Purchasing process clarity is due in large part to an excellent Business Office manual. The manual, available online, is updated regularly.

For “regular” purchases, the entire process is electronically based. The district uses procurement cards to assist with regular purchasing needs. Procurement cards are an efficient way to manage regular and ongoing purchasing and maintain records.

CONTRACTING

Contracting process and procedures are clearly understood and followed. Employees using contracts expressed confidence in the process and trust in business office staff to efficiently and creatively meet their needs.

RECOMMENDATION

Continued effort to maintain proper purchasing and contracting process must be addressed. As resources become more limited, the process to obtain best prices and negotiations become more essential. For example, the district has a strong relationship with KCDA, a purchasing cooperative. While that relationship provides a seamless and low-cost purchasing system, the district should continuously work with KCDA and other vendors to ensure the least overall price for purchased goods. The cost of regularly upgrading systems and documentation for contracting and purchasing needs to be a standard component of the district budget. In lean economic times, central office support budgets are often trimmed in favor of keeping as many resources as possible at the school level. Everett has an efficient purchasing and contracting system and has already cut staff to a minimum level. Additional cuts that affect the process could result in audit findings and other financial problems.

With a small and busy staff, approvals for purchasing and contracting are sometimes delayed. A single approving authority may be in a meeting or out of the office. The district should develop a back-up approval system for critical approvals related to health and safety needs.

ORGANIZATIONAL THOUGHTS

OBSERVATION 1

For future consideration, it might be important to carefully analyze infrastructure costs and changes to infrastructure including technology systems before decisions are made to move ahead on a purchase or change. The recent reorganization bringing finance and technology together offers opportunity to align plans. The merging of the two programs may take time to be fully realized, but the district will benefit from seeing these interests working in concert.

OBSERVATION 2

Each school district is facing the likely prospect of continuing pressure to cut costs. The following thoughts occurred during the review in this regard.

RECOMMENDATIONS

Possible realignment of resources:

- The production of the Consolidated Annual Financial Report (CAFR) has been recognized as exemplary and has been appreciated. The time/cost in its creation

and production may be something to reconsider if the other sources of fiscal information and reporting are judged adequate.

- The levels of classified staffing in high schools appeared somewhat higher than in other districts known to reviewers. Making comparisons between districts is difficult because consideration needs to be given to the entire staffing model (e.g., nurses, counselors, testing support). The thought is offered for consideration.
- The school district is making a significant commitment to student safety with a campus security officer and a uniformed school resource officer on site at high schools. This is a highly charged topic of course. It is suggested that as these services are assessed, there be consideration given as to whether acceptable, less costly approaches might reduce costs (e.g., more technology perhaps).
- It appeared that school carryovers seem large in some cases and possibly inconsistent with district policy. For the sample schools reviewed, carryovers are running between 23 percent and 50 percent of the annual allocation.

G. MAINTENANCE AND OPERATIONS

The Maintenance and Operations Department for the Everett Public Schools is responsible for maintaining 17 elementary school, five middle schools, four high schools, the Everett Memorial Stadium facility, the Everett Civic Auditorium, and six district support facilities. There are 367 acres of lawns, fields, wetlands, and wetland buffers included in the acreage under the school district's ownership and care. The roofs comprise 64 acres of surface and there are 78 acres of paved surface included in parking lots, walkways, and play areas. Within the facilities there are 42 acres of carpet and tile and five acres of gymnasium flooring.

Maintenance of grounds includes mowing, maintenance of fields and flowerbeds, keeping up parking lots, weed control, and removal of snow and ice as needed.

The work performed by the department also includes maintenance of building electrical, plumbing, heating, ventilation, air conditioning, roofing, and flooring systems. In addition, care of wall surfaces, alarm systems, fire suppression, and intercoms are attended to. There is also a fleet of vehicles (not school buses), which is used in a variety of maintenance services.

One of the most visible and critical functions is providing custodial services to schools and administrative buildings. Delivery of supplies and equipment is provided by department personnel as well.

MAINTENANCE

OBSERVATIONS

- The organizational structure appears to be built upon equal job descriptions. For example, all staff falls under the "Maintenance Mechanic" title regardless of their trade affiliation. This system allows for cross training, partnering on project solutions, and mixing and matching trades during peak season times.
- There are 22 FTEs in the Maintenance Department (20 trades and two mechanics).
- All Maintenance staff work one shift (7 a.m.–3:30 p.m.).
- Work order priorities are communicated well with customers. There is reportedly great follow through of work orders regardless of priority. For example, any safety or instructional needs are high priority and any beautification projects are low priority.
- There appears to be a collaborative approach between Maintenance staff and the Capital Projects and Operations staff.
- The supervisor understands the daily distribution of work orders and the training needs to ensure safety.
- The supervisor meets with staff daily for work order distribution and each trade group weekly to discuss high priority work orders.
- Weekly or monthly training opportunities for staff are planned and provided.
- There appears to be clear delineation between maintenance supported items in a

- classroom versus non-supported items. For example, installing “insta-hots” in classroom is a non-supported item and the school building is charged for services.
- Based on feedback received, the Maintenance FTE’s seem to align with the needs of the district.
 - It appears that staff members believe they have the appropriate amount/type of necessary equipment to perform their duties.

RECOMMENDATIONS

- It is recommended that the school district consider implementation of an automated work order system that ties in Maintenance and Operations to Capital Projects.
- Another recommendation is that the district considers a swing shift to minimize impacts to instructional time in the classroom (95 percent of all Work Orders are completed during instructional time).
- The reviewers feel it would be helpful to consider incorporating a preventative maintenance program with major areas (mechanical, plumbing, door hardware, etc.).
- Given the importance, it seems advisable to continue to refine communication between Capital Projects, Operations, and building customers.
- It appears that it would be valuable to further train managers and department staff related to department and district budgets. (It seemed that only the director had primary understanding and approval function for budgets.)
- It seemed that it would be valuable to consider establishing a temporary help program for the summer season.

OPERATIONS

OBSERVATIONS:

- Building hours range between 5 a.m. and 11 p.m.
- Distribution of staff:
 - High School 6 FTE (48 hours)
 - Middle School 3 FTE (24 hours)
 - Elementary 2 FTE (15 hours)
- The reviewers were told the district implemented a standards committee, which consists of management and labor participants.
- The district has implemented monthly meetings with day head custodians.
- The review team was told that 50 percent to 60 percent of the staff is English language learners (ELL).
- Management and custodial staff appear to do a good job of communicating with building staff.
- It appeared that the custodial sub pool is relatively healthy (roughly 20 FTEs available).

- The department has established an operations manual (green binder) for building custodians. For example, the green binder consists of custodial standards, runs, and procedures.
- The department has established team cleaning for carpets and hard floors during the summer season.
- The staff believes they have the appropriate amount/type of necessary equipment to perform their duties.
- There was an impression that going through a series of budget reductions has resulted in the staff reportedly feeling stressed and concerned about job security and balancing work load with service-level expectations.
- Reportedly some custodial staff members are coming in prior to their shift time in order to complete their operational cleaning tasks.
- There seems a building perception that the Operations Department has taken the lion's share of budget reductions, and therefore, building staff are careful about their requests.
- There is a chain of command approval process for supply/product purchases.

RECOMMENDATIONS

- It appears that there would be value in having an additional FTE to support the supervisory position during the a.m. or p.m. shift. (Supervisor is responsible for shift coverage of 5 a.m.–11 p.m. and evaluations for 83 FTEs.)
- It appeared that the district should consider establishing an in-depth and detailed training program for staff.
- The reviewers felt it would be helpful to initiate a monthly meeting for swing shift custodians.
- In order to provide assistance in evaluating the program and planning for budgets, it would be very valuable for the program to create a system to gather data, assess productivity, create benchmarks, etc. (The reviewers can describe such a system.)
- It may be helpful to consider a cleaning program that simplifies communication for ELL staff.
- Based on input received during the review, it seemed wise to reconsider how to cover absenteeism. For example, currently pulling FTE from secondary school buildings to cover elementary buildings, which may limit the cleanliness in both buildings.

H. TRANSPORTATION

Everett Public Schools' Pupil Transportation service levels are divided between district owned vehicles operated by district employees and contractual services provided by Durham Transportation Services.

District service is primarily for McKinney-Vento (homeless student) transportation, while Durham provides to-from school transportation, special needs, field trips, extra-curricular, and other related services.

Pupil Transportation serves 17 elementary schools, five middle schools, three high schools, and one alternative school.

The district owns and operates 13 school buses, five cars, and eight vans. Durham owns and operates 115 school buses.

The district built a transportation center several years ago that houses the fleet, the operations, and the maintenance for Durham. Although an unusual circumstance, as nearly all contractors have to find facilities for their operations, a district-owned facility certainly enhances the relationship between the two entities. The district also uses satellite facilities to house buses.

Frequently, the Pupil Transportation industry talks in terms of safety and efficiency. However, there is a critical service-oriented component that is sometimes overlooked and/or omitted in the conversations—effectiveness. Safety and efficiency are critical, but transportation must meet the needs of the customers/clients—the children, parents, schools, and communities that are served.

The most important factor in providing safe, efficient, and effective Pupil Transportation service starts with the leadership that is presently provided by the executive director for Facilities and Operations—both to the district's staff as well as to Durham. It is evident that the quality of operations in the Transportation Department is directly related to this leadership and support. This person is a strong advocate for the participatory team concept, and he has developed such with his district transportation manager and Durham's manager. They in turn have fostered a similar atmosphere throughout their individual departments. Their mission and goals are clear. The support staff and the driving staff feel supported and valued. Such support fosters it in others—the employees in both the district's department and in Durham's are in turn supportive of their managers and of the mission and goals at hand.

It is this leadership at all levels that has allowed Everett Public Schools to successfully maneuver through a period of cutbacks and reductions in transportation. The district reduced daily hours within their Transportation Department and installed a new software routing program as well. While unable to assess the impact of these steps until revenue and costs can be analyzed after the current school year, these reductions are significant steps in their efforts to reduce the dollars being taken away from the classroom by subsidizing transportation. It may be unlikely that current reductions will in fact result in operating on state revenue alone. However, it does establish some ground work that should be helpful when the state implements the new transportation funding model in the 2011–12 school year.

The district has been and continues to be extremely supportive of pupil transportation. Inquiries

throughout the district indicated that when considering a new program, different program, or an adjustment to a current program, their first consideration is the impact it will have on transportation. Even when there is potential for an adjustment in bell times, the district's first call is to transportation for their assessment as to viability. The result is that transportation is seen as a critical support service that must be included in district decision making. Transportation personnel respond to this important consideration by fostering a can-do attitude and making every possible effort to meet the needs and requests of the district.

A comment by the manager for Durham is indicative of the relationship with the district:
“The district is our customer; and we owe them the best customer service we can possibly provide!”

Every department that was interviewed had the same commentary about the district's Transportation Department as well as the contractor Durham.

Sample statements:

- “Very user friendly.”
- “Gets every child to school ready to learn.”
- “Requests are handled immediately.”
- “They do everything to meet our needs—when we have an urgent request, they respond with urgency and compassion.”
- “They are absolute heroes.”
- “They are always very receptive to our needs.”
- “The drivers are amazing.”

STATISTICAL INFORMATION GATHERED

➤	BUSES:	
	Everett: 13	
	Durham: 115	
➤	MILES FSY 2009–10	
	Bus to/from:	1,248,059
	Bus field trip:	64,824
	Bus extracurricular:	14,292
	Cars/Vans for McKinney-Vento	13
	Car/van field trip:	0
	Car/van McKinney-Vento:	188,735 (home to school)
	Car/van extracurricular:	3,010
➤	1026A: FSY 2009-10	
	To/from:	\$1,335,756
	Shuttles:	\$34,913
	Passes	\$28,425
	Mid-K	\$22,930
	K-5	\$362,027
	Special Education	\$1,899,768
	SE Shuttles	\$14,174
	Total	\$3,770,923

*District owned fleet plus the vans used by the high schools are maintained by Durham.

➤	STAFFING:	
	• Durham:	
	General Manager	
	Operations Supervisor	
	Dispatchers, 2	
	Training Supervisor	
	Maintenance Supervisor	
	Mechanics, 4	
	Utility person	
	Field Inspector	
	• Everett:	
	Supervisor	4:45 a.m. to 4:00 p.m.
	Coordinator	7:30 a.m. to 4:30 p.m.
	*Trainer/Dispatcher	9:00 a.m. to 4:00 p.m.
	*Admin. Assistant	0:00 a.m. to 5:00 p.m.

*Moved from 8 hrs/day to 6 hrs/day FSY 2010. All scheduled for 260 days.

OBSERVATION 1

The district recently purchased property and built a new transportation facility. This allows the current and future contractors to focus on other aspects of the business and not have to search for an appropriate site. This also keeps the miles of bus routes consistent year after year. The site is easily accessible and appears to be centrally located.

OBSERVATION 2

The Everett Public School Transportation webpage is well designed and user friendly. A positive feature is the ability to enter an address and have the system provide route information, etc.

OBSERVATION 3

The district-operated routes evolved due to the McKinney-Vento demand (for transportation of homeless students). Everett started to see this demand approximately six years ago. District transportation management explained that Durham was not willing or interested in performing these routes; therefore, the district needed to start its own fleet. This required small vehicles and the ability to transport only one or two students at a time. The district transportation staff determined that it would be in their best interest to buy cars/vans or small buses and transport these students. As a result, the district has gone from five to 26 routes within a few years.

RECOMMENDATION

This was a rapid increase for the district to adjust to in a short time. The cost of the district operating these 26 routes was not known or available at the time of this review. It would seem wise to evaluate the advantages and disadvantages in running a parallel transportation system and determine whether it would be cost effective to request Durham to add the services to their assignment if their charge is equal to or less than actual district cost.

OBSERVATION 4

Approximately half of the drivers the district employs have their Commercial Driver's License while the other half does not. This causes difficulties for dispatching the right person to the right vehicle and limits the usage of the drivers.

RECOMMENDATION

The purpose of the district routes initially was to bus the McKinney-Vento students; however, district buses are also transporting highly capable students. It is possible that the transporting of these 15 students could be handled by Durham

OBSERVATION 5

All calls from parents, school staff, etc. are received by the district transportation office, not Durham. The Transportation office is responding to calls regarding: (1) late buses, (2) problems with bus drivers, (3) bus stop times, and (4) items left on the buses. This requires the district to make an additional call to Durham before they can resolve the issue. Durham's

dispatcher does not have access to a computer to look up student information or routes. The routes are submitted to Durham through an email from Everett Transportation staff.

RECOMMENDATION

The district could consider having all calls that have to do with buses on the road going directly to the dispatcher. The dispatcher would need to be empowered with more responsibility. The caller would be dealing directly with Durham. Durham would have more accurate and timely information. Durham would need access to district data to respond to caller concerns. District staff could monitor Durham's incoming calls by listening to the radio to determine if caller concerns are being satisfied. Additional staff (i.e., contractor manager, driver trainer) should be able to access the route information that is available on the newly purchased software program.

OBSERVATION 6

Training records are well documented and maintained by the contractor. All drivers' meetings are videotaped and a driver that missed the meeting is required to watch the actual meeting. It appears that drivers do not receive training from the Special Education Department.

RECOMMENDATION

The district may wish to consider that educational staff be involved in the training of the bus drivers for specific special student needs.

OBSERVATION 7

The Everett Transportation staff implemented a new software program for routing efficiencies. Other technology is available that might benefit the department.

RECOMMENDATION

The district could consider the benefit of using a GPS system, student electronic IDs, and cameras on every bus. These could be reviewed for practicality/value and added to the upcoming bid document if they were felt desirable.

OBSERVATION 8

The district formed a "reconsideration committee," which evaluated bus stops that had been eliminated for the 2010–11 school year. The committee was comprised of district cabinet members.

RECOMMENDATION

The district could consider reconfiguring this panel into a Safety Advisory Committee as suggested in WAC 392-151-017. This WAC suggests a committee made up of district and transportation staff as well as representatives from law enforcement, traffic engineering, parent community, and walking/exercise advocates. The transportation funding formula will change in 2011. One of the significant changes in this formula is consideration to fund transportation of students living within one radius mile that have

hazardous walking conditions to school. The draft WAC governing this funding requires a robust committee to be involved in designating hazardous routes where the district will bus students. Making this committee change now will allow time to review hazards and redesign transportation service levels to be in line with funding formula and could increase funding for transporting students in hazardous areas.

OBSERVATION 9

It was reported that field- trip planning, the application submission process, and scheduling are done manually.

RECOMMENDATION

The district could consider instituting an automated system for field trips that teachers could use to request field trips as well as schedule and bill trips. There are programs available that will allow a teacher, coach, or athletic director to submit field-trip requests directly to transportation managers. These allow for approval by principals, athletic directors, or others to approve the trips all online. Some of these programs will prepare billing documents and management reports for processing. These programs can assist transportation managers with separating field trip mileage from other transportation mileage when they prepare annual OSPI mileage reports.

OBSERVATION 10

It was unclear who monitors the driver's time. Durham indicated that they always know when a driver goes over the route time; and they are required to write that down on the driver's daily report. District staff indicated that Durham would not bill for something unless they (the district) approved it. There doesn't appear to be a reconciliation of actual routes billed by Durham versus route time authorized by the district.

RECOMMENDATION

In the next bid, the district may want to expand the contract to require Durham to bill time approved by the district as indicated in the routing software. This would keep the billing consistent and prevent the district from having to spend time evaluating the billed routes and overruns.

OBSERVATION 11

It was reported that Durham drivers use radios for communication while district drivers use cell phones.

RECOMMENDATION

If this is actually the case, for emergency purposes a plan should be considered for the school district/Durham to communicate to all drivers simultaneously.

OBSERVATION 12

Communication between district staff and contractor staff—it appeared that contractor management personnel did not have direct access to Versatrans information. Bus drivers

noted that it took a day or two to get the information to them on route, stop, or other changes.

RECOMMENDATION

The district could consider giving the contractor access to read only Versatrans information. This would speed up information on route changes to drivers.

I. FOOD SERVICES

The Everett Public Schools Nutrition Program is considered exemplary in the state due to the rate of participation, the elements of education included, the fiscal experience for the school system, and compatibility with schools in general. This program also is well respected in the local ESD region. There is evidence of high morale and people seem satisfied and happy to be working in the program. There appears to be a sense of support for school Food Service personnel by the district-level Food Service office. There was ample evidence of a willingness to try new approaches and ideas.

Summary data for the past year was as follows:

Everett Public School Food and Nutrition Department
2009–10

Total Revenue	\$6,173,787
Total Expenses	\$5,243,194
Total Staffing	50.3 FTE

9200 lunches served each day

- ☒ 55 percent of the total student enrollment
- ☒ 57 percent of elementary students
- ☒ 70 percent of middle school students
- ☒ 40 percent of high school students

2600 breakfasts served each day

- ☒ 14 percent of total student enrollment
- ☒ 19 percent of elementary students
- ☒ 11 percent of middle school students
- ☒ 6 percent of high school students

39 percent free and reduced eligible

In interviewing principals regarding the Food Service Program, the following questions were utilized:

- What seems to be the overall strengths of the Food Service Program?
- What seems to be the primary problems in the Food Service Program?
- If you could do one thing to improve the Food Service Program, what would it be?
- Is there an advisory committee associated with the Food Service Program (e.g., possibly with students, parents, employees, etc.)?
- Are there other issues that we should have asked you about or you would like to share?

Administrators were positive about the Food Service Program. The following are comments noted:

- Elementary:
 - Positive about on-site preparation of food—felt this allowed promotion of healthy habits and participation in the message of healthy lifestyles.
 - Food Services is willing to problem solve (e.g., late buses—students were not able to eat breakfast, so someone called Food Services and breakfast was made available in a bag so that students could eat in the classroom; requested additional funding for staff to supervise at breakfast—this was done; cut down on ala carte desserts when students were eating desserts and not the lunch; Food Services is open to requests).
 - A principal wondered about some of the menu items offered in regards to nutritional content but liked the choices of yogurt, sandwich, and salad bar in case students don't like the main choice; has trust in the department that nutritional standards are being met; cannot understand why parents make a lunch; likes chocolate milk as a choice.
 - A principal did not have suggestions how to improve service at the school, cited examples at a school when there were students not eating because of cultural issues; Food Services had cooking classes in the evening and met with Arabic moms during the day to talk about choices available to students; made that extra effort to bridge the gap.
 - A principal felt that the meal planning that goes into the elementary menu influences meal planning at home; promotes good choices—we are educating the whole child.
 - Meal time is another part of the school day.
 - A principal appreciated the systems in place to pay online; taking care of emergency lunches (not the students fault); picture on screen at cash register; sack lunches for field trips.
 - Appreciates the quality of catering at meetings; Food Services helps schools to get the most out of their catering funds.
 - Felt what the kitchen staff does is “miraculous,” regarded as part of the school staff, “unsung heroes of the school.”

- Secondary Administration:
 - Good appetizing food.
 - Friendly atmosphere, kids like to work in the kitchen area.
 - No problems.
 - Would like to see more staff in the kitchens so that school could go down to two lunches, but there is limited space in the cafeteria—would have to rotate students out.
 - Principal does not think about Food Service because it is seamless... it is a service that “works.”

- Central Office Administration:
 - The Food and Nutrition manager is the poster child for following protocol in regards to human resource issues.
 - The department does a good job of screening, hiring, and training with minimal assistance needed to do it right.

- Department is open to new ideas; there are processes in place and they follow them.
- Always looking for new training resources.
- Empathetic, caring and fair.

➤ School Kitchen Staff:

Elementary:

- Well supported.
- If there were a pot of money to spend, would like heated wells, so they do not have to lift pans back and forth from oven.
- Kitchen staff feels supported at school site and from office.
- Staff are proud of what they are doing (e.g., "free cookie coupon" when students arrive at the school).
- Many opportunities for connection with the Food Services office staff.
- Nutrikids is a huge help with recipes, production records, grocery list...staff clearly understood the features.
- Some latitude with menu items as long as menu was met, "burger day"—hamburger and cheeseburgers but cook also served fish burgers as another choice because students like them.

Secondary:

- Supported by office (e.g., Nutrikids program on their computer, linked to recipes and production records).
- Proud to be a pilot of the Nutrikids plan.
- Pride in trying new recipes (e.g., vegetable lasagna).
- If there was a "pot of money," manager asked for bigger freezer and frig and "something for kids."
- Could not offer what they do without student help (per principal's comments above there are always students who want to help) seems like a win-win relationship.
- Manager feels fully supported by school and Food Service office.
- Every kid has a mom—we are their mom here at school; we are all on the same page.
- Explained all the choices offered.
- Nutrikids a huge help.
- Allergies are taken care of by the students.
- Money, would like new ovens, warmer, walk in frig and freezer.
- Working on introducing more vegetables.
- Feels supported by administration and Food Service office.

➤ Food Service Office Staff

- Personnel issues are first worked through field supervisors, upon further concern the Food Service manager and/or Human Resources get involved.
- The district Food Services manager reviews all evaluations; the field supervisors provide kitchen managers with their evaluations and those individuals evaluate other kitchen staff.

- Issues or concerns—It would be helpful to provide additional scheduled kitchen visits; currently not enough time to spend a full day with each kitchen.
- Possible program improvements—provide more kitchen visits.
- Willing to try new programs and train staff.
- Used phone system to notify families that they qualify for free/reduced meals instead of mailing notices.
- Cooks order online with the distributor using a restricted order guide.
- No warehouse.
- Shared network drive with all kitchens—procedures/recipes all online with staff.
- Summer feeding in low income housing complex, included forming a partnership with the apartment manager to serve meals during the summer.
- Creative reaching out to families of a different culture (e. g., meeting with Arabic moms to show/explain what food the service program serves).
- All documents which were requested were available.
- Always looking for the next new idea.
- See their role as support to the schools.
- New manager/leadership training is a positive addition.
- Always looking for the next new challenge and how to do what they do better (e.g., small group meetings by region/grade level).
- Great food/nutrition annual training calendar in place; cross training within kitchens to provide appropriate leadership; and work performed while someone is on leave.
- The supervisors had been cross trained for elementary/secondary, now north and south cross training.
- Program also oversees concessions at the main field.
- Feel well supported by department and district.

J. TEACHING AND LEARNING

INSTRUCTION AND ASSESSMENT

The Everett Public Schools is served in the area of curriculum and instruction by two district-level departments. The Curriculum, Alignment, and Implementation Department works in the areas of curriculum, assessment, instruction, testing, research, special education, and categorical programs. There is also another district-level department, which administers instructional support and student services. This second program is involved with day-to-day oversight and support for the elementary and secondary schools. Both of these major district-level programs are connected to the area of professional development, which is coordinated in large part through the Human Resources Department. It should be mentioned at the outset of this section that Everett Public Schools gives evidence at being at the top of school districts in Washington in improving student achievement. The work is going forward in an intentional manner, driven by policy direction from the board level and obvious hard work at the administrative level and throughout the buildings.

The Curriculum, Alignment, and Implementation Department provides curriculum specialists who work with teachers in fine arts, health and fitness, instructional technology, reading and writing, science, social studies, evaluation, and research. The school district website provides links to a list of curriculum/subject areas, which describe the array of subject areas for which direction is provided. As the title of this department would indicate, “alignment” is an important characteristic in curriculum and instruction. This term generally refers to the work done to ensure that what is taught in the district is matched to the required standards for teaching and learning as determined at the state level. This has been a challenging area for most school districts as the older curricula employed in schools were not necessarily consistent from grade to grade and school to school. Bringing instruction into closer alignment with common standards has taken a great deal of time. In fact, it is not a task with a finishing point since the state standards are in a condition of flux and new teaching materials require implementation. The second driving force in alignment is the need to see that what is taught matches what is actually tested. Since many tests are imposed upon the district from outside the system, this alignment must be attended to. It would seem logical that instruction, which is organized to meet the requirements on what is taught, should automatically be in line with what is tested. The match up, however, has not always been uniform. Hence, the work which the department of curriculum and alignment does with assessment is vital.

The amount of student and staff time connected to testing is very substantial. The school district has an assessment office working in this area; and it provides scheduling, training, and support for tests such as the Measurements of Student Progress/High School Proficiency Exam (MSP/HSPE) (formerly the WASL), the Washington Alternate Assessment System (WASS), Certificate of Academic Achievement Options (CAAO), National Assessment of Educational Progress (NAEP), and others. The district has a calendar for the preparation and administration of these exams. In addition, there are district developed and/or adopted testing programs for the periodic assessment of ongoing instruction. These formative and summative assessments are most frequently designed to help illustrate the actual learning levels during the year and guide needed adjustments as indicated.

The Instructional Development and Student Services Department mentioned above works with development and implementation of instruction at the building level. Day-to-day issues from schools will rise to the area and district level in this department for attention. The department oversees school resource officers, student readmissions, and administers the records and reports as required by law (weapons, student discipline, suspensions, and expulsions.) The department also oversees the professional development for administration, the Equity and Access Advisory Council, the School Improvement Planning process, and AYP support and oversight. The associate superintendent for Instruction is in overall charge, there are two area executive directors, and other directors and supervisory personnel working with building administrators and staff members.

The school district has emphasized the improvement of on-time graduation rates as a part of efforts to strengthen overall student success. This topic is a nationwide concern as so many students have gotten behind in earning credits toward graduation and then have dropped out before graduation. Everett Public Schools has invested much time in the process of tracking student progress, assisting with catching up or credit retrieval, support in meeting testing requirements, and achieving graduation. OSPI reports that the current extended graduation rate is in the 90 percent range in the three large high schools, which is a remarkably high figure. The figure for the alternative high school is 76.6 percent, which is very high for alternative schools serving at-risk students. The work on graduation, per se, is complementary to the work being done to strengthen the curriculum and the instructional program overall.

Acknowledgement for laying the foundation of the current success of strong systems was attributed to the former superintendent and to stability in the board of directors. Some interviewees commented on how the State of School Reviews (SOSR) process moved from one, in the late 1990s and early 2000s that was sterile and unfriendly to a process held at the school sites that is more reflective of successes, challenges, and unique school cultures. "After years of expecting improvement, it is clear high standards and expectations are now part of our culture." That culture is being further developed under the leadership of the new superintendent as well.

In addition to the work of the superintendents and highly-functioning principals, a strong teaching core was frequently given as another reason for academic success across the district. The principal group is considered "amazing" by central office administrators. If teachers are not effective, issues are dealt with. The current, strong teaching core was attributed in part to a focus on hiring the very best going back to the early 2000s and that the hiring process remains strong. Leadership in the Human Resources Department continues to focus on teaching and learning. There is a strong belief that because Everett Public Schools is a high-performing district the district attracts high-performing people. Specific examples were given of teachers and administrators who could have worked in neighboring districts, but have chosen to work in Everett.

Central office administrators and building principals are working hard. "People work harder here than other districts in which I have worked. They put in more hours, do more professional reading, and serve on professional committees." Most believe the high expectations are accompanied by high support.

There is a great deal of pride in the accomplishments of the district and hope for the future. Area

directors meet two times formally each year with each principal. There is a push to be more transparent about student achievement. Principals work towards this goal by holding events that focus on student achievement and sending data home in newsletters as well as other means of communicating with families and patrons.

There were also concerns mentioned. It is perceived by some people that while the individual cabinet level administrators are strong, there are some personality differences. There were comments that more focus for leadership team activities would be helpful and more visibility in schools by top administrative staff would be appreciated.

One of the reviewers commented that rarely have they visited or been involved with a district that had such a strong foundation for assessment driving instruction, accountability for results, and focused instruction. Everett Public Schools is in the enviable position of being at the top of its game! It is clear the district has benefitted from stable executive, central office, principal, and board of director leadership. Specific examples were frequently cited of system-wide improvement efforts such as strong hiring practices, an effective State of School Review (SOSR) process, identification of challenges, and celebration of successes. Everett employees work hard and have a great deal of pride in their work and their efforts on behalf of the children they serve.

RECOMMENDATIONS

The challenge for any highly-performing organization is to keep up the momentum. Currently, recent reorganization at the cabinet level is perceived by some to be uncomfortable. It appears that there is a separation between curriculum and instructional programs, almost a “silo” effect. There is a perception in the field as evidenced by how cabinet members interrelate in meetings that working relationships could be improved. There is also the belief that leadership team meetings could be more effective. It is recommended the superintendent work with the cabinet to discuss dynamics and personal relationships on the team. Possibly, agendas for leadership team meetings and the summer institute could be strengthened by including members in the field in the planning and preparation of the meetings. (One particular indicator of separation between curriculum and instructional leadership emphases is underscored by the school district’s website. In the general listing of school district departments, the Instructional Support and On Time Graduation Departments are not described and in one list do not show up.) Reorganization at the cabinet level might be considered with Curriculum, Instruction, and Assessment Departments reporting to one cabinet member. It should be reemphasized that the perception of reviewers is that the discomfort or concerns mentioned by people was linked to personalities rather than competence. The work being done is excellent and people are highly skilled and competent.

ALTERNATIVE EDUCATION/SUMMER SCHOOL/ON-TIME GRADUATION/CULTURAL COMPETENCE

OBSERVATIONS

- The Everett Public Schools appears to enjoy a robust alternative education system including opportunities at Sequoia High School and a variety of summer school offerings. Sequoia High School provides support to 300 students in grades 9–12 using a direct instructional model with a 1:15 teacher-to-student ratio. The school is noted for a high level of student engagement and the use of 4-week blocks or units of learning. Students also are supported by a nursery program and advanced placement offerings. Sequoia High School graduated 72 students in 2010.
- Everett students have free 24–7 access to an online learning program with district-developed curriculum if it is part of their six-period day. Students use the online program to accelerate their learning or to recover credits.
- The district has developed a strong relationship with home school families that is exemplary. Home school students and families meet two times a week with teaching staff for additional support for their children. Everett home school students can earn an Everett Public School diploma.
- A strong summer school program runs from four to six weeks to provide an additional means for students to recover credits and graduate. There is also a traditional summer school for a fee of \$275 to students who want to accelerate. Scholarships are available for students who cannot afford the fee. Summer schools also occur for three weeks at the four elementary schools that did not reach AYP. Data was kept on the students; and it was noted these students did not lose ground over the course of the summer.
- Reviewers were told that five years ago the on-time graduation rate was less than 53 percent. The district responded aggressively with a taskforce including counselors, teachers, administrators, and community members. Many steps were taken including an aggressive look at failure rate by teacher and department, close attention to data for each student, use of a success coordinator at each high school, after school help, use of data, written protocols, and the implementation of AVID at Everett High School and North Middle School. AVID was cited as the single most successful tool in changing the culture at North Middle School.
- The Everett community is seeing an increased influx of immigrant families. There is a strong desire to ensure the staff has the cultural competency tools to work with youngsters from a variety of cultures. There is concern about how to maintain an inclusive environment in the community and schools. It was noted there appears to be an increase in gang activity among Hispanic and Russian youth as well as the Insane Posse. There exists a strong relationship with the Everett Police Department including campus security, school resource officers, as well as the county sheriff's department.

RECOMMENDATIONS

- It is obvious the support students receive through alternative education, summer school offerings, and a rigorous on-time graduation protocol has paid large dividends for Everett Public Schools. Recent data shows that the on-time graduation rate is now 83.7 percent and the extended rate 90.3 percent. The district is sensitive to the needs of diverse and disadvantaged learners and has put in strong systems to support them. It seems evident that this work should definitely be sustained.
- The district implemented the use of survey data through the Center for Educational Effectiveness (CEE) in March 2010. The survey data is one tool to use to consider if the district offerings match parent's perceptions that students' needs are being met. CEE data is much broader than alternative education. CEE parent survey data is a tool that is also useful as a dipstick to gauge progress on meeting the needs of all children. The breadth and variety of alternative offerings should continue as should the attention to on-time graduation rate that the district has aggressively pursued.
- The District has engaged with a consultant to provide a three-year approach to staff development in the area of cultural competence. The reviewers support continuing that emphasis.

GENERAL OBSERVATIONS

- The School Improvement Planning (SIP) process is systematic and well designed. Materials provided by the assessment department to support SIP and the Review of Evidence are very well done, easy to read, and useful tools upon which to build revised school improvement plans.
- Reading and literacy in grades 6–10 is no longer a problem area. Some administrators believe they are being pushed by the board to dump math and start over. There is a concern that elementary principals are not in a position to learn a new curriculum with so much else on their plate at this time. “We need time to get it (current new initiatives) done—need two years or more to roll out a plan. Need more regular progress monitoring.”
- It was noted with regard to initiatives that there is concern that the load may become too great.
- The central office administrators are committed to immediate attention for schools that have gone into AYP status. These tended to be schools with the highest SES status. A well articulated plan was developed with the site administration and teacher leadership team. This plan focused on interventions, useful data, and actions steps, which are developed and implemented. The use of in-district sequestering of the building team at the Lively Center was used for these building teams to work and

have assistance from central office staff in the development of their plan. The SIP plans were impressive as they had areas of intervention identified as “school actions, grade actions, and classroom actions.” Interviewees from the school level, mid management, and cabinet level were able to articulate the AYP Improvement Plan for each building. This speaks of the clear articulation of the need and planned improvement action steps. It was not surprising that two of the schools moved out of AYP status for the first year, and holding the performance for a second year will move them completely out of the status. The accountable administrator for schools in AYP status shared that “now we know how to get a school out of AYP status, and are ready if it happens again.” Some districts do a lot of hand wringing, try some interventions, and hope for the best. The knowledge of paying attention to their data and developing interventions in accordance to that data is serving Everett Public Schools well!

- The Curriculum and Assessment Department recently completed an elementary reading adoption that builds ownership for the program throughout the system. After the core committee of teacher practitioners finished the review and made a recommendation (which was acted on by the school board), the implementation process was completely re-invented. Taking an additional year to “field test” the product in three schools—a low-, medium-, and high-performing school. The anticipated outcomes of this were to learn how to implement the K–5 curriculum best, pre-determine what worked, where they would need to focus, and build ownership with all teachers. This allowed for problems to be worked out at the field tested schools while the teachers at the school became “owners and experts of the program” leveraging fidelity of the program for years to come.
- The Highly Capable Program is meeting the needs of identified elementary and middle-level students and reaching out to parents with monthly meetings listening to how students are responding to the programs.
- It is very impressive that the data from the assessment office continues to provide pertinent data for building and programs with a philosophy that this data “will mean nothing if nothing is done with it.”
- The department is also working on the acquisition of a Learning Management System (LMS), which will have long-term impacts on analyzing data with SIS reporting. The district is planning a multi-year roll out while they move to standards-based grading. The Everett Public Schools’ experience with system changes will provide guidance for the planning and timing of the procurement.

RECOMMENDATIONS:

- It is recommended that increased attention be paid at the elementary level to the underserved elementary age students in the area of the Challenge programs. The programs are housed in the south end of the district. Creative and focused

initiatives to begin a program in a north end school are recommended. Additionally it is recommended that a serious focus (equal to the intensity of the on-time graduation initiative) towards early intervention be explored. With the data systems in place and creative central office staff, this early intervention initiative should be effective.

- Everett Public Schools has enjoyed community support, being a grandfathered district making available resources to support the buildings. In analyzing the interviews conducted, it was uncertain if there is an articulated plan for the potential loss of some state funds for the upcoming biennium. What will that mean for the facilitators support, SIF and mid-manager support, and the extra four days of staff development, if funds are limited? The reviewer's impression may be incomplete, but preparation and planning at all levels to respond to the almost certain reduced funding seems important if not presently underway.

In summary, regarding teaching/learning/curriculum/instruction, Everett Public Schools has much of which to be proud. The community is supportive of its schools as evidenced by levy passages, support from law enforcement, and other service organizations. The district has a culture of high expectations, which has resulted in exemplary student achievement. Interviewees consistently stated student achievement is a top priority for the district. Staff members work hard to achieve the board's stated goal: "Ensure each student learns to high standards."

K. SPECIAL PROGRAMS

The Special Services Department of the Everett Public Schools serves approximately 2,300 students with various forms of assistance. The students range in age from three to 21 years. Children referred and assessed as eligible for services receive help through plans and programs—the Individualized Family Service Plan (IFSP) for infants and toddlers and an Individualized Education Program (IEP) for preschool and school age children. The process of developing these individualized plans and programs involves parental input along with a variety of educational practitioners as well. The intent of the efforts is to provide specially designed instruction (SDI) to assist him or her with opportunities to succeed in their learning. There are a variety of programs and services which comprise the resources for students:

- Resource Room provides SDI to assist children with success in the general education classrooms.
- Extended Resource Program provides more as needed in magnet school settings.
- Life Skills Program serves students who need intensive help for all areas of learning. These services are also provided at magnet schools.
- Positive Behavior Support Program provides children and families SDI behavior control to help them gain maximum benefit from learning.
- Developmental Kindergarten is designed for Kindergarten children who require SDI in the general Kindergarten setting.
- Therapy services such as Occupational, Physical, Speech, Audio Logical and Psychological are provided for children and their families' in-school and in-community settings.
- School psychologists are available at each school and assist with assessment of students, consultation for teachers, families, and others working with students. They also provide a link to community-based services where needed.
- Educational audiologists work with students who have hearing impairment. Work is done with students, staff members, and families in terms of accommodations, needed services, equipment, and technology. These individuals also administer state required hearing testing.
- Teacher of deaf and hearing impaired, teachers of the visually impaired, and orientation and mobility SDI services are provided for children and their families. This includes direct assistance of specially designed instruction covering listening, communication, academics and other support.
- Vision specialist works with children who have impaired vision and need assistance with their teaching programs.
- Assistive Technology Team is charged with providing supportive or adaptive technology which assists children's access to services and learning environments as it could be of help to students.

The above list indicates the breadth and complexity of the program. The program was reviewed by six people on the review team from a variety of settings—district-level Special Education

practitioners, educational service district level, and private organization providing consultation to school districts.

The general consensus is that the Special Education Program in the Everett Public Schools is functioning effectively in meeting the needs of students and families and complying with the local, state, and federal regulations surrounding these services.

There were numerous positive qualities of the program noted during the review.

- The school district is focused upon student learning and success—this extends across all programs including Special Education.
- The morale among Special Education personnel seemed strong.
- There appears to be a supportive relationship between general education staff and Special Education personnel.
- The extended school year program focused on behavior appears to have had results.
- There is a serious effort to provide information and communication, including personal notes on occasion.
- The establishment of a Special Education Parent Advisory Council in partnership with the ARC seems positive.
- There appears to be involvement opportunities for families at a variety of levels.
- There appears to be a very sincere, solid focus upon the needs of students.
- The Procedure Implementation Guide is a positive tool.
- It appeared to reviewers that class sizes and caseloads were acceptable.
- Full-time data support person is providing valuable support.
- The Special Education administrative staff is positively regarded and their efforts appreciated.
- It appeared from the Washington State Report Card that Special Education students were making gains.
- Management of student records appears well organized and efficient.
- It was reported that over the past five years, complaints and requests for due process hearings have been properly responded to.
- The school district's approach to continuous reviews of high school credits earned and direct action taken for those not earning enough credits to be on track for graduation is admirable.

The fact that there were six individuals reviewing Special Education assisted with the examination. There were many thoughts as to what was observed and possible suggestions for school district consideration. As indicated in terms of the review in general, these thoughts are offered as possibilities—it is recognized that the school district will see these across a very broad array of factors and will look for those ideas that seem best to fit the overall needs of the school system.

OBSERVATION 1

The Special Education staff generally expressed a sense of support from the district Special Education administrative level. People feel that their concerns are considered very important. The response time to requests from the school level, however, seems to some Special Education personnel to have been slowed by budget cuts. Some comments were made concerning staff uncertainty about procedures and the way the Special Education administrative structure works. (Some of this was attributed to the loss of facilitators and one director.)

RECOMMENDATION

It is of course important for the timeliness of responses to staff members to be a continuing focus. It is clearly a goal from the district level to respond to requests as quickly as possible. Where feasible, a 24-hour initial response would be welcomed if that is not currently the goal. A suggestion for consideration was simply that progress reports be provided when requests are being evaluated or prepared. There may also be value in further promotion and familiarity with the Procedure Implementation Guide available for Special Education staff members—it has a very useful array of information and assistance for staff members.

OBSERVATION 2

There was comment noted by reviewers that Special Education staff would appreciate additional professional development attention. Some of the interest seemed connected to implementation of curricula and other interest was general. A “kick off” meeting at the beginning of the year was felt an unfortunate loss. Another point of view was that training around differentiating curriculum for Special Education students was as important as training in compliance.

RECOMMENDATION

Within the available resources and time, a focus upon checking with Special Education staff as to the most needed kind of staff development would seem advisable to help ensure that what is provided falls in the areas of greatest perceived need by building staff members. A short list of thoughts on this subject was offered by one reviewer:

- Webinar, video streaming, audio conferences.
- Office stand-up meetings, lunch-bunch training, after-school offerings.
- Utilizations of in-district staff and/or exchange with a neighboring district for trainers.
- Cross train staff to help spread learning and provide backups.
- Gain access to OSPI training or resource materials (e.g., for updating the 504 manual).

OBSERVATION 3

A note which is related to communication was that new Special Education teachers seemed in some cases to need more attention and early support.

RECOMMENDATION

This would be a valuable consideration as the details for assignments for new Special Education teachers are worked out. If it is possible to augment orientation for these individuals with some mentoring and/or additional discussions for guidance it appeared it would be valued.

OBSERVATION 4

It appeared that the degree/frequency of family disputes in the Special Education program were limited. The reviewers understood that there were two citizen complaints within that period with one dropped and one addressed through professional development. There were reportedly four due process hearings with one still in process—in two cases, the parents either withdrew or did not appear. One of the due process hearings was initiated by the district. It appeared that one is still in process or under dispute.

RECOMMENDATION

This history indicates a low incidence of protest or disagreement over the program. Yet, the topic of the quality of the Special Education Program continues to be raised. It seemed to the reviewers that the quality of the program is high and issues of non-compliance are not evident. The staff and the accomplishments within Special Education deserve commendation rather than condemnation.

OBSERVATION 5

There were comments regarding staff wishes for new curricula/materials for Special Education students. This seemed particularly connected to math. There was allusion to a history of uncertainty as to where funds for math materials would originate (i.e., general or Special Education). It was not certain how broad the need may cut across the variety of subjects, but people seemed to generally feel the need for additional funds, materials, and training in implementation. Another point was made in reference to supplemental curriculum materials and lack of alignment with core curriculum and assessment data.

RECOMMENDATION

This topic was not completely clear due to the limited time available for the review team. It seems advisable, however, for school district personnel to take note of this concern to determine where the needs are evident, how they can be met within the schedule for curricular renewal, and resources available.

OBSERVATION 6

At least one reviewer was told that there seems to be need for greater flexibility between the criteria for Resource Room, Extended Resource Room, and Life Skills.

RECOMMENDATION

This is an extremely difficult area due to the need for placement to fit assessment and the IEP. It is simply noted for consideration since it was not clear just how general staff members may experience the concern.

OBSERVATION 7

The reviewers were told that the Special Education program utilizes an approach to addressing student behavior problems called Positive Behavior Support (PBS), while the general program in the district does not. This may result in referrals for behavioral problems, which may not fit the Special Education framework (i.e., the Special Education model may view the behavior as something which could be approached differently in the general classroom setting rather than requiring Special Education response).

RECOMMENDATION

As with other points connected to the Special Education Program, this is offered knowing that the reference is based on limited information. Given that circumstance, a note is simply made that this may deserve discussion among special and general education staff. (One reviewer observed that “It can be very difficult when Special Education tries to influence general education about something so pervasive as student behavior . . . A collaborative approach to behavior management is often successful in reducing inappropriate referrals to Special Education.”)

OBSERVATION 8

A number of reviewers were told that provisions/wording connected to the collective bargaining agreement concerning staff assignments in some cases does not seem to permit the best match of skills with job. There was also comment that response to add paraprofessional support could be slow, with the exception of the southern end of the school system.

RECOMMENDATION

There may indeed be difficulty between the wording of the bargaining agreement in connection to making staff assignments. On the other hand, there may also be some uncertainty as to how this process is governed by general school district human resources practice. As with other topics, this is simply mentioned for thought. Timeliness and equity would be points to consider as well.

OBSERVATION 9

There seems very solid support for school district initiatives among Special Education staff members. One area of concern might be in regard to the connection that Special Education personnel feel to the overall district strategic plan. It seemed that the broad district scheme was not clear.

RECOMMENDATION

This may be a narrow concern or may affect just a segment of the overall Special Education staff. However, since the comments were noted during the period in which the school district is engaged in a very large scale development of a new strategic plan, it seems important to ensure Special Education engagement with the product. One

suggestion was to be sure that the essence of the new strategic plan be displayed in Special Education rooms and work spaces.

OBSERVATION 10

There was comment related to paraprofessional staff members interested in cross training and opportunity for expanded work possibilities, a broader view of the program.

RECOMMENDATION

The topic of professional development for paraprofessional staff members is of course part of the general topic for the Special Education Program. One particular point was support for staff members in improving data entry and web-based IEP data and becoming more experienced with the web system as a whole.

L. TECHNOLOGY

The school district has been functioning under the direction set in technology plans dating from 1997 and renewed periodically since that time. Each school district is required to have a current plan in place and the most recent for Everett Public Schools is dated for 2010–13. This new three-year plan is based upon information gathered from administrators, educators, students, and people involved with the technology program at the district and building level. One particular intention is to have technology be of the quality to directly contribute to school and district instructional improvement plans. The primary thrust of the plan overall is to direct the use of technology in support of student learning. There are several broad goals which address major needs:

- “By the spring of 2013, reflective feedback from key stakeholders in Everett Public Schools will demonstrate the effectiveness of the technology modernization process.” In basic terms, this goal is directed toward making the best use of present technology resources and filling in additional hardware, software, infrastructure, and training where there are still gaps. This will in part include replacement of outdated technology. Attention will be paid to the possible value of newer technology tools such as online textbooks.
- “By the spring of 2013, reflective feedback from key stakeholders in Everett Public Schools will demonstrate the effective systematic support for the data and testing environment.” This goal is aimed at supporting and developing the use of testing and resulting data that is gathered. The intent is to include standardized testing as well as district directed formative and summative testing.
- “By the spring of 2013, 75 percent of all 8th grade students in Everett Public Schools will demonstrate proficient adaptive and transformative uses of technology (OSPI’s Technology Integration Tiers 2 and 3 respectively) as indicated by Grappling’s Technology and Learning Spectrum.” In more straightforward wording, this is aimed at ensuring that by the end of 8th grade, all students will be competent in using basic technology. This will include student developed work using technology, learning to use technology for research, and becoming familiar with a variety of technology and computer applications.
- “By the spring of 2013, 70 percent of all teachers in Everett Public Schools will demonstrate proficient adaptive and transformative technology integration (OSPI’s Technology Integration Tiers 2 and 3 respectively) as indicated by Grappling’s Technology and Learning Spectrum.” This goal is based upon the same principles as the third bullet above which issues from standards supported by the Office of Superintendent of Public Instruction. In this goal, the thrust is to help staff members gain training and ability to use technology in the classroom as an integral part of instruction. This is essentially focused upon training for staff members.
- “By the spring of 2013, 80 percent of all administrators, teachers, and teacher-librarians in Everett Public Schools will demonstrate proficient adaptive and transformative uses of technology integration (OSPI’s Technology Integration Tiers 2 and 3 respectively) as indicated by Grappling’s Technology and Learning Spectrum.” This goal is similar to fourth bullet but includes administrators and teacher-librarians as additional groups for training and skill building in use of technology.

One of the primary activities will be to improve bandwidth for data, voice, and video services. A focus upon development of “cloud computing” for remote access is also planned. From a more technical view, the school district has a fiber-optic, wide-area network (WAN), which relies upon Microsoft Operating System based servers, UNIX hosts, and Windows/Intel clients. The standard Microsoft programs are utilized (Excel, PowerPoint, WORD, Publisher, and Exchange mail services.) The school district intends to maintain a student to computer ratio of 5:1. There are approximately 9,000 computers in use and less than eight fulltime employees for technical support. It is expected that the school district would replace approximately 2,000 computers per year. The funding for technology in the school system is drawn from the general fund budget and a capital levy for technology costs.

GENERAL CONCLUSIONS

- The IT Department is both respected and trusted by all of the individuals interviewed.
- The district has a well thought out Curriculum and Technology Plan for Learning that has been developed through a very thorough process involving a multitude of users and stake holders.
- Everett has passed a levy with a significant amount of dollars allocated to technology.
- Everett has plans to implement a learning management system (LMS) that will strain the current resource allocation in the IT and other departments.
- There are concerns about how long some of the current desktop equipment can effectively last.
- Most central office and administrative technology functions are fairly linear and well supported.
- The district has a well-managed technology procurement process in place and is well functioning.

OBSERVATION 1

The district has been very aggressive in its plans to use technology to support student learning.

RECOMMENDATION

With current resource reductions both in staff and dollars, the district needs to remain realistic in its resource allocations to upcoming projects.

OBSERVATION 2

Some of the district’s desktop technology is becoming dated and near the end of its effective life cycle.

RECOMMENDATION

The district needs to have a detailed, funded plan in place that will replace or modernize aging desktop systems.

OBSERVATION 3

Everett, like most other districts, has had to reduce resources in the IT Department and elsewhere to keep its budget balanced.

RECOMMENDATION

As the district moves forward with its major technology projects, it needs to be diligent in ensuring that the resources are available to make these projects successful. Priorities and resource allocation, particularly for instructional technology personnel, may need to be revisited and reevaluated. The district technology plan speaks to this priority, but it will require protecting the resources to carry it out.

OBSERVATION 4

With current technology projects, staff development seems to be an integral part of the plan.

RECOMMENDATION

Even when resources get reduced in some areas, the district needs to be sure to allocate enough staff development resources to ensure the successful implementation of the technology support projects. There are currently a number of technology related offerings for professional development for the year. These would require annual reassessment to match up with the needs identified both at the building and district level through instructional planning.

OBSERVATION 5

Everett continues to expand its need for the use of technology not only in the classroom but for administrative and assessment purposes as well.

RECOMMENDATION

There will be a point where the expectation of technology resources will exceed the actual resources available. The district needs to continue to be aware and include the IT Department where appropriate as it plans for the use of technology in the district.