



# Financial Corrective Action Plan

**Dallas Independent School District  
Financial Workshop  
Thursday, October 2, 2008**

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**Exhibits. Exhibit A (Draft) (Pages 7-9)**  
(Dallas ISD Proposed Reduction in Force Process to Level to Staffing Formulas Based on Student Enrollment in Compliance with Board Policy DFF (Local)

**Exhibit B** (Board Resolution)

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**Exhibit D** (Central Office Personnel Reductions)

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## **SECTION 1**

### **Purpose**

The purpose of the Financial Corrective Action Plan is to provide the roadmap for rebuilding the financial position of the Dallas Independent School District and in turn provide mechanisms to restore public confidence and transparency.

## **SECTION 2**

### **Scope**

The financial corrective action plan will evaluate and analyze all aspects of the District's central office and campus operations. At central office, certain functions will need to be scaled down and focused in a more efficient direction. Central Office expenditures will be reduced by 10% where campus and student impact is minimal. Vacant positions, with few exceptions that are critical for campus and student services, will be eliminated. The Office of Professional Responsibility will be reduced and the case impact will have to be more stringently prioritized. All internal publications will be switched to web-based delivery for all constituents. The main switchboard will be combined with HD Connect for all external calls.

## **SECTION 3**

### **Define RIF**

As per Board policy DFF (Local), "reduction in force (RIF)" means the dismissal of a teacher, administrator, or other professional employee under contract before the end of a contract term or at the end of the contract term, for reasons of financial exigency or program change.

"Financial exigency" means any decline in the District's financial resources brought about by decline in enrollment, cuts in funding, decline in tax revenues, or any other actions or events that create a need for the District to reduce financial expenditures for personnel.

"Program change" means any elimination, curtailment, or re-organization of a curriculum offering, program, or school operation due to either a lack of student response to particular course offerings, legislative revisions to program funding, or a reorganization or consolidation of two or more individual schools, school programs, areas, departments or divisions. The term shall also include a districtwide change in curriculum objectives, or a modification or reorganization of staffing patterns.

## **RIF DEFINITION AND BOARD POLICY, continued**

### **Board Policy**

#### **How do our current policies dictate the processes?**

### **Employment Areas and Consideration for Available Positions**

As per Board policy DFF (Local), a reduction in force may be implemented in one, several, or all employment areas, as determined by the Board if for financial exigency, or as determined by the General Superintendent if for a program change. When a reduction in force is to be implemented for financial exigency, the General Superintendent shall assist the Board by making recommendations to the Board regarding the employment areas and positions to be affected. In determining affected employment areas and positions, the General Superintendent or Board may combine or coordinate employment areas, as defined below (e.g., the Board may combine “elementary programs” and “compensatory education programs” to identify an employment area of “elementary compensatory education program”).

Employment areas shall be defined as:

1. Elementary grades, subjects, departments, or programs
2. Secondary grades, departments or programs
3. Counseling programs
4. Special programs, such as gifted and talented, bilingual, special education, compensatory education, and migrant education
5. Library programs
6. Other nonteaching professional and professional staff
7. Teachers on probationary status
8. Professional employees holding temporary certificates or permits
9. Other Districtwide programs

Once the General Superintendent has identified the appropriate employees in the affected area(s), those employees shall be considered for other available positions for which they apply and are qualified up to the date of a hearing requested in accordance with the provisions below. Assignments to new jobs shall be based on matching of certification, qualifications, experience and skill sets.

## **RIF DEFINITION AND BOARD POLICY, continued**

### **Notice and Orientation to Employees**

As per Board policy DFF (Local), after considering the General Superintendent's or Board's recommendation, and if no vacancies exist for which the identified employees are qualified, the General Superintendent shall determine the employees to be proposed for discharge or nonrenewal, as appropriate. The General Superintendent shall provide each employee with written notice of the proposed action, including a statement of the reason(s) requiring such action and notice that the employee is entitled to a hearing. The Human Resource Services staff will notify each person whose contract is proposed to be terminated or non-renewed of his or her status by personal delivery or certified mail-return receipt requested as soon as possible. Such notification will include:

1. The date of last day of work
2. The reason for the RIF
3. The status of benefits, including instructions for converting coverage
4. Appeal and hearing procedures applicable to the particular employee

An orientation session will be conducted by the Human Resource Services to counsel with RIF personnel as to other employment opportunities, unemployment compensation, insurance, substitute work, and other rights to which the employee may be entitled.

The employee's address, as it appears on the District's record, shall be deemed to be the correct address. It shall be the employee's responsibility to ensure that the Human Resource Services Department has his or her current address on file.

## RIF DEFINITION AND BOARD POLICY, continued

### **Criteria for Decision**

As per Board policy DFF (Local), using the following criteria, the General Superintendent shall recommend employees within the affected employment area(s) for discharge or nonrenewal because of a reduction in force, pursuant to applicable policies related to termination or nonrenewal. These criteria are listed in order of importance. The General Superintendent shall apply them sequentially to the extent necessary to identify the employees who least satisfy the criteria and therefore are subject to the reduction in force; i.e., if all necessary reductions can be accomplished by applying the certification criterion, it is not necessary to apply the performance criterion, etc.

1. **Certification**: Appropriate certification and/or endorsement for the current or projected assignment.
2. **Performance**: Effectiveness as reflected by appraisal records and other written evaluative information.  
If the General Superintendent in his or her discretion decides that the documented performance differences between two or more reduction in force prospects are too insubstantial to rely upon, he or she may proceed to apply criterion 3 and, thereafter and to the extend need, criterion 4.
3. **Seniority**: Length of continuous service in the District. An authorized leave shall not be considered an interruption of continuous service.
4. **Professional background**: Professional education and work experience related to the current or projected assignment.

## **SECTION 4**

### **Define “Leveling”**

#### **What is leveling? Who is monitoring the process of leveling?**

Leveling is the process for determining adjustments for allocating positions. Positions for school allocations are based on staffing formulas defined by the actual enrollment. A team including principals, learning community executive directors, budget, staffing, and program specialists monitored the leveling process.

### **CAVEAT**

**The details and pertinent information presented below in this Exhibit A are, at the time of this writing, still being refined via consultation.**

## **EXHIBIT A (DRAFT)**

### **Dallas ISD Proposed Reduction in Force Process to Level to Staffing Formulas Based on Student Enrollment in Compliance with Board Policy DFF (Local)**

#### **Premise**

The Reduction in Force (RIF) guidelines and processes to be used to level to staffing formulas based on student enrollment must be policy-driven, clear, transparent, objective, and unambiguous.

#### **Determination of Over-Formula Staff**

Through the initial “staff to formula” analysis, the number of over-formula teachers and other employees have been determined.

#### **RIF Process for Leveling to Formula Based on Student Enrollment**

1. First, the District will level at the school sites using actual student enrollment and approved staffing formulas.
2. The staffing formulas will be used to identify surplus over-formula positions, not surplus teachers and other contract employees. No teachers or contract employees will be released from positions/schools at this time. Teachers and contract employees will remain in their current positions until the districtwide RIF process is completed to identify teachers and contract employees to be released.
3. The District will use policy DFF (Local) criteria in a districtwide process to determine surplus teachers and other contract employees to be released in the following order:
  - a. Certification will be determined for all teachers in surplus positions. Teachers and contract employees, who have not completed their Texas certification requirements, will be considered the first to be released. This may include:
    - i. first, teachers on probationary certificates
    - ii. second, teachers operating with certification from other states

## EXHIBIT A (DRAFT), continued

### RIF Process for Leveling to Formula Based on Student Enrollment, continued

- b. Performance will be used to identify surplus positions for certified teachers and other contracted employees as follows:
    - i. First, teachers and contract employees with Unsatisfactory or Below Expectations ratings will not meet the performance criteria and will be considered the first to be released for performance.
    - ii. Second, teachers and contract employees with Proficient or above on the most recent PDAS summative evaluations, and with one or more domains rated Below Expectations or Unsatisfactory, will be considered.
    - iii. Third, other written documentation completed prior to the closing of Spring 2008 PDAS cycle will be considered.
  - c. Seniority will be applied as follows:
    - i. As a tie-breaking process for performance, teachers and other contract employees will be identified in affected surplus areas by continuous district seniority.
  - d. Professional background, including professional education and work experience related to the current or projected assignment will be considered only if necessary after all other criteria above have been applied.
4. Assignment/placement of teachers and other contract employees to vacant positions will occur in the following order:
- a. Teachers and other contract employees will be reassigned to the same campus, if possible.
  - b. Teachers and other contract employees will be assigned within their current learning community if home campus assignment is not possible.
  - c. Teachers and other contract employees will be assigned to positions in the district outside of their current learning community, if necessary. For these districtwide assignments:
    - i. Working from the highest years of seniority down, teachers and other contract employees will have an opportunity to identify their top three preferred assignments.
    - ii. Human Development will make an effort to place teachers and other contract employees in one of their top three choices or they will be assigned to a position for which they are qualified.
5. No reassignment or release of any teacher or other contract employee will occur until the districtwide RIF process as described has been completed and then thoroughly vetted for policy-compliance and quality control. The process results (not including specific names of affected staff) will be shared with the CTO prior to completing the RIF process.



## **EXHIBIT A (DRAFT), continued**

### **One-time Transfer/Reassignment Process**

After the RIF process has been completed and vetted, there may be a one-time reassignment of teachers and contract employees to positions vacated as a result of the reduction in force, but it will not result in the domino effect of “bumping” as this will be a one-time move.

### **Settlement Offers**

1. If teachers and other contract employees accept the settlement offer, agreeing not to appeal their RIF, those persons will be paid through the 2008 fall semester, January 16, 2009, including benefits. The district will honor unemployment compensation claims.
2. If non-contract employees accept the settlement offer, agreeing not to file grievances on their RIF, those persons will be paid for one month, including benefits. The district will honor unemployment compensation claims.
3. Employees released by the RIF process will be given 48 hours to make a decision on the settlement offer.
4. Even though being paid by the district, the employees who accept the settlement agreement will be released to search for other employment or retire.
5. Contract employees not released through the RIF may volunteer to retire or resign and be paid through January 16, 2009. These employees are not eligible for unemployment compensation.

### **Employee Panel**

Any teacher/employee who is released through the RIF process should be given the opportunity to make a 3 minute presentation to a panel. The panel should be made up of highly placed Dallas ISD officials, at least one school board member, and leaders of the employee organizations. The purpose of the presentation is not an appeal. It is an opportunity for the affected employee to “have her/his say” in a professional manner about why his/her position is important, the difference he/she has made, etc.

## Central Office Reductions

### What reductions were made to central office to offset the budget deficit?

All departments in central office organizations were asked to evaluate their current and future expenditures to drive a more efficient and effective department. Analysis was done within and across Divisions. Management was asked to eliminate 10% of the expenditures to include personnel and non-personnel general operating dollars. Reductions should target areas that they could do without and not impair service levels for students.

See Exhibit D for details.

## SECTION 5

### **TEA Involvement**

#### **What is the role of TEA short term and long term?**

Short term, the District needs to complete the plan to address the current deficit and receive board approval. Once that occurs, an appropriate group from the administration will go to Austin to present the plan and respond directly to questions from TEA. Included in this plan will be an overview of the plan to more strategically use alternate funding sources to supplement the General Fund. Long term, in addition to the statutory requirements, TEA will be kept apprised of the progress and status of the deficit reduction plan. The District is in constant contact with TEA regarding questions as to the appropriate use of grant funds.

### **Shortfall Management**

#### **How do federal grant monies effect this year's and next year's budget?**

The Financial Transformation Team began looking at the strategy to maximize the impact of the federal and state grant money in June 2008. The team began by looking at the two funds with the largest carry-forwards, Title I and IDEA-B. Two consultants from TASBO, Tom Canby and Becky Garcia, both of whom are experienced in this area, were engaged to assist us in evaluating amounts spent in the general fund. Based on their advice, it was determined that at least \$13.5 million had been spent and charged to the general fund that should have and could have been properly funded with grant funds. A final grant application has been filed to reflect these amounts. The team is working to include in its files the proper documentation of this effort. The carry-forward effect of these adjustments will reduce the impact on the General Fund in 2008-2009 by approximately \$14 million. The team is currently reviewing new programs and additional expenditures that are budgeted in the General Fund and are eligible to be funded with grant funds. The process of identifying these amounts is ongoing and is expected to yield at least \$4 million additional in the 2008-2009 fiscal year.

#### **How do we openly set forth a strategy for budget shortfall management?**

The immediate steps are that Carolyn Jones has taken over as the budget director and led the budget department's effort in the leveling/RIF process that was headed up by HD. The next step is compare actual 2007-2008 expenditures by organization to the budgeted expenditures in the 2008-2009 adopted budget. This process and the application of the specific cost reductions identified in the deficit reduction plan will be turned into a revised budget to manage the rest of the 2008-2009 fiscal year. It is expected to be completed and presented at the November Board Briefing. As part of the revised budget process, monthly monitoring will be developed. The first area will be a process to properly manage position control and move it out of the Budget Department into Human Development. There will be a monthly process to reconcile the actual payroll to what would be expected based on the position control. There will also be additional scrutiny of monthly amounts for non-payroll expenditures. It is expected by March, a process will be implemented to ensure that all expenditures are recognized on a timely basis. The team expects to have at least one "hard close" before the next year-end.

## **GENERAL INFORMATION AND QUESTIONS, continued**

### **Shortfall Management, continued**

#### **How does it affect the campus level?**

The funds covered by the state and federal grants are generally limited to direct expenditure on a Title I campus or a campus that is in the AU or AYP process. The compliance monitoring is done to ensure that occurs.

### **Federal Grant Monies**

#### **What levels of accountability are to be followed with federal monies and what accountability measures are in place to ensure transparency?**

At the beginning of the 2007-2008 fiscal year, it was determined that all functions relating to federal, state and local grants needed to be consolidated into a properly staffed and trained department to begin using these funds on a more strategic and compliant basis. In March 2008, the director – grants management was identified and directed to begin building the department. The grants accounting and grants acquisition and management functions were reassigned to this department. In July 2008, a manager of grants compliance was identified. The plan is to have 8 compliance specialists in this department, one assigned to each Learning Community and one to the Central Staff, to ensure that funds are budgeted and spent on a timely, strategic basis that is compliant with the appropriate regulations. In June 2008, the national consulting firm of Protiviti was engaged to assist with audit preparation and to assist in developing an organizational structure with the appropriate processes, procedures and systems and to identify an appropriate training program for staff members and other employees who are involved in the process. This project is on schedule for completion in January 2009. The overriding control is the Single Audits required by DOE and TEA. These are annual audits of both the numbers and compliance performed by Deloitte & Touche.

### **Budget/Accounting Staff Qualifications**

#### **Who is qualified in budget/accounting staff to manage process?**

Marian Hamlett is a consultant who is filling the role of director – accounting services, focused principally on the 2007-2008 audit process. She is highly qualified and a key contributor to the reconstruction of the Accounting Department. As the audit is completed, she will assume a more active role in the management and review of improvements in the accounts payable and payroll processes. Emily Ray, a CPA and long-time employee of the district, has been in the director – grants management position since March 2008. She has made excellent progress in pulling together a complicated and, heretofore, very unorganized process. Carolyn Jones has assumed responsibility for the director – budget services through this current crisis and, at least, through the completion of the 2009-2010 budget cycle. Marian, Emily and Carolyn are conducting a review of the organizational structure and all personnel in their respective areas, with a preliminary review expected to be completed in October. In the meantime, several key roles reporting to these managers are being filled by outside consultants.

## **GENERAL INFORMATION AND QUESTIONS, continued**

### **Internal Financial and Staffing Controls**

#### **What can we expect in October through March pertaining to the system of internal controls and accountability?**

As noted in the management letter, the system of internal controls and accountability are very weak. The process to review, redesign and implement improvements to the system have begun and, as presented to the board in June, are expected to take up to three years to correct.

The specific expectations are as follows:

- 2008-2009 revised budget – As discussed above, the detail revised budget should be completed by the November board briefing.
- 2009-2010 budget – Work will begin in December with the campus personnel plan to be completed by the end of February and the balance of the budget by the end of April. Budget will be broken down into monthly amounts to set up a monthly and/or quarterly budget to actual analysis in the 2009-2010 fiscal year.
- Procedures for monthly reconciliations – payroll costs to budget – In place by the end of November 2008.
- Accounts payable – Monthly procedures to ensure timely recording by November 2008 and an imaging document management and control system in place by April 2009.
- Grants management – Redesign and implementation completed in January 2009 with a side-by-side budgeting process with the General Fund process to follow.
- Monthly closing process - back on schedule after completion of audit. Will plan to have July and August closed in October with September and October to close in December. Expect to schedule at least one “hard close” prior to year-end to continue identifying and correcting weaknesses in that process.

### **Fund Balance Recovery**

#### **What is the projection for the fund balance?**

It would seem unrealistic to expect to recover the fund balance in less than three years. The exact recovery period will be dependent on help from the Legislature and the will of the Board and the administration. The principal goal of the Financial Services area is to provide accurate and timely information to support the process.

## **GENERAL INFORMATION AND QUESTIONS, continued**

### **Position Control**

Design work has begun and is expected to be completed and implemented in Human Development by March 2009.

### **Short Term Solutions (December 2008)**

- Hiring freeze in effect
- All vacant positions will be eliminated
- Any new positions will be justified and approved by the Division Chief and Superintendent of Schools and reported to the Board of Trustees
- Hard stop for adding positions will be set in Oracle for any new hires or moves
- Monitor, track and manage funding sources
- Automatic alerts will be sent to the Chief of Staff and Superintendent of Schools on position changes

### **Long Term Solutions (March 2009)**

- Set position control coding for each position in the District
- Set controls and balances in Budget and Human Development for position adds, changes and vacancies
- Institute cross-functional exception reporting to track position trails
- Show actual financial impact on budget
- Generate critical staffing decision reports and dashboards for Management based on a data warehouse

Detailed district staffing will be incorporated into OrgPlus Enterprise tied to Oracle.

### **Bus Transportation**

All ridership formulas are being reviewed, including hazardous routes, as a means of determining opportunities to consolidate routes. In addition, all field trips funded through the general operating fund code, excluding UIL are being reviewed. Current year expenditure savings are around \$250,000 although still pending are field trip reviews by funding sources.

### **Vendor Contracts Under \$50,000**

Many of the vendors listed have been awarded procurements from Bids, Request for Proposals (RFP), and/or Request for Quotes (RFQ). Several contractors have been awarded multiple assignments. To monitor contract or assignment awards, periodically, the Purchasing Department systematically aggregates contractor data and assignments.

## **GENERAL INFORMATION AND QUESTIONS, continued**

### **Reduction in Force/District Impact**

#### **Who has the RIF experience in the department to ensure fairness and equity and that the process is being monitored?**

The District has engaged outside counsel that specializes in the execution of RIF's. In conjunction with in-house legal staff, outside counsel has reviewed the District RIF policies and procedures, reviewed our plan of RIF execution, and provided their opinions regarding the fairness of the RIF policies, plans and procedures.

### **Legal Issues**

#### **How are we guaranteed all policies are being followed fairly and not being broken?**

As noted above, the District has engaged outside counsel that specializes in the execution of RIF's. In conjunction with in-house legal staff, outside counsel has reviewed the District RIF policies and procedures, reviewed our plan of RIF execution, and provided their opinions regarding the fairness of the RIF policies, plans and procedures.

#### **Where are the weak areas for potential future lawsuits?**

Unfortunately, when employees are terminated, litigation is always a possibility. However, at the advice of employment counsel, the District will provide terminated employees opportunities that will hopefully ease the pain of losing a job, and thereby minimize the prospect of litigation.

#### **How much money are we talking about for future lawsuits?**

TEA hearings for terminated teachers generally last 60-90 days and cost in the neighborhood of \$20,000-\$50,000, depending on the complexity of the case and the expertise on the other side. If the other attorney is a school lawyer, the cost is usually less because they do not waste time on irrelevant issues.

### **Communications Plan**

The Financial Corrective Action Plan will be on the District web site with a schedule and detailed action plan.

#### **How are we rebuilding trust with the public?**

Taking decisive, responsible action to resolve the financial crisis, coupled with continued communication and transparency with the public, will ultimately afford the opportunity to regain the public trust.

## **GENERAL INFORMATION AND QUESTIONS, continued**

### **Communications Plan, continued**

#### **What are the roles for the AFT and NEA in the process?**

#### **How do we keep them on board with us and not against us?**

As the financial corrective action plan was developed, top level staff has sought and received advice and counsel from the AFT and NEA. These organizations will continue to provide guidance through the execution and implementation of the RIF.

#### **Do we need additional help from the business community?**

#### **What kinds of public and business outreach communication are planned for oversight and updates?**

The District has pledged to solicit advice and counsel from, and communicate regularly with the Dallas Region Chamber and the general business community with regard to the execution of our Financial Corrective Action Plan.



## GENERAL INFORMATION AND QUESTIONS, continued

### **Request 1:**

**Provide a written step-by-step detailed plan for implementing the reduction in force of contracted employees. I would suggest a *Campus Improvement Plan* type format, with clearly identified, specifically stated affected employment areas, the objective performance measurement applicable to all contract employees, clarification that districtwide seniority will be used, strategies, action steps, timelines, administrators responsible, costs savings, and evaluation. Reduction in force shall be made on a districtwide basis rather than by campus.**

See Exhibit A (Pages 7-9)

### **Request 2:**

**In the written detailed plan for implementing the reduction in force of contracted employees, include information on assessing, determining, and selecting affected employees on a districtwide basis rather than by campus. When a reduction in force is to be implemented, the Board or the General Superintendent, as applicable, shall first determine which employment areas shall be affected.**

See Exhibit A (Pages 7-9)

### **Request 3:**

**In the written detailed plan for implementing the reduction in force of contracted employees, indicate specifically which employment areas shall be affected. The General Superintendent shall confine his or her recommendations for personnel reductions to staff members and administrators assigned to the affected programs or employment areas.**

See Exhibit B

## **GENERAL INFORMATION AND QUESTIONS, continued**

### **Request 4:**

**In the written detailed plan for implementing the reduction in force of contracted employees, indicate the criteria for selecting staff members and administrators in the affected programs or employment areas. A reduction in force may be implemented in one, several, or all employment areas, as determined by the Board if for financial exigency, or as determined by the General Superintendent if for a program change. When a reduction in force is to be implemented for financial exigency, the General Superintendent shall assist the Board by making recommendations to the Board regarding the employment areas and positions to be affected.**

**Employment areas shall be defined as:**

- 1. Elementary grades, subjects, departments, or programs.**
- 2. Secondary grades, departments or programs.**
- 3. Counseling programs.**
- 4. Special programs, such as gifted and talented, bilingual, special education, compensatory education, and migrant education.**
- 5. Library programs.**
- 6. Other nonteaching professional and professional staff.**
- 7. Teachers on probationary status.**
- 8. Professional employees holding temporary certificates or permits.**
- 9. Other District-wide programs.**

See Exhibit A (Pages 7-9)

### **Request 5:**

**In the written detailed plan for implementing the reduction in force of contracted employees, indicate specific employment areas that shall be affected. Additionally, indicate the reason for selecting each of the employment areas.**

See Exhibit A (Pages 7-9)

### **Request 6:**

**Provide a list of schools/departments with the employment positions and the number of positions to be reduced. An orientation session will be conducted by the Human Resource Services to counsel with RIF personnel as to other employment opportunities, unemployment compensation, insurance, substitute work, and other rights to which the employee may be entitled.**

See Exhibit C

## GENERAL INFORMATION AND QUESTIONS, continued

### Request 7:

In the written detailed plan for implementing the reduction in force of contracted employees, provide the anticipated dates, description, and examples of the orientation session, and the written employment separation/settlement offers that will be made to affected employees. Once the General Superintendent has identified the appropriate employees in the affected area(s), those employees shall be considered for other available positions for which they apply and are qualified up to the date of a hearing requested in accordance with the provisions below. Assignments to new jobs shall be based on matching of certification, qualifications, experience and skill sets.

See Exhibit A (pages 7-9)

### Request 8:

In the written detailed plan for implementing the reduction in force of contracted employees, indicate specific current available positions for which affected employees may apply. Using the following criteria, the General Superintendent shall recommend employees within the affected employment area(s) for discharge or nonrenewal because of a reduction in force, pursuant to applicable policies related to termination or nonrenewal. These criteria are listed in order of importance.

- 1. Certification: Appropriate certification and/or endorsement for the current or projected assignment.**

Currently, the Dallas ISD has instituted a hiring freeze. However, as positions become available, employees will be eligible to apply for any open position.

### Request 9:

In the written detailed plan for implementing the reduction in force of contracted employees, provide a definition, explanation, and examples of *“appropriate certification and/or endorsement”*.

- 2. Performance: Effectiveness as reflected by appraisal records and other written evaluative information.**

See Exhibit A (pages 7-9) and certification and endorsements will be honored in the teacher placement process

## GENERAL INFORMATION AND QUESTIONS, continued

### **Request 10:**

**In the written detailed plan for implementing the reduction in force of contracted employees, provide a definition, explanation, and examples of “appraisal records and other written evaluative information”.**

**If the General Superintendent in his or her discretion decides that the documented performance differences between two or more reduction in force prospects are too insubstantial to rely upon, he or she may proceed to apply criterion 3 and, thereafter and to the extend need, criterion 4.**

- 3. Seniority: Length of continuous service in the District. An authorized leave shall not be considered an interruption of continuous service.**
- 4. Professional background: Professional education and work experience related to the current or projected assignment.**

See Exhibit A (pages 7-9)

### **Request 11:**

**In the written detailed plan for implementing the reduction in force of contracted employees, provide a definition, explanation, and examples of “Professional education and work experience related to the current or projected assignment”.**

We do not anticipate utilizing this criterion.

## GENERAL INFORMATION AND QUESTIONS, continued

### Central Office Reductions in Force

#### Request 12:

**Provide a written step-by-step detailed plan for implementing the reduction in force of at-will employees. I would suggest a *Campus Improvement Plan* type format, with clearly identified, specifically stated affected employment areas, the objective performance measurement applicable to all contract employees, clarification that district wide seniority will be used, strategies, action steps, timelines, administrators responsible, costs savings, and evaluation.**

All departments in central office organizations were asked to evaluate their current and future expenditures to drive a more efficient and effective department. Analysis was done within and across Divisions. Management was asked to eliminate 10% of the expenditures to include personnel and non-personnel general operating dollars. Reductions should target areas that they could do without and not impair service levels for students. With all things being equal, performance and seniority will apply.

#### Request 13:

**In the written detailed plan for implementing the reduction in force of at-will employees, include information on assessing, determining, and selecting affected employees.**

All departments in central office organizations were asked to evaluate their current and future expenditures to drive a more efficient and effective department. Analysis was done within and across Divisions. Management was asked to eliminate 10% of the expenditures to include personnel and non-personnel general operating dollars. Reductions should target areas that they could do without and not impair service levels for students.

#### Request 14:

**In the written detailed plan for implementing the reduction in force of at-will employees, indicate specifically which employment areas shall be affected.**

See Exhibit D

#### Request 15:

**Provide a list of departments with the employment positions and the number of positions to be reduced.**

See Exhibit D

## GENERAL INFORMATION AND QUESTIONS, continued

### Request 16:

**In the written detailed plan for implementing the reduction in force of at-will employees, indicate the criteria for selecting staff members and administrators in the affected programs or employment areas.**

All departments in central office organizations were asked to evaluate their current and future expenditures to drive a more efficient and effective department. Analysis was done within and across Divisions. Management was asked to eliminate 10% of the expenditures to include personnel and non-personnel general operating dollars. Reductions should target areas that they could do without and not impair service levels for students.

### Request 17:

**In the written detailed plan for implementing the reduction in force of at-will employees, indicate specific employment areas that shall be affected. Also, indicate the reason for selecting each of the employment areas.**

All departments in central office organizations were asked to evaluate their current and future expenditures to drive a more efficient and effective department. Analysis was done within and across Divisions. Management was asked to eliminate 10% of the expenditures to include personnel and non-personnel general operating dollars. Reductions should target areas that they could do without and not impair service levels for students.

### Request 18:

**In the written detailed plan for implementing the reduction in force of at-will employees, provide the anticipated dates, description, and examples of the orientation session, and the written employment separation/settlement offers that will be made to affected employees.**

See Exhibit E

### Request 19:

**In the written detailed plan for implementing the reduction in force of at-will employees, indicate specific current available positions for which affected employees may apply.**

Currently, Dallas ISD has instituted a hiring freeze. However, as positions become available, at-will employees will be eligible to apply for any open position.

## GENERAL INFORMATION AND QUESTIONS, continued

### Request 20:

In the written detailed plan for implementing the reduction in force of at-will employees, provide a definition, explanation, and examples of any appraisal records and other written evaluative information that will be used in determining affected at-will employees.

This does not apply to at-will employees.

### Central Office/District-wide Costs Reductions

### Request 21:

Identify districtwide initiatives, with the budgeted costs of the initiatives.

Please provide further clarification.

### **Response added 10/2/08 per email from Denise Collier at 12:48 PM**

Arny and James,

In reference to Dr. Blackburn's question #21, we have reduced and/or are in discussion to reduce contracts by the following amounts:

1. *NCEA contract total approved by the Board was \$845,500. After negotiations with the NCEA, this contract will be reduced by \$597,320. A letter to this effect is being developed in collaboration with the Legal Dept. confirming this contract revision and cost reduction.*
2. *IFL contract total approved by the Board was \$647,900. After negotiations with the IFL, this contract will be reduced by \$152,800. A letter to this effect is being developed in collaboration with the Legal Dept. confirming this contract revision and cost reduction.*
3. *Dual Language contract approved by the Board was \$240,000. We are in discussion with the Dr. Gomez to reduce this contract by \$92,000. A letter to this effect will be developed in collaboration with the Legal Dept. confirming this contract revision and cost reduction.*
4. *AVANCE contract approved by the Board was \$300,000. We are in discussion with AVANCE to reduced the contract by approximately \$50,000. A letter to this effect will be developed in collaboration with the Legal Dept. confirming this contract revision and cost reduction.*

### **Response added 10/2/08 per email from Donna Micheaux at 9:33 AM**

5. *OHI - we are proposing cutting that contract in half (from approximately \$550,000 to \$225,000).*

## GENERAL INFORMATION AND QUESTIONS, continued

### Other Possible Cost Reductions

#### Request 22:

Provide a list of employees who are retire/rehire, with their organization name, job name, and salary.

See Exhibit F

#### Request 23:

Provide a list of employees who have more than 25 years of service with the Dallas ISD; with organization name, job name, and salary.

See Exhibit G

**How many teachers will be lost if we collapse the Secondary Teacher Collaborative Learning Period? How much money will be saved by doing this?**

<b>Category</b>	<b>Positions</b>	<b>Cost</b>
Middle School	140	\$7.82M
High School	120	\$6.70M
<b>Total</b>		<b>\$14.52M</b>