Loudoun County Public Schools
FY14 Operating Budgets

School Board Questions and Answers
Board of Supervisors Questions and Answers

July 2013
# Loudoun County Public Schools
## FY14 Operating Budgets - School Board Questions and Answers
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<td>Provide a list of the 333.0 positions requested in the FY14 Superintendent's Proposed Operating Budget (include both FTE and cost).</td>
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<td>2</td>
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<td>1 73</td>
<td>Provide the cost related to the SOQ chart on page 345-346. Also provide the page reference where the positions are found in the budget document.</td>
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<td>3</td>
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<td>For all maintenance worker new staffing requests, provide information concerning the last time a position was requested and changes that have taken place since that time.</td>
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<td>Provide a list of service calls to which the Environmental Specialist responded and substantiate the need for an additional Environmental Specialist.</td>
<td>Rose</td>
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<td>5</td>
<td>3</td>
<td></td>
<td>How many substitute custodians do we currently have? Provide absentee information and why we need additional substitutes.</td>
<td>Morse</td>
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<td>6</td>
<td>4</td>
<td>7 95</td>
<td>Provide a copy of the analysis which was done a couple of years ago in reference to outsourcing custodial services.</td>
<td>Fox</td>
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<td>Provide a schedule of the number of custodians at schools during the day and the number at night and the responsibilities of custodians.</td>
<td>Turgeon</td>
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<td>Provide a breakdown of the increases in Operations and Maintenance in Facilities Services.</td>
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<td>9</td>
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<td>How many students at each school are taking AP Exams?</td>
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<td>10</td>
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<td>Are we currently paying for a GPS service? Will that cost no longer be necessary with the implementation of new communications system?</td>
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<td>What is causing the increase in Operations and Maintenance and Capital Outlay?</td>
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<td>12</td>
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<td>When was Safety and Security moved from Transportation? When was communications equipment maintenance moved from Transportation to Safety and Security?</td>
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<td>What would the estimated cost savings be if the elementary walk zone was changed from 0.8 mile to 1.0 mile?</td>
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<td>8 130</td>
<td>Provide the walk zone study that was approved by the Health, Wellness, Transportation Committee as a part of the answer to question #13.</td>
<td>Reed</td>
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<td>15</td>
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<td>3 81</td>
<td>What has been the experience of other jurisdictions with outsourcing transportation? Was there significant cost savings?</td>
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<td>16</td>
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<td>What specific statutory provisions are there in reference to charging for transportation?</td>
<td>Fox</td>
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<td>Provide the results of the telecommunications study.</td>
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<td>Provide the cost of the telecommunications analyst position.</td>
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<td>Provide the rational for all new position requests in Facilities Services.</td>
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<td>Why is there an 11% increase in Facilities Services?</td>
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<td>Why is there an 11% increase in Transportation Services?</td>
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<td>Provide a list of the addition to the fleet and expansion of services in Central Vehicle Maintenance.</td>
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<td>Provide a breakdown of the conference fees in the School Board budget.</td>
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<td>Provide a breakdown of membership fees in the School Board budget.</td>
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<td>11</td>
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<td>Provide a breakdown of subscriptions in School Board budget. Which ones are required and what are the benefits of the subscriptions?</td>
<td>Turgeon</td>
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<tr>
<td>27</td>
<td>11</td>
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<td>Are there various levels of VSBA and NSBA memberships?</td>
<td>Rose</td>
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<td>28</td>
<td>11</td>
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<td>Provide a list of all attorneys who LCPS uses and the services they provide.</td>
<td>Rose</td>
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<td>29</td>
<td>12</td>
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<td>Provide a breakdown of overtime by department.</td>
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<td>30</td>
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<td>What is the usage of the wellness center?</td>
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<td>What is the cost of mailing report cards? Are we going to move to electronic with Clarity?</td>
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<td>32</td>
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<td>16 148</td>
<td>Provide a list of the architectural and engineering expenditures for land acquisition by project for the last 5 years.</td>
<td>Rose</td>
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<td>33</td>
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<td>9 135</td>
<td>Provide a description of land tests which are done, when the tests are done during the process and what the requirement for the test is.</td>
<td>Turgeon</td>
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<td>34</td>
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<td>25 259</td>
<td>Provide a list of the other work/survey areas and samples of work/surveys which have been done by K12 insight.</td>
<td>Morse</td>
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<td>35</td>
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<td>What is the average length of time that a retiree receive healthcare benefits after retirement?</td>
<td>Kuesters</td>
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<td>Provide the number of employees we consider full time who work less than 30 hours per week but more than 17.5 hours per week.</td>
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<td>Are all of the rates shown on page 10 of the Compensation handout 12 month rates?</td>
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<td>If we were to re-define full-time for VRS purposes would we be required to grandfather current employees? Is there any legal obligation concerning this?</td>
<td>Fox</td>
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<td>39</td>
<td>15</td>
<td></td>
<td>If we offer a no cost group health insurance option would it encourage employees who do not take GHI to enroll in GHI?</td>
<td>Hornberger</td>
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<td>40</td>
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<td></td>
<td>For dual employee households, how does the cost of this group health insurance plan affect them?</td>
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<td>Is there a possibility of offering catastrophic group health insurance coverage only?</td>
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<td>What is the current retention rate for LCPS technology employees. How do LCPS technology salaries compare to other local jurisdictions?</td>
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<td>Relate SOQ to General Education (page 345 vs. 72). Reconcile the pages - General Education vs. Supplemental Information.</td>
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<td>What is the adoption or user rate at the elementary school level for Clarity?</td>
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<td>Breakdown the Clarity usage by elementary, middle, and high. Also when it came online.</td>
<td>Bergel</td>
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<td>How much of the Adult Ed budget is for grant matching? Adult Ed instructor costs and fees for classes?</td>
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<td>Of the amount budgeted for Adult Education, provide the breakdown of the funds collected.</td>
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<td>How many enrolled in GED? Provide the enrollments by program.</td>
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<td>Provide information concerning the involvement of the community in art programs. Is there integration with the community outlets for art?</td>
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<td>Provide a breakdown of the percent of Career &amp; Technical Education classes provided in MS and HS vs. Monroe Technology Center.</td>
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<td>Any discussions of expanding JROTC program?</td>
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<td>Provide assignments of ELL teachers and TA's at each school, the number of students and the percent of students (students being served, not just eligible).</td>
<td>Hornberger/Turgeon</td>
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<td>What would be the cost of an extra planning day?</td>
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<td>What would be the cost to allow an unencumbered planning day at the MS level?</td>
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<td>Provide the budget/costs for textbooks for the last 5 years.</td>
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<td>56</td>
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<td>What is the average unit cost of a textbook for the last 5 years?</td>
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<td>Breakdown the Personnel and O&amp;M costs on the General Education page by elementary, middle, and high school levels.</td>
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<td>Provide data showing trends month by month of spending.</td>
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<td>What is the difference in teaching load between SOL department chairs and teachers? What would the savings be if department chairs taught one additional class?</td>
<td>Hornberger</td>
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<td>20</td>
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<td>Provide list of department chair responsibilities.</td>
<td>Bergel</td>
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<td>How many teachers are leading clubs and receiving no additional compensation?</td>
<td>Rose</td>
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<td>62</td>
<td>21</td>
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<td>What is the increase in number of students for TJ and Governor's schools from FY12 to FY13? What is the projection for FY13 to FY14?</td>
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<td>What is the full cost of sending students to TJ? What is the full cost of sending a student to Governor's School?</td>
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<td>Number of students in Futura and Spectrum over the last five years and the number who have dropped out of those programs over the same years?</td>
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<td>What additional positions are budgeted for Champe? Clarify the new support positions on the HS page.</td>
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<td>What is the cost savings to the County if LCPS purchases a library system?</td>
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<td>Explain why it would be beneficial for LCPS to purchase a library system.</td>
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<td>What would the budgetary impact of moving full time to 30 hours per week?</td>
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<td>Provide an analysis of the Personnel costs on the Middle School page 94.</td>
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<td>What would the consequences be of hiring the secretary for Trailside Middle School for a half-year instead of the full year?</td>
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<td>Why is there such a difference in Capital Outlay through FY10 - FY14 for Music? Provide a summary of what is being funded.</td>
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<td>What was the one time high cost in music in FY13? What is the enrollment in music program in last 5 years?</td>
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<td>How many Parent Liaisons and Interpreters are there?</td>
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<td>How much was Pathways in last years' budget? Where was it?</td>
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<td>Where have we lost grant funding that required moving staff from grants to local?</td>
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<td>How many Reading Specialists in MS and HS? What is the focus of that program?</td>
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<td>What is the Capital Outlay in FY12 in Science?</td>
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<td>How many teachers take advantage of the staff development opportunities and how do we compare with other counties?</td>
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<td>What is the cost of the FTEs transferred to Staff Development and the Teacher Mentor program transferred to Personnel? Also provide the O&amp;M costs.</td>
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<td>In the Staff Development budget, provide a breakdown of conferences that require out of town travel and overnight stays.</td>
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<td>How many MS and HS Summer School? How many of our secondary summer school needs could be met by online courses?</td>
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<td>Provide a 4 year revenue history for summer school and the percent of the program being covered.</td>
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<td>When was the last time summer school rates were raised?</td>
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<td>Provide the number of tests given to students over the last 4 years.</td>
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<td>Breakdown the positions by mandated and not mandated for Special Education.</td>
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<td>86</td>
<td>31</td>
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<td>How many times have we ever been out of compliance in Special Education?</td>
<td>Bergel</td>
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<td>87</td>
<td>32</td>
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<td>Provide the percentage of the special education students are located within their cluster. Comparison of current and expected because of boundaries.</td>
<td>Hornberger</td>
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<td>88</td>
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<td>Provide a breakdown of location of Special Education teachers and Special Education teacher assistants and ratio of students to teacher.</td>
<td>Hornberger</td>
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<td>89</td>
<td>35</td>
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<td>Relate the new positions in Special Education to the Staffing chart on page 156.</td>
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<tr>
<td>90</td>
<td>35</td>
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<td>Why are there changes in the FY12 Appropriated budget to the FY12 Actual in Special Education?</td>
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<td>91</td>
<td>35</td>
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<td>Provide the requirement of Special Education students to be in general education classrooms and what LCPS percentages were.</td>
<td>Turgeon</td>
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<td>92</td>
<td>36</td>
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<td>Over the last 4 years, what were the mandated requirements and how did we meet them?</td>
<td>Hornberger</td>
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<td>93</td>
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<td>The percent of students with disabilities and LCPS student population is 10.78%. What is it for the surrounding jurisdictions?</td>
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<td>What is the number of students who exit Special Education because their IEPs have been met. Is that why LCPS percent of Special Education is low?</td>
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<td>Provide the mandate suggestions to be included in LCPS legislative package.</td>
<td>Fox</td>
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<td>96</td>
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<td>Provide a list of the classified reclassifications that have occurred this year and the cost.</td>
<td>Hornberger</td>
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<td>97</td>
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<td>Provide the mandated vs. non-mandated positions in Student Services.</td>
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<td>98</td>
<td>38</td>
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<td>Revision to Question 41 Is there a possibility of offering catastrophic group health insurance coverage only? Clarified as a high deductible plan.</td>
<td>Hornberger</td>
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<td>99</td>
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<td>What is the process should the School Board desire to close a school?</td>
<td>Hornberger</td>
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<td>100</td>
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<td></td>
<td>Regarding the SEAC proposed &quot;transitions specialist&quot; position, how can this position help promote students into successful and contributing members of our community as well as identifying students who may be at risk to engage in dangerous actions.</td>
<td>Rose</td>
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<td>101</td>
<td>39</td>
<td>24 258</td>
<td>OPEB: What are the differences in the OPEB reforms recommended by the Superintendent as assumed in his Proposed FY 2014 Operating Budget and those already undertaken by the Board of Supervisors? Please provide comparable charts showing the difference in the Annual Required Contribution (ARC) and funding annually set aside/proposed for both the Superintendent’s proposed and Board of Supervisor’s adopted OPEB reform plans over the last several years.</td>
<td>Hornberger</td>
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<tr>
<td>102</td>
<td>40</td>
<td>10 139</td>
<td>HEALTH INSURANCE: What would be the amount that could be rebated per month to eligible employees who opt out of LCPS' health insurance plan if an additional $15 per month was added to both OAP and POS premiums for Employee Only plans of the Personnel Committee’s recommended plan? (Calculation: Total current Employee Only enrollees x $15 divided by the current number of eligible employees not enrolled in the LCPS health insurance plan)? This approach is intended to be revenue neutral, unless savings are gained through the voluntary migration of eligible employees away from health insurance offered through LCPS. My assumption is that, since we do not know if any will migrate, it cannot be directly factored into the budget with any level of certainty.</td>
<td>Hornberger</td>
</tr>
<tr>
<td>103</td>
<td>40</td>
<td>10 139</td>
<td>TRANSPORTATION: How many school buses were in operation in FY12? How many are there currently in FY13? How many new buses and replacement buses were included in the FY13 Appropriated Budget? How many replacement buses are included in the FY14 Superintendent's Proposed Operating Budgets?</td>
<td>Hornberger</td>
</tr>
<tr>
<td>104</td>
<td>40</td>
<td>10 139</td>
<td>TRANSPORTATION: How many school buses were decommissioned in FY11, FY12 and FY13 (anticipated) and what was their condition at time of decommissioning? Please provide a chart specifying the model, age, years of service, mileage and reason for decommissioning for each.</td>
<td>Hornberger</td>
</tr>
<tr>
<td>105</td>
<td>41</td>
<td>10 139</td>
<td>TRANSPORTATION: What is the optional equipment that is routinely loaded on school buses purchased by LCPS and the approximate cost on each bus?</td>
<td>Hornberger</td>
</tr>
<tr>
<td>106</td>
<td>42</td>
<td>10 139</td>
<td>TRANSPORTATION: What has been the turn-over rate of bus drivers and bus attendants over the past three years (FY10, FY11 and FY12)? What is the approximate cost of training each new bus driver and attendant?</td>
<td>Hornberger</td>
</tr>
<tr>
<td>107</td>
<td>42</td>
<td>10 139</td>
<td>STAFFING: How are the current 108 Technology Teaching Assistants assigned? Why are there more of them than Technology Resource Teachers? What is the average cost associated with each position (salary/benefits)?</td>
<td>Hornberger</td>
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<tr>
<td>108</td>
<td>42</td>
<td></td>
<td>INSTRUCTIONAL PROGRAMMING: How much in fees are collected from each student associated with the Driver's Education “Behind the Wheel” program and budgeted in total for FY14? How much is the cost of this particular program, in terms of personnel, O &amp; M, and capital outlay cost (including vehicle depreciation, if applicable)? Is the “Behind the Wheel” program required to be offered by the school division?</td>
<td>Hornberger</td>
</tr>
<tr>
<td>109</td>
<td>43</td>
<td></td>
<td>OTHER REVENUE: What are the sources of “other revenue” anticipated in the FY13 Proposed Budget and what are the amounts of revenue associated with each source? What is the destination of these funds for each (by percentage, if shared)?</td>
<td>Hornberger</td>
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<tr>
<td>110</td>
<td>43</td>
<td></td>
<td>STAFFING: Last year we learned that the staffing metric for custodian allocations within LCPS is one custodian per 19,000 square feet with the addition of one athletic custodian at the HS level (see FY13 Budget SB Q/A #107). What is the metric used in surrounding jurisdictions? How many fewer custodians would be needed system-wide if this metric was increased to one custodian per 20,000 square feet?</td>
<td>Hornberger</td>
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<tr>
<td>111</td>
<td>44</td>
<td></td>
<td>TRANSPORTATION: Have school start-times ever been modified in order to maximize the number of runs that could be done by a particular driver/bus? If not why not? Realistically what could be the maximum number of runs possible and approximately what would be the range of minutes that start-times would need to be adjusted (10 minutes, 15 minutes, 20 minutes, etc.)? Would this need to be done by Cluster?</td>
<td>Hornberger</td>
</tr>
<tr>
<td>112</td>
<td>44</td>
<td></td>
<td>STAFFING: Do HS Athletic Directors, Athletic Assistants or Athletic Trainers teach any courses (i.e. Health/PE)? If not, why not?</td>
<td>Hornberger</td>
</tr>
<tr>
<td>113</td>
<td>45</td>
<td></td>
<td>STAFFING: What year did LCPS begin staffing Athletic Assistants? What are the primary responsibilities of Athletic Assistants?</td>
<td>Hornberger</td>
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<td>114</td>
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<td></td>
<td>INSTRUCTIONAL PROGRAMMING: How many Loudoun students attend Thomas Jefferson HS in Fairfax County and at what cost? Please include a thorough analysis, including tuition paid to FCPS, state per/student revenue lost, transportation, etc. and chart that cost and number of students over the last four years and proposed for FY14.</td>
<td>Hornberger</td>
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<tr>
<td>115</td>
<td>46</td>
<td>17 &amp; 18 152</td>
<td>SMALL SCHOOLS: What are the additional annual operating costs associated with each of the 5 smallest elementary schools in the county with roughly 150 students or fewer (Aldie ES, Hamilton ES, Hillsboro ES, Lincoln ES, and Middleburg ES)? What is the Capital Asset Preservation Program (CAPP) costs for each of them for the next five years? Please provide a breakdown of those costs for each school and their range of capacity utilization over the next 5 years.</td>
<td>Hornberger</td>
</tr>
<tr>
<td>116</td>
<td>46</td>
<td></td>
<td>SMALL SCHOOLS: Based on current Capital Improvement Program (CIP) projections, would it still be possible to absorb the anticipated student populations of the 5 smallest schools (Aldie, Hamilton, Hillsboro, Lincoln and Middleburg) into existing schools within their same planning areas over the next 5 years? By my calculation these five schools currently have a combined enrollment of 544 students, a combined program capacity of 819 (combined 66% utilization rate) and declining enrollment trajectory. Furthermore, four of them (Hamilton, Hillsboro, Lincoln and Middleburg) are located in the Western Loudoun Planning Area which has a projected surplus facility capacity of between roughly 1,200 and 1,500 at the elementary level through the 2017-18 school year and is anticipated to be on a declining enrollment trajectory overall as a planning area. It would appear that closing all four of these small schools in Western Loudoun would not even half the surplus elementary facility capacity in that Planning Area and still leave ample space for potential (but unlikely) student growth of more than 700-800 students (20% or more). Is this assessment correct?</td>
<td>Hornberger</td>
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<td>118</td>
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<td>COMPENSATION: What is the budgetary cost of taking the same approach with salary increases in FY14 as was done in FY13 at the following levels: $500 or $0.33/hour; $1,000 or $0.66/hour; and $1,500 or $1.00/hour? Roughly how many salaried employees (each full and part-time) and hourly employees (each full and part-time) are there proposed to be in FY14? Would it be possible to provide year-end bonuses to employees with any end of year surplus remaining in the budget in FY14?</td>
<td>Hornberger</td>
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<tr>
<td>119</td>
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<td></td>
<td>Investigate the possibility of seeking historic preservation status for Lincoln including the possibility of applying for federal grants.</td>
<td>Morse</td>
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<td>120</td>
<td>48</td>
<td></td>
<td>What would be the estimated budget impact of increasing the definition of &quot;full-time&quot; to 6.0 hours/day for the purposes of VRS and OPEB only and grandfathering all current employees who are already vested?</td>
<td>Fox</td>
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<td>121</td>
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<td></td>
<td>What would be the estimated budget impact of increasing the definition of &quot;full-time&quot; to 6.0 hours/day for the purposes of VRS and OPEB only if grandfathering ALL current employees (vested or not)?</td>
<td>Fox</td>
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<tr>
<td>122</td>
<td>48</td>
<td></td>
<td>Assuming that the school board adopt the &quot;Fox Plan&quot; for health insurance premiums, what would be the estimated budget impact of increasing the threshold of eligibility for health insurance benefits in FY 14 as follows: 100% benefit (LCPS premium subsidies as described in &quot;Fox Plan&quot;) at 6.0 hours/day or more, 75% benefit (LCPS subsidizes premiums at levels 75% of subsidy rates in the &quot;Fox Plan&quot;) at 5.0 hours/day, and 50% benefit (50% &quot;Fox Plan&quot; subsidies) at 4.0 hours/day, and no benefit at less than 4.0 hours/day BUT grandfathering all employees at 4.0 hours a day or more in FY 14?</td>
<td>Fox</td>
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<td>123</td>
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<td>What would be the estimated budget impact of the changes described in #3 (above) without any grandfathering?</td>
<td>Fox</td>
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<td>124</td>
<td>49</td>
<td></td>
<td>How many students take advantage of Howard Hughes Medical Institute (HHMI) exchange program? What schools participate in this program?</td>
<td>Morse</td>
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<td>125</td>
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<td></td>
<td>Could the summer STEM camp program be expanded in the Howard Hughes Medical Institute (HHMI) grant? How much would it cost to open a third site?</td>
<td>Morse</td>
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<td>126</td>
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<td></td>
<td>What part of JROTC is personnel and what part is O&amp;M? Where are the teachers?</td>
<td>Hornberger</td>
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<td>127</td>
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<td></td>
<td>How is it determined which school receive funds from the Technology Grant? Do they provide validation for the funding?</td>
<td>Morse</td>
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<tr>
<td>128</td>
<td>50</td>
<td></td>
<td>Is the Title I report posted on the web site and where is it posted?</td>
<td>Rose</td>
</tr>
<tr>
<td>129</td>
<td>50</td>
<td>14 147</td>
<td>Provide progress over last 3 or 4 years for ELL students are making in assessments for Title III A - ELL.</td>
<td>Morse</td>
</tr>
<tr>
<td>130</td>
<td>50</td>
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<td>Number of students served by Title X Part C over the last 3 years?</td>
<td>Bergel</td>
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<td>131</td>
<td>51</td>
<td></td>
<td>Which of the two new positions (Senior Financial Analyst and Accountant) in Financial Services is higher priority if both could not be afforded?</td>
<td>Hornberger</td>
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<tr>
<td>132</td>
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<td></td>
<td>Provide the cost of bereavement leave as suggested by LEA. Is there a record of absences due to death in family?</td>
<td>Turgeon</td>
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<tr>
<td>133</td>
<td>51</td>
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<td>Did the County experience the same type of increase for their retirees?</td>
<td>Turgeon</td>
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<tr>
<td>134</td>
<td>51</td>
<td>13 146</td>
<td>Provide analysis of the northern VA jurisdictions and what they offer retirees for health insurance.</td>
<td>Hornberger</td>
</tr>
<tr>
<td>135</td>
<td>51</td>
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<td>Provide breakdown of Non-Departmental budget over 4 years.</td>
<td>Hornberger</td>
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<td>136</td>
<td>52</td>
<td>12 142</td>
<td>Provide list of vehicle purchases in the Lease.</td>
<td>Hornberger</td>
</tr>
<tr>
<td>137</td>
<td>52</td>
<td></td>
<td>Are there any vehicles in lease that are for Driver Education?</td>
<td>Turgeon</td>
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<tr>
<td>138</td>
<td>52</td>
<td></td>
<td>Provide the number of mentors for 2011-12 and the stipend cost for mentoring and workshops. What is projected for FY14?</td>
<td>Turgeon</td>
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<td>139</td>
<td>52</td>
<td></td>
<td>Is there competition for the mentor positions? How are they selected? Are there more teachers wanting to mentor than there are mentor positions?</td>
<td>Morse</td>
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<tr>
<td>140</td>
<td>53</td>
<td></td>
<td>Provide statistics on the number of teachers that leave LCPS and the reason for leaving. Provide the number of teachers hired from other jurisdictions. Also provide the retention rate.</td>
<td>Rose</td>
</tr>
<tr>
<td>141</td>
<td>53</td>
<td></td>
<td>Provide analysis of the costs and the benefits as a result of the NCLB waiver for all departments.</td>
<td>Turgeon</td>
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<tr>
<td>142</td>
<td>54</td>
<td></td>
<td>Are there any processes in place to evaluate substitutes?</td>
<td>Turgeon</td>
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<tr>
<td>143</td>
<td>54</td>
<td></td>
<td>Do retirees leave Loudoun County?</td>
<td>Hornberger</td>
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<td>144</td>
<td>54</td>
<td></td>
<td>Do we give any incentives to entice people to take hard-to-staff positions? Could an extra step be given if a teacher has less than 15 years of experience?</td>
<td>Hornberger</td>
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<td>145</td>
<td>55</td>
<td>19 158</td>
<td>Provide a listing of all new positions with the cost of each position.</td>
<td>Hornberger</td>
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<td>146</td>
<td>55</td>
<td></td>
<td>Pg. 52-55 of the DTS budget document includes budget amounts for the tech plan. Please provide the board with cross references from each line item on the DTS document to the corresponding line item in the LCPS budget.</td>
<td>Kuesters</td>
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<td>147</td>
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<td></td>
<td>Define a needs based budget. What is the difference between needed services/programs and mandatory services/programs?</td>
<td>Kuesters</td>
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<td>148</td>
<td>55</td>
<td>23 219</td>
<td>What percentage of the budget is mandatory vs. non-mandatory (needed or discretionary)?</td>
<td>Kuesters</td>
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<tr>
<td>149</td>
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<td></td>
<td>What is the staffing and full cost of a typical elementary school? Middle school? High school?</td>
<td>Kuesters</td>
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<td>150</td>
<td>56</td>
<td></td>
<td>Pg. 253 – Please explain the large increases in the request for Operations &amp; Maintenance (+$809,277 or +87.8%) and Capital Outlay (+$685,000 or +274%)</td>
<td>Kuesters</td>
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<tr>
<td>151</td>
<td>58</td>
<td></td>
<td>What is the size of the motor pool?</td>
<td>Kuesters</td>
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<td>152</td>
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<td>20 160</td>
<td>Please provide a copy of the report from Walden Economic Consulting that was referenced in the December 6, 2012 budget presentation.</td>
<td>Kuesters</td>
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<td>153</td>
<td>58</td>
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<td>What is the full cost of an LCPS employee? Provide a list of all of the</td>
<td>Kuesters</td>
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<td>cost components attached to an individual employee (e.g., salary, health</td>
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<td>insurance, OPEB, VRS, other employment benefits, training, liability</td>
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<td>insurance, paid leave, etc.)</td>
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<td>21 216</td>
<td>Provide the number of actual employees (not FTEs) for FY 2010 through FY</td>
<td>Kuesters</td>
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<td>2014, broken down by position, as shown in the table from pg. 29.</td>
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<td></td>
<td>Do Teacher Assistants in the Technology Resource department teach any</td>
<td>Kuesters</td>
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<td>classes? How many Teacher Assistants are assigned to a lab? Or are they</td>
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<td>assigned to a school? Why are there more Teacher Assistants than</td>
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<td>Technology Resources Teachers?</td>
<td></td>
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<td>156</td>
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<td></td>
<td>When do the acceptance letters for Thomas Jefferson get mailed?</td>
<td>Hornberger</td>
</tr>
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<td>157</td>
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<td></td>
<td>Which teachers will be getting the handhelds in the first rollout?</td>
<td>Hornberger</td>
</tr>
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<td>158</td>
<td>59</td>
<td></td>
<td>Provide a breakdown of the O&amp;M costs in Technology Services.</td>
<td>Hornberger</td>
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<td></td>
<td>What is the percentage of schools nationally and in the Commonwealth</td>
<td>Hornberger</td>
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<td></td>
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<td>that have switched to one-to-one technology?</td>
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<td>160</td>
<td>60</td>
<td>22 217</td>
<td>Compare the OPEB cost in the Superintendent's Proposed budget to the</td>
<td>Hornberger</td>
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<td>County.</td>
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<td>161</td>
<td>60</td>
<td></td>
<td>What are other jurisdictions doing about caps on retiree health insurance?</td>
<td>Turgeon</td>
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<td>162</td>
<td>60</td>
<td></td>
<td>Regarding the renovations for Lincoln ES, please provide an analysis of</td>
<td>Turgeon</td>
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<td>the work needed (when such renovations/repairs were last completed, life</td>
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<td>span of parts/systems needing repair, as well as alternatives to said</td>
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<td>renovations). Is there a possibility that some of these renovations be</td>
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<td>pushed to another year? If there was interest in the community to</td>
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<td>provide funding for such repairs, could arrangements be made to do so?</td>
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<td>163</td>
<td>61</td>
<td></td>
<td>How much was spent on paper and ink in FY 12 and 13? How much was budgeted for paper and ink in FY 12 and 13? Please list amount for schools (as a whole...not by individual school) and admin.</td>
<td>Turgeon</td>
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<tr>
<td>164</td>
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<td>How many devices are asked for in the Technology Services budget and what educational need do they fill?</td>
<td>Kuesters</td>
</tr>
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<td>165</td>
<td>62</td>
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<td>Dell seems to be heavily invested in thin client solutions since their purchase of Wyse. Looks like they currently offer a thin client netbook/laptop that might be a good fit for a student 1:1 device. There is an article that suggests they may have a tablet on the way. Could you give me a ballpark estimate on what this type of solution would run on a per-unit basis (taking into account both the device and the servers required to run it) what is the implications on software licensing? Do we still have to buy a license for each unit or is there any savings on the software end that would result from virtualization? Are there any other school districts that have gone this way to do 1:1? Does Dell Wyse have a lease program?</td>
<td>Fox</td>
</tr>
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<td>167</td>
<td>62</td>
<td>26 262</td>
<td>Follow up to question #137, provide a list of all driver education vehicles in the lease (not just this year).</td>
<td>Turgeon</td>
</tr>
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<td>63</td>
<td></td>
<td>Regarding question #163, need further explanation as to why some schools have a shortage of paper and ink.</td>
<td>Turgeon</td>
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<td>63</td>
<td></td>
<td>FEES: According to p. 126 of the proposed budget, the “Summer in the Arts” program costs a total of $187,634 in FY14, $350,000 more than in FY13, and at a cost of $425 per student, is “100% self-funded by tuition charged to participants.” However, the staff response to Q/A #109 indicates that a total of only $45,000 is anticipated in the proposed budget in revenue from fees associated with tuition for the “Summer in the Arts” program. This projected revenue would appear to represent less than 24% of the cost of the program, not 100% as claimed on p. 126. How do you explain this discrepancy? What really would the tuition fees need to be to fully-fund this two-week, extracurricular, summer program?</td>
<td>Hornberger</td>
</tr>
<tr>
<td>Item Number</td>
<td>Page Number</td>
<td>Attachment Number and Page</td>
<td>Question</td>
<td>Board Member</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>170</td>
<td>64</td>
<td></td>
<td>FEES: According to the staff response to Q/A #82, tuition for Summer School is covering a smaller and smaller share of the operating costs of the program over the last few years as the fees charged for Summer School have remained stagnant but program costs have grown significantly (14.6% in proposed FY14 over budgeted FY13 alone). What would be the estimated increased revenue generated by charging the following for summer school: Elementary: $350 (up $25 over FY13/7.7% increase) Middle School: $550 (up $50 over FY13/10% increase) High School: $725 (up $75 over FY13/11.5% increase)</td>
<td>Hornberger</td>
</tr>
<tr>
<td>171</td>
<td>64</td>
<td></td>
<td>FEES: According to the staff response to Q/A #108, tuition for the “Behind the Wheel” program within Driver’s Education at $195/student only partially offsets the cost of this program that is not covered by state aid. LCPS could charge as much as$214.57 per student to cover the cost of this optional program that is already heavily subsidized to parents by state support. What would be the estimated increase in revenue generated by charging $214.50/student for this program (up $19.50 or a 10% increase over FY13)?</td>
<td>Hornberger</td>
</tr>
<tr>
<td>172</td>
<td>65</td>
<td></td>
<td>FEES: The Food Services budget is designed to be self-supporting through a combination of federal/state aid and fees charged for each meal served. Fees charged for each meal served have not needed to be increased over the last couple years to meet the costs associated with providing this service. Are all costs associated with this service actually included in this assessment, including all employment costs for associated personnel (proposed raises/cost of living increases, OPEB costs, and a share of administrative overhead beyond the immediate Food Services budget alone)? If not, why not? What would the meal price increases need to be in order to accurately account for these additional costs, and what would be the total offset (expenses/revenue) associated with these meal increases in the proposed budget?</td>
<td>Hornberger</td>
</tr>
<tr>
<td>Item Number</td>
<td>Page Number</td>
<td>Attachment Number and Page</td>
<td>Question</td>
<td>Board Member</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>----------------------------</td>
<td>--------------------------------------------------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>173</td>
<td>66</td>
<td></td>
<td>LEASE/PURCHASE: What are the total expenses in the FY14 Superintendent’s Proposed Operating Budget that could be funded through the Proposed Lease/Purchase Budget, if there were no funding limits in that budget? Please provide a summary of those expenses and where they can be found in the proposed budget (department, type–O&amp;M or capital outlay – and page number). What other considerations must be made in determining how much and which items should be afforded through the Lease/Purchase Budget?</td>
<td>Hornberger</td>
</tr>
<tr>
<td>174</td>
<td>67</td>
<td></td>
<td>Submit the actuals for the O and M justification in Support Services on p. 248. I would like to see why the staff asked for $24,468,880 in FY14.</td>
<td>Bergel</td>
</tr>
<tr>
<td>175</td>
<td>68</td>
<td></td>
<td>Explain the Technology Services computer equipment reduction of $4.5 million.</td>
<td>Bergel</td>
</tr>
<tr>
<td>176</td>
<td>69</td>
<td></td>
<td>In developing the cost of meals, are utilities, custodial support, cafeteria equipment replacement, and cafeteria monitors costs included in the price? If they aren't, how much would it increase the price if they were included?</td>
<td>Reed</td>
</tr>
<tr>
<td>177</td>
<td>69</td>
<td></td>
<td>In the past, when we had to reconcile the approved budget with the BOS cuts, we were told we couldn't adjust the meals price without going back to the BOS for approval. Can you explain why and what procedures we would need to go through to get a price change 'approved'?</td>
<td>Reed</td>
</tr>
<tr>
<td>178</td>
<td>69</td>
<td></td>
<td>Regarding question #53 on pg.18 what is the cost of an unencumbered planning period, not day, for MS teachers.</td>
<td>Bergel</td>
</tr>
<tr>
<td>179</td>
<td>70</td>
<td></td>
<td>What is the cost savings from increasing class size? Where could class size be increased (in specific locations and classes) without increasing the overall class size average? What would the cost savings be?</td>
<td>Bergel</td>
</tr>
<tr>
<td>180</td>
<td>70</td>
<td></td>
<td>How many drivers leave after obtaining CDL, how long do they stay, what are associated costs of training?</td>
<td>Morse</td>
</tr>
<tr>
<td>181</td>
<td>70</td>
<td></td>
<td>What is the annual cost of the NSBA membership? What is the annual cost of the VSBA membership?</td>
<td>Rose</td>
</tr>
<tr>
<td>182</td>
<td>70</td>
<td></td>
<td>What is the total budget for field trips (or what percentage reduction this cut if from the total field trip budget)?</td>
<td>Turgeon</td>
</tr>
<tr>
<td>Item Number</td>
<td>Page Number</td>
<td>Attachment Number and Page</td>
<td>Question</td>
<td>Board Member</td>
</tr>
<tr>
<td>-------------</td>
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<td>----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>183</td>
<td>70</td>
<td></td>
<td>What is the total budget for substitutes (or what percentage reduction this cut if from the total substitute budget)?</td>
<td>Turgeon</td>
</tr>
<tr>
<td>184</td>
<td>71</td>
<td></td>
<td>Provide the breakdown of the O&amp;M reductions of $2,271,293 in Support Services</td>
<td>Turgeon</td>
</tr>
<tr>
<td>185</td>
<td>71</td>
<td></td>
<td>Of the three elementary schools where a half-time librarian reduction is proposed, how many librarians are currently assigned to these schools?</td>
<td>Turgeon</td>
</tr>
<tr>
<td>186</td>
<td>71</td>
<td></td>
<td>What would be the budgetary impact of reinstating the 10 year minimum requirement for retirement from the proposed 15 year minimum requirement?</td>
<td>Turgeon</td>
</tr>
<tr>
<td>187</td>
<td>71</td>
<td></td>
<td>Were there any changes to the instructional funds budget in the recommended reconciliation? If so, what will be the per pupil allotment for FY14 and how does it compare to the FY13 allotment?</td>
<td>Turgeon</td>
</tr>
<tr>
<td>188</td>
<td>71</td>
<td></td>
<td>How much is budgeted for the pilot program to introduce tablets/one-to-one devices in the classroom? How many schools, which teachers, and in what subjects will these be used?</td>
<td>Turgeon</td>
</tr>
<tr>
<td>189</td>
<td>71</td>
<td></td>
<td>How much was realized in substitute funding in FY 10, 11 and 12? I am curious how the FY 13 budget levels compare to what has been actually expended.</td>
<td>Hornberger</td>
</tr>
<tr>
<td>190</td>
<td>71</td>
<td></td>
<td>What is the cost of freshmen sports?</td>
<td>Sheridan</td>
</tr>
<tr>
<td>191</td>
<td>72</td>
<td></td>
<td>What is the cost of Family Life teachers and could PE teachers teach FLE? If so, could the FLE teachers be absorbed through attrition?</td>
<td>Sheridan</td>
</tr>
</tbody>
</table>
1. Provide a list of the 333.0 positions requested in the FY14 Superintendent’s Proposed Operating Budget (include both FTE and cost). (Hornberger/Dec. 13, 2012)

<table>
<thead>
<tr>
<th>ENROLLMENT GROWTH</th>
<th>FTE</th>
<th>Salary &amp; Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instruction</td>
<td>187.8</td>
<td>$13,208,500</td>
</tr>
<tr>
<td>Grade K-12 classroom teachers (127.3), elementary art (3.0), music (3.0) and physical education (4.0) teachers, reading teachers (2.0), family life teacher (1.0), librarians (3.5), and guidance counselors (2.0) to service the needs of 2,566 additional students. Special education teachers (42.0) for enrollment growth.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bus Drivers and Attendants</td>
<td>17.0</td>
<td>$646,300</td>
</tr>
<tr>
<td>Bus drivers (12.0) and attendants (5.0) necessary for enrollment growth.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher Assistants</td>
<td>53.1</td>
<td>$1,588,000</td>
</tr>
<tr>
<td>Teacher assistant’s regular education (11.1) and special education (42.0) to address the needs of additional students.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructional Support</td>
<td>9.0</td>
<td>$642,300</td>
</tr>
<tr>
<td>Social worker (2.0), psychologist (2.0), educational diagnostician (1.0), occupational therapist (1.0), eligibility coordinator (1.0), and safety &amp; security technician (2.0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>School Based Other School Support</td>
<td>5.0</td>
<td>$215,600</td>
</tr>
<tr>
<td>Safety and security specialist (3.0), and school secretaries (2.0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>School Based Administration</td>
<td>4.0</td>
<td>$402,900</td>
</tr>
<tr>
<td>Assistant Principals (1.0), and Dean (3.0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-School Based Administration</td>
<td>1.0</td>
<td>$97,900</td>
</tr>
<tr>
<td>Special Education Behavioral Specialist</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-School Based Other Support Staff</td>
<td>19.5</td>
<td>$940,100</td>
</tr>
<tr>
<td>Maintenance workers (14.5), senior financial analyst (1.0), accountant (1.0), senior network engineer (1.0), telecommunications analyst (1.0), and communications technician (1.0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-School Based Secretary Clerical</td>
<td>2.1</td>
<td>$98,300</td>
</tr>
<tr>
<td>Account clerk (1.0), grant assistant (0.1), warehouse assistant (1.0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL ENROLLMENT GROWTH</td>
<td>298.5</td>
<td>$17,839,900</td>
</tr>
</tbody>
</table>
### NEW SCHOOLS

<table>
<thead>
<tr>
<th></th>
<th>FTE</th>
<th>Salary &amp; Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Discovery ES and Moorefield Station ES open fall of 2013, 1 middle school, 1 high school, and 1 elementary fall 2014)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instruction</td>
<td>6.0</td>
<td>$422,000</td>
</tr>
<tr>
<td>Librarians (2.0), technology resource teachers (2.0), and guidance counselors (2.0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher Assistants</td>
<td>2.0</td>
<td>$59,800</td>
</tr>
<tr>
<td>Technology assistants (2.0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Custodians</td>
<td>14.5</td>
<td>$528,700</td>
</tr>
<tr>
<td>School Based Other School Support</td>
<td>4.0</td>
<td>$172,500</td>
</tr>
<tr>
<td>Library assistants (2.0), and school secretaries (2.0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>School Based Administration</td>
<td>6.0</td>
<td>$604,400</td>
</tr>
<tr>
<td>Principal (2.5), assistant principal (2.5), and athletic director (1.0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nurses &amp; Health Clinic Assistants</td>
<td>2.0</td>
<td>$72,700</td>
</tr>
<tr>
<td>Health clinic assistant (2.0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL NEW SCHOOLS</td>
<td>34.5</td>
<td>$1,860,100</td>
</tr>
<tr>
<td>TOTAL</td>
<td>333.0</td>
<td>$19,700,000</td>
</tr>
</tbody>
</table>

2. **Provide the cost related to the SOQ chart on page 345-346. Also provide the page reference where the positions are found in the budget document.** (Kuesters/Dec. 13, 2012)

See Attachment #1

3. **For all maintenance worker new staffing requests, provide information concerning the last time a position was requested and changes that have taken place since that time.** (Kuesters/Dec. 13, 2012)

Facilities Services technician positions are requested annually to accommodate the growth in buildings and equipment to be maintained. A staffing model for managing the number of maintenance positions was established in 1999 and had been used to increase staff based on the size of new schools opened in a fiscal year. Since 2008, because of budget shortfalls and despite the fact that we have added 8 schools and 1.4 million square feet of school area, we have only added two technician positions; a school plant engineer for John Champe High School and a maintenance crew chief.
4. **Provide a list of service calls to which the Environmental Specialist responded and substantiate the need for an additional Environmental Specialist.** (Rose/Dec. 13, 2012)

The Environmental Specialist responded to 456 environmental work orders in Fiscal Year 2012 and has responded to 166 environmental work orders this fiscal year. These environmental and indoor air quality work orders are in addition to the routine staff work performed by the Environmental Specialist which includes:

- Preparing, updating and distributing Manufacturer Safety Data Sheet manuals required by OSHA for chemicals used in schools
- Managing all asbestos abatement projects
  - Conducting asbestos awareness training for Facilities personnel, and the schools custodial staff
  - Conducting Radon monitoring
  - Inspecting, sampling, and managing abatement projects for lead based paint
  - Hazardous waste identification and disposal
  - Registering and managing above ground storage tanks new and existing schools with the Commonwealth of Virginia Department of Environmental Quality

All of these responsibilities make it difficult to meet all scheduled inspections and reporting for government required environmental programs. Records maintenance for all of the aforementioned tasks is critical.

5. **How many substitute custodians do we currently have? Provide absentee information and why we need additional substitutes.** (Morse/Dec. 13, 2012)

There are currently twelve (12) substitute custodians (7 day custodians / 5 night custodians).

Absentee information is as follows:

<table>
<thead>
<tr>
<th>2012</th>
<th>Month</th>
<th>Average Number Daily Absent Custodians</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td></td>
<td>104</td>
</tr>
<tr>
<td>February</td>
<td></td>
<td>62</td>
</tr>
<tr>
<td>March</td>
<td></td>
<td>63</td>
</tr>
<tr>
<td>April</td>
<td></td>
<td>66</td>
</tr>
<tr>
<td>May</td>
<td></td>
<td>68</td>
</tr>
<tr>
<td>June</td>
<td></td>
<td>57</td>
</tr>
<tr>
<td>July</td>
<td></td>
<td>85</td>
</tr>
<tr>
<td>August</td>
<td></td>
<td>85</td>
</tr>
<tr>
<td>September</td>
<td></td>
<td>104</td>
</tr>
<tr>
<td>October</td>
<td></td>
<td>68</td>
</tr>
<tr>
<td>November</td>
<td></td>
<td>72</td>
</tr>
</tbody>
</table>

Additional substitute custodians are needed to partially cover the number of custodians absent on any given day.
6. **Provide a copy of the analysis which was done a couple of years ago in reference to outsourcing custodial services.** (Fox/Dec. 13, 2012)

As staff gathers current relevant information regarding the potential outsourcing of custodial services, we have identified a document that may be helpful to the School Board as it considers “outsourcing” as an option in its budget deliberations.

“A Guide to Contracting Out School Support Services: Good for the School? Good for the Community?” is a report, published by the Great Lakes Center for Education Research & Practice and addresses the issues school districts encounter with outsourcing services.

The report (attachment #7) may be found on pages following this response. Please note the potential advice offered to school officials that are considering “outsourcing” and the implications for contract administration once a decision has been made.

7. **Provide a schedule of the number of custodians at schools during the day and the number at night and the responsibilities of custodians.** (Turgeon/Dec. 13, 2012)

See attachment #2.

8. **Provide a breakdown of the increases in Operations and Maintenance in Facilities Services.** (Turgeon/Dec. 13, 2012)

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Triennial Inspection Required by the Asbestos Hazard Emergency Response Act (AHERA)</td>
<td>$ 54,000</td>
</tr>
<tr>
<td>Arc Flash Hazard Assessment of 13 high school electrical panels and switchgear required by OSHA regulations. Arc Flash Assessment is the determination of the level of hazard which exists at each electrical enclosure including switchgear, control panels, panel boards, and disconnect switches ($20,000 per school).</td>
<td>$ 260,000</td>
</tr>
<tr>
<td>Anticipated Need for Contract Snow Removal (Next Winter)</td>
<td>$ 100,000</td>
</tr>
<tr>
<td>Preventive Maintenance Contracts for Equipment in New Schools</td>
<td>$ 30,000</td>
</tr>
<tr>
<td>Includes: elevator and wheelchair lifts at Champe and Douglass Elementary; fire sprinkler inspections at Champe and Douglass Elementary; HVAC and cooling tower water treatment at Champe and Douglass Elementary; emergency generators at Discovery and Moorefield Station Elementary; kitchen exhaust hood cleaning at Champe and Douglass Elementary; grease trap pumping at Champe and Douglass Elementary; new requirement for quarterly pumping in Purcellville Schools; dimmer system inspection at Champe.</td>
<td></td>
</tr>
<tr>
<td>Preventive Maintenance During First Year (Excludes emergency generator - covered by construction contractor).</td>
<td></td>
</tr>
<tr>
<td>New Requirement for Certified Inspection of Grandstands and Telescopic Bleachers (Inspection as required by International Code Council Regulation 300).</td>
<td>$ 60,000</td>
</tr>
<tr>
<td>Electrical Service for New Schools</td>
<td>$ 255,000</td>
</tr>
</tbody>
</table>
9. How many students at each school are taking AP Exams? (Bergel/Dec. 13, 2012)

The chart below shows the number of AP tests which were taken in 2011-12.

<table>
<thead>
<tr>
<th>High School</th>
<th>2011-12 Test Taken</th>
</tr>
</thead>
<tbody>
<tr>
<td>Briar Woods</td>
<td>1,484</td>
</tr>
<tr>
<td>Broad Run</td>
<td>1,369</td>
</tr>
<tr>
<td>Dominion</td>
<td>1,150</td>
</tr>
<tr>
<td>Freedom</td>
<td>1,399</td>
</tr>
<tr>
<td>Heritage</td>
<td>644</td>
</tr>
<tr>
<td>Loudoun County</td>
<td>1,101</td>
</tr>
<tr>
<td>Loudoun Valley</td>
<td>1,056</td>
</tr>
<tr>
<td>Park View</td>
<td>697</td>
</tr>
<tr>
<td>Potomac Falls</td>
<td>1,131</td>
</tr>
<tr>
<td>Stone Bridge</td>
<td>1,777</td>
</tr>
<tr>
<td>Tuscarora</td>
<td>977</td>
</tr>
<tr>
<td>Woodgrove</td>
<td>1,241</td>
</tr>
</tbody>
</table>

10. Are we currently paying for a GPS service? Will that cost no longer be necessary with the implementation of new communications system? (Morse/Dec. 13, 2012)

Yes, we are currently paying for a GPS service. At this time, 1,115 vehicles have GPS capability installed in them. The vendors for GPS are AT&T and Sprint. The actual billing is amortized into a monthly fleet vehicle fee that each department is responsible which is generally estimated at $6.00 per month. The GPS bill for December 2012 was $7,825.17.

Of the 1,115 vehicles - 840 are busses. The remainder of the vehicles are used by technicians, County personnel and Safety & Security personnel in the field.

The total cost of GPS to LCPS is estimated at $8,000.00 per month.

The digital radio upgrade will also allow LCPS to be independent of any vendor relationship in handling GPS tracking within the Loudoun County region, thus significantly reducing the current $8,000 monthly fee in place. A vendor relationship may still exist only for those busses that travel outside the region but the costs will be substantially reduced.
11. What is causing the increase in Operations and Maintenance and Capital Outlay in Facility Services? (Kuesters/Dec. 13, 2012)

The facility maintenance and operation budget increases are driven by the following:

- Opening of Discovery and Moorefield Station elementary schools
- Increasing costs associated with maintaining 80 other aging educational facilities
- The OSHA required Arc Flash Hazard Assessment
- The Tri-annual Asbestos Hazard Emergency Response Act Inspections
- Anticipation of Contract Snow Renewal
- Facilitating the advanced placements exams
- Increases in electric for two (2) new schools and rate increases

12. When was Safety and Security moved from Transportation? When was communications equipment maintenance moved from Transportation to Safety and Security? (Turgeon/Dec. 13, 2012)

Safety and Security began having its own budget page beginning in FY03. The communications maintenance function was moved to Safety and Security during fiscal year 2012.

13. What would the estimated cost savings be if the elementary walk zone was changed from 0.8 mile to 1.0 mile? (Turgeon/Dec. 13, 2012)

*Minimal cost savings would be realized by expanding the walk zone from our existing .8 mile walk zone to the proposed 1.0 mile walk zone.*

The Loudoun County Public Schools Traffic and Pedestrian Specialist and the administration of the Transportation Department reviewed the walk zones of the 53 elementary schools for possible expansion from .8 mile to 1.0 mile. After reviewing all 53 elementary schools, it was determined that the area either lacked sufficient connecting walking paths, “walking areas” were assigned to a different School Attendance Boundary, or walkers in the area would be required to cross a major roadway. There are 3,262 elementary students within the .8 to 1.0 mile area for the 53 schools.

There are 29 elementary schools with existing walk zones and 24 elementary schools without an established walk zone.

Currently, there are eight (8) elementary schools where the Transportation Department is attempting to establish new walk zones or expand existing walk zones. Safety approval of these new walk zones are contingent upon new pavement markings being placed on the roadway for needed cross walks and the ability to obtain additional Loudoun County Sheriff’s Office crossing guards from the County of Loudoun. The schools currently under review include: Balls Bluff Elementary, Belmont Station Elementary, Creighton’s Corner Elementary, Liberty Elementary, Mill Run Elementary, Pinebrook Elementary, Sycolin Creek Elementary, and Tolbert Elementary.
In order to accurately determine savings in the area of increased walk zones, it is necessary to re-route the entire school division because bus routes typically are made up of elementary, middle, and high school runs. In a few cases, in the more densely populated areas of the County, it may be possible to have double elementary, middle, or high school runs—but in most cases, the runs are a combination of elementary, middle, and high schools. Therefore, when a run is lengthened (for example—with fewer riders, longer distance to pick up more students), it has a direct impact on the timing for middle and high school runs as well. In addition, attendance zones for some schools would actually be in the “walk zone” for another school.

14. Provide the walk zone study that was approved by the Health, Safety, Wellness, Transportation Committee as part of the answer to question #13. (Reed/Dec. 13, 2012)

Attached (attachment #8) please find the walk zone study that was approved by the Health/Safety/Wellness Transportation Committee.

15. What has been the experience of other jurisdictions with outsourcing transportation? Was there significant cost savings? (Fox/Dec. 13, 2012)

Runaway Spending: Private Contractors Increase the Cost of School Student Transportation Services in Pennsylvania, March 2012, was completed by the Keystone Research Center as an independent analysis of contracted carriers in Pennsylvania. The study examines the cost of transportation services for Pennsylvania’s school districts, focusing on the impact on costs of contracting-out using data from the Pennsylvania Department of Education from 1986 to 2008. The experience of the jurisdictions with outsourcing transportation has not been favorable. There appears to have been increased transportation costs.

Please see attachment #3 that provides details of the Keystone study.

16. What specific statutory provisions are there in reference to charging for transportation? (Fox/Dec. 13, 2012)

Section 22.1-6 of the Code of Virginia states:

“Except as provided in this title or as permitted by regulation of the Board of Education, no fees or charges may be levied on any pupil by any school board. No pupil’s scholastic report card or diploma shall be withheld because of nonpayment of any such fee or charge.”

On December 19, 2012, a VDOE fee regulation dating back to 1980 was repealed and replaced by 8 VAC 20-720-80. Under the old regulation, two Virginia Attorney General opinions (2007 and 2010) opined that under both the old regulation and law, school divisions could not charge fees for pupil transportation to and from school.

The new regulation now makes it explicitly clear that school division shall not charge fees for pupil transportation to and from school.

Under the new regulation, a school division may charge a fee, provided a fee policy is first adopted, for a student’s pro rata share of the cost of providing transportation for voluntary extracurricular activities.


It is difficult to predict accurately, but experience with families who do not have their own means of transportation readily available has shown that the students tend to have a greater number of absences. The distance to a bus stop
All School Board Questions and Answers

is sometimes a barrier to families taking advantage of even free services. For example, we continue to have students for whom the fee is waived decline to attend summer school because of the regional transportation which is not close enough to their home. Not being able to attend regularly or access special assistance may impact student performance.

There is a high correlation between attendance rates and student achievement. Without transportation services, attendance could be impacted negatively, which can have an adverse affect on student achievement and impact our high graduation rate. Under state and federal provisions of the IDEA, all students with disabilities must be provided transportation to and from school as part of their individualized education program (IEP).

18. Provide the results of the telecommunications study. (Turgeon/Dec. 13, 2012)

LCPS moved from Verizon to Avaya for phone system equipment maintenance effective November 1, 2012. This contract provides for repair of our equipment and includes:

24x7 Remote technical support and alarm monitoring, same business day response to issues and down systems, a service manager and software patches. The value of the service contract is that any failed Avaya hardware will be replaced.

Examples of items not included under contract include Verizon dial tone line, trunk and circuit outages, routine MAC work (Moves, Adds and Changes), Project and new school management, Technical support to an individual level, Software upgrades, Audits, Database upkeep, Dial plan design, Voice Mail Issues and Programming, Phone sets not working properly and programming of sets, Training.

For items not covered, Avaya charges $260 per hour to perform changes during business hours.

The cost for Avaya to perform the FY12 1,116 tickets (billable) at $260.00/hr. would be $290,160 assuming each request would require one hour.

Current staff is able to repair most problems in short order or have a "work around" in place in short order. The goal is not to repair issues but to eliminate them from occurring. Proper audits, PMI's (Preventive Maintenance Inspections), updates and patches can prevent service related issues. Upon major outages we can initiate back up plans and procedures while the repair is handled with an Engineer level tech through the service contract.

LCPS staff continues to prioritize work requests to ensure the best possible service.


Salary and Benefits $67,000.


See attachment #4.

21. Why is there an 11% increase in Facilities Services? (Fox/Dec. 13, 2012)

New Personnel plus Fringe
Triennial Inspection Required by the Asbestos Hazard Emergency Response Act (AHERA)
Arc Flash Hazard Assessment
Anticipated Need for Contract Snow Removal (Next Winter)
Preventive Maintenance Contracts for Equipment in New Schools
Preventive Maintenance during First Year
New Requirement for Certified Inspection of Grandstands and Telescopic Bleachers
Electrical Service for New Schools
Electrical Services Weather Factor (cut in FY 2013 budget)
Electrical Services Rate Increases
Water and Sewage for New Schools
Water and Sewage Rate Increases
Lease

See response to Question 8 for additional details.

22. Why is there an 11% increase in Transportation Services? (Fox/Dec 13, 2012)

The 11% increase in Transportation Services is attributed to:

<table>
<thead>
<tr>
<th>Title</th>
<th>Increase</th>
<th>Justification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Services</td>
<td>$24,400</td>
<td>Loudoun Co. Sheriff Officer to direct traffic at Buffalo Trail ES - 2 hours a day @ $60 an hour for 180 days = $21,600 On-site GPS training</td>
</tr>
<tr>
<td></td>
<td></td>
<td>for transportation specialist, area supervisors and lead drivers - $2,800.</td>
</tr>
<tr>
<td>Computer Equipment</td>
<td>$34,000</td>
<td>Two (2) desktop computers for Lead Driver positions (John Champe and Special Education) $1,100 ea. = $2,200 One (1) laptop computer</td>
</tr>
<tr>
<td></td>
<td></td>
<td>for Transportation Director @ $1,400 Thirty (30) replacement GPS units for non-functioning GPS units $825 = $24,750 plus brackets/</td>
</tr>
<tr>
<td></td>
<td></td>
<td>installation $5,650. The GPS units allow for two way data communication/collection/alerts (to bus as well as from the bus). Older GPS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>units allow for only one way (from the bus) data collection.</td>
</tr>
<tr>
<td>Bus Drivers</td>
<td>$426,140</td>
<td>Requested Bus Driver positions (10) $121,916 Requested Lead Driver positions (2)</td>
</tr>
<tr>
<td></td>
<td>$121,916</td>
<td>Due to a change in budgeting for lapse and turnover, the Transportation budget in FY13 is reduced resulting in an increase for FY14.</td>
</tr>
<tr>
<td></td>
<td>$1,453,839</td>
<td></td>
</tr>
<tr>
<td>Bus Drivers</td>
<td>$1,042,904</td>
<td>Field Trips (Academic, Athletic, Music and Activity Runs)</td>
</tr>
<tr>
<td>Special Runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Central Vehicle</td>
<td>$1,455,045</td>
<td>Increase in cost due to higher fuel prices, aging of bus fleet and vehicles requiring additional maintenance costs.</td>
</tr>
<tr>
<td>Maintenance &amp; Fuel</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Most of the increase is Personnel costs related to increase in benefits.
23. **Provide a list of the addition to the fleet and expansion of services in Central Vehicle Maintenance.**  
(Kuesters/Dec. 13, 2012)

The following LCPS fleet additions are requested in the FY14 Lease Purchase

- **QTY 2, Utility Body Service Truck with Plow, Dept. - Facilities Maintenance**  
  Est. $63,000 ea

- **QTY 1, 4x4 Pickup with Plow & Cap, Dept. - Facilities Maintenance**  
  Est. $33,000 ea

- **QTY 1, Small Box Truck, Dept. - Facilities Maintenance**  
  Est. $41,000 ea

- **QTY 1, Medium Box Truck with Liftgate, Dept. - Central Warehouse**  
  Est. $45,000 ea

The estimated $19,000 annual O&M cost for the vehicles listed above is represented in the LCPS Transportation budget; indexcode 140245, subobject 6140.

The Central Vehicle Maintenance (CVM) FY14 Expense Projection (budget document) reflects costs that are estimated from actual historical fleet growth and usage trends for the combined County of Loudoun and LCPS fleets. CVM does not develop new fleet initiatives but rather reacts to the stated needs of its customer base and applicable federal or state regulation changes. The final report of the fleet study being conducted by Mercury Associates will enumerate a number of new initiatives that are largely aimed at improving risk management and operational fleet safety.

24. **Provide a breakdown of the conferences fees in the School Board budget.**  
(Turgeon/Jan. 2, 2013)

<table>
<thead>
<tr>
<th>Conference</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>VSBA Annual Convention registration fees</td>
<td>$2,495.00</td>
</tr>
<tr>
<td>VSBA Annual Convention room fees</td>
<td>$1,240.00</td>
</tr>
<tr>
<td>VSBA Clerical Convention room registration</td>
<td>$150.00</td>
</tr>
<tr>
<td>VSBA room for clerk</td>
<td>$264.00</td>
</tr>
<tr>
<td>VSBA Governor's Conference registration</td>
<td>$1,100.00</td>
</tr>
<tr>
<td>VSBA Governor's Conference lodging</td>
<td>$580.25</td>
</tr>
<tr>
<td>K12 Education Summit— registration</td>
<td>$250.00</td>
</tr>
<tr>
<td>K12 Education Summit – lodging</td>
<td>$564.90</td>
</tr>
<tr>
<td>VSBA Legislative Conference registration</td>
<td>$1,200.00</td>
</tr>
<tr>
<td>VSBA Legislative Conference lodging</td>
<td>$922.02</td>
</tr>
</tbody>
</table>

25. **Provide a breakdown of membership fees in the School Board budget.**  
(Hornberger/Jan. 2, 2013)

**Association Membership Fees:**
- VSBA Annual membership  
  $13,117.91
- NSBA Annual membership  
  $9,300.00

**School Board Membership Fees:**
- VSBA Council of School Attorneys membership  
  $175.00
- Local Government of Attorneys membership  
  $960.00
- Loudoun County Bar Association  
  $195.00
26. **Provide a breakdown of subscriptions in School Board budget. Which ones are required and what are the benefits of the subscriptions?** (Turgeon/Jan. 2, 2013)

The publications that the School Board currently receives are included in the annual membership subscriptions.

Legal subscriptions paid out of the School Board accounts:

- Thompson Subscriptions: $1,654.00
- Family & Medical Leave Handbook: $428.50
- Public Employer’s Guide to FLSA Employee Classification: $408.50
- ADA Compliance Guide: $409.00
- The Answer Book of FERPA: $125.00
- Virginia School Law Deskbook 2012-2013 Edition (2): $120.00
- 1- DeVita & 1 for Ms. Rose: $120.00
- Rules of Evidence: $54.00

27. **Are there various levels of VSBA and NSBA memberships?** (Rose/Jan. 2, 2013)

The associations were called and they advised that there is only one level of membership.

28. **Provide a list of all attorneys with whom LCPS contracts and the services they provide.** (Rose/Jan. 2, 2013)

<table>
<thead>
<tr>
<th>Outside Counsel Name</th>
<th>Service</th>
<th>Budget Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eliot Norman, Esq. Williams Mullen</td>
<td>Immigration</td>
<td>Superintendent</td>
</tr>
<tr>
<td>Jennifer Schirkey Lenhart Obenshain PC</td>
<td>Benefits</td>
<td>Superintendent</td>
</tr>
<tr>
<td>Stacy Haney (Reed Smith)</td>
<td>Personnel Grievance Appeals</td>
<td>Superintendent</td>
</tr>
<tr>
<td>Kathy Mehfoud, Patrick Adriano, Jason Balou (Reed Smith)</td>
<td>Special Education</td>
<td>Special Education</td>
</tr>
</tbody>
</table>
29. Provide a breakdown of overtime by department. (Morse/Jan. 2, 2013)

<table>
<thead>
<tr>
<th>Department</th>
<th>Overtime</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business &amp; Financial Services</td>
<td>$293,358</td>
<td>ERP and peak work loads</td>
</tr>
<tr>
<td>Central Support</td>
<td>$23,350</td>
<td>Peak work loads</td>
</tr>
<tr>
<td>Grants</td>
<td>$32,620</td>
<td>Peak work loads</td>
</tr>
<tr>
<td>Instruction</td>
<td>$21,604</td>
<td>Peak work loads</td>
</tr>
<tr>
<td>Personnel Services</td>
<td>$121,210</td>
<td>ERP and peak work loads</td>
</tr>
<tr>
<td>Technology Services</td>
<td>$20,000</td>
<td>Peak work loads</td>
</tr>
<tr>
<td>Support Services</td>
<td>$2,824,024</td>
<td>Custodians, building checks, community use, safety and security for athletic events, nighttime school events, dispatch, bus drivers and attendants.</td>
</tr>
</tbody>
</table>

$3,336,166

*Partially offset by building use revenue

30. What is the usage of the wellness center? (Rose/Jan. 2, 2013)

Since October 1, 2012, there is an average of 490 visitors per month to the Wellness Center. The equipment in the wellness center was donated by CIGNA.

31. What is the cost of mailing report cards? Are we going to move to electronic with Clarity? (Turgeon/Jan. 2, 2013)

Average costs per report card mailed:
- Elementary $ .70
- Middle $ .75
- High $1.00

Our vendor does not have the capability at this time to produce the actual report card form as part of the parent portal.

32. Provide a list of the architectural and engineering expenditures for land acquisition by project for the last 5 years. (Rose/Jan. 2, 2013)

The attached (attachment #16) chart provides a list of expenditures incurred by Planning over the last five years. As you can see from the chart, there is a wide range of school projects and costs. A few examples will help explain the differences.

School projects, like the students LCPS serves, are all unique. As students have different needs, so do the sites that are explored and ultimately selected for development. The required studies vary for different sites. Take for example, the Threatened and Endangered Species studies that are required for the application process. In some cases, this may simply entail letters to the Virginia Department of Conservation and Recreation (DCR) and...
Department of Game and Inland Fisheries (DGIF) in Richmond to seek information as to whether rare and/or endangered species have been documented near or are expected to inhabit the potential site location. That was not, however, the case for the due diligence that was part of the ES-21 (Grant Perkins) and HS-8 sites. Information from DCR indicated the potential for rare and endangered species. This necessitated a field investigation and report by professionals trained to identify rare and endangered species. The more detailed investigations showed no signs of the potential species cited by DCR; consequently, LCPS was permitted to move forward.

A similar circumstance occurred on the Discovery E.S. site (E.S.-21). The Discovery E.S. site was owned by members of the Lee family, (as in family members of Robert E. Lee, the general who lead the south during the Civil War). The Phase 1 archeological study uncovered pottery shards, nails, and other materials that were associated with a former house that may have been occupied by tenant farmers, an overseer or even slaves that were a part of the family plantation. That discovery sparked a more extensive investigation (Phase II) including a catalogue of material unearthed on the site. Ultimately, staff and our consultants were asked to prepare a history of the site and a potential exhibit for inclusion in the future school.

When timelines for a project are constrained, staff is frequently forced to process the legislative and site plans simultaneously in order to meet a projected opening. If the chart is examined closely, there is a column for MS-5 and HS-7 at Lenah and two others, one for MS-5 Lunsford and another for HS-7 Champe. Initially, staff pursued a collocated middle and high school site that was to be located south of the Lenah Run subdivision. At the end of the legislative process, the Commission Permit and Special Exception were not approved by the Board of Supervisors. That decision led to a new round of site searches that ultimately resulted in the current Lunsford and Champe sites. Almost $400,000 was expended for processing the collocated Lenah site. In the end, an additional $600,000 was needed to secure separate Commission Permits and Special Exceptions for the Lunsford and Champe sites. The expenditures tabulated for the Lenah site do not include the engineering expenses that were incurred for the concurrent site plan processing. An additional $700,000 was expended for the engineering on the Lenah site. In the end, slightly over $1.1 million was expended on the application process. This highlights the risk that is incurred during the discretionary review period and what happens when timelines become constrained. If a site is rejected, those expenses cannot be recouped or reapplied elsewhere. Expenses also increase substantially when the legislative application and site plan are run concurrently because a change recommended by the review agencies and/or planning commission has to be reflected in the site plan documents which often necessitate re-engineering the site. In the end, project costs escalate.

The last thing that I would like to highlight underscores the word “sharing”. If ES-15 Frederick Douglass is examined, the expenditures for the project are unusually high. This is related to the difference in funding. The land acquisition money was approved in FY2004 and the construction funds were not approved until FY2011. The land acquisition money that was available made it possible to fund critical portions of the site plan that needed to be completed before the regular construction funding was available. The engineering studies and payments for the Certified Letter of Map Revision (CLOMAR) are expensive and they require 12 to 15 months to process through local authorities and the Corp of Engineers. Funding available through land acquisition insured that the process was completed in time for the school to be bid. Had LCPS waited until the construction funds were made available in FY2011, the school would not have opened in 2012.

Each of these sites has a unique aspect. There is a balance in the due diligence process to secure adequate information to make sound decisions while being fiscally prudent. Which studies are needed up front, which studies may be deferred to the Special Exception or Site Plan process and when must all studies be accomplished simultaneously are factors that play into each site’s review. The ability to acquire land far enough in advance to avoid concurrent process can be a tremendous cost savings measure. The proposed zoning ordinance amendment to allow schools by-right, if enacted, will be greatly beneficial to the land development process. While the characteristics of each site differ, the attached chart illustrates some of the variables and associated costs. If you have additional questions, please call me at your earliest convenience.
33. Provide a description of land tests which are done, when the tests are done during the process, and what the requirement for the test is. (Turgeon/Jan. 2, 2013)

The attached chart (attachment #9) provides a list of tests that are needed to assess viability of land for public school purposes. The description of each test is outlined below. The attached chart lists the test and the typical costs that are incurred for the measure in question. All of the tests described below have to be conducted to determine a site’s development capacity and/or they are needed for some phase of the legislative or ministerial review. The typical costs of required tests provided the basis for the FY 2014 Professional Architectural and Engineering operating budget request.

In addition to the chart, staff has included a response that was provided to the School Board last March that details the due diligence testing that will still be required if and when public schools become a by-right use.

34. Provide a list of the other work/survey areas and samples of work/surveys which have been done by K12 insight. (Morse/Jan. 2, 2013)

See attachment #25.

35. What are the average years that retirees receive healthcare benefits after retirement? (Kuesters/Jan. 2, 2013)

The average life expectancy after retirement is estimated at 27.1 years. However, many of our employees do not take healthcare in retirement. For example, last year only 51% of all retirees elected health insurance in retirement.

36. Provide the number of employees we consider full time who work less than 30 hours per week but more than 17.5 hours per week. (Fox/Jan. 2, 2013)

<table>
<thead>
<tr>
<th>Staff</th>
<th>Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bus Drivers and Bus Attendants</td>
<td>379</td>
</tr>
<tr>
<td>Food Services</td>
<td>67</td>
</tr>
<tr>
<td>Psych/SW/Therapist</td>
<td>6</td>
</tr>
<tr>
<td>Teachers</td>
<td>128</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>580</strong></td>
</tr>
</tbody>
</table>

37. Are all of the rates shown on page 10 of the Compensation handout 12 month rates? (Fox/Jan. 2, 2013)

No, Fairfax apparently went to a 10 month deduction system this year. However, the data displayed on the hand-out reflects monthly rates, not annual rates.

38. If we were to re-define full-time for VRS purposes would we be required to grandfather current employees? Is there any legal obligation concerning this? (Fox/Jan. 2, 2013)

We would not be required to grandfather current employees if full-time employment was re-defined. Employees who no longer met the definition would no longer be covered. Depending on vesting status, those employees could take a refund of previously contributed funds, or leave the funds in VRS until they reached retirement age. Additionally, no further contributions to VRS would be made on their behalf. We are aware of no further legal obligations.

However, it is possible to set up two different definitions for full-time employment. For example, the School Board has the authority to develop a policy that creates two “tiers” of coverage, so that full-time employees hired before June 30, 2013, would be defined at 17.5 hours per week (for at least 180 days per year), and provide a new definition...
of full-time employment at a different number of hours per week, beginning with those hired after July 1, 2013—essentially “grandfathering” those already participating with VRS.

We would need to adopt Board policy language to document the distinction.

39. If we offer a no cost group health insurance option would it encourage employees who do not take GHI to enroll in GHI? (Hornberger/Jan. 2, 2013)

Perhaps. If that were the case, LCPS would then contribute about $7,800 per year to the self-insurance fund for each of these individuals. Should half of those who currently do not take our health insurance opt to access the proposed OAP no-cost employee only plan, would result in an increase in employer premiums of about $7.8 million dollars.

Additionally, LCPS would become the “primary insurer” resulting in an overall increase in medical claims for employees previously not in our plan.

40. For dual employee households, how does the cost of this group health insurance plan affect them? (Hornberger/Jan. 2, 2013)

Currently employees and their spouse who both work for LCPS in benefits-eligible positions get a spousal discount. Both employees pay the “employee only” rate (each) for the family plan.

41. Is there a possibility of offering catastrophic group health insurance coverage only? (Hornberger/Jan. 2, 2013)

From a system perspective, LCPS has stop loss insurance coverage, which is coverage for entities that self-fund, or self-insure, their own employee health benefit plans. Rather than paying premiums to an insurance company to cover health care expenses for employees, LCPS pays the claims and contracts with CIGNA to administer the health plan for each employee. Stop-loss insurance is a layer of protection in case health insurance claims exceed a certain threshold.

From an employee perspective, we offer an employee-paid cancer plan that provides benefits to employees in the event of a cancer diagnosis, which could indeed be considered “catastrophic.”

42. What is the current retention rate for LCPS technology employees? How do LCPS technology salaries compare to other local jurisdictions? (Morse/Jan. 2, 2013)

During FY11, 2 technology employees left LCPS for an attrition rate of 2.5%. During FY12, 4 technology employees left LCPS resulting in an attrition rate of 5%. During FY13 thus far, 3 technology employees have left LCPS as of January 8, 2013 for an attrition rate thus far of 3.8%. Forty-four percent of the technology employees leaving in the last three years indicated they were leaving for positions with private employers, and this represented the largest group of exiting technology employees who chose to indicate their future plans.

Three technology positions common to school districts in Northern Virginia were benchmarked against the average of four competitors: Alexandria City Schools, Arlington Public Schools, Fairfax County Schools, and Prince William County Schools. The first position benchmarked was senior network engineer. LCPS pays 5.18% below the average of competitors at the entry level for this position, 7.25% below the average of competitors at the midpoint of the position, and 3.57% over the average of competitors at the maximum salary for the position. The second position benchmarked was network specialist. LCPS pays 24.86% below the market average at the minimum, 18.52% below the average of competitors at the midpoint, and 15.16% below the market average at the maximum for the position. The third position benchmarked was computer technician, instructional. LCPS pays 4.11% over the average of
competitors at the minimum, 13.45% over competitors at the midpoint for the position and 2.23% over midpoint at the maximum salary for the position.

43. Relate SOQ to General Education (page 345 vs. 72). Reconcile the pages – General Education vs. Supplemental Information. (Morse/Jan. 3, 2013)

See attachment #5.

44. What is the adoption or user rate at the elementary school level for Clarity? (Rose/Jan. 3, 2013)

Note: Access requested for students in grades 3-12; the portal has not opened for grades K-2 yet.

Counts of Clarity Parent Portal Requests Received and Granted by Schools as of January 11

<table>
<thead>
<tr>
<th></th>
<th>ES Total</th>
<th>MS Total</th>
<th>HS Total</th>
<th>Other</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>ESL</td>
<td>10,678</td>
<td>12,941</td>
<td>12,702</td>
<td>121</td>
<td>36,442</td>
</tr>
</tbody>
</table>

45. Breakdown the Clarity usage by elementary, middle, and high. Also when it came online. (Bergel/Jan. 3, 2013)

See question #44.


LCPS must match 15% of each federal grant which equates to $14,434.00 based on the total grant amount of $96,227.00. Adult Education instructors are hourly employees. The course fees vary based upon the length and duration of the class. For example, the courses fee for a semester course (meeting approximately 2-2.5 hours per night twice a week) ranges from $100-$150. Students are responsible for textbook or materials costs. Adult Education is mandated in the Code of Virginia 22.1-225 A and B.

47. Of the amount budgeted for Adult Education, provide the breakdown of the funds collected. (Hornberger/Jan. 3, 2013)

Adult Education Costs for FY12

<table>
<thead>
<tr>
<th>Program</th>
<th>Grant Funding (p. 174)</th>
<th>Revenue from Fees</th>
<th>Enrollment FY12</th>
</tr>
</thead>
<tbody>
<tr>
<td>ESL</td>
<td>96,227</td>
<td>86,750</td>
<td>865</td>
</tr>
<tr>
<td>GED</td>
<td>52,564</td>
<td>9,133</td>
<td>147</td>
</tr>
<tr>
<td>Adult High School</td>
<td>4,188</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>GED Testing</td>
<td>12,485</td>
<td>220</td>
<td></td>
</tr>
<tr>
<td>General Interest</td>
<td>139,926</td>
<td>1,801</td>
<td></td>
</tr>
</tbody>
</table>


See question 47.
49. Provide information concerning the involvement of the community in art programs. Is there integration with the community outlets for art? (Turgeon/Jan. 3, 2013)

There are numerous county-wide school business partnerships including, The Franklin Park Performing and Visual Arts Center, The Art Institute of Washington, Loudoun Academy of The Arts, Starbucks, Dulles Town Center, INOVA Loudoun Hospital, George Washington University. Additionally, specific schools also have partnerships with local art galleries and corporations, such the Chris Cooley Gallery in Leesburg.

Schools are also provided with the opportunity to have local visiting artists come in to their school and demonstrate in various media and to discuss with the students career related opportunities.

Art:

1) The Empty Bowls Project wherein six local artists spent the day making bowls for the Empty Bowl Dinner, which is scheduled sometime in March. The artist's made a total of 144 bowls. Artists donated the bowls they made for art students in grades six through eight to glaze for the dinner. The funds raised for the event are donated to the Western Loudoun Food Pantry.

2) LEF partnered with the art program to allow the opportunity for local artist/business owner Tom Neel, owner of a Fine Art & Design Gallery, to present career related information and share his success story with high school art students.

3) The set-up, design and installation of community exhibits at various venues allows for student artists to have real world experiences out in the community.

4) The National Art Honor Society under the direction of various LCPS art teachers allows high school students the opportunity to be involved in school community projects to include research, design and execution of creative plans.

5) Varied types of student portfolios to include digital portfolios allow students the opportunity to communicate meaningful creative ideas, writing and products to be viewed beyond the art classroom, for example, at college/career portfolio days.

6) Digital resources such as Arts Edge in partnership with the Kennedy Center which allows for teachers/students to access multidisciplinary learning and resources through video, etc..

Music Activities:

1) Partnership with Loudoun County Libraries through the "Young Musicians of Loudoun Concert Series." Student groups perform for local audiences at library locations.

2) Partnership with some Loudoun Arts Council members (Rebecca Kite-Yamaha percussion performing artist provides clinics for some schools funded in part by a grant from the Virginians for the Arts Foundation). Also, recent partnership with Aguado Guitar club in which students, teachers, and local guitarists collaborated to create a CD of performances.

3) Student/group performances are, of course, showcased in numerous ways throughout the year through public performances in a variety of venues.
50. Provide a breakdown of the percent of Career & Technical Education classes provided in MS and HS vs. Monroe Technology Center. (Turgeon/Jan. 3, 2013)

<table>
<thead>
<tr>
<th>School Level</th>
<th>% Students Enrolled in CTE</th>
<th>% Students Enrolled in CTE</th>
<th># Classes Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Middle School</td>
<td>100% in grades 6 &amp; 7</td>
<td>32% in grade 8 electives</td>
<td>5 CTE courses – semester &amp; full-year</td>
</tr>
<tr>
<td>High School</td>
<td>55% in grades 9-12 electives</td>
<td></td>
<td>39 CTE courses – semester &amp; full-year Jr ROTC regional class at LCHS</td>
</tr>
<tr>
<td>Monroe Tech Center</td>
<td>100%</td>
<td></td>
<td>39 CTE courses – 3-credits per year</td>
</tr>
</tbody>
</table>


LCPS has been on a waiting list to receive a commission for Army or Air Force units for several years. The consistent response has been that the Northern Virginia area has reached its saturation point with available ROTC commissions. Staff will continue to seek assistance from community members and legislators who may be able to help accelerate LCPS’s eligibility for a new commission.

52. Provide assignments of ELL teachers and TA’s at each school, the number of students and the percent of students (students being served, not just eligible). (Hornberger/Turgeon/Jan. 3, 2013)

The first attachment displays the percentage and number of ELL students associated with each school. The second attachment shows where students from more than one school have been grouped to receive ELL services. The ELL staffing for each site is also shown on the second attachment.

See attachments #6A and #6B.

53. What would be the cost of an extra planning day? (Rose/Jan. 3, 2013)

Another planning day could be added to the teacher calendar at no cost by moving one of the planning days prior to the first day for students farther into the calendar year. The impact would be that school would end one day later for students and teachers.

54. What would be the cost to allow an unencumbered planning day at the MS level? (Bergel/Jan. 3, 2013)

See question # 53.

55. Provide the budget/costs for textbooks for the last 5 years. (Kuesters/Jan. 3, 2013)

Textbook Costs for FY09 – FY13:

<table>
<thead>
<tr>
<th>Year</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY09</td>
<td>$2,770,114</td>
</tr>
<tr>
<td>FY10</td>
<td>$2,424,174</td>
</tr>
</tbody>
</table>
All School Board Questions and Answers

Loudoun County Public Schools – FY 2014 Operating Budget

FY11 $3,054,174
FY12 $3,054,174
FY13 $3,054,174
FY14 $3,837,697

56. What is the average unit cost of a textbook for the last 5 years? (Morse/Jan. 3, 2013)

Over the past five years primarily used textbooks have been purchased. The last year that new books were purchased in a full-scale adoption was 2007. The average costs of the books at that time were $54 for elementary, $59 for middle, and $86 for high school. Mr. Peebles, the Warehouse Supply Coordinator, reports that it is becoming difficult to find reliable used book sources and new books are being purchased when it is necessary. In recent years used books for elementary and middle school books have been in the $30 to $50 range. The typical difference in the cost of a new versus a used book for high school is $100 to $50. The textbook fund also covers the purchase of teachers’ editions, testing software, DVDs, audio CDs, and other supplementary materials associated with the textbook series.

57. Breakdown the Personnel and O&M costs on the General Education page by elementary, middle, and high school levels. (Hornberger/Jan. 3, 2013)

<table>
<thead>
<tr>
<th></th>
<th>Personnel</th>
<th>O &amp; M</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elementary</td>
<td>$147,401,306</td>
<td>$2,249,802</td>
</tr>
<tr>
<td>Middle</td>
<td>76,008,761</td>
<td>1,578,543</td>
</tr>
<tr>
<td>High</td>
<td>93,288,795</td>
<td>3,713,837</td>
</tr>
<tr>
<td>Total</td>
<td>$316,698,862</td>
<td>$7,542,174</td>
</tr>
</tbody>
</table>

58. Provide data showing trends month by month of spending. (Rose/Jan. 3, 2013)

By first quarter (September YTD) an average of 41.4% of all allotments funds had been spent.

By mid-year (December YTD) an average of 60.1% of all allotment funds had been spent.

By third quarter (March YTD) an average of 81.2% of all allotment funds had been spent.

By the end of May 2012, an average of 99.2% of all allotment funds had been spent.

<table>
<thead>
<tr>
<th></th>
<th>JULY YTD</th>
<th>AUG YTD</th>
<th>SEPT YTD</th>
<th>OCT YTD</th>
<th>NOV YTD</th>
<th>DEC YTD</th>
<th>JAN YTD</th>
<th>FEB YTD</th>
<th>MARCH YTD</th>
<th>APRIL YTD</th>
<th>MAY YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>16.4%</td>
<td>31.5%</td>
<td>41.4%</td>
<td>48.6%</td>
<td>55.2%</td>
<td>60.1%</td>
<td>66.3%</td>
<td>73.6%</td>
<td>81.2%</td>
<td>89.7%</td>
<td>99.2%</td>
</tr>
</tbody>
</table>

59. What is the difference in teaching load between the SOL department chair and other teachers? What would the savings be if the SOL department chairs taught one additional class? (Hornberger/Jan. 3, 2013)

The High School SOL Department Chairmen teach 3 periods of the typical 5-period assignment. The remaining Department Chairmen teach a full 5-period assignment. One teaching block is considered a .2 FTE assignment.
Increasing the teaching load for the SOL Chairmen would be equivalent to a savings of a .8 FTE or approximately $60,000 per high school staffing cost.

60. Provide a list of department chair responsibilities. (Bergel/Jan. 3, 2013)

The responsibilities for High School Department Chairmen are shown below. The SOL Department Chairs are responsible for additional areas during their released periods.

- Implements the district’s curriculum in cooperation with the appropriate subject area supervisor
- Assists the principal in establishing departmental objectives and develops a plan for the implementation and evaluation of objectives and in interpretation of the instructional program to parents and the community; conducts departmental meetings and attends relevant School District and professional meetings as needed or required; assists department teachers in the handling of day-to-day activities and problems of instruction and acts as a resource person for teachers on curriculum; assumes responsibility for the ordering, inventory, and distribution of all departmental instructional materials; provides orientation and in-service training programs for departmental personnel; assists in identifying and utilizing community resources for the departmental program; advises the principal on the department’s budgetary needs
- Meets with other department heads to promote interdisciplinary programs
- Keeps informed on educational innovations and trends as they relate to departmental concerns
- Implements an ongoing program of curriculum evaluation in cooperation with the appropriate subject area supervisor
- Makes regular classroom visitations of departmental personnel, provides follow-up consultation, and submits requested status reports to the principal
- Performs related work as required

CORE SOL CHAIRS (additional responsibilities)

- Perform related duties to SOL testing to include: assist in the identification of specific students for retesting and remediation; collect necessary resources for assessment and remediation, schedule use of computer labs and other resources for class and small group testing, establish proctor schedules within the departments
- Meet with administration and assist in the scheduling of classes in core and elective areas
- Makes recommendations to the principal with regard to departmental personnel

61. How many teachers are leading clubs and receiving no additional compensation? (Rose/Jan. 3, 2013)

At the elementary level, there are 76 teachers who are reported to be conducting after-school clubs without additional compensation.

At the middle level, there are 324 clubs led by teachers who do not receive compensation.

At the high school level, on average 15 clubs are provided with stipends. Examples include SCA sponsor, debate/forensics, and dance/drill team. On average 40 clubs per school are not provided with stipends. Examples may include the Bible club, hiking club, environmental club, and chess club.
62. What is the increase in number of students for TJ and Governor's schools from FY12 to FY13? What is the projection for FY13 to FY14? (Turgeon/Jan. 3, 2013)

<table>
<thead>
<tr>
<th>Budget Year</th>
<th># Students in Governor’s School</th>
<th># Students in Foreign Language Academies</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY12</td>
<td>64</td>
<td>14</td>
</tr>
<tr>
<td>FY13</td>
<td>70</td>
<td>30</td>
</tr>
<tr>
<td>Projected FY14</td>
<td>85</td>
<td>42</td>
</tr>
</tbody>
</table>

TJHSST Enrollments

<table>
<thead>
<tr>
<th>School Year</th>
<th>Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY12</td>
<td>191</td>
</tr>
<tr>
<td>FY13</td>
<td>204</td>
</tr>
<tr>
<td>FY14 Projected</td>
<td>213</td>
</tr>
</tbody>
</table>

63. What is the full cost of sending students to TJ? What is the full cost of sending a student to Governor’s School? (Kuesters/Jan. 3, 2013)

**TJHSST Tuition:** This varies slightly each year based on Local Share and State share contributions. There has been a ceiling of $13,000 per student. That amount has been budgeted by LCPS for FY12, FY13, and the FY14 budget includes $13,000, each, for 213 students ($2,769,000).

There are also special education resource costs. There have been several twice-exceptional students attending TJ. LCPS is billed for their needs; payment is made from the Gifted Education budget.

Transportation costs are funded by the LCPS Transportation Office.

**Governor’s School Tuition:** In the FY14 Budget, $950 is allocated for each student to attend the Governor’s Academy (Total: $80,750). This amount is half of the full tuition. For the Foreign Language Academies, $1200 has been budgeted to cover the cost for 42 participants ($50,400).
64. Number of students in Futura and Spectrum over the last five years and the number who have dropped out of those programs over the same years? (Rose/Jan. 3, 2013)

**Spectrum Program Withdrawals: 5 year Report**

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Program Membership</th>
<th>Withdrawals</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008-2009</td>
<td>2007</td>
<td>70</td>
<td>3%</td>
</tr>
<tr>
<td>2009-2010</td>
<td>2127</td>
<td>121</td>
<td>6%</td>
</tr>
<tr>
<td>2010-2011</td>
<td>2215</td>
<td>119</td>
<td>5%</td>
</tr>
<tr>
<td>2011-2012</td>
<td>2413</td>
<td>110</td>
<td>5%</td>
</tr>
<tr>
<td>2012-2013</td>
<td>2554</td>
<td>93</td>
<td>4%         (One semester)</td>
</tr>
<tr>
<td>Totals</td>
<td>11316</td>
<td>513</td>
<td>5.00%</td>
</tr>
</tbody>
</table>

**Futura Program Withdrawals: 5 year Report**

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Program Membership</th>
<th>Withdrawals</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008-2009</td>
<td>1493</td>
<td>50</td>
<td>3%</td>
</tr>
<tr>
<td>2009-2010</td>
<td>1490</td>
<td>46</td>
<td>3%</td>
</tr>
<tr>
<td>2010-2011</td>
<td>1745</td>
<td>54</td>
<td>3%</td>
</tr>
<tr>
<td>2011-2012</td>
<td>1666</td>
<td>31</td>
<td>2%</td>
</tr>
<tr>
<td>2012-2013</td>
<td>1212</td>
<td>14</td>
<td>1%         (One semester)</td>
</tr>
<tr>
<td>Totals</td>
<td>7606</td>
<td>195</td>
<td>2.50%</td>
</tr>
</tbody>
</table>
65. What additional positions are budgeted for Champe? Clarify the new support positions on the HS page. (Hornberger/Jan. 3, 2013)

Additional Positions to Complete John Champe HS Staffing

<table>
<thead>
<tr>
<th>FTE</th>
<th>Position Title</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Assistant Principal</td>
<td>High School Education</td>
</tr>
<tr>
<td>1.0</td>
<td>Secretary</td>
<td>High School Education</td>
</tr>
<tr>
<td>1.0</td>
<td>Study Hall Monitor</td>
<td>General Education</td>
</tr>
<tr>
<td>1.0</td>
<td>Librarian</td>
<td>Will be added to Library Media</td>
</tr>
<tr>
<td>1.0</td>
<td>Library Assistant</td>
<td>Will be added to Library Media</td>
</tr>
</tbody>
</table>

Clarification of Position Increases on the High School Education page

<table>
<thead>
<tr>
<th>FTE</th>
<th>Position Title</th>
<th>School</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Principal</td>
<td>HS-6</td>
</tr>
<tr>
<td>1.5</td>
<td>Assistant Principal</td>
<td>JCHS, .5 HS-6</td>
</tr>
<tr>
<td>2.0*</td>
<td>Dean</td>
<td>BRHS, BWHS</td>
</tr>
<tr>
<td>3.0</td>
<td>Support (Secretaries)</td>
<td>JCHS, BWHS, HS-6</td>
</tr>
</tbody>
</table>

*incorrect on page 82 as 3.0 positions
**incorrect total on page 82 as 8.5 positions

66. What is the cost savings to the County if LCPS purchases a library system? (Turgeon/Jan. 3, 2013)

Since the County is also planning on purchasing a new library management system (LMS), the specific savings is difficult to gauge. Every vendor structures their pricing differently, typically on either number of holdings, number of libraries, or number of patrons... and then negotiates from that point; consequently, it is difficult to determine what the true savings would be initially and annually. We could logically deduce that if the pricing were based on collection size, we represent 61% of the current system so the savings to the taxpayer could theoretically be 61% of $2.5 million, less the cost of our proposed K-12 centric system ($140,000).

Other ways to calculate the percentage of the projected $2.5 million that could result in a savings to the County if LCPS is not included in a joint RFP:

- Based on holdings we represent 61% of the current legacy system.
- Based on number of libraries we represent 89%.
- Based on number of active patrons we represent roughly 75%.

67. Explain why it would be beneficial for LCPS to purchase a library system. (Rose/Jan. 3, 2013)

LCPS has budgeted $140k as a placeholder for a K-12 centric library system, if it is determined that it would be cost effective to purchase a separate library system from the County. The current legacy library management system (LMS) was designed for print materials and outdated; it no longer meets the needs of the 8 Loudoun public libraries or the 80 LCPS school libraries.
A K-12 school-centric LMS is important because of the following features:

*Interface to Digital Curriculum Content* – no longer a print material management system but a management of and portal to all LCPS multimedia resources, consolidating all of our digital resources: Print and eBooks (with multi-user rights and 1:1 user rights), Diverse Multimedia Online Subscription Resources, Video-on-demand system Safari Montage all of which is correlated and searchable by instructional standards. This is key for us as we move away from print textbooks.

*Integration with a Student Information System (SIS)* – Dynamic information sharing to include student photos and other instructionally-focused data beyond directory info to support different user groups: students, teachers, and librarians. As our school populations grow larger, this is information that helps librarians know our students and their instructional needs.

*Instructional Tool* – Provides Lexile and Fountas and Pinnell guided reading levels for each resource (print and ebooks, webpages, etc.); integrates with Reading programs such as Accelerated Reader and others; allows instructional information to flow back and forth to SIS. A K-12 centric LMS can also “suggest” other books based on students' personal reading choices. All of the above information can be reported out through a variety of instructionally-focused report templates.

*Developmentally Appropriate Interface for K-5 Children* – This is key to helping children find materials and support developmentally appropriate ICT literacy. Children now are used to using easy-to-use digital interfaces now (Think 4 and 5 year-olds with iPads).

*Partnership and Integration with Current LCPS Digital Content Providers* – Mackin print and eBook materials, Safari Montage video-on-demand system, Gale-Cengage multimedia resource databases.

*Opportunities for Collaboration with Colleagues in Virginia and the Nation* – Over 90% of the school districts in Virginia use a K-12 centric LMS. Because of the added features that support the K-12 school mission, we see very few instances nationally of a public library and a K-12 school library sharing one system.

*Support the LCPS Technology Plan Goals* – As we move away from print books to digital multimedia resources and companion virtual classrooms, the LCPS Tech Plan calls for providing a mobile device for grade 4-12 students to access those resources. They will need a system that provides access to all of those resources from one portal.

68. What would the budgetary impact of moving full time to 30 hours per week? (Fox/Jan. 9, 2013)

There are 580 employees who would no longer be eligible for VRS, group life insurance, and group health insurance. The total savings would be $7.2 million.

69. Provide an analysis of the Personnel costs on the Middle School page 94. (Kuesters/Jan. 9, 2013)

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position salaries (177.0)</td>
<td>$10,342,548</td>
</tr>
<tr>
<td>Hourly/Part-time Salaries</td>
<td>$ 129,672</td>
</tr>
<tr>
<td>Benefits</td>
<td>$ 4,264,914</td>
</tr>
<tr>
<td>Total</td>
<td>$14,737,134</td>
</tr>
</tbody>
</table>

The increase is not as great as anticipated because there were two newly hired principals and four newly hired assistant principals for FY14. There was likely savings associated with that turnover.
70. What would the consequences be of hiring the secretary for Trailside Middle School for a half-year instead of the full year? (Hornberger/Jan. 9, 2013)

The work of the secretary for the planning year prior to the opening of a middle school involves many tasks. The principal is often out of the office, meeting with feeder school students, interviewing for staff, meeting with parents, and developing business partnerships for the new school. The secretary is often the only person in the new school office, so is the primary point of contact for all business related to the school. Some of the many duties include:

- Registration training, file/forms set-up, and registration of new students.
- Process purchase orders for all furniture and equipment for the building.
- Set up and maintenance of personnel files of staff as hired.
- Set up main office and principals’ files, and create forms for the school.
- Work collaboratively with the Construction department in selecting detailed items (color choices, placement of items) for new building.
- Coordinate opening of school meetings for staff.
- Meet with vendors (such as photographer, agendas, yearbook, vending, etc.), finalize contracts for principal's review and approval.
- Prepare detailed “to-do” and “check” lists in anticipation of opening day, and review with each responsible staff member as they are hired.
- Initiate fund-raising to build student activity account funds.
- Meet and work with PTA officers to coordinate efforts in opening a new school.
- Set up appointments for interviews for staffing for all positions in the new school.
- Prepare Staff and Student handbooks for principal's review.
- Create room-by-room (checklist of inventory for each room) to post outside each classroom, office, conference, etc.) in preparation for “move in.”
- Generate communication including a monthly newsletter and updated website to keep the community informed of progress.

Condensing the time to complete these many tasks from a full-year to a half-year would impact the timeliness and thoroughness of these necessary first steps to opening a new school.

71. Why is there such a difference in Capital Outlay through FY10 - FY14 for Music? Provide a summary of what is being funded. (Turgeon/Jan. 9, 2013)

Funding for capital outlay items was delayed in FY10, 11 and 12 in the final phase of reconciling the budget to the funding provided by the Board of Supervisors. The current funding requests address a backlog of needs to replace old instruments and damaged equipment, as well as to purchase new large instruments to support a growing instrumental program. Capital outlay includes purchase of sousaphones, tubas, a harp, pianos, replacement of worn out risers, replacement of old shells, and additional music library storage.

72. What was the one time high cost in music in FY13? What is the enrollment in the music program in last 5 years? (Kuesters/Jan. 9, 2013)

The additional costs reflect purchases needed to meet program and student needs. Items include (basses, cellos, storage racks) for the orchestra program and additional large band instruments due to enrollment growth as well as the need to replace worn out instruments and equipment in older schools. Also included in operations and
maintenance is funding to accommodate increase repair/maintenance costs, additional school based instruments and transportation costs for All County and All District Events.

The music program in elementary school grows as the enrollment increases because all students in grades 1-5 receive music instruction. Enrollment in secondary schools’ music electives at the secondary level has increased in the past 5 years as follows:

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment</td>
<td>11,672</td>
<td>12,854</td>
<td>13,411</td>
<td>13,940</td>
<td>13,795</td>
<td>14,472</td>
</tr>
</tbody>
</table>

Source: LCPS Data Warehouse

The strings program, in particular, continues to grow rapidly.

73. How many Parent Liaisons and Interpreters are there? (Turgeon/Jan. 9, 2013)

Parent Liaisons: 66
Interpreters: 167
These are part-time, at-will employees. No benefits other than FICA are involved in their employment.

74. How much was Pathways in last years’ budget? Where was it? (Kuesters/Jan. 9, 2013)

The budget for Pathways was in General Education for FY13. The amount was $436,688.

75. Where have we lost grant funding that required moving staff from grants to local? (Turgeon/Jan. 9, 2013)

<table>
<thead>
<tr>
<th>Position</th>
<th>Moved from</th>
<th>Moved to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pathways Supervisor</td>
<td>Title II</td>
<td>Reading</td>
</tr>
<tr>
<td>Federal Programs Supervisor</td>
<td>Title I</td>
<td>Instructional Services</td>
</tr>
<tr>
<td>Secretary</td>
<td>Title I</td>
<td>.5 Reading, .5 Instructional Services</td>
</tr>
<tr>
<td>ELL Teacher</td>
<td>Title III</td>
<td>ELL Existing PCN</td>
</tr>
<tr>
<td>ELL Teacher Assistant</td>
<td>Title III</td>
<td>ELL Existing PCN</td>
</tr>
</tbody>
</table>
The two ELL positions moved from the grant will be placed in currently existing PCN's for next year. No additional positions requested.

76. How many Reading Specialists in MS and HS? What is the focus of that program? (Hornberger/Jan. 9, 2013)

Distribution of Reading Specialists
- Middle School - 18
- High School - 16
- Douglass School - 1

What is the focus of that program?

The reading specialists have been assigned to middle and high schools in order to assist teachers with students who are below grade level or have difficulty reading high school level materials. The reading specialist works directly with identified students and serves as an in-house consultant to classroom teachers. Daily responsibilities include:
- Co-teaching with middle school English teachers – *Literacy Journey* reading and writing workshop
- Teaching elective literacy classes – *Reading Strategies Workshop* (grades 6,7,8); *Accelerating Literacy* (grade 7); *21st Century Literacy Strategies* (grades 9-12)
- Providing professional development
- Assessing students who are struggling readers
- Providing literacy coaching to content teachers (Math, Science, Language Arts, Social Science, Art, English)
- Serving as a key member of the school’s literacy team
- Team teaching with content teachers
- Supporting ELL and SPED teachers and/or team teaching with them
- Providing resources and procuring materials for teachers
- Participating in meetings with grade level and department chairs
- Organizing and implementing annual *Battle of the Books* (all high schools)
- Participating in Professional Learning Communities
- Modeling instructional strategies
- Co-planning with content teachers
- Providing remediation to struggling readers
- Co-teaching *Fundamentals of Writing*
- Providing *Study Skills* instruction during FLEX block

77. What is the Capital Outlay in FY12 in Science? (Turgeon/Jan. 9, 2013)

The items for FY12 under the Capital Outlay category were a Biological Safety Cabinet (BSC) and a CO2 incubator. It is likely that there will be more requests for the BSCs in the future. Both pieces of equipment are used in cell culture and microbiology as our research focus in science is expanding.

78. How many teachers take advantage of the staff development opportunities and how do we compare with other counties? (Morse/Jan. 9, 2013)

Funds shown on the Staff Development Page enable LCPS to provide the following activities.
Included are the activity titles/descriptions and the number of participants.

**Cohort Membership (6298)**

GMU (George Mason University)
- SPED – 3 cohorts in progress – 67
- SPED Leadership - 18
- Ed Leadership - 2 cohorts - 37
- ELL - 31
- Instructional Technology Integration - 23
- Teacher Leadership - 12

SU (Shenandoah University)
- SPED - 16
- Ed Leadership - 25
- Reading - 21
- Initial Licensure - 8
- Children’s Lit - 30

Catholic University
- Library Media – 8

Longwood University
- Library Media - 20

GWU (George Washington University)
- Ed Leadership – 19

**Other Courses (6298)**

- Driver’s Ed - 32
- English/Writing -
- Science -
- Praxis Prep - 22
- Summer Writing Institute – 4

**Tuition Reimbursement (5115)** - 419 (2012-13 as of 1/14/13)

**Nat'l Board Certification (5125)** - 14 graduated recently (now have 116 total in LCPS)

**Workshop Offerings** - August 28 – December 21, 2012 – 7585 participants

**Workshop Presenters/Curriculum Development**

- Workshop Presenters (Teachers) – 25 presenters - 743 participants
- Aspiring Principals – 31
- Teacher Leadership Series – 36
Module Development Teams – 55
Teacher Leader Institute - 413
School-Based PD Development Teams - 299

Additional On-Site Services for Staff
History Alive! - 56
Loudoun County History - 120
New Administrator Institute - 32
Literacy Framework - 42
Instructional Skills Summer Workshop - 43
PD Support for News Schools – 120
LCPS Administrative Team Institute – 350 participants
August 2012 County-wide PD Days – all regular and SPED teachers and SPED Teacher Assistants
PD Allotments to Schools – all school-based staff ($6.50 per student)

The information on how we compare with other counties is not available.

79. **What is the cost of the FTEs transferred to Staff Development and the Teacher Mentor program transferred to Personnel? Also provide the O&M costs.** (Kuesters/Jan. 9, 2013)

There was one Data Analyst position transferred into Staff Development (in Department of Instruction) for a total salary and benefit cost of $121,651.

There were two positions transferred from Staff Development to Personnel Services (one Specialist and one Secretary) for a total salary and benefit cost of $216,807. In addition, $698,461 was transferred for mentor and coaching stipends and curriculum development. The increase was offset by different salary and benefit choices for personnel.

Operations and Maintenance costs of $3,550 were associated with the Teacher Mentor program that was transferred to the Personnel Department.

80. **In the Staff Development budget, provide a breakdown of conferences that require out of town travel and overnight stays.** (Turgeon/Jan. 9, 2013)

Conferences Requiring Overnight Stays and Funded by the Staff Development Budget
JMU Content Teaching Academy – five nights in JMU Dorms - 30 staff members
Learning Forward Conference – 7 (five nights - 6; three nights – 1)
Virginia Learning Forward – one night - 4

Conferences for Pathways Staff:
- Teacher’s College – one night – 3
- Int’l Reading Assoc. – 5 nights – 4
- VA Reading Assoc. – 3 nights – 2
- Reading Workshop – 5 nights – 2
- Writing Workshop – 5 nights – 2
- Coaching Institute/Writing – 5 nights – 2
81. How many MS and HS Summer School? How many of our secondary summer school needs could be met by online courses? (Bergel/Jan. 9, 2013)

Summer School Enrollment FY12

<table>
<thead>
<tr>
<th></th>
<th>Middle</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Middle</td>
<td>372</td>
<td></td>
</tr>
<tr>
<td>High</td>
<td>1164</td>
<td></td>
</tr>
</tbody>
</table>

The high school courses available online would meet most of the students’ needs. An issue to be considered is that there is no sliding scale with our online vendor for students on free or reduced lunch.

82. Provide a 4 year revenue history for summer school and the percent of the program being covered. (Hornberger/Jan. 9, 2013)

The Summer School Budget on page 128 reflects the costs of both the General Education program and the Extended School Year program (ESY) for special education students for whom we cannot charge fees. Prior to FY 11, summer school expenditures for the ESY program were not tracked separately. Thus the data below reflects the General Education Program with fee information from FY 11 to FY 14. Note fees for free and reduced eligible students are charged on a sliding scale.

<table>
<thead>
<tr>
<th></th>
<th>FY11 Actual</th>
<th>FY12 Actual</th>
<th>FY13 Budget</th>
<th>FY14 Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Education Summer School</td>
<td>$550,752</td>
<td>$1,072,670</td>
<td>$1,265,883</td>
<td>$1,450,228</td>
</tr>
<tr>
<td>General Education Revenue</td>
<td>$444,703</td>
<td>$501,474</td>
<td>$615,000</td>
<td>$615,000</td>
</tr>
<tr>
<td>Percentage covered</td>
<td>80.7%</td>
<td>46.8%</td>
<td>48.6%</td>
<td>42.4%</td>
</tr>
</tbody>
</table>

83. When was the last time summer school rates were raised? (Turgeon/Jan. 9, 2013)

The last time that summer school fees were raised was the summer of 2010.

84. Provide the number of tests given to students over the last 4 years. (Morse/Jan. 9, 2013)

See attachment #11.

85. Breakdown the positions by mandated and not mandated for Special Education. (Kuesters/Jan. 9, 2013)

The federal and state regulations mandate services and do not specifically list positions, except for the teacher and teacher assistant positions related to the staffing requirements and related services. All positions in the Office of Special Education are related to mandated services LCPS is required to provide. Mandates related to all new positions are listed on the pages for each Office in the department. These mandates include providing a Free Appropriate Public Education (8 VAC 20-81-100); Individualized Education Programming (8 VAC 20-81-110);
Discipline Procedures and Use of Positive Behavioral Interventions (8VAC 20-160); Special Education Staffing Requirements (8 VAC-20-41-40) and Parent Participation (8 VAC 20-91-110C and E.).

Mandated Positions listed include teachers and speech-language pathologists (892.8) teacher assistants (714.9) and instructional support of occupational therapists and physical therapists (36.1).

Regarding mandated positions, the position of Individualized Education Program (IEP) specialist is not mandated but coordinating the management, training, technical, and reporting requirements of the IEP system for more than 7,000 students is mandated. Similarly, administrators and clerical support are not mandated services, however, to complete the tasks associated with the implementation of the regulations staff are required. The staff members include:

- Director - 1
- Supervisors - 11
- Coordinators - 3
- Specialists - 8
- Deans - 4
- Clerical Support - 10

86. How many times have we ever been out of compliance in Special Education? (Bergel/Jan. 9, 2013)

LCPS expends extensive resources to meet the many complex federal and state compliance requirements. In the past year, corrective action plans have been implemented to satisfy these compliance requirements based on three areas:

- State Performance Report, June 2012
- State Complaints, 2012

1. Virginia Department of Education, Office of Federal Program Monitoring

**Summary of Requirements Found in Noncompliance**

The review team determined that the following area was in noncompliance with special education requirements and required a corrective action plan.

- 8VAC20-81-110. Individualized Education Program development, revision, and content
  - An explanation of test scores must be included
  - Documentation of parent considerations must be considered
2. State Performance Plan Compliance Indicators 7, 12, and 13

**Compliance Indicator 7: Preschool Outcomes**

<table>
<thead>
<tr>
<th></th>
<th>2010-2011 Division Performance</th>
<th>2010-2011 State Target</th>
<th>State Target Met</th>
</tr>
</thead>
<tbody>
<tr>
<td>7c. Use of appropriate behavior to meet their needs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. % functioning within age expectations</td>
<td>60.00%</td>
<td>62%</td>
<td>No</td>
</tr>
</tbody>
</table>

**Compliance Indicator - Required performance rating is 100%**

<table>
<thead>
<tr>
<th>Compliance Indicator</th>
<th>Required performance rating is 100%</th>
<th>* Performance Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicator 12 - Percent of children referred by Part C prior to age 3, who are found eligible for Part B, and who have an IEP developed and implemented by their third birthdays. (20 U.S.C. 1416(a)(3)(B))</td>
<td>99.00%</td>
<td></td>
</tr>
<tr>
<td>Indicator 13 - Percent of youth with IEPs aged 16 and above with an IEP that includes appropriate measurable postsecondary goals that are annually updated and based upon an age appropriate transition assessment, transition services, including courses of study, that will reasonably enable the student to meet those postsecondary goals, and annual IEP goals related to the student's transition services needs. There also must be evidence that the student was invited to the IEP Team meeting where transition services are to be discussed and evidence that, if appropriate, a representative of any participating agency was invited to the IEP Team meeting with the prior consent of the parent or student who has reached the age of majority. (20 U.S.C. 1416(a)(3)(B))</td>
<td>95.98%</td>
<td></td>
</tr>
</tbody>
</table>

* A performance rating less than 100% demonstrates noncompliance.

3. State Complaints

Loudoun serves more than 7,000 students. During the 2011-2012 school year, 5 state complaints were received. There was one that required a corrective action plan in the area of developing the IEP in a timely manner and implementing the IEP as written.

87. Provide the percentage of the special education students who are located within their cluster. Comparison of current and expected because of boundaries. (Hornberger/Jan. 9, 2013)

At this time, 100% of middle school and high school students receive services in their cluster. The exception would be students who receive highly specialized programming in programs for students with emotional disabilities, autism, and multiple disabilities. At the elementary level, 100% of students with developmental delays and students who receive Cross-categorical services (LD and OHI) receive services within their cluster. Approximately 85% of students with autism receive services within their cluster. The exception is for the Tuscarora and Heritage clusters. These students receive services in Leesburg in the Loudoun County cluster (Frederick Douglass Elementary). Approximately 46% of students with emotional disabilities, 53% of students with intellectual disabilities and 31% of students with multiple disabilities receive services with their assigned clusters. The services are provided in geographical locations such as in the Leesburg, Ashburn, Dulles South, Sterling, and Western Loudoun areas.
With the opening of Discovery and Moorefield Station Elementary Schools we will be able to add services for students with emotional and intellectual disabilities. The number of students with multiple disabilities is so small that we will continue to locate services geographically.

88. Provide a breakdown of location of Special Education teachers and Special Education teacher assistants and ratio of students to teacher. (Hornberger/Jan. 9, 2013)

<table>
<thead>
<tr>
<th>Elementary Schools</th>
<th># of Teachers</th>
<th># of TA</th>
<th>Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aldie</td>
<td>1</td>
<td>1</td>
<td>1:8</td>
</tr>
<tr>
<td>Algonkian</td>
<td>8</td>
<td>8</td>
<td>1:8</td>
</tr>
<tr>
<td>Arcola</td>
<td>8.6</td>
<td>9</td>
<td>1:10</td>
</tr>
<tr>
<td>Ashburn</td>
<td>8</td>
<td>6</td>
<td>1:9</td>
</tr>
<tr>
<td>Banneker</td>
<td>2</td>
<td>2</td>
<td>1:9</td>
</tr>
<tr>
<td>Ball's Bluff</td>
<td>7.6</td>
<td>7</td>
<td>1:11</td>
</tr>
<tr>
<td>Belmont Station</td>
<td>9</td>
<td>9</td>
<td>1:12</td>
</tr>
<tr>
<td>Buffalo Trail</td>
<td>10</td>
<td>7</td>
<td>1:8</td>
</tr>
<tr>
<td>Catoctin</td>
<td>8</td>
<td>10</td>
<td>1:9</td>
</tr>
<tr>
<td>Creighton's Corner</td>
<td>6</td>
<td>6</td>
<td>1:12</td>
</tr>
<tr>
<td>Cedar Lane</td>
<td>11.8</td>
<td>11</td>
<td>1:10</td>
</tr>
<tr>
<td>Cool Spring</td>
<td>10.6</td>
<td>8</td>
<td>1:9</td>
</tr>
<tr>
<td>Countryside</td>
<td>9.5</td>
<td>8</td>
<td>1:9</td>
</tr>
<tr>
<td>Dominion Trail</td>
<td>7</td>
<td>7</td>
<td>1:10</td>
</tr>
<tr>
<td>Emerick</td>
<td>3.5</td>
<td>5</td>
<td>1:12</td>
</tr>
<tr>
<td>Evergreen Mill</td>
<td>7</td>
<td>7</td>
<td>1:12</td>
</tr>
<tr>
<td>Frederick Douglass</td>
<td>12</td>
<td>16</td>
<td>1:9</td>
</tr>
<tr>
<td>Frances Hazel Reid</td>
<td>9</td>
<td>10</td>
<td>1:11</td>
</tr>
<tr>
<td>Forest Grove</td>
<td>4</td>
<td>5</td>
<td>1:10</td>
</tr>
<tr>
<td>Guilford</td>
<td>8</td>
<td>5</td>
<td>1:8</td>
</tr>
<tr>
<td>Hamilton</td>
<td>3.5</td>
<td>7</td>
<td>1:10</td>
</tr>
<tr>
<td>Hillsboro</td>
<td>1</td>
<td>0</td>
<td>1:13</td>
</tr>
<tr>
<td>Hillside</td>
<td>6</td>
<td>7</td>
<td>1:8</td>
</tr>
<tr>
<td>Horizon</td>
<td>8</td>
<td>10</td>
<td>1:8.5</td>
</tr>
<tr>
<td>Hutchison Farms</td>
<td>6</td>
<td>4</td>
<td>1:12</td>
</tr>
<tr>
<td>Kenneth Culbert</td>
<td>14</td>
<td>13</td>
<td>1:10</td>
</tr>
<tr>
<td>Leesburg</td>
<td>7</td>
<td>6</td>
<td>1:8</td>
</tr>
<tr>
<td>Legacy</td>
<td>8</td>
<td>7</td>
<td>1:13</td>
</tr>
<tr>
<td>Liberty</td>
<td>9</td>
<td>8</td>
<td>1:12</td>
</tr>
<tr>
<td>Lincoln</td>
<td>1.5</td>
<td>0</td>
<td>1:8</td>
</tr>
<tr>
<td>Little River</td>
<td>5</td>
<td>3</td>
<td>1:10</td>
</tr>
<tr>
<td>Lovettsville</td>
<td>6</td>
<td>5</td>
<td>1:12</td>
</tr>
<tr>
<td>Lowes Island</td>
<td>4</td>
<td>4</td>
<td>1:12</td>
</tr>
<tr>
<td>Luckettts</td>
<td>2</td>
<td>1</td>
<td>1:13</td>
</tr>
</tbody>
</table>
### Elementary Schools

<table>
<thead>
<tr>
<th>School</th>
<th># of Teachers</th>
<th># of TA</th>
<th>Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meadowland</td>
<td>2.5</td>
<td>2</td>
<td>1:12</td>
</tr>
<tr>
<td>Middleburg</td>
<td>0.5</td>
<td>1</td>
<td>1:3</td>
</tr>
<tr>
<td>Mill Run</td>
<td>5</td>
<td>4</td>
<td>1:13</td>
</tr>
<tr>
<td>Mountain View</td>
<td>6</td>
<td>4</td>
<td>1:12</td>
</tr>
<tr>
<td>Newton Lee</td>
<td>10</td>
<td>12</td>
<td>1:9</td>
</tr>
<tr>
<td>Pinebrook</td>
<td>8</td>
<td>9</td>
<td>1:10</td>
</tr>
<tr>
<td>Potowmack</td>
<td>5.5</td>
<td>4</td>
<td>1:12</td>
</tr>
<tr>
<td>Round Hill</td>
<td>7</td>
<td>8</td>
<td>1:11</td>
</tr>
<tr>
<td>Rosa Lee Carter</td>
<td>7.5</td>
<td>10</td>
<td>1:10</td>
</tr>
<tr>
<td>Rolling Ridge</td>
<td>7</td>
<td>9</td>
<td>1:11</td>
</tr>
<tr>
<td>Sanders Corner</td>
<td>7.5</td>
<td>8</td>
<td>1:8.5</td>
</tr>
<tr>
<td>Seldens Landing</td>
<td>8</td>
<td>6</td>
<td>1:12</td>
</tr>
<tr>
<td>Sterling Elementary</td>
<td>4.3</td>
<td>3</td>
<td>1:14</td>
</tr>
<tr>
<td>Sugarland</td>
<td>10.5</td>
<td>8</td>
<td>1:10</td>
</tr>
<tr>
<td>Sully</td>
<td>8</td>
<td>7</td>
<td>1:8</td>
</tr>
<tr>
<td>Steuart Weller</td>
<td>12</td>
<td>16</td>
<td>1:9</td>
</tr>
<tr>
<td>Sycolin Creek</td>
<td>12</td>
<td>15</td>
<td>1:10</td>
</tr>
<tr>
<td>Tolbert</td>
<td>6</td>
<td>4</td>
<td>1:10</td>
</tr>
<tr>
<td>Waterford</td>
<td>1</td>
<td>1</td>
<td>1:12</td>
</tr>
</tbody>
</table>

### Middle Schools

<table>
<thead>
<tr>
<th>School</th>
<th># of Teachers</th>
<th># of TA</th>
<th>Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belmont Ridge</td>
<td>19</td>
<td>12</td>
<td>1:8</td>
</tr>
<tr>
<td>Blue Ridge</td>
<td>15</td>
<td>10</td>
<td>1:8</td>
</tr>
<tr>
<td>Eagle Ridge</td>
<td>13</td>
<td>13</td>
<td>1:8</td>
</tr>
<tr>
<td>Farmwell Station</td>
<td>16</td>
<td>13</td>
<td>1:8</td>
</tr>
<tr>
<td>Harper Park</td>
<td>16.8</td>
<td>12</td>
<td>1:8</td>
</tr>
<tr>
<td>Harmony Middle</td>
<td>15</td>
<td>12</td>
<td>1:8</td>
</tr>
<tr>
<td>J L Simpson</td>
<td>17</td>
<td>13</td>
<td>1:9</td>
</tr>
<tr>
<td>J M Lunsford</td>
<td>12.5</td>
<td>13</td>
<td>1:10</td>
</tr>
<tr>
<td>Mercer Middle</td>
<td>9</td>
<td>7</td>
<td>1:8</td>
</tr>
<tr>
<td>River Bend Middle</td>
<td>18</td>
<td>15</td>
<td>1:8.5</td>
</tr>
<tr>
<td>Stone Hill</td>
<td>15.5</td>
<td>16</td>
<td>1:8</td>
</tr>
<tr>
<td>Smart's Mill</td>
<td>15</td>
<td>11</td>
<td>1:9</td>
</tr>
<tr>
<td>Seneca Ridge</td>
<td>15.5</td>
<td>12</td>
<td>1:8</td>
</tr>
<tr>
<td>Sterling Middle</td>
<td>14.8</td>
<td>11</td>
<td>1:8</td>
</tr>
</tbody>
</table>
### High Schools

<table>
<thead>
<tr>
<th>High Schools</th>
<th># of Teachers</th>
<th># of TA</th>
<th>Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broad Run</td>
<td>18</td>
<td>14</td>
<td>1:9</td>
</tr>
<tr>
<td>Briar Woods</td>
<td>18</td>
<td>12</td>
<td>1:8</td>
</tr>
<tr>
<td>Dominion High</td>
<td>15.5</td>
<td>12</td>
<td>1:9</td>
</tr>
<tr>
<td>Freedom High</td>
<td>18</td>
<td>13</td>
<td>1:10</td>
</tr>
<tr>
<td>Heritage High</td>
<td>24</td>
<td>10</td>
<td>1:8</td>
</tr>
<tr>
<td>John Champe</td>
<td>10</td>
<td>7</td>
<td>1:7</td>
</tr>
<tr>
<td>Loudoun County</td>
<td>16</td>
<td>14</td>
<td>1:10</td>
</tr>
<tr>
<td>Loudoun Valley</td>
<td>16</td>
<td>12.78</td>
<td>1:8</td>
</tr>
<tr>
<td>Potomac Falls</td>
<td>22</td>
<td>19</td>
<td>1:8</td>
</tr>
<tr>
<td>Park View</td>
<td>16</td>
<td>15</td>
<td>1:8</td>
</tr>
<tr>
<td>Stone Bridge</td>
<td>20</td>
<td>13</td>
<td>1:9</td>
</tr>
<tr>
<td>Tuscarora High</td>
<td>27</td>
<td>17.5</td>
<td>1:9</td>
</tr>
<tr>
<td>Woodgrove High</td>
<td>25</td>
<td>13</td>
<td>1:9</td>
</tr>
</tbody>
</table>

### 89. Relate the new positions in Special Education to the Staffing chart on page 156. (Morse/Jan. 9, 2013)

<table>
<thead>
<tr>
<th>Staffing</th>
<th>FY14 FTE</th>
<th>FY14 New Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher</td>
<td>839.3</td>
<td>40 teachers; 3 speech-language pathologists</td>
</tr>
<tr>
<td>Teacher Assistants</td>
<td>756.9</td>
<td>42 teacher assistants</td>
</tr>
<tr>
<td>Instructional Support</td>
<td>38.1</td>
<td>1 occupational therapist; 1 physical therapist (not requested in FY14/moved from teacher to PT in FY13)</td>
</tr>
<tr>
<td>Specialist</td>
<td>7</td>
<td>1 behavior specialist</td>
</tr>
</tbody>
</table>

### 90. Why are there changes in the FY12 Appropriated budget compared to the FY12 Actual in Special Education? (Turgeon/Jan. 9, 2013)

Salaries and benefits are higher than budgeted due to the addition of teachers and teacher assistants to serve more special education students than were projected. The increase in professional services was due to the need for more speech services. LCPS was unable to hire sufficient speech therapists to provide the necessary services and therefore contractual services were used. Finally, the increase in capital outlay was caused by the carryover of open purchase orders from FY11.

### 91. Provide the requirement of Special Education students to be in general education classrooms and what LCPS percentages were. (Turgeon/Jan. 9, 2013)

Both the federal Individuals with Disabilities Education Act (IDEA) and the Virginia Regulations Governing Special Education state that students must be educated in the least restrictive environment. They have operationalized this requirement into the amount of time students spend in the general education classroom and results are reported annually in the State Performance Report:
Compliance Indicator 5: School-Age Least Restrictive Environment.

Data used for measurement against state targets for the 3 components of Indicator 5 are percentages reflecting:

1. The percent of students ages 6-21 who spend at least 80% of their day in the regular class
2. The percent of students ages 6-21 who spend at least 40% of their day in the regular class
3. The percent of students ages 6-21 served in public or private separate schools, residential placements, or homebound or hospital placements.

Data for the last 2 years are as follows:

<table>
<thead>
<tr>
<th></th>
<th>2010-2011 Division Performance</th>
<th>2010-2011 State Target</th>
<th>State Target Met</th>
</tr>
</thead>
<tbody>
<tr>
<td>5a. 80% or More of Time Inside Regular Classroom</td>
<td>68.00%</td>
<td>68%</td>
<td>Yes</td>
</tr>
<tr>
<td>5b. 40% or Less of Time Inside Regular Classroom</td>
<td>5.00%</td>
<td>8%</td>
<td>Yes</td>
</tr>
<tr>
<td>5c. Served in Separate Public or Private School, Residential, Home-Based or Hospital Facility</td>
<td>1.000%</td>
<td>&lt;1%</td>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2009-2010 Division Performance</th>
<th>2009-2010 State Target</th>
<th>State Target Met</th>
</tr>
</thead>
<tbody>
<tr>
<td>5a. 80% or More of Time Inside Regular Classroom</td>
<td>54%</td>
<td>66%</td>
<td>No</td>
</tr>
<tr>
<td>5b. 40% or Less of Time Inside Regular Classroom</td>
<td>12%</td>
<td>9%</td>
<td>No</td>
</tr>
<tr>
<td>5c. Served in Separate Public or Private School, Residential, Home-Based or Hospital Facility</td>
<td>1%</td>
<td>&lt;1%</td>
<td>No</td>
</tr>
</tbody>
</table>

92. Over the last 4 years, what were the mandated requirements and how did we meet them? (Hornberger/Jan. 9, 2013)

LCPS has complied with all the mandated requirements for the Individuals with Disabilities Education Act (IDEA) and the Virginia Regulations Governing Special Education, Section 504 of the Rehabilitation Act and the Standards of Quality over the past several years. Other mandates for Student Services can be found on pp. 163-164 of the budget book as well as in the response to question #97. While we met all requirements, there were a few areas of non-compliance noted by the monitoring process that are outlined in detail in question 86.
93. The percent of students with disabilities and LCPS student population is 10.78%. What is it for the surrounding jurisdictions? (Reed/Jan. 9, 2013)

<table>
<thead>
<tr>
<th>School Division</th>
<th>% of Students with Disabilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexandria City</td>
<td>12.5%</td>
</tr>
<tr>
<td>Arlington</td>
<td>15.0%</td>
</tr>
<tr>
<td>Fairfax</td>
<td>13.8%</td>
</tr>
<tr>
<td>Loudoun</td>
<td>10.78%</td>
</tr>
<tr>
<td>Prince William</td>
<td>11.4%</td>
</tr>
</tbody>
</table>

94. What is the number of students who exit Special Education because their IEPs have been met? Is that why LCPS percent of Special Education is low? (Fox/Jan. 9, 2013)

Our exit data indicates that we have approximately 55 students who have exited special education because their IEPs have been met. They were mostly students with speech and language impairments and preschool students with a disability of developmental delay. The low percentage of students in Loudoun County can be attributed to the strong general education programs that we have in place, particularly early literacy programs, and the interventions we provide to students during the Child Study process to address the identified learning weaknesses.

95. Provide the mandate suggestions to be included in LCPS legislative package. (Fox/Jan. 9, 2013)

The following suggestions are recommended for inclusion in a future LCPS legislative package. Many were already presented as comments to the Virginia Department of Education regulations and to the Virginia Council of Administrators of Special Education.

Legislative Issues:

- Continue to support appropriate/full funding for IDEA in FY2014 and in future years.
- Increase efficiencies in the IEP development process to reduce the paperwork burden on classroom teachers.
- Continue support for safe, evidence-based strategies regarding students with challenging behaviors; prohibit restraint and seclusion as planned interventions in students’ IEP.
- Support multi-tiered systems of support (MTSS) such as Responsive Instruction (RtI) and Positive Behavioral Interventions and Supports (PBIS) for all students.
- Provide funding for professional development for all general and special educators to connect effective, research-based practices for collaboration, instruction and assessments of general and special education students.
- Continue support for developing and maintaining a highly qualified workforce of special education teachers and instructional support personnel and administrators and maintain local control for HOUSSE (High Objective Uniform State Standard of Evaluation).
- Support of data-driven decisions and appropriate funding to provide transition activities, and academic and vocational opportunities for students with disabilities.
- Provide local school divisions with support and develop more efficient reporting systems to minimize staff time spent on reporting requirements.
96. Provide a list of the classified reclassifications that have occurred this year and the cost. (Hornberger/Jan. 9, 2013)

### 2011-2012 Approved Reclassification Requests

<table>
<thead>
<tr>
<th>Department</th>
<th># of Employees</th>
<th>Current Title/Level</th>
<th>New Title/Level</th>
<th>Request Date</th>
<th>Effective Date</th>
<th>Salary</th>
<th>FICA/VRS 23.31%</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bus &amp; Fin</td>
<td>1</td>
<td>Budget Technician - 14</td>
<td>Budget Analyst - 16</td>
<td>7/12/2011</td>
<td>1/3/2012</td>
<td>$3,585</td>
<td>$836</td>
<td>$4,421</td>
</tr>
<tr>
<td>Instruction Services</td>
<td>1</td>
<td>Secretary II - 11</td>
<td>IMT - 12</td>
<td>5/18/2012</td>
<td>7/2/2012</td>
<td>$4,733</td>
<td>$1,103</td>
<td>$5,836</td>
</tr>
<tr>
<td>Pupil Services</td>
<td>1</td>
<td>Registrar - 15</td>
<td>Senior Registrar - 17</td>
<td>2/17/2012</td>
<td>7/2/2012</td>
<td>$10,364</td>
<td>$2,416</td>
<td>$12,780</td>
</tr>
<tr>
<td>Pupil Services</td>
<td>1</td>
<td>Secretary II - 11</td>
<td>Prog. Asst. SHS - 13</td>
<td>4/18/2012</td>
<td>7/2/2012</td>
<td>$6,298</td>
<td>$1,468</td>
<td>$7,766</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>$28,677</strong></td>
<td><strong>$35,361</strong></td>
</tr>
</tbody>
</table>

97. Provide the mandated vs. non-mandated positions in Student Services. (Kuesters/Jan. 9, 2013)

All 8 positions for the Office of Student Services requested in the FY14 proposed budget provide mandated services to students, as indicated on pp. 163-164. School counselors are mandated by the Standards of Quality. Health clinic specialists, school social workers, and substance abuse prevention specialists provide mandated services to students as related services personnel and must be highly qualified in their field to do so. This also includes psychologists, occupational, physical and speech therapists, and interpreters for deaf and hard of hearing impaired students by qualified personnel. For example, school social workers provide services mandated by the Individuals with Disabilities Education Act and the Fostering Connections Act. Substance abuse prevention specialists provide the substance use/abuse education services for all students and intervention for identified students as required by §22.1-274. School health services that “Other personnel may refuse to provide perform nonemergency health-related services for students or may refuse to obtain training in the administration of insulin and glucagon.” Clinic personnel may not refuse care for students at any time.

Health clinic specialists, under the direction of Resource Nurses, and the nurses in selected and secondary clinics perform health services for students. The presence of a health professional is critical for many reasons, including the implementation of individual health care plans and procedures for students. In the absence of a clinic specialist or nurse, other professionals in the schools are not required to provide student health services. The Code of Virginia stipulates in §22.1-274. School health services that “Other personnel may refuse to provide perform nonemergency health-related services for students or may refuse to obtain training in the administration of insulin and glucagon.”

98. Revision to Question 41. Is there a possibility of offering catastrophic group health insurance coverage only? Clarified as a high deductible plan. (Hornberger/Jan. 9, 2013)

CIGNA offers a high deductible plan that LCPS could access but more time is needed to investigate the possibility of offering that option to staff.
99. What is the process should the School Board desire to close a school? (Hornberger/Jan. 10, 2013)

The code of Virginia 22.1-79(4) says the School Board can

Provide for the consolidation of schools or redistricting of school boundaries or adopt pupil assignment plans whenever such procedure will contribute to the efficiency of the school division.

The code of Virginia 22.1-79(8) kicks in a public notice and comment requirement for all "consolidation of schools", all transfers of administration of a school to a private entity, and for all school divisions over 15,000 students who want to redistrict or adopt a student assignment plan impacting 15% or more the pupils at the affected school.

The closing of any school would impact 100% of those students. So, the CODE requires at least one public comment after a minimum of 10 days notice.

SB Policy 2-32, however, goes beyond the CODE in terms of the requirements to redistrict or adopt a student assignment plan. A school closing necessarily involves the redistricting or reassigning of 100% of the students in the school proposed for closing.

The short answer is that the process for closing a school is covered by SB Policy 2-32.

100. Regarding the SEAC proposed "transitions specialist" position, how can this position help promote students into successful and contributing members of our community as well as identifying students who may be at risk to engage in dangerous actions? (Rose/Jan. 10, 2013)

Both the transition specialist and the behavior specialist were recommended by SEAC and proposed and eliminated in the FY13 Pupil Services proposed budget due to reductions. While both continue to be needed, it was determined that these positions would be prioritized; the behavior specialist is proposed for the FY14 budget and the transition specialist proposed for FY15, given the budget constraints this year.

The current transition teachers will continue to provide community integration and job development opportunities for students in our high schools. We believe the safe schools practices, such as those processes used for threat assessment, behavior intervention and bullying prevention, can be implemented by the school-based psychologists, counselors and social workers, requested in the FY14 proposed budget. They will continue to identify and work with at-risk students in our schools.

101. OPEB: What are the differences in the OPEB reforms recommended by the Superintendent as assumed in his Proposed FY 2014 Operating Budget and those already undertaken by the Board of Supervisors? Please provide comparable charts showing the difference in the Annual Required Contribution (ARC) and funding annually set aside/proposed for both the Superintendent’s proposed and Board of Supervisor’s adopted OPEB reform plans over the last several years. (Hornberger/Jan. 13, 2013)

See attachment #24.
102. HEALTH INSURANCE: What would be the amount that could be rebated per month to eligible employees who opt out of LCPS’ health insurance plan if an additional $15 per month was added to both OAP and POS premiums for Employee Only plans of the Personnel Committee’s recommended plan (Calculation: Total current Employee Only enrollees x $15 divided by the current number of eligible employees not enrolled in the LCPS health insurance plan)? This approach is intended to be revenue neutral, unless savings are gained through the voluntary migration of eligible employees away from health insurance offered through LCPS. My assumption is that, since we do not know if any will migrate, it cannot be directly factored into the budget with any level of certainty. (Hornberger/Jan. 13, 2013)

At this point in time, 2,579 employees are in the “Employee Only” plan. There are 1,999 employees who do not take our health insurance plan, thus any plan to increase the employee only premium by $15 will pay for a $15 opt out payment. This scenario would be revenue neutral as long as the number of employees who opt out is less than those taking the “Employee Only” plan.

103. TRANSPORTATION:

How many school buses were in operation in FY12? 840

How many are there currently in FY13? 833

How many new buses and replacement buses were included in the FY13 Appropriated Budget?

There were 0 buses included in the FY13 Appropriated Operating Budget.

All bus purchases (new and replacement) are purchased through the separate Lease/Purchase agreement. Through Lease/Purchase 57 replacement buses were purchased and 0 additional buses were added.

How many replacement buses are included in the FY14 Superintendent’s Proposed Operating Budgets? (Hornberger/Jan. 13, 2013)

71 Replacements.

104. How many school buses were decommissioned in FY11, FY12 and FY13 (anticipated) and what was their condition at time of decommissioning? Please provide a chart specifying the model, age, and years of service, mileage and reason for decommissioning for each. (Hornberger/Jan. 13, 2013)

For the sake of this discussion ‘decommissioning’ is interpreted as ‘taken out of service.’ This does not necessarily equate to ‘disposed.’ Also, as FY13 replacement buses are currently arriving and trade-ins being returned, the numbers reported below are relevant to 1/15/2013.

FY11, 10 decommissioned (7 traded in, 3 awaiting trade-in)
FY12, 5 decommissioned (1 traded in, 4 awaiting trade-in)
FY13, 7 buses have been decommissioned so far this fiscal year. It is anticipated that 57 buses will be disposed of this fiscal year; 54 will be traded in; one (1) out-of-service bus has been donated to the Monroe Technology Center as a classroom educational tool; two (2) are being donated to the Loudoun County Fire & Rescue Training Division to provide training for emergency responders. This will leave 27 buses in the fleet that are currently 13 years old or older.

See attachment #10 for chart.
105. TRANSPORTATION: What is the optional equipment that is routinely loaded on school buses purchased by LCPS and the approximate cost on each bus? (Hornberger/Jan. 13, 2013)

The following is the list of options for a 77 passenger, regular education bus. The cost is approximately $25,000.

- Engine Fan Clutch
- Air powered entrance door
- 2nd Rear Heater
- Stainless steel hand rails
- Digital, 2 Camera Surveillance System
- Driver's seat air ride suspension pedestal
- Bus #s on Roof
- Additional roof hatch
- Broom Holder
- Mud flaps
- 2 Way Radio
- Automatic tire chains
- GPS Unit
- 100 gallon fuel tank
- 270 Amp Alternator (Required w AC and/or Lift)
- 120,000 BTU front & rear A/C
- Tinted passenger windows
- Dash Air - 15,000 BTU
- Public Address (internal & external speaker system)
- LED Exterior Light Pkg.
- Battery Disconnect
- LED Strobe Warning Lights
- Air Brake air dryer
- Driver's light w/separate switch light
- 4-Wheel Air Disc Brakes
- Heated and Remote Control Mirrors
- ABS - Traction Control
- Painted white roof
- Child reminder system (Child Checkmate)
- Tilt/Telescopic steering column
- "Vandalock System" locking system
- Rear Mounted Stop Sign
- LED Strobe light on stop signs
- Rear air-ride suspension
- Mud and Snow Rear Tires
106. TRANSPORTATION: What has been the turn-over rate of bus drivers and bus attendants over the past three years (FY10, FY11 and FY12)? What is the approximate cost of training each new bus driver and attendant? (Hornberger/Jan. 13, 2013)

<table>
<thead>
<tr>
<th>FY10 Resignations:</th>
<th>Bus Drivers</th>
<th>95</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Bus Attendants</td>
<td>20</td>
</tr>
<tr>
<td>FY11 Resignations:</td>
<td>Bus Drivers</td>
<td>98</td>
</tr>
<tr>
<td></td>
<td>Bus Attendants</td>
<td>21</td>
</tr>
<tr>
<td>FY12 Resignations:</td>
<td>Bus Drivers</td>
<td>104</td>
</tr>
<tr>
<td></td>
<td>Bus Attendants</td>
<td>24</td>
</tr>
</tbody>
</table>

The average training cost for a new bus driver is $1,600 and $1,000 for a bus attendant, respectively.

107. STAFFING: How are the current 108 Technology Teaching Assistants assigned? Why are there more of them than Technology Resource Teachers? What is the average cost associated with each position (salary/benefits)? (Hornberger/Jan. 13, 2013)

The Technology Resource Teachers are assigned one per school, with the exception of the eight smallest elementary schools that share a TRT. There are more Technology Assistants because there is one Technology Assistant assigned to each elementary school and two technology assistants assigned to each middle and high school because there are multiple computer labs in the secondary schools.

108. INSTRUCTIONAL PROGRAMMING: How much in fees are collected from each student associated with the Driver’s Education “Behind the Wheel” program and budgeted in total for FY14? How much is the cost of this particular program, in terms of personnel, O & M, and capital outlay cost (including vehicle depreciation, if applicable)? Is the “Behind the Wheel” program required to be offered by the school division? (Hornberger/Jan. 13, 2013)

Loudoun County received $183.07 per pupil (n=695) in state aid for students enrolled in behind-the-wheel (BTW) instruction in 2010-11 and $161.48 per pupil (n=832) for 2011-12. LCPS collects $195 per pupil in fees, which covers all the costs for delivering this high-quality instruction. Instructors are paid the same amount in salary ($195 per pupil for 14 hours of instruction) as the students pay for BTW services. All in-car Driver Education instruction takes place before and after school hours.

Each year, the total cost to provide this instructional service is analyzed. If the cost exceeds the actual operating expenses minus the state aid and the student fees, the school board can consider raising the fee to cover all costs. Vehicle depreciation, fuel, personnel, etc., are all included when calculating the total cost. Since we prepared the budget before the 2011-12 fees were calculated, I did not request an increase in BTW fees. We could conceivably charge up to $214.57 per pupil this school year.

Our not-for-profit program, supplemented by state aid, considerably reduces the costs of BTW for parents. Students in Loudoun County Public Schools, regardless of race, disability or ability to pay, all have access to this high-quality program. Our instructional program has administrative oversight, cars that are maintained on a regular service schedule, and is taught by LCPS staff. Parents feel safer when students are in cars with school board employees (not strangers) and our student crash rates are less than crash rates for students that take commercial programs. The improvements in LCPS crash rates were referenced in the Driver Education section of the budget and can also be accessed at:

The state does not require us to provide this service. Driver education is a long-term investment in community safety and safe driving is an essential school to work skill.

109. OTHER REVENUE: What are the sources of “other revenue” anticipated in the FY13 Proposed Budget and what are the amounts of revenue associated with each source? What is the destination of these funds for each (by percentage, if shared)? (Hornberger/Jan 13, 2013)

The sources of Other Revenue are as follows:

<table>
<thead>
<tr>
<th>Category</th>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants</td>
<td>Howard Hughes Foundation</td>
<td>$1,000,000</td>
</tr>
<tr>
<td></td>
<td>Teaching in Loudoun</td>
<td>$50,372</td>
</tr>
<tr>
<td></td>
<td>PAVAN</td>
<td>$50,000</td>
</tr>
<tr>
<td></td>
<td>Junior Navy ROTC Program</td>
<td>$18,000</td>
</tr>
<tr>
<td>Tuition and Fees</td>
<td>Athletic Fees</td>
<td>$820,000</td>
</tr>
<tr>
<td></td>
<td>Advanced Placement Test Fees</td>
<td>$1,060,000</td>
</tr>
<tr>
<td></td>
<td>Parking Fees</td>
<td>$500,000</td>
</tr>
<tr>
<td></td>
<td>Tuition-Day School</td>
<td>$425,000</td>
</tr>
<tr>
<td></td>
<td>Tuition-Summer in the Arts</td>
<td>$45,000</td>
</tr>
<tr>
<td></td>
<td>Tuition-Summer School</td>
<td>$630,000</td>
</tr>
<tr>
<td></td>
<td>Tuition-Driver Education</td>
<td>$100,000</td>
</tr>
<tr>
<td>Other Local</td>
<td>Rebates, Refunds &amp; Recoveries</td>
<td>$200,000</td>
</tr>
<tr>
<td></td>
<td>Sale of Textbooks</td>
<td>$40,000</td>
</tr>
<tr>
<td></td>
<td>E-Rate Reimbursement</td>
<td>$700,000</td>
</tr>
<tr>
<td></td>
<td>Use of Building</td>
<td>$1,250,000</td>
</tr>
<tr>
<td></td>
<td>Transportation Services to County</td>
<td>$500,000</td>
</tr>
<tr>
<td></td>
<td>On-line Payments</td>
<td>$23,100</td>
</tr>
<tr>
<td></td>
<td>Sale of Equipment</td>
<td>$190,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>$7,601,472</strong></td>
</tr>
</tbody>
</table>

All of the grant revenue is a source of funding for the specific program funded by the grant. Tuition and fees are a source of funding to offset the costs of the program for which they are charged with the exception of parking fees which are a funding source for the operating budget as is other local revenue.

110. STAFFING: Last year we learned that the staffing metric for custodian allocations within LCPS is one custodian per 19,000 square feet with the addition of one athletic custodian at the HS level (see FY13 Budget SB Q/#107). What are the metric used in surrounding jurisdictions? How many fewer custodians would be needed system-wide if this metric was increased to one custodian per 20,000 square feet? (Hornberger/Jan. 13, 2013)

The surrounding jurisdictions vary in their staffing models. Fairfax County Public Schools uses a base formula of 19,000 square feet per custodian. Fauquier County Public Schools also use 19,000 square feet, Arlington Public Schools uses 20,000 square feet but they have an adjustment factor, by school, for community use, and Prince William County Public schools uses 21,000 square feet as their staffing model.
If the metric were changed to 20,000 square feet per custodian, the total reduction would be 32.5 custodian positions.

In elementary schools, it will be difficult to find .5 FTE necessary to meet the loss of one (1) full-time custodian in the staff reduction model.

111. TRANSPORTATION: Have school start-times ever been modified in order to maximize the number of runs that could be done by a particular driver/bus? If not why not?

Yes. Areas where population density allows such as Ball’s Bluff and Leesburg Elementary have been modified.

Realistically what could be the maximum number of runs possible and approximately what would be the range of minutes that start-times would need to be adjusted (10 minutes, 15 minutes, 20 minutes, etc.)?

It must be noted that modifying start times would require starting some schools earlier than 7:50 AM or later than 9:00 AM. Opening some elementary schools 30 minutes earlier would have the school day begin at 7:20 AM with students arriving at 7:00 AM and a number of students boarding the bus at 6:35 AM. In addition, many students would be walking or standing at bus stops in the dark. The other option would be to open some schools at 9:15 – 9:30 AM. Students on this schedule would arrive home well after 4:30 PM. In order to determine an approximate cost savings we would have to receive direction on the acceptable limits to such an expansion of the opening window for LCPS and be allowed to determine which schools would be affected in order to obtain the maximum efficiency.

Would this need to be done by Cluster? (Hornberger/Jan. 13, 2013)

No. Staggering of school start times would be arranged by school proximity not clusters.

112. STAFFING: Do HS Athletic Directors, Athletic Assistants or Athletic Trainers teach any courses (i.e. Health/PE)? If not, why not? (Hornberger/Jan. 13, 2013)

The staff members in these positions do not teach any classes. The High School Athletic Departments consist of 23 sports programs, 68 different teams, approximately 70 coaches and between 450 and 680 participates each year.

The responsibility for the entire Athletic Department rests with the Athletic Director and the Assistant Athletic Director. The list below gives some of the duties and responsibilities for this staff of two:

<table>
<thead>
<tr>
<th>Eligibility</th>
<th>Budget</th>
<th>VHSL rules compliance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduling</td>
<td>Uniforms and Equipment</td>
<td>Coaches meetings</td>
</tr>
<tr>
<td>Booster club</td>
<td>Event management</td>
<td>Parent meetings</td>
</tr>
<tr>
<td>Facilities cleanliness</td>
<td>Event security</td>
<td>Interview and hire coaches</td>
</tr>
<tr>
<td>Seasonal paperwork</td>
<td>School master calendar</td>
<td>Ticket sales and collection</td>
</tr>
<tr>
<td>Transportation</td>
<td>Officials</td>
<td>Parent issues and concerns</td>
</tr>
<tr>
<td>Preparation of fields</td>
<td>Supervision of coaches</td>
<td></td>
</tr>
</tbody>
</table>

The Athletic Director must also attend monthly district and regional meetings along with VHSL Group Board and Membership meetings and VHSL eligibility meetings. When they are out of the office the Assistant AD’s will cover.

The Assistant Athletic Director works a 208 day contract starting the first of August through the middle of June. They assist with the responsibilities listed above as well as covering events in the evening as late as 10:00 pm along with Saturday and holiday events.

The Athletic Trainer works a 208-day contract starting the first of August through the middle of June. They cover all practices during the week and Saturday and holiday practices as needed along with all home athletic events and all
home and away varsity football games. Depending on the schedule they may work as late as 10:00 pm to cover these events. Many Athletic Trainers do not hold a teaching certificate as their major is in Athletic Training.

Primary Function:

The Certified Athletic Trainer (AT) is responsible for coordinating and administering a comprehensive health care program for all student athletes. The Certified Athletic Trainer is responsible for immediate care of injured athletes. The Certified Athletic Trainer implements techniques and strategies to encourage the prevention of athletic injuries and illnesses and provides for recognition, evaluation, management, and rehabilitation of injuries to student athletes. The Certified Athletic Trainer advises coaches and coordinates the efforts of doctors, athletes, and parents. The Certified Athletic Trainer ensures that players participate only when capable and that physicians’ instructions are understood and followed.

Qualifications:

- Must be certified by the National Athletic Trainer Association and maintain that association’s standards
- Must be licensed by the Virginia Board of Medicine as an Athletic Trainer
- Must be able to communicate effectively with students, parents, administrators, and medical personnel to ensure that proper methods are used in prevention and treatment of injuries
- Must be a Certified First Aid/CPR Instructor.
- Responsible for concussion evaluation and return to play protocol.

Essential Job Functions:

- Develops a plan for emergency health care of injured athletes.
- Provides evaluation and treatment to injured athletes.
- Initiates and processes all injury reports.
- Establishes injury prevention practices.
- Supervises the athletic training room.
- Assists staff in selection and fitting of equipment.
- Maintains first aid supplies and ensures that they are in their proper location for use.
- Maintains accurate medical records for all athletes, to include, but not limited to, athletic physicals, treatments rendered, physician referrals and recommendations, etc.
- Renders on-site decisions, in the absence of a physician, on the playing status of a player.
- Advises coaches and coordinates the efforts of doctors, athletes and parents.
- Counsels the coaches when an athlete may participate in practice or games following injury or illness.
- Counsels athletes in seeking proper medical assistance for follow-up care.
- Conducts in-service programs for the coaching staff in the care and prevention of athletic injuries.
- Ensures current CPR and First Aid certification of all coaches through class instruction.
- Assists administrators, coaches, and game officials in decisions regarding playing surface and atmospheric conditions relating to player safety.

113. STAFFING: What year did LCPS begin staffing Athletic Assistants? What are the primary responsibilities of Athletic Assistants? (Hornberger/Jan. 13, 2013)

Staffing for the Assistant Athletic Director’s began in the FY02 budget with the addition of boys’ and girls’ lacrosse. See answer to above question for responsibilities of Assistant AD’s.
114. INSTRUCTIONAL PROGRAMMING: How many Loudoun students attend Thomas Jefferson HS in Fairfax County and at what cost? Please include a thorough analysis, including tuition paid to FCPS, state per/student revenue lost, transportation, etc. and chart that cost and number of students over the last four years and proposed for FY14. (Hornberger/Jan. 13, 2013)

<table>
<thead>
<tr>
<th></th>
<th>FY10</th>
<th>FY11</th>
<th>FY12</th>
<th>FY13</th>
<th>FY14</th>
</tr>
</thead>
<tbody>
<tr>
<td># Students</td>
<td>149</td>
<td>177</td>
<td>191</td>
<td>204</td>
<td>Projected 213</td>
</tr>
<tr>
<td>Tuition Paid</td>
<td>$1,726,541.00</td>
<td>$1,888,059.00</td>
<td>$2,084,192.00</td>
<td>$2,381,947.00</td>
<td>$2,769,000.00</td>
</tr>
<tr>
<td>State Revenue Lost</td>
<td>LCPS receives the State revenue for those students attending Thomas Jefferson HS.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation Cost</td>
<td>**</td>
<td>**</td>
<td>$352,891.08</td>
<td>$412,599.07</td>
<td>$495,118.88</td>
</tr>
</tbody>
</table>

**Transportation costs not collected these years.

115. SMALL SCHOOLS: What are the additional annual operating costs associated with each of the 5 smallest elementary schools in the county with roughly 150 students or fewer (Aldie ES, Hamilton ES, Hillsboro ES, Lincoln ES, and Middleburg ES)? What is the Capital Asset Preservation Program (CAPP) costs for each of them for the next five years? Please provide a breakdown of those costs for each school and their range of capacity utilization over the next 5 years. (Hornberger/Jan. 13, 2013)

We have provided the potential savings in operating costs for Aldie, Hamilton, Hillsboro, Lincoln, and Middleburg elementary schools at a total $2.7 million with the Food Services costs at $260,000. See Attachment #17 for the potential savings by school. It should be noted that this estimate was prepared assuming that all current teachers except 3 would be moved with the students in the event that a school was closed. Therefore, if a decision were made to close any of the five schools, the savings are likely to vary based on enrollments at school(s) being closed and the receiving school(s) and thus changes in the number of teacher positions.

Attachment #18 provides the planned CAPP expenditures and the capacity utilization for the five schools.

116. SMALL SCHOOLS: Based on current Capital Improvement Program (CIP) projections, would it still be possible to absorb the anticipated student populations of the 5 smallest schools (Aldie, Hamilton, Hillsboro, Lincoln and Middleburg) into existing schools within their same planning areas over the next 5 years? By my calculation these five schools currently have a combined enrollment of 544 students, a combined program capacity of 819 (combined 66% utilization rate) and declining enrollment trajectory. Furthermore, four of them (Hamilton, Hillsboro, Lincoln and Middleburg) are located in the Western Loudoun Planning Area which has a projected surplus facility capacity of between roughly 1,200 and 1,500 at the elementary level through the 2017-18 school year and is anticipated to be on a declining enrollment trajectory overall as a planning area. It would appear that closing all four of these small schools in Western Loudoun would not even half the surplus elementary facility capacity in that Planning Area and still leave ample space for potential (but unlikely) student growth of more than 700-800 students (20% or more). Is this assessment correct? (Hornbeger/Jan. 13, 2013)

The assessment is correct.
117. SMALL SCHOOLS: Please provide the driving distance and estimate driving time between the following schools:  
A. Middleburg ES and Banneker ES  
   Miles = 5.2    /    Estimated Drive Time = 10 Minutes  
B. Lincoln ES and Emerick ES  
   Miles = 2.3    /    Estimated Drive Time = 5 Minutes  
C. Lincoln ES and Kenneth W. Culbert ES  
   Miles = 2.6    /    Estimated Drive Time = 5-7 Minutes  
D. Hamilton ES and Kenneth W. Culbert ES  
   Miles = 1.3    /    Estimated Drive Time = 5 Minutes  
E. Hillsboro ES and Mountain View ES  
   Miles = 3.3    /    Estimated Drive Time = 6-10 Minutes  
F. Aldie ES and Arcola ES  
   Miles = 7.0    /    Estimated Drive Time = 15 Minutes  
G. Aldie ES and Pinebrook ES  
   Miles = 8.2    /    Estimated Drive Time = 15-18 Minutes  

118. COMPENSATION: What is the budgetary cost of taking the same approach with salary increases in FY14 as was done in FY13 at the following levels: $500 or $0.33/hour; $1,000 or $0.66/hour; and $1,500 or $1.00/hour? Roughly how many salaried employees (each full and part-time) and hourly employees (each full and part-time) are there proposed to be in FY14? Would it be possible to provide year-end bonuses to employees with any end of year surplus remaining in the budget in FY14? (Hornberger/Jan. 13, 2013)  

The cost of each of the salary increase options would be for 9,730.2 FTEs:  

- $500 or $0.33 per hour  
  $5.8 million  
- $1,000 or $0.66 per hour  
  $11.6 million  
- $1,500 or $1.00 per hour  
  $17.5 million  

At this point, it is too early to determine whether year-end funds could be used for an employee bonus.  

119. Investigate the possibility of seeking historic preservation status for Lincoln including the possibility of applying for federal grants. (Morse/Jan. 14, 2013)  

To place Lincoln Elementary School on the National Register of Historic Places, LCPS would first have to have declared an historic site by the Virginia Historic Preservation Office.  

When being considered for this designation, the site is evaluated on the following criteria:  

- Is this building associated with events that have made a significant contribution to the broad patterns of our history; or  
- Is this building associated with the lives of significant persons in or past; or
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- Does it embody the distinctive characteristics of a type, period, or method of construction, or that represent the work of a master, or that possess high artistic values, or that represent a significant and distinguishable entity whose components may lack individual distinction; or
- Has it yielded or is likely to yield, information important in history or prehistory.
- Is the property old enough to be considered historic (generally at least 50 years old) and does it still look much the way it did in the past?

Proposed nominations are reviewed by the state’s historic preservation office and the state’s National Register Review Board. The length of the state process varies, but will take a minimum of 90 days.

Complete nominations, with certifying recommendations, are submitted by the state to the National Park Service in Washington, D.C., for final review and listing by the Keeper of the National Register of Historic Places. The National park Service makes a listing decision within 45 days.

The financial benefits of being placed on the National Register of Historic Places are primarily aimed at non-public property owners. For instance, a 20 percent income tax credit is available for the rehabilitation of historic, income-producing buildings that are determined by the Secretary of the Interior, through the National Park Service, to be “certified historic structures.”

There are some federal preservation grants for planning and rehabilitation of buildings on the register.

120. What would be the estimated budget impact of increasing the definition of “full-time” to 6.0 hours/day for the purposes of VRS and OPEB only and grandfathering all current employees who are already vested? (Fox/Jan 14, 2013)

If the definition for VRS was changed to 6.0 hours/day and all currently vested employees were grandfathered the budget savings would be $500,000.

Any impacts to OPEB would have to be calculated by the actuarial consultants.

121. What would be the estimated budget impact of increasing the definition of “full-time” to 6.0 hours/day for the purposes of VRS and OPEB only if grandfathering ALL current employees (vested or not)? (Fox/Jan 14, 2013)

There would be no budgetary impact since all vacancies and new staffing requests are budgeted for more than six hours per day.

122. Assuming that the school board adopts the "Fox Plan" for health insurance premiums, what would be the estimated budget impact of increasing the threshold of eligibility for health insurance benefits in FY14 as follows: 100% benefit (LCPS premium subsidies as described in "Fox Plan") at 6.0 hours/day or more, 75% benefit (LCPS subsidizes premiums at levels 75% of subsidy rates in the "Fox Plan") at 5.0 hours/day, and 50% benefit (50% "Fox Plan" subsidies) at 4.0 hours/day, and no benefit at less than 4.0 hours/day BUT grandfathering all employees at 4.0 hours a day or more in FY14? (Fox/Jan 14, 2013)

The savings if all employees working 4 hours or more were grandfathered would be $760,000.
123. What would be the estimated budget impact of the changes described in #122 (above) without any grandfathering? (Fox/Jan 14, 2013)

The savings without any grandfathering would be $2,700,000

124. How many students take advantage of Howard Hughes Medical Institute (HHMI) exchange program? What schools participate in this program? (Morse/Jan. 15, 2013)

The exchange program listed in the HHMI grant is a research exchange between the AOS and the Hwa Chong Institute in Singapore.

<table>
<thead>
<tr>
<th>Budget Year</th>
<th>AOS Students</th>
<th>HCI Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY09</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>FY10</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td>FY11</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>FY12</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>FY13</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>FY14 (anticipated)</td>
<td>12</td>
<td>12</td>
</tr>
</tbody>
</table>

125. Could the summer STEM camp program be expanded in the Howard Hughes Medical Institute (HHMI) grant? How much would it cost to open a third site? (Morse/Jan. 15, 2013)

It costs approximately $41,000 per site to run the STEM camp. To be consistent with part of the goals of HHMI for the use of the grant funds, the camp has targeted students who are economically disadvantaged and would not normally have access to high quality science experiences in the summer. The budget for the camp includes all of the personnel costs and equipment as well as curriculum development that occurs during the school year. The specially trained staff conducts the camp in two sites in Leesburg and Sterling in two different sessions. Our future plans for the camp are to extend into middle school summer offerings at the same sites and to train additional staff to conduct the camps so that we can open the opportunity to more students for a reasonable fee in addition to serving the targeted student group.

126. What part of JROTC is personnel and what part is O&M? Where are the teachers? (Hornberger/Jan. 15, 2013)

The FY14 Budget shows $88,000 in Salaries and $18,000 in O & M. For the first time this year, we listed the salary subsidies from the Navy for our three teachers as a grant under Personnel on the JROTC grant page. In past years, only Operations and Maintenance funds for uniform dry cleaning, field trips, and consumables has been on the grant page. These are CTE teachers so their FTE’s appear as positions on the Career and Tech Education page. In future years, we will revert to treating this as a salary subsidy instead of a grant.

127. How is it determined which school receive funds from the Technology Grant? Do they provide validation for the funding? (Morse/Jan. 15, 2013)

The Technology Grant funding from the state is determined based on a formula of $50k for school division allocation + $26k per school. The funding is allocated to the district to accommodate SOL online testing. The technology was implemented in the following state mandatory sequence:
- Phase one all high schools
- Phase two all middle schools
All School Board Questions and Answers

- Phase three all elementary schools
  Subsequent allocations were used to maintain and upgrade district-wide infrastructure and equipment as needed in direct support of online SOL testing.

128. Is the Title I report posted on the web site and where is it posted? (Rose/Jan. 15, 2013)

The NCLB Consolidated Application can be found on the LCPS web page through the following steps: Administration → Instruction → Federal Programs.

129. Provide progress over last 3 or 4 years for ELL students are making in assessments for Title III A - ELL. (Morse/ Jan. 15, 2013)

The following is an explanation of Attachment #14 which is a display of the status of meeting the targets for each year.

Title III requires that LEP students meet the Annual Measurable Achievement Objectives (AMAO) at a division level in the following: (1) Progress and Proficiency and (2) mastery of content in Reading/Language Arts and Mathematics.

The Progress and Proficiency performance are assessed through the WIDA ACCESS (World Class Instructional Design and Assessment) for ELLs that is administered on an annual basis. The Progress target is a measurement of students progressing in gaining proficiency in English.

The Reading/Language Arts and Mathematics performance measures for mastery of content are the annual Standards of Learning (SOL) assessments.

**Title III Annual Measurable Achievement Objective (AMAO) Three Year Summary**

<table>
<thead>
<tr>
<th>Year</th>
<th>Progress</th>
<th>Proficiency</th>
<th>Reading SOL</th>
<th>Mathematics SOL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Target</td>
<td>Percent Passed</td>
<td>Target</td>
<td>Percent Passed</td>
</tr>
<tr>
<td>2010-2011</td>
<td>64%</td>
<td>75%</td>
<td>15%</td>
<td>20%</td>
</tr>
<tr>
<td>Based on 2009-2010 data</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011-2012</td>
<td>65%</td>
<td>93%</td>
<td>16%</td>
<td>22%</td>
</tr>
<tr>
<td>Based on 2010-2011 data</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2012-2013</td>
<td>66%</td>
<td>93%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Based on 2011-2012 data</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

130. What is the number of students served by Title X Part C over the last 3 years? (Bergel/Jan. 15, 2013)

The McKinney-Vento Act defines “homeless children and youth” (school age and younger) as: Children and youth who lack a fixed, regular, and adequate nighttime residence, including children and youth who are sharing the
housing of other persons due to loss of housing, economic hardship, or a similar reason; and unaccompanied youth, meaning youth not in the physical custody of a parent or guardian, such as runaways and youth denied housing by their families. It should be noted that most (approximately 85%) of the students eligible are in the category of “sharing housing” or are “unaccompanied youth” who may be living with other families.

<table>
<thead>
<tr>
<th>School Year</th>
<th>Number of Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009-10</td>
<td>447</td>
</tr>
<tr>
<td>2010-11</td>
<td>659</td>
</tr>
<tr>
<td>2011-12</td>
<td>785</td>
</tr>
</tbody>
</table>

131. Which of the two new positions (Senior Financial Analyst and Accountant) in Financial Services is higher priority if both could not be afforded? (Hornberger/Jan. 15, 2013)

Senior Financial Analyst - This position will have a direct impact on operational efficiencies throughout LCPS.

132. Provide the cost of bereavement leave as suggested by LEA. Is there a record of absences due to death in family? (Turgeon/Jan. 15, 2013)

Based on last year, the cost of bereavement leave would be approximately $340,000. This estimate may not be complete as many may use leave without identifying the purpose for which it is taken.

133. Did the County experience the same type of increase for their retirees? (Turgeon/Jan. 15, 2013)

Yes, the County's premium increased for over 65 retirees as well since we are rated as one group. The move from a self-insured plan to a fully-insured plan for the over 65 retirees simply shifts the risk from us to a third-party, Humana, which increases costs in the short-term. However, the change was made was to reduce the OPEB liability and ultimately reduce costs significantly over the long-term.

134. Provide analysis of the northern VA jurisdictions and what they offer retirees for health insurance. (Hornberger/Jan. 15, 2013)

See attachment #13.

135. Provide breakdown of Non-Departmental budget over 4 years. (Hornberger/Jan. 15, 2013)

<table>
<thead>
<tr>
<th></th>
<th>FY11 Actual</th>
<th>FY12 Actual</th>
<th>FY13 Adopted</th>
<th>FY14 Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary Placeholder</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$12,000,000</td>
</tr>
<tr>
<td>OPEB/Retiree Health Insurance</td>
<td>$19,647,113</td>
<td>$22,000,000</td>
<td>$19,250,000</td>
<td>$20,274,147</td>
</tr>
<tr>
<td>Separation Pay*</td>
<td>$0</td>
<td>$0</td>
<td>$2,212,928</td>
<td>$2,235,056</td>
</tr>
<tr>
<td>Workers Compensation</td>
<td>$1,700,000</td>
<td>$1,168,742</td>
<td>$1,881,000</td>
<td>$1,975,000</td>
</tr>
<tr>
<td>Short Term Disability</td>
<td>$694,973</td>
<td>$716,114</td>
<td>$741,600</td>
<td>$815,100</td>
</tr>
<tr>
<td>Insurance</td>
<td>$1,395,255</td>
<td>$1,301,601</td>
<td>$1,539,974</td>
<td>$1,545,600</td>
</tr>
<tr>
<td>Total</td>
<td>$23,437,341</td>
<td>$25,186,457</td>
<td>$25,625,502</td>
<td>$38,844,903</td>
</tr>
</tbody>
</table>

Loudoun County Public Schools – FY 2014 Operating Budget
* Separation pay is charged to the account the retiring or leaving employee is funded from, thus no funds are displayed in actual.

136. Provide list of vehicle purchases in the Lease.  (Hornberger/Jan. 15, 2013)

The attached (attachment # 12) spreadsheets provide the information.

137. Are there any vehicles in lease that are for Driver Education?  (Turgeon/Jan. 15, 2013)

2 replacement Driver's Ed cars are included in the FY14 Lease Purchase.
(Replacement defined as vehicles >10 years old or 100K miles).

138. Provide the number of mentors for 2011-12 and the stipend cost for mentoring and workshops.  What is projected for FY14?  (Turgeon/Jan. 15, 2013)

In FY12, the total cost for mentoring stipends and workshops including FICA was $579,473.63.  This figure included funds paid for mentoring and coaching stipends, attendance at workshops for new teachers and mentors outside of contract time, and presenting at workshops.  The total number of mentors was 471.  The mentor protégée ratio was 1.4.  Mentors are paid $800 for the first mentee and $100 for each mentee after.

In FY13, $687,696 was budgeted for mentoring stipends and workshops including FICA.  In FY14, the same amount was budgeted as for FY13.  Some factors are variable in the mentoring and coaching program.  The FY13 total year projection was for 700 new teachers.  If mentors and protégées had a 1:1 instead of a 1:1.4 ratio, the cost of the program would exceed the FY13 budget.  The ratio varies from year to year depending on where new teachers are employed and in which content areas.  While we can predict within a range the number of teachers new to Loudoun County who will be hired, it is more difficult to predict the number of teachers within LCPS who will change programmatic levels (e.g. elementary school to middle school) or content areas, and these teachers are also provided mentoring services.  Principals can also request mentoring support for second-year teachers during their first semester.

Additionally, grant funding is variable.  In FY13, the state eliminated the hard-to-staff grant, which paid some mentoring costs in FY12.  Other VADOE funding is variable as well, and LCPS is typically notified well into the spring semester of what the VADOE funding amount will be for the current year.  We have not yet received any VADOE funding for FY13.

139. Is there competition for the mentor positions?  How are they selected?  Are there more teachers wanting to mentor than there are mentor positions?  (Morse/Jan. 15, 2013)

Mentors are recruited by their principals, assistant principals, department chairs, subject area lead teachers, and supervisors.  Mentors must be approved by their principals in order to be considered as candidates for mentoring.  Special programs such as early childhood special education, speech, technology resource teachers, etc. must have the approval of the supervisor.  Mentor placement is also influenced by need in specific content areas, schools, or grade levels.  Mentors must be on continuing contracts and agree to the requirements of the program.  This process narrows the field of mentor applicants.  For the 2012-2013 school year, 114 applicants to be mentors have not yet been placed with one or more protégées.  They remain in the mentor pool in the event they are needed for later hires at their locations or in their content areas.
140. Provide statistics on the number of teachers that leave LCPS and the reason for leaving. Provide the number of teachers hired from other jurisdictions. Also provide the retention rate. (Rose/Jan. 15, 2013)

378 licensed employees left LCPS during the 2011-2012 school year. 100 of these licensed employees retired. The separation reasons stated by the remaining 278 licensed employees are included on the attached chart. These reasons have been updated from previous reports.

80 licensed employees came to LCPS with out-of-division (in-state) experience.

56 licensed employees arrived with both out-of-division and out-of-state experience.

Some of these employees may have experienced a gap in their careers before coming to Loudoun County Public Schools.

The 2011-12 total attrition rate was 7.62%, including retirees. Therefore our retention rate for that same school year was 92.38%.

<table>
<thead>
<tr>
<th>2011-2012 Reasons for Attrition</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Adoption</td>
<td>1</td>
</tr>
<tr>
<td>Another Position</td>
<td>25</td>
</tr>
<tr>
<td>Another Position - Alexandria</td>
<td>1</td>
</tr>
<tr>
<td>Another Position - Arlington</td>
<td>1</td>
</tr>
<tr>
<td>Another Position - Fairfax</td>
<td>7</td>
</tr>
<tr>
<td>Another Position - Prince William</td>
<td>2</td>
</tr>
<tr>
<td>Private Employment</td>
<td>7</td>
</tr>
<tr>
<td>Childcare</td>
<td>47</td>
</tr>
<tr>
<td>Continuing Education</td>
<td>3</td>
</tr>
<tr>
<td>EOY Assignment</td>
<td>4</td>
</tr>
<tr>
<td>Graduate School</td>
<td>2</td>
</tr>
<tr>
<td>Household Duty</td>
<td>24</td>
</tr>
<tr>
<td>Moved from the Area</td>
<td>89</td>
</tr>
<tr>
<td>Non-renewal</td>
<td>4</td>
</tr>
<tr>
<td>Personal</td>
<td>2</td>
</tr>
<tr>
<td>Personal Illness</td>
<td>8</td>
</tr>
<tr>
<td>Other</td>
<td>50</td>
</tr>
<tr>
<td>Transfer of Spouse</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>278</td>
</tr>
</tbody>
</table>

141. Provide analysis of the costs and the benefits as a result of the NCLB waiver for all departments. (Turgeon/Jan. 15, 2013)

It is difficult to identify all of the costs and benefits related to the NCLB waiver at this time. The total impact will be known by the end of the first full year. The most immediate known impact is the necessity to move 3.0 FTEs into the
Operating Budget because of the requirement to “set aside” 10% of the grant this year to pay for the state liaison, monitoring software, and professional development.

The benefits are that resources are being provided by VA DOE to our staff designed to improve our school improvement efforts across the entire school system.

An explanation of the differences between the former NCLB requirements and those in the current waiver was a topic at the January 17th Curriculum and Instruction Committee Meeting. The power point will be posted on the LCPS web site with the meeting notes.

142. Are there any processes in place to evaluate substitutes? (Turgeon/Jan. 15, 2013)

LCPS has a procedure through which administrators can document any problems with substitute teacher performance and request that the substitute not return to his or her school location. A written form is completed summarizing any problems or incidents, and the administrator shares the concern with the substitute. The substitute has an opportunity to explain or provide any additional information. If there is a performance problem that is more serious in nature and incompatible with continued service as a substitute teacher, the issue is managed by the Department of Personnel Services. If there are multiple small incidents in which principals request that a substitute not return to their schools, the issue is managed by the Department of Personnel Services.

LCPS also has a procedure to recognize outstanding substitute teachers. Principals can nominate substitutes for a substitute teacher of the year award. Principals can also write letters of commendation for substitute teachers’ files.

143. Do retirees leave Loudoun County? (Hornberger/Jan. 15, 2013)

Yes.
Total Retirees - 917
 Loudoun Co. residents - 490
 Virginia, non-Loudoun Co. residents - 228
 Retirees outside of Virginia – 199

144. Do we give any incentives to entice people to take hard-to-staff positions? Could an extra step be given if a teacher has less than 15 years of experience? (Hornberger/Jan. 15, 2013)

Currently LCPS does not offer incentives for hard-to-fill positions. The only exception is that LCPS does not apply the 15 year external experience cap to special education teachers. A plan to provide incentives could be studied. It may be worth noting that many teachers with special education licensure also have licensure in one or more general education areas. Some considerations would be whether or not incentive pay could be provided to incumbents in hard-to-fill positions, whether or not providing incentives for hard-to-fill positions (which presumably would include special education) would cause current LCPS general education teachers with special education licensure to seek assignment changes, and what metrics would be used to identify hard-to-fill positions. Without baseline or trend data, cost might be difficult to predict accurately. It may also be worth noting that we are planning a change in recruiting strategy this season that would be cost neutral with the hope that it will improve the robustness of our applicant pool this season.
145. Provide a listing of all new positions with the cost of each position. (Hornberger/Jan. 16, 2013)

See Attachment #19.

146. Pg. 52-55 of the DTS budget document includes budget amounts for the tech plan. Please provide the board with cross references from each line item on the DTS document to the corresponding line item in the LCPS budget. (Kuesters/Jan. 16, 2013)

The DTS strategic action #2 for FY14 “Update and align district Technology Plan incorporating district goals and measuring results through defined key performance indicators”. DTS has begun the process of developing key performance indicators that with align the budget, technology plan and district goals. When the analysis and alignment process is completed, the DTS budget will have a direct correlation to the technology plan.

147. Define a needs based budget. What is the difference between needed services/programs and mandatory services/programs? (Keusters/Jan. 16, 2013)

The phrase “needs-based budget” is merely shorthand for “deemed to be needed” and is the common interpretation of Virginia Code Section 22.1-92 (A) by school divisions and local governing bodies across the Commonwealth.

Section 22.1-92(A) requires the Superintendent, with school board approval, to submit to the governing body “the estimate of the amount of money deemed to be needed for the next fiscal year for the support of the public schools.” Thus, in essence, the Superintendent has a legal obligation to advocate for expenditures based on school needs, to support the students, fulfill community expectations and meet the Commonwealth’s requirements.

Mandated services generally refer to programs that the Commonwealth or federal government requires we provide.

148. What percentage of the budget is mandatory vs. non-mandatory (needed or discretionary)? (Kuesters/Jan. 16, 2013)

It is not possible to determine the percentage of the budget that is mandatory vs. non-mandatory.

It is important to note that many of the State and federal mandates require staff resources across many departments.

The Commission on Local Government regularly develops a Catalog of State and Federal Mandates on Local Government.

That document, pages 91 through the top of page 128, lists all mandates that are part of DOE or K-12 education in the Commonwealth. Only the section of the document pertaining to DOE or K-12 has been included and is attached. (Attachment #23)

As you can see in the listing, some mandates are relatively simple; others more complicated. The mandates listed do not usually provide specificity as to how the mandate is to be accomplished.

For example, the first mandate is the requirement that each school division has a Superintendent and provides travel and office expenses for his/her office. Although certainly we can determine the cost of the Superintendent’s salary plus travel and office expenses, the portion funded by the State is not as clear-cut since the State’s share is based on a weighted average and is subject to the local composite index. Ultimately, the State funding for the Superintendent’s salary is a very small portion of the Basic Aid funding of $138 million. This explanation would be generally true of any funded position within LCPS.
As another example, the second mandate addresses grievance procedures. To determine the cost of processing a grievance could include staff time from a variety of departments such as the Department of the grieving employee, the Personnel Department, the Superintendent’s office, and School Board legal counsel depending on the complexity of the grievance.

Thus, many of these mandates require staff resources to accomplish, but to determine the amount of staff time spent across departments on each mandate would require a job audit. Job audits are a way of getting facts about a position including the amount of time spent on each task.

Depending on the specificity, some of the listed mandates could potentially be costed, although that would take considerable time and resources to do so.

149. What is the staffing and full cost of a typical elementary school? Middle school? High school? (Kuesters/Jan. 16, 2013)

This response is based on our median school at each programmatic level and includes administrative, classified, and licensed employees. Costs for individual schools may vary.

<table>
<thead>
<tr>
<th>Department</th>
<th>FTE Count</th>
<th>Estimated Salary and Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>ES</td>
<td>82</td>
<td>$6,142,686</td>
</tr>
<tr>
<td>MS</td>
<td>131</td>
<td>$10,163,842</td>
</tr>
<tr>
<td>HS</td>
<td>161</td>
<td>$13,145,687</td>
</tr>
</tbody>
</table>

150. Pg. 253 – Please explain the large increases in the request for Operations & Maintenance (+$809,277 or +87.8%) and Capital Outlay (+$685,000 or +274%) (Kuesters/Jan. 16, 2013)

**Capital Outlay Increase Response:**

The increase to the Capital Outlay budget is principally due to the costs associated with the requirements in replacing the existing aging radio system. These costs reflect all expected outlay except a final allocation of $300,000 for the final replacement of the remaining bus radios. The expectation is this would be required in FY15.

The current radio system is outdated and cannot support the expanding infrastructure necessary for Loudoun County Schools. The existing (7) Tower framework remains relevant and will be utilized. Radios will be converted to digital technology which will allow the capacity for use to double.

The current plan will utilize all current radio equipment and will be eliminated as new equipment is funded.

This request assembles the total expected costs for this phase of the radio re-design which involves upgrading the Transportation Dispatch Consoles and initiate the first installment of new Campus Radios and associated supportive technologies.

**Major Expenditures:**

$300,000.00 – Funding required to convert 300 school busses to the new digital mobile radio standard.
$300,000.00 – This is the first phase of a 5 year plan for campus radio replacement of radios. This is for 17 schools whose radios have surpassed their useful life time. Most radios are replaced every 5 years, and most of these radios are in excess of 7 years old.

$15,000.00 – Purchase Gr1225 Repeaters that are in excess of 15 years old and no longer reliable and past their realistic life cycle. The failure of repeaters results in a failure of radio communications in total for an area of Loudoun County.

$60,000 - Ongoing Camera parity ensuring all Middle Schools have the same allocation. Currently many middle schools do not have sufficient hallway cameras or camera support for high student trafficking areas and have requested additional technology.

**Operations and Maintenance**

**Response:**

The cost associated with this increase is principally to ensure ALL schools have the same technology footprint and to ensure technologies in place are maintained and replaced as necessary.

The significant requests for funding are intended to provide Elementary Schools with the same capability as Middle and High Schools. Currently, Elementary Schools are off line and key cards have to be programmed on site. This is costly and timely for Technicians when this could be accomplished with the stroke of a key pad. As this technology changes, the cost to bring Elementary schools will also increase, again due to subtle changes in upgrades.

The current funding request is for 10 Elementary schools to be placed “on line” over the next 4 years to close the gap. Additional funding is in support of added AIPHONE Technology to allow for expanded access to schools that have an “automatic entrance operator”.

Other funding is to replace Aging DVR recording systems in schools, to supplement APhone entrance capabilities as well as to replace Fire Alarm Panels. The Fire Alarm System maintenance was moved from Facilities to Safety and Security with no additional funding.

**Major Expenditures:**

$250,000.00 – This cost is associated with the completed capability associated with the expansion of the card access reader system into the Elementary Schools. The current readers are “off line” which means doors must be re-programmed on site and cannot be remotely locked or unlocked. This funding is the first of 4 phases to allow for 10 schools to go on line for the key card access.

$209,000.00 – This funding is requested to support a second Aiphone entrance for every school with an existing automatic entrance and card access option.(handicapped ) This will allow the electric operator entrance to be used by visitors and employees without causing staff disruption.

$200,000.00 – This funding is to support the repair of 2,000 aging security cameras, 225 DVR’s and 400 Electronic locking systems.
$72,000.00 – This funding is to initiate a 5 year replacement cycle for DVR replacement. Currently there is no funding to support this endeavor.

$36,000.00 – This is the first of a 5 year program to enhance the existing system capability in high schools so that alarms may be armed and disarmed remotely to avoid unnecessary technician response and backlog. The funding request is for (6) High Schools per year at $6,000.00 each. This program would also allow schools to not fall victim to the false alarm fine protocols currently in place.

151. What is the size of the motor pool? (Kuesters/Jan. 16, 2013)

379 vehicles

152. Please provide a copy of the report from Walden Economic Consulting that was referenced in the December 6, 2012 budget presentation. (Kuesters/Jan. 16, 2013)

See attachment #20.

153. What is the full cost of an LCPS employee? Provide a list of all of the cost components attached to an individual employee (e.g., salary, health insurance, OPEB, VRS, other employment benefits, training, liability insurance, paid leave, etc.). (Kuesters/Jan. 16, 2013)

Below is the full cost of LCPS Teacher as reported in the FY13 WABE Guide (page 47):

<table>
<thead>
<tr>
<th>Description</th>
<th>Percentage</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary (LCPS FY13 Average Salary)</td>
<td></td>
<td>$60,875</td>
</tr>
<tr>
<td>Benefits</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social Security</td>
<td>7.65%</td>
<td>$4,657</td>
</tr>
<tr>
<td>Retirement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Virginia Retirement System (VRS)</td>
<td>11.66%</td>
<td>$7,098</td>
</tr>
<tr>
<td>VRS Retiree Health Care Credit</td>
<td>1.11%</td>
<td>$676</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>1.19%</td>
<td>$724</td>
</tr>
<tr>
<td>Health Insurance: POS - Family Coverage</td>
<td>23.87%</td>
<td>$14,532</td>
</tr>
<tr>
<td>Name: CIGNA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dental/Vision</td>
<td>1.75%</td>
<td>$1,066</td>
</tr>
<tr>
<td>Total Benefits</td>
<td>47.23%</td>
<td>$28,753</td>
</tr>
<tr>
<td>Total Salary and Benefits</td>
<td></td>
<td>$89,628</td>
</tr>
</tbody>
</table>
154. Provide the number of actual employees (not FTEs) for FY 2010 through FY 2014, broken down by position, as shown in the table from pg. 29. (Kuesters/Jan. 16, 2013)

It is not possible to provide the actual employees by category for 2010 to 2014. The position control system is a dynamic database where the number of positions filled, vacant, and in various stages of hiring and separation, change daily.

155. Do Teacher Assistants in the Technology Resource department teach any classes? How many Teacher Assistants are assigned to a lab? Or are they assigned to a school? Why are there more Teacher Assistants than Technology Resources Teachers? (Kuesters/Jan. 16, 2013)

Technology Assistants do not possess teaching licenses; they are classified employees. The number of Technology Assistants exceeds the number of Technology Resource Teachers because two (2) Technology Assistants are assigned to each middle and high school because those schools have multiple computer labs while each elementary school has only one (1) computer lab and one (1) Technology Assistant.

156. When do the acceptance letters for Thomas Jefferson get mailed? (Hornberger/Jan. 16, 2013)

Students who are semi-finalists are being notified this week. They will return to complete the other components of the application process. The final notification of the status of their application will be mailed in May.

157. Which teachers will be getting the handhelds in the first rollout? (Turgeon/Jan. 16, 2013)

Upon further review, DTS is recommending that the district develop a pilot for the teacher one to one initiative. The pilot will consist of 650 strategically deployed devices for teacher, student and lab use. A targeted alignment of technology, curriculum and instruction with measurable and deliverable goals will be developed in cooperation with the Department of Instruction. The pilot will explore and examine various type of devices current on the market. Upon successful completion, the district will design a phased approach to district-wide implementation.


Below is a breakdown of the O&M costs in Technology Services for FY14.

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contractual Services</td>
<td>3,349,522</td>
</tr>
<tr>
<td>Communication</td>
<td>2,281,916</td>
</tr>
<tr>
<td>Materials, Supplies, Minor Equipment*</td>
<td>8,361,705</td>
</tr>
<tr>
<td>Training and Mileage</td>
<td>2,700</td>
</tr>
<tr>
<td>Continuing Education</td>
<td>78,604</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>14,074,447</strong></td>
</tr>
</tbody>
</table>

*Computer equipment request has been reduced.
159. What is the percentage of schools nationally and in the Commonwealth that have switched to one-to-one technology? (Hornberger/Jan. 16, 2013)

This question will require research.

160. Compare the OPEB cost in the Superintendent’s Proposed budget to the County. (Hornberger/Jan. 16, 2013)

See attachment #22.

161. What are other jurisdictions doing about caps on retiree health insurance? (Turgeon/Jan. 16, 2013)

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>Cap Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexandria</td>
<td>$265 capped dollar amount</td>
</tr>
<tr>
<td>Arlington</td>
<td>Percentage based with $1,200 capped dollar amount</td>
</tr>
<tr>
<td>Fairfax</td>
<td>$100 capped dollar amount</td>
</tr>
<tr>
<td>Prince William</td>
<td>No plan offered once retirees are Medicare-eligible</td>
</tr>
</tbody>
</table>

162. Regarding the renovations for Lincoln ES, please provide an analysis of the work needed (when such renovations/repairs were last completed, life span of parts/systems needing repair, as well as alternatives to said renovations). Is there a possibility that some of these renovations be pushed to another year? If there was interest in the community to provide funding for such repairs, could arrangements be made to do so? (Turgeon/Jan. 14, 2013)

Lincoln Elementary School receives the routine painting and annual wood floor refinishing as is completed in all schools. The most recent upgrade at Lincoln was changing the windows in 2001 and reroofing in 2006.

The FY2013 CAPP project to replace the original fluorescent lighting fixtures at the school was driven by Federal legislation to cease manufacturing of T-12 florescent tubes that are used by the existing fixtures. The project planned to reuse existing wiring but, upon conducting their site inspection, the engineer discovered the existing wiring, while still safe, did not conform to current electrical codes and would require replacement in order to pass the electrical inspection for the light replacements. The upgrade to meet code compliance resulted in the $200,000 FY2014 electrical project. The fixture replacements cannot be completed without the upgrade project. Though we currently have a supply of the T-12 fluorescent fixtures, they are out of production and it will become more difficult, and expensive, to obtain tubes in the future. Staff recommends the new wiring and new light fixture be done at the same time due to code requirements and efficiency requiring the ceiling be uncovered one (1) time. Also, in scheduling both projects at the same time, one would anticipate a savings in labor costs.

The fire alarm system at the school is still functional, but its replacement was included in the FY2014 program because the system is reaching the end of its projected life and it would be more cost effective, and less disruptive, to replace the fire alarm wiring and supporting devices while the ceiling is removed for the lighting upgrade. Staff recommends the fire alarm system be completed at the same time as the wiring and new lighting for the same reasons as stated above. Since the ceiling will be open, less labor should be required in completing the fire alarm project.
While the heat pumps still function at the school, their replacement is driven by the fact they are deteriorating. When the pumps fail, staff will be required to install equipment compliant with the new HVAC outdoor air codes and, therefore, it will be more cost effective to replace them as a “group” rather than as individual units as they fail.

*Could some of these renovations be delayed for another year?* - the answer is “yes” – with the understanding if one of the systems has a major failure, staff will be obligated to replace said system.

*If there was interest in the community to provide funding for such repairs, could arrangements be made to do so?* Staff would always welcome community support, but with projects as outlined above, that encompass code requirements at the local and state level, staff must make certain that all applicable codes requirements are met.

Apart from the projects listed above, there are no additional projects that need to be accomplished at Lincoln Elementary School within the next six (6) years. The projects listed in the CAPP are facility preservation projects that are required to operate the building and should be provided as part of the school division ownership costs.

163. *How much was spent on paper and ink in FY 12 and 13? How much was budgeted for paper and ink in FY 12 and 13?* Please list amount for schools (as a whole...not by individual school) and admin. (Turgeon/Jan. 19, 2013)

Amount budgeted in the Support Services paper account includes administrative paper, staples for copiers, ink (for digital duplicators only) and masters, binder tape, tabs, etc. for copy center, miscellaneous office supplies. Funding for school paper is within the instructional allotments.

**FY12 (Full Year)**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>$774,257</td>
</tr>
<tr>
<td>Administration</td>
<td>$101,010</td>
</tr>
<tr>
<td>Duplicator Ink/Masters</td>
<td>$ 42,840</td>
</tr>
</tbody>
</table>

**FY13 (YTD)**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>$460,874</td>
</tr>
<tr>
<td>Administration</td>
<td>$ 53,508</td>
</tr>
<tr>
<td>Duplicator Ink/Masters</td>
<td>$ 25,945</td>
</tr>
</tbody>
</table>

Paper is purchased centrally and distributed and charged to the schools, so determining usages and budgets is not a difficult exercise. However, ink or toner is purchased in a variety of ways, (p-card, centrally and at school locations using purchase orders) so to determine the usage would require a significant manual research project. However, the Department of Technology Services has a printer review planned. Toner usage is one of the components of the review.

164. *How many devices are asked for in the Technology Services budget and what educational need do they fill?* (Kuesters/Jan. 18, 2013)

Refresh 5160 Instructional computers
- 2,958 LAB Computers
- 102 LAB AV Computers
- 2,100 AV Computers in the classroom at 47 schools
1:1 Pilot*
- 650 devices

Refresh 636 administrative computers
- 350 laptops
- 286 desktops
*Computer equipment request has been reduced.

165. Dell seems to be heavily invested in thin client solutions since their purchase of Wyse. Looks like they currently offer a thin client netbook/laptop that might be a good fit for a student 1:1 device. There is an article that suggests they may have a tablet on the way. Could you give me a ballpark estimate on what this type of solution would run on a per-unit basis (taking into account both the device and the servers required to run it) what is the implications on software licensing? Do we still have to buy a license for each unit or is there any savings on the software end that would result from virtualization? Are there any other school districts that have gone this way to do 1:1? Does Dell Wyse have a lease program? (Fox/Jan. 21, 2013)

Dell seems to be heavily invested in thin client solutions since their purchase of Wyse.
Yes

Looks like they currently offer a thin client netbook/laptop that might be a good fit for a student 1:1 device.
Yes

There is an article that suggests they may have a tablet on the way.
Yes, but not released.

Could you give me a ballpark estimate on what this type of solution would run on a per-unit basis (taking into account both the device and the servers required to run it) what is the implications on software licensing?

Thin client devices like Wyse range from $150 dollars and up. Dell and a variety of other vendors are developing new solutions to meet the needs and demands of this new technology. The server requirements would be addressed after analysis of available solutions that best align with the infrastructure and requirements of LCPS.

Do we still have to buy a license for each unit or is there any savings on the software end that would result from virtualization?

There is a licensing cost for individual nodes. The nodes can be purchased or leased in a named license or concurrent use format.

Are there any other school districts that have gone this way to do 1:1?
Yes.

Does Dell Wyse have a lease program?
Leasing hardware is an option. It does not appear to be cost effective after a cursory view.

167. Follow up to question #137; provide a list of all driver education vehicles in the lease (not just this year). (Turgeon/Jan. 22, 2013)

LCPS has been using Lease Purchase financing for the acquisition of new vehicles and equipment since 1999. Each lease is paid off over the course of the succeeding four years. Therefore, the majority of LCPS fleet vehicles were acquired using lease purchase financing (considered an industry best practice by Mercury Associates) and, roughly,
168. Regarding question #163, need further explanation as to why some schools have a shortage of paper and ink. (Turgeon/Jan. 22, 2013)

The purchase of paper and ink is managed at the school level. However, paper is purchased by Support Services in bulk, stored at the central warehouse and sent to schools as requested using their instructional funds. The assertion that schools have run out of paper, or paper has been “rationed” comes up from time to time from teachers. Mr. Platenberg announced last year that principals should let him know if they need additional support with paper. Principals also routinely make requests to Mrs. Ackerman to transfer funds to cover shortages or to conduct special projects. Staff is at a disadvantage because we do not know from which schools the teacher concerns are originating.

If a teacher finds that there are no funds available for paper, that teacher should alert the Superintendent.

169. FEES: According to p. 126 of the proposed budget, the “Summer in the Arts” program costs a total of $187,634 in FY14, $350,000 more than in FY13, and at a cost of $425 per student, is “100% self-funded by tuition charged to participants.” However, the staff response to Q/A #109 indicates that a total of only $45,000 is anticipated in the proposed budget in revenue from fees associated with tuition for the “Summer in the Arts” program. This projected revenue would appear to represent less than 24% of the cost of the program, not 100% as claimed on p. 126. How do you explain this discrepancy? What really would the tuition fees need to be to fully-fund this two-week, extracurricular, summer program? (Horberger/Jan. 23, 2013)

The Summer in the Arts program is self-supporting. The local tuition and fee revenue distribution provided in the answer to question #109 was not distributed correctly. Upon further review of the actual revenue history, the revised revenue distribution is as follows:

<table>
<thead>
<tr>
<th>Grants</th>
<th>Howard Hughes Foundation $1,000,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teaching in Loudoun</td>
<td>$50,372</td>
</tr>
<tr>
<td>PAVAN</td>
<td>$50,000</td>
</tr>
<tr>
<td>Junior Navy ROTC Program</td>
<td>$18,000</td>
</tr>
<tr>
<td>Tuition and Fees</td>
<td>$820,000</td>
</tr>
<tr>
<td>Athletic Fees</td>
<td>$1,060,000</td>
</tr>
<tr>
<td>Advanced Placement Test Fees</td>
<td></td>
</tr>
<tr>
<td>Parking Fees</td>
<td>$500,000</td>
</tr>
<tr>
<td>Tuition-Adult Education</td>
<td>$115,000</td>
</tr>
<tr>
<td>Tuition-Day School</td>
<td>$140,000</td>
</tr>
<tr>
<td>Tuition-Summer in the Arts</td>
<td>$185,000</td>
</tr>
<tr>
<td>Tuition-Summer School</td>
<td>$615,000</td>
</tr>
<tr>
<td>Tuition-Driver Education</td>
<td>$145,000</td>
</tr>
<tr>
<td>Other Local</td>
<td>Rebates, Refunds &amp; Recoveries $200,000</td>
</tr>
<tr>
<td></td>
<td>Sale of Textbooks $40,000</td>
</tr>
<tr>
<td></td>
<td>E-Rate Reimbursement $700,000</td>
</tr>
</tbody>
</table>
Use of Building $1,250,000
Transportation Services to County $500,000
On-line Payments $23,100
Sale of Equipment $190,000
Total $7,601,472

170. FEES: According to the staff response to Q/A #82, tuition for Summer School is covering a smaller and smaller share of the operating costs of the program over the last few years as the fees charged for Summer School have remained stagnant but program costs have grown significantly (14.6% in proposed FY14 over budgeted FY13 alone). What would be the estimated increased revenue generated by charging the following for summer school: Elementary: $350 (up $25 over FY13/7.7% increase), Middle School: $550 (up $50 over FY13/10% increase), High School: $725 (up $75 over FY13/11.5% increase). (Hornberger/Jan. 23, 2013)

Summer school serves a large portion of free/reduced lunch students and special education students. The number of special education students on extended school year has increased each year and no tuition is charged to those students. Similarly our percentage of free/reduced lunch and homeless children has also increased each year to result in the incremental costs displayed on the summer school page. There was no summer school high school in FY11. Our estimation based on the history of the number of students who paid full and reduced tuition is that the increases proposed in the question would result in approximately 10% or about $60,000 increased revenue over FY13.

We do not recommend an increase in Summer School tuition for FY14.

171. FEES: According to the staff response to Q/A #108, tuition for the “Behind the Wheel” program within Driver’s Education at $195/student only partially offsets the cost of this program that is not covered by state aid. LCPS could charge as much as $214.57 per student to cover the cost of this optional program that is already heavily subsidized to parents by state support. What would be the estimated increase in revenue generated by charging $214.50/student for this program (up $19.50 or a 10% increase over FY13)? (Hornberger/Jan. 23, 2013)

For Driver’s Education, we must make the charge to students revenue neutral. There is a formula to be completed and submitted to the state which includes all costs associated with the vehicle, instructional materials, and teacher stipend. We could pay the instructors more just to get to the $214.50 limit but there would still be no revenue to LCPS.

We do not recommend an increase in tuition for the “Behind the Wheel” program for FY14.
172. FEES: The Food Services budget is designed to be self-supporting through a combination of federal/state aid and fees charged for each meal served. Fees charged for each meal served have not needed to be increased over the last couple years to meet the costs associated with providing this service. Are all costs associated with this service actually included in this assessment, including all employment costs for associated personnel (proposed raises/cost of living increases, OPEB costs, and a share of administrative overhead beyond the immediate Food Services budget alone)? If not, why not? What would the meal price increases need to be in order to accurately account for these additional costs, and what would be the total offset (expenses/revenue) associated with these meal increases in the proposed budget? (Hornberger/Jan. 23, 2013)

All employee costs associated with food services are in the food service budget. This includes all food service staff at the school level as well as in the administration building. This does include all benefits as well for all staff. All proposed raises would be included as well. We do not pay indirect costs. In doing a survey with the immediate area the only county paying indirect costs is Fairfax and that is due to the fact they have a stand-alone central kitchen system. Fairfax also supplies food to the jail, senior center, meals on wheels, etc. which are not part of the school system.

<table>
<thead>
<tr>
<th>School System</th>
<th>Breakfast</th>
<th>Lunch Elementary</th>
<th>Lunch Middle</th>
<th>Lunch High School</th>
<th>Plans for 2014 Meal Pricing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loudoun County Public Schools</td>
<td>$2.00</td>
<td>$3.00</td>
<td>$3.10</td>
<td>$3.10</td>
<td>Do not plan to raise them for 2014</td>
</tr>
<tr>
<td>Fairfax County Public Schools</td>
<td>$1.50</td>
<td>$2.65</td>
<td>$2.75</td>
<td>$2.75</td>
<td>Do not plan to raise them for 2014</td>
</tr>
<tr>
<td>Prince William County Public Schools</td>
<td>$1.40</td>
<td>$2.25</td>
<td>$2.40</td>
<td>$2.50</td>
<td>Plan to raise $.10 for 2014</td>
</tr>
<tr>
<td>Alexandria County Public Schools</td>
<td>$1.50</td>
<td>$2.35</td>
<td>$2.60</td>
<td>$2.60</td>
<td>Plan to raise $.05 to $.10 for 2014</td>
</tr>
<tr>
<td>Arlington County Public Schools</td>
<td>$1.40</td>
<td>$2.60</td>
<td>$2.60</td>
<td>$2.70</td>
<td>Plan to raise $.05 for 2014</td>
</tr>
</tbody>
</table>

A meal price increase of .10 would equal roughly $1 million in additional revenue, however with any price increase we do see participation go down due to the higher cost. This is not an exact science since there is no way to guess the amount the participation will drop.

We do not recommend an increase in meal prices for FY14.
173. LEASE/PURCHASE: What are the total expenses in the FY14 Superintendent’s Proposed Operating Budget that could be funded through the Proposed Lease/Purchase Budget, if there were no funding limits in that budget? Please provide a summary of those expenses and where they can be found in the proposed budget (department, type – O&M or capital outlay – and page number). What other considerations must be made in determining how much and which items should be afforded through the Lease/Purchase Budget? (Hornberger/Jan. 23, 2013)

In general, vehicles and computers are the most suitable items for lease purchasing because they provide collateral for the bank loan and have a life greater than the loan period. The bank is the lien holder until the loan is paid off. Currently we have $2,250,245 budgeted in Capital Outlay across three Departments. The other Departments do not have any Capital Outlay funds budgeted.

The Department of Instruction has $698,245 budgeted in Capital Outlay although some of the items may not be suitable for lease purchasing, such as software.

- Career and Tech Education – replacement equipment at Monroe: $111,000 (page 50)
- Athletic Programs – replacement equipment at several schools: $53,500 (page 54)
- Library Media – card catalogue (software/licensing): $140,000 (page 86)
- Music – new/replacement instruments: $148,745 (page 96)
- Research – replacement servers: $245,000 (page 108)

The Department of Support Services has $1,466,000 budgeted in Capital Outlay although some of the items may not be suitable for lease purchasing, such as building alterations or the radio system.

- Construction – principal requests for building alteration: $375,000 (page 244)
- Facilities – mowers, custodial equipment, kitchen equipment: $156,000 (page 248)
- Safety & Security – radio communications system: $935,000 (page 252)

The Department of Technology Services has $86,000 budgeted in Capital Outlay although some of the items may not be suitable for lease purchasing, such as software.

- Technology Services – software, equipment: $86,000 (page 320)

Technology Services has $18,574,444 budgeted in Operations and Maintenance, a large portion of which is for existing maintenance contracts, software, various types of operating supplies, telecommunications etc. Those items would not be suitable for lease purchase. Equipment purchases also are part of the Technology O&M budget; some of those items might be suitable assuming that would be seen as collateral and are equipment that has an expected life greater than four years.

The computer equipment request has been reduced.
174. Submit the actuals for the O and M justification in Support Services on p. 248. I would like to see why the staff asked for $24,468,880 in FY14. (Bergel/Jan. 24, 2013)

<table>
<thead>
<tr>
<th>Service</th>
<th>FY10 Actual</th>
<th>FY11 Actual</th>
<th>FY12 Actual</th>
<th>FY13 Approp</th>
<th>FY14 Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contractual Services</td>
<td>$2,615,179.19</td>
<td>$3,310,311.37</td>
<td>$2,905,136.75</td>
<td>$2,803,260.00</td>
<td>$3,574,700.00</td>
</tr>
<tr>
<td>Utilities</td>
<td>$11,380,504.30</td>
<td>$12,411,056.57</td>
<td>$13,270,584.80</td>
<td>$16,674,133.00</td>
<td>$17,223,554.00</td>
</tr>
<tr>
<td>Communication</td>
<td>$4,135.53</td>
<td>$5,390.46</td>
<td>$7,486.66</td>
<td>$6,400.00</td>
<td>$6,400.00</td>
</tr>
<tr>
<td>Materials, Supplies, Minor Equipment</td>
<td>$2,989,848.80</td>
<td>$3,071,554.60</td>
<td>$3,515,916.72</td>
<td>$3,130,549.00</td>
<td>$3,547,001.00</td>
</tr>
<tr>
<td>Mileage Reimbursement</td>
<td>$15.40</td>
<td>$69.87</td>
<td>$919.33</td>
<td>$0.00</td>
<td>$11,000.00</td>
</tr>
<tr>
<td>Training &amp; Continuing Education</td>
<td>$37,544.77</td>
<td>$51,667.92</td>
<td>$39,635.97</td>
<td>$67,528.00</td>
<td>$74,225.00</td>
</tr>
<tr>
<td>Leases &amp; Rentals</td>
<td>$28,792.07</td>
<td>$45,330.29</td>
<td>$59,396.92</td>
<td>$32,000.00</td>
<td>$32,000.00</td>
</tr>
<tr>
<td><strong>Total O&amp;M</strong></td>
<td><strong>$17,056,020.06</strong></td>
<td><strong>$18,895,381.08</strong></td>
<td><strong>$19,799,077.15</strong></td>
<td><strong>$22,713,870.00</strong></td>
<td><strong>$24,468,880.00</strong></td>
</tr>
</tbody>
</table>

The increase is due to the following:

- Triennial Inspection Required by the Asbestos Hazard Emergency Response Act (AHERA) $54,000
- Arc Flash Hazard Assessment of 13 high school electrical panels and switchgear required by OSHA regulations. Arc Flash Assessment is the determination of the level of hazard which exists at each electrical enclosure including switchgear, control panels, panel boards, and disconnect switches ($20,000 per school) $260,000
- Anticipated Need for Contract Snow Removal (Next Winter) $100,000
- Preventive Maintenance Contracts for Equipment in New Schools $30,000
  Includes: elevator and wheelchair lifts at Champe and Douglass Elementary; fire sprinkler inspections at Champe and Douglass Elementary; HVAC and cooling tower water treatment at Champe and Douglass Elementary; emergency generators at Discovery and Moorefield Station Elementary; kitchen exhaust hood cleaning at Champe and Douglass Elementary; grease trap pumping at Champe and Douglass Elementary; new requirement for quarterly pumping in Purcellville Schools; dimmer system inspection at Champe.
- Preventive Maintenance During First Year (Excludes emergency generator - covered by construction contractor.)
- New Requirement for Certified Inspection of Grandstands and Telescopic Bleachers $60,000
  (Inspection as required by International Code Council Regulation 300)
- Electrical Service for New Schools $251,010
- Electrical Services Weather Factor ($500,000 cut on January 24, 2013 Adopted Budget) $618,000
175. Explain the Technology Services computer equipment reduction of $4.5 million.

Based on new information DTS is reducing the funding request for computer equipment by $4,500,000. This reduction was achieved by reevaluating the teacher one-to-one initiative and leveraging grant funds in place of operating funds.

DTS is recommending that the district develop a pilot for the teacher one to one initiative. The pilot will consist of 650 strategically deployed devices for teacher, student and lab use. A targeted alignment of technology, curriculum and instruction with measurable and deliverable goals will be developed in cooperation with the Department of Instruction. The pilot will explore and examine various types of devices currently on the market. Upon successful completion of the pilot, the district will design a phased approach to district-wide implementation. The cost of this initiative in the FY14 budget is $500,000.

DTS is recommending that the school board approve the computer refresh for 5,160 instructional computers and 636 administrative computers ($5,604,450). DTS proposes using $1,000,000 of technology grant funding be used to offset the impact to the operating budget.

<table>
<thead>
<tr>
<th>Original Teacher 1:1 initiative</th>
<th>4,000,000</th>
<th>Original budget amount requested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost of recommended Teacher 1:1 pilot</td>
<td>500,000</td>
<td>Strategic deployment of 1:1 devices</td>
</tr>
<tr>
<td>Budget Reduction</td>
<td>3,500,000</td>
<td>Operating budget cost saving</td>
</tr>
<tr>
<td>Computer Refresh</td>
<td>5,604,450</td>
<td>Recommended 47 school and admin refresh</td>
</tr>
<tr>
<td>Grant funding offset</td>
<td>1,000,000</td>
<td>Fund computers from grant budget</td>
</tr>
<tr>
<td>Proposed Funding FY14 operating</td>
<td>4,604,450</td>
<td>Reduced operating cost for 47 school and admin refresh</td>
</tr>
<tr>
<td>Teacher 1:1 pilot</td>
<td>500,000</td>
<td>New amount for 1:1 teacher pilot</td>
</tr>
<tr>
<td>Computer Refresh</td>
<td>4,604,450</td>
<td>New amount for 47 school and admin computer refresh</td>
</tr>
<tr>
<td>New Proposed Budget</td>
<td>5,104,450</td>
<td>New proposed FY14 budget</td>
</tr>
<tr>
<td>Budget Reduction</td>
<td>4,500,000</td>
<td>Total operating budget reduction</td>
</tr>
</tbody>
</table>
176. In developing the cost of meals, are utilities, custodial support, cafeteria equipment replacement, and cafeteria monitors costs included in the price? If they aren’t, how much would it increase the price if they were included? (Reed/March 30, 2013)

The items listed in the above question are not included in the expenditures for cafeteria. The required revenue increase to include those items could be calculated. However, it is believed that would increase the meal prices to a level that would be unacceptable. Currently, LCPS meal prices exceed all of the surrounding school divisions, thus an increase was not proposed for this next year and it is believed that the current prices can cover our expenditures, which include the compensation increase and the employer reduction to healthcare costs.

<table>
<thead>
<tr>
<th>School System</th>
<th>Breakfast</th>
<th>Lunch Elementary</th>
<th>Lunch Middle</th>
<th>Lunch High School</th>
<th>Plans for 2014 Meal Pricing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loudoun County Public Schools</td>
<td>$2.00</td>
<td>$3.00</td>
<td>$3.10</td>
<td>$3.10</td>
<td>Do not plan to raise them for 2014</td>
</tr>
<tr>
<td>Fairfax County Public Schools</td>
<td>$1.50</td>
<td>$2.65</td>
<td>$2.75</td>
<td>$2.75</td>
<td>Do not plan to raise them for 2014</td>
</tr>
<tr>
<td>Prince William County Public Schools</td>
<td>$1.40</td>
<td>$2.25</td>
<td>$2.40</td>
<td>$2.50</td>
<td>Plan to raise $.10 for 2014</td>
</tr>
<tr>
<td>Alexandria County Public Schools</td>
<td>$1.50</td>
<td>$2.35</td>
<td>$2.60</td>
<td>$2.60</td>
<td>Plan to raise $.05 to $.10 for 2014</td>
</tr>
<tr>
<td>Arlington County Public Schools</td>
<td>$1.40</td>
<td>$2.60</td>
<td>$2.60</td>
<td>$2.70</td>
<td>Plan to raise $.05 for 2014</td>
</tr>
</tbody>
</table>

177. In the past, when we had to reconcile the approved budget with the BOS cuts, we were told we couldn’t adjust the meals price without going back to the BOS for approval. Can you explain why and what procedures we would need to go through to get a price change ‘approved’?

The BOS will appropriate a specific amount for the Food Services Fund, separate from the School Operating Fund. Since that fund is self-supporting (no local County funding is needed) they will appropriate the amount we requested in the FY 14 School Board Proposed Budget. After that appropriation is completed on Wednesday (April 3, 2013), any decision to increase the meal prices would increase the revenue, (and expenditures - as the two must balance), so that we would have to request a supplemental appropriation.

178. Regarding question #53 on pg.18 what is the cost of an unencumbered planning period, not day, for MS teachers? (Bergel/April 9, 2013)

The middle school teachers are assigned teaching duties for 6 of 8 periods. The remaining two periods are (1 period) for assisting students in resource time or team planning and (1 period) for individual unencumbered planning time. The planning time is already in the teachers’ schedules.
179. What is the cost savings from increasing class size? Where could class size be increased (in specific locations and classes) without increasing the overall class size average? What would the cost savings be? (Bergel/April 9, 2013)

There is no way to increase class size at certain schools that does not also increase the overall class size average for the school level. Even though only individual schools would be affected, because we would be dividing by a smaller number of teachers in total, the overall class size average would also be greater.

To raise class size by 1 student on average, 20 teachers could be reduced in middle school and 25 teachers could be reduced in elementary schools.

180. How many drivers leave after obtaining CDL, how long do they stay, what are associated costs of training? (Morse/April 15, 2013)

<table>
<thead>
<tr>
<th>TRAINEES</th>
<th>FY 2013 (YTD)</th>
<th>FY 2012</th>
<th>FY2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number Trained</td>
<td>70</td>
<td>126</td>
<td>99</td>
</tr>
<tr>
<td>Number Received CDL</td>
<td>67</td>
<td>99</td>
<td>91</td>
</tr>
<tr>
<td>Number Resigned within 1 Year With CDL</td>
<td>11</td>
<td>6</td>
<td>31</td>
</tr>
<tr>
<td>Percent Resigned with CDL</td>
<td>16.42%</td>
<td>6.06%</td>
<td>34.07%</td>
</tr>
<tr>
<td>Average Cost Per Trainee</td>
<td>$1,528.00</td>
<td>$1,439.00</td>
<td>$1,305.00</td>
</tr>
</tbody>
</table>

181. What is the annual cost of the NSBA membership? What is the annual cost of the VSBA membership? (Rose/April 28, 2013)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>VSBA Annual membership</td>
<td>$13,117.91</td>
</tr>
<tr>
<td>NSBA Annual membership</td>
<td>$ 9,300.00</td>
</tr>
</tbody>
</table>

Please see Question #25.

182. What is the total budget for field trips (or what percentage reduction this cut is from the total field trip budget)? (Turgeon/April 29, 2013)

The budget for bus driver’s salaries provides funds for regular runs and special runs (fieldtrips) and totals $18.8 million. The Superintendent’s Recommended Changes include a $1,042,904 or a 5.5 percent reduction.

183. What is the total budget for substitutes (or what percentage reduction this cut is from the total substitute budget)? (Turgeon/April 29, 2013)

The FY14 School Board Proposed Budget for substitutes is $ 12,122,342. The Superintendent’s Recommended Changes include a $2,231,198 or 18.4 percent reduction.

The reductions in operations and maintenance include materials, supplies and equipment. These reductions defer routine maintenance, the potential of reduction in services delaying repairs, and long term major replacement implications.

185. Of the three elementary schools where a half-time librarian reduction is proposed, how many librarians are currently assigned to these schools?  (Turgeon/April 29, 2013)

There is currently one librarian (1.0 FTE) at each of the three elementary Schools (Legacy, Liberty and Pinebrook.) This staffing will still comply with SOQ requirements.

186. What would be the budgetary impact of reinstating the 10 year minimum requirement for retirement from the proposed 15 year minimum requirement? (Turgeon/April 29, 2013)

The budgetary impact of reinstating the 10 year minimum requirement to receive health insurance benefits in retirement would depend on several variables such as the amount of the benefit offered, the number of employees eligible who do not retire this year, etc.

187. Were there any changes to the instructional funds budget in the recommended reconciliation? If so, what will be the per pupil allotment for FY14 and how does it compare to the FY13 allotment?  (Turgeon/April 29, 2013)

The recommended reconciliation does not include a reduction in instructional allotments. The per student amount is budgeted to remain the same as FY13 (ES $33.38 per student; MS $38.88 per student; and HS $38.88 per student.)

188. How much is budgeted for the pilot program to introduce tablets/one-to-one devices in the classroom? How many schools, which teachers, and in what subjects will these be used?  (Turgeon/April 29, 2013)

$500,000 is included in the SB Proposed budget for implementation of a pilot 1 to 1 initiative. The Superintendent has recommended deferral of the pilot to FY 15 reducing the Department of Technology budget.

189. How much was realized in substitute funding in FY 10, 11 and 12? I am curious how the FY 13 budget levels compare to what has been actually expended.  (Hornberger/April 29, 2013)

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY10 Actual</td>
<td>$7,923,309</td>
</tr>
<tr>
<td>FY11 Actual</td>
<td>$10,308,916</td>
</tr>
<tr>
<td>FY12 Actual</td>
<td>$11,465,499</td>
</tr>
<tr>
<td>FY13 Budget</td>
<td>$9,946,030</td>
</tr>
<tr>
<td>FY14 School Board Adopted</td>
<td>$12,122,342</td>
</tr>
<tr>
<td>FY14 Reconciliation</td>
<td>$9,946,030</td>
</tr>
</tbody>
</table>

190. What is the cost of freshmen sports?  (Sheridan/April 29, 2013)

Freshman sports stipends are $303,000.
191. What is the cost of Family Life teachers and could PE teachers teach FLE? If so, could the FLE teachers be absorbed through attrition? (Sheridan/April 29, 2013)

There are 18 FLE teachers for cost of $1,341,000.

We are unsure as to whether the FLE teachers could be placed in other positions. Our 18 FLE Specialists have varied endorsements including: Health/PE, Science, Math, FACS, and elementary education. There are concerns about protecting the integrity and sensitive nature of the curriculum. The FLE curriculum is constantly under community scrutiny and the teachers receive specific training to be careful to avoid opening doors that should not be opened with respect to that curriculum. We believe that we have earned the confidence of parents because of the care that we have taken with the content and the caliber of professionals teaching these sensitive areas.
Attachments for
School Board
Questions and Answers
### Virginia Standards of Quality (SOQ) Staffing versus LCPS Staffing

#### Instruction:

<table>
<thead>
<tr>
<th>Program</th>
<th>SOQ Required Staffing</th>
<th>SOQ Total Staffing</th>
<th>LCPS Total Staffing</th>
<th>Difference</th>
<th>Cost</th>
<th>Page Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Ed – Kindergarten Teacher*</td>
<td>24:1, no class greater than 29</td>
<td>105</td>
<td>135.5</td>
<td>30.5</td>
<td>$2,272,250</td>
<td>72</td>
</tr>
<tr>
<td>Kindergarten Teacher Asst.*</td>
<td>Class greater than 24 students</td>
<td>3.5</td>
<td>130</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kindergarten Teacher Asst.*</td>
<td>If LCPS teacher staffing raised to SOQ levels</td>
<td>78</td>
<td>130</td>
<td>52</td>
<td>$1,794,000</td>
<td>72</td>
</tr>
<tr>
<td>General Education - Elementary Teacher</td>
<td>24:1, no class greater than 30</td>
<td>710</td>
<td>743</td>
<td>33</td>
<td>$2,458,500</td>
<td>72</td>
</tr>
<tr>
<td>Grades 1-3*</td>
<td>25:1, no class greater than 35</td>
<td>458</td>
<td>469</td>
<td>11</td>
<td>$819,500</td>
<td>72</td>
</tr>
<tr>
<td>General Education - Middle School Teacher</td>
<td>24:1, no class greater than 30</td>
<td>801.6</td>
<td>832.4</td>
<td>30.8</td>
<td>$2,294,600</td>
<td>72</td>
</tr>
<tr>
<td>Grades 6-8*</td>
<td>Total student load – 150; no class greater than 35 students</td>
<td>1020</td>
<td>1,027</td>
<td>7</td>
<td>$521,500</td>
<td>72</td>
</tr>
<tr>
<td>General Education - High School Teacher</td>
<td>24:1, no class greater than 30</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grades 9-12*</td>
<td>Total student load – 150; no class greater than 35 students</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Applying SOQ ratios requires changes in LCPS class size policy*

| Limited English Proficiency                | 17 teachers per thousand students identified for services                               | 89.6               | 159                 | 69.4       | $5,170,300    | 66             |
| Reading Specialists                        | 1 per elementary school, at discretion of School Board                                  | 0 or 55            | 82.2                | 27.2       | $2,026,400    | 72             |
| Elementary Principal                      | 1/2 to 299 students                                                                     | 51.5               | 53                  | 1.5        | $183,600      | 60             |
| Middle School Principal                   | 1 per school                                                                            | 14                 | 14                  | 0          | $0            | 94             |
| High School Principal                     | 1 per school                                                                            | 13                 | 13                  | 0          | $0            | 82             |
| Elementary Asst. Principal                | 1/2 at 600 students; 1 at 900                                                           | 18.5               | 47                  | 28.5       | $2,909,850    | 60             |
| Middle Asst. Principal                    | 1 each 600 students                                                                     | 20                 | 28                  | 8          | $868,000      | 94             |
## Virginia Standards of Quality (SOQ) Staffing versus LCPS Staffing

### Instruction (continued):

<table>
<thead>
<tr>
<th>Program</th>
<th>SOQ Required Staffing</th>
<th>SOQ Staffing</th>
<th>LCPS Total Staffing</th>
<th>Difference</th>
<th>Cost</th>
<th>Page Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Asst. Principal</td>
<td>1 each 600 students</td>
<td>25</td>
<td>39</td>
<td>14</td>
<td>$1,656,200</td>
<td>82</td>
</tr>
<tr>
<td>Elementary Librarian</td>
<td>1/2 to 299 students; 1 full-time at 300</td>
<td>51.5</td>
<td>53</td>
<td>1.5</td>
<td>$111,750</td>
<td>86</td>
</tr>
<tr>
<td>Middle School Librarian</td>
<td>1/2 to 299 students; 1 full-time at 300; 2 full-time at 1,000 students</td>
<td>25</td>
<td>27</td>
<td>2</td>
<td>$149,000</td>
<td>86</td>
</tr>
<tr>
<td>High School Librarian (including Douglass &amp; Monroe)</td>
<td>1/2 to 299 students; 1 full-time at 300; 2 full-time at 1,000 students</td>
<td>25</td>
<td>26</td>
<td>1</td>
<td>$74,500</td>
<td>86</td>
</tr>
<tr>
<td>Elementary Clerical</td>
<td>Part-time to 299 students; 1 at 300 students</td>
<td>51.5</td>
<td>110.9</td>
<td>59.4</td>
<td>$3,183,840</td>
<td>60</td>
</tr>
<tr>
<td>Middle School Clerical</td>
<td>1 per school; 1 additional for each 600 students beyond 200</td>
<td>31</td>
<td>84</td>
<td>53</td>
<td>$2,840,800</td>
<td>94</td>
</tr>
<tr>
<td></td>
<td>1 for the library at 750 students</td>
<td>14</td>
<td>14</td>
<td>0</td>
<td>$0</td>
<td>86</td>
</tr>
<tr>
<td>High School Clerical</td>
<td>1 per school; 1 additional for each 600 students beyond 200</td>
<td>34</td>
<td>66</td>
<td>32</td>
<td>$1,715,200</td>
<td>82</td>
</tr>
<tr>
<td></td>
<td>1 for the library at 750 students</td>
<td>14</td>
<td>14</td>
<td>0</td>
<td>$0</td>
<td>86</td>
</tr>
<tr>
<td>Elementary art, music, and PE</td>
<td>5 per 1,000 students in grades K-5</td>
<td>167</td>
<td>201.2</td>
<td>34.2</td>
<td>$2,547,900</td>
<td>72</td>
</tr>
<tr>
<td>Technology Support</td>
<td>1 FTE per 1000 students in K-12 for Instructional Technology Resource Teacher</td>
<td>70</td>
<td>80</td>
<td>10</td>
<td>$745,000</td>
<td>132</td>
</tr>
<tr>
<td></td>
<td>1 FTE per 1000 students in K-12 for technology support</td>
<td>70</td>
<td>73</td>
<td>3</td>
<td>$199,800</td>
<td>320</td>
</tr>
</tbody>
</table>
## Virginia Standards of Quality (SOQ) Staffing versus LCPS Staffing

### Guidance Counselors:

<table>
<thead>
<tr>
<th>Program</th>
<th>SOQ Required Staffing</th>
<th>SOQ Total Staffing</th>
<th>LCPS Total Staffing</th>
<th>Difference</th>
<th>Cost</th>
<th>Page Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Counselors</td>
<td>Elementary schools, one hour per day per 100 students, one full-time at 500 students, one hour per day additional time per 100 students or major fraction thereof; middle schools, one period per 80 students, one full-time at 400 students, one additional period per 80 students or major fraction thereof; high schools, one period per 70 students, one full-time at 350 students, one additional period per 70 students or major fraction thereof.</td>
<td>70.8 elem.  41 middle  57.4 high</td>
<td>72.5 elem.  47.5 middle  65 high</td>
<td>1.7  6.5  7.6</td>
<td>$126,650  $484,250  $566,200</td>
<td>162 162 162</td>
</tr>
</tbody>
</table>

### Special Education:

<table>
<thead>
<tr>
<th>Program</th>
<th>SOQ Required Staffing</th>
<th>SOQ Total Staffing</th>
<th>LCPS Total Staffing</th>
<th>Difference</th>
<th>Cost</th>
<th>Page Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Autism</td>
<td>1 Teacher  1 Teacher Assistant  Maximum caseload of 8 students</td>
<td>80  80  80 **</td>
<td>488.5  305 **</td>
<td>17.5  22</td>
<td>$1,303,750  $759,000</td>
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<td>Cross-Categorical - Includes Specific Learning Disability and Other Health Impairment</td>
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**Additional staffing is required to support needs outlined in students’ Individualized Education Programs (IEPs) as well as to provide behavioral or academic support for students in the general education setting.**
### Virginia Standards of Quality (SOQ) Staffing versus LCPS Staffing

**Special Education (continued):**

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<th>LCPS Total Staffing</th>
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</table>

**Additional staffing is required to support needs outlined in students’ Individualized Education Programs (IEPs) as well as to provide behavioral or academic support for students in the general education setting.**
Elementary Schools –
1 daytime custodian
Remainder of the custodians assigned to the school work the evening shift. In elementary schools with four cleaning custodians, the Head Custodian works the evening shift

Middle Schools –
1 daytime custodian
1 custodian mid-day (optional)
Head Custodian & all other custodians work the evening shift

High Schools –
1 daytime custodian
1 custodian mid-day (optional)
Head Custodian & all other custodians work the evening shift

WORK ASSIGNMENTS

Day Shift Responsibilities – The custodian working the day shift is responsible for routinely performing the following functions:
Open the school or administrative facility
Open classrooms/offices
Check building for vandalism
Make sure heat and air conditioning are working properly
Unlock exterior doors for teachers’ and students’ arrival
Pick up trash around building
Prepare the cafeteria for lunch
Clean up trash and spills during lunch
Dry mop hallways – twice a day – once after students arrive and once midday
Check restrooms throughout the school day to make sure that all supplies are full
Set up for special events that occur during the school day
Clean up after student sickness or injury incidents
Remove snow from sidewalks
Apply de-icing salt as needed
Replace and recycle burned out light bulbs (elementary and middle schools)
Mow grass
Weed eat
Spread mulch
Other duties as assigned by the Principal

Mid-Day Shift Responsibilities – The custodian working the mid-day shift is responsible for routinely performing the following functions:
Clean up trash and spills during lunch
Pick up tables and wet mop cafeteria floor after lunch
After school hours, perform cleaning responsibilities assigned by head custodian
Other duties as assigned by the Principal

Evening Shift Responsibilities – The evening shift is responsible for cleaning the school or administrative facility so that it is ready for the next instructional or business day. These responsibilities include:
Remove trash from classrooms and offices
Pick up debris from floors
Clean windows  
Clean marks from desks and chairs  
Vacuum classroom and office floors  
Clean and restocking restrooms  
Dust mop halls  
Clean stairwells  
Wet mop classrooms and halls to keep floors free of stains  
Clean stains from carpets  
Clean carpets  
Replace and recycle burned out light bulbs (elementary and middle schools)  
Clean snow from sidewalks when school is closed for “Snow Days”  
Scrub and recoat floors when necessary  
Set-up and clean-up for special evening events  
Supervise community use events that occur during the evening shift  
Close and lock interior doors as directed by the Principal  
Ensure that all exterior doors are locked and securely closed at the end of the shift  
Activate security system  
Other duties as assigned by the Principal

### SCHOOL CUSTODIAL ASSIGNMENTS  
2012-2013 SCHOOL YEAR

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<tr>
<th>SCHOOL / FACILITY</th>
<th>Number AM Custodians</th>
<th>Number PM Custodians</th>
<th>Number Mid-Shift Custodians</th>
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**MIDDLE SCHOOLS**

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NOTE: Totals do not reflect one Athletic Custodian at each high school
The study may be found at the following link:

Please see: Page 3 – Executive Summary and Page 17 – Conclusion below:

Executive Summary
This study examines the cost of transportation services for Pennsylvania’s school districts, focusing especially on the impact on costs of contracting out. Using data from the Pennsylvania Department of Education from 1986 to 2008, the study statistically analyzes total costs, the costs to the state, and the costs to local school districts. On average 72% of transportation services were contracted out by Pennsylvania school districts in 2008, up from 62% in 1986.

In analyzing school district transportation costs, we control for the impact on costs of school district enrollment, fuel costs, spending for transportation of special education students, and the wealth and income of the school district. We find that:

• Contracting out significantly increases total costs. For example, if the “typical” district (with enrollment and other variables equal to the average for all districts) shifts from contracting out none of its transportation services to contracting out for all of its services, costs increase an estimated $223,861 (in 2008 dollars).

• Contracting out also increases costs to the state, in part because the state reimburses contracted transportation services at a higher rate than district self-provided services. In the typical district, increasing contracting out from zero to 100% increases costs to the state by $231,903.

• For local school districts, there is no statistically significant difference (at the 5% level) between what they pay for transportation services when they contract out versus when they self-provide transportation—in effect, the more generous state reimbursement of contracting out compensates for the increase in total costs.

In addition to the state’s more generous reimbursement for contracted transportation services, decisions to contract out are also driven in some cases by the lump sum that districts receive up front for selling their bus fleet. Contractors also reportedly “low ball” their prices when bidding for new contracts—i.e., promise lower costs than actually result. Analysis of a sub-sample of 29 districts that privatized transportation services between 1992 and 2001 reveals that these districts experienced a 26% increase in total transportation costs in the five years after contracting out compared to a 6% increase in the five years before contracting out. Most of the jump in costs took place in the first year after privatization. Despite higher costs, districts may not revert to self-provided services because the state’s more generous reimbursement of contractor services absorbs the increase. In addition, once districts sell their bus fleet, reverting back to self-provided services is impeded by the up-front cost of repurchasing a fleet. Lastly, school officials may be reluctant to publicize the increase in costs due to privatization.

Contracting out substantially increases state spending on transportation services. We estimate that if all districts switched to the self-supply of transportation services, total spending on student transportation services would fall by $78.3 million dollars with all of the cost savings accruing to the state.

Why does contracting out cost more than self-providing transportation services? While this requires further study, the general answer is that private contractors do not provide efficiencies sufficient to compensate for increases in costs associated with contracting out. These increases include contractor profits, the higher salaries of private contractors at the managerial and executive level, and the cost to school districts of monitoring contractors. Contracting can also be expensive because of lack of competition within the private industry in some areas. In addition, once a contract is in place, switching contractors or in-sourcing services may be disruptive, create managerial headaches, or impose financial transition costs. These transition costs give current contractors leverage when charging for unanticipated
additional services or bargaining over contract renewal terms. These reasons that privatization costs more than self-providing services are not unique to the school bus transportation industry but arise with a wide range of privatized services.

A quote in response to a Joint State Government Commission survey provides an illustration of how private contracting can raise costs (the full quote is in the conclusion to this report):¹

“...we purchased 3 mini-buses (1 with a wheelchair lift) and 4 minivans. Before...we were contracting 21 minivans that were transporting the same amount of students. We have saved over $200,000 per year in expenses by running a more efficient bus fleet.... [We] believe we can add to savings in areas such as extra-curricular transportation and field trip transportation."

At a time when the state is scouring the entire budget for cost savings, in-sourcing school transportation services represents a significant saving opportunity. To move in this direction, the state should lower the subsidy for contracted services to the subsidy for self-provided transportation services. Savings could be used to reverse some of the recent cuts to the state’s basic education subsidy. The state should also provide technical assistance to districts to re-evaluate their transportation services, and low-interest loans to assist with the purchase of new school buses. The Pennsylvania Association of School Business Officials (PASBO) could provide the technical assistance, supporting contracting in when it would lead to large savings, promoting the spread of best transportation practices when districts self-provide, and providing districts that continue to contract out with the expertise to bargain better contract terms. Through PASBO or a stand-alone entity, the commonwealth could also create its own non-profit transportation services provider that submits bids in response to district requests for proposals. This innovative option would directly address the lack of competition in the industry and also overcome the challenge with purchasing new buses, since the commonwealth bus company would have its own buses.
Conclusion
The use of contracted carriers by Pennsylvania school districts increases total spending on student transportation services in the Commonwealth. Private contractors do not provide efficiencies sufficient to compensate for the increases in costs associated with contracting out. These increases include contractor profits, the higher salaries of private contractors at the managerial and executive level, and the cost to school districts of monitoring contractors’ costs. Contracting can also be expensive because of lack of competition within the private industry in some areas. In addition, once a contractor is in place, switching contractors or contracting in may be disruptive, creating managerial headaches, or financial transition costs, such as the cost of purchasing a fleet of buses when a district reverts to self-providing services. Transition costs give the current contractor market leverage, allowing them to charge higher prices for unanticipated additional services.

A recent Joint State Government Commission report contains a case example of the potential to save significant money by bringing contracted transportation services back into the district.

“...for the school year September 2007, we purchased 3 mini-buses (1 with a wheelchair lift) and 4 minivans. Before we took on this initiative, we were contracting 21 minivans that were transporting the same amount of students. We have saved over $200,000 per year in expenses by running a more efficient bus fleet for these isolated areas. We are continuing to isolate areas of transportation where we can “chip away”. We...believe we can add to savings in areas such as extra-curricular transportation and field trip transportation. Additionally, we have taken complete responsibility for Intermediate Unit & Early Intervention transportation and, again, believe we have successfully achieved better efficiency.”

Statewide, in-sourcing school transportation services represents a significant saving opportunity. Savings could be used to reverse some of the recent cuts to the state’s basic education subsidy. To achieve more savings from contracting in, the state should start by eliminating the distortion in district decision-making that results from the higher subsidy for contracted services. The state could also partner with the Pennsylvania Association of School Board Officials (PASBO) to provide technical assistance on transportation services to school
districts. Such technical assistance could encourage contracting in when it would lead to large savings, promote the spread of best transportation practices among districts that self-provide services, and provide districts that continue to contract out with the expertise needed to bargain better contract terms. Through PASBO or a stand-alone entity, the commonwealth could also create its own non-profit transportation services provider that submits bids in response to district requests for proposals. This innovative option would directly address the lack of competition in the industry and also overcome the challenge with purchasing new buses, since the commonwealth bus company would have its own buses.

The following justification is provided for each new position requested in the FY 2014 Facilities Services portion of the Operating Budget:

**Account Clerk III** – This position was established in 1997. At that time, the position was responsible for processing for payment less than 1,000 purchase orders and processing less than 1,400 utility bills annually.

Currently, the Account Clerk processes for payment over 3,100 purchase orders per year as well as approximately 2,300 purchase card transactions. Due to this volume, the annual processing of more than 3,500 utility bills is now performed by a separate staff member as a collateral duty to the employee’s primary responsibility. Efficiency is compromised due to the magnitude of the transactions and because only one staff member is dedicated to handling them. This volume is cause for the potential of delay in receipt of materials or services.

The single Account Clerk in the Department of Facilities Services processes procurement actions comparable to other LCPS Departments with a much larger accounting support staff. The introduction of the Enterprise Resource Program (ERP) will increase the workload of the Account Clerk to maintain the ERP documentation. Sharing this workload between two full-time Account Clerks is necessary to maintain the integrity of the procurement process.

**Environmental Specialist** – The Environmental Specialist position was originally established to manage the asbestos abatement program. Through the years, as the focus on environmental issues increased, the functions of this position have increased and changed.

The Environmental Specialist is still responsible for managing all asbestos abatement projects as well as the Tri-annual AHERA inspections and performing the six-month periodic surveillance inspections. The Environmental Specialist is also responsible for conducting asbestos awareness training for Facilities Services personnel, and school custodial staff. In addition the Environmental Specialist has oversight of Radon monitoring; above-ground storage tank (AST) inspections; lead paint inspection; sampling and abatement projects; and hazardous waste identification and disposal.

AST responsibilities also include registering tanks for new schools with the Commonwealth of Virginia Department of Environmental Quality. In addition, the Environmental Specialist responds to all Indoor Air Quality (IAQ) issues within all LCPS schools and support buildings. The IAQ issues presently consume nearly 75% of the Environmental Specialist’s available work hours. These issues include meeting with school personnel to discuss odors in schools; water quality concerns; student and staff allergic reactions; and coordinating indoor air and water quality studies as well as investigations by third-party environmental firms. All of these studies make it difficult to meet required scheduled inspections and reporting for government environmental programs. Records maintenance for all tasks is critical.

Facilities Services has utilized other administrators to triage many of the indoor air quality odor complaints, but these administrators are not trained in handling these issues and often must defer the complaint to the Environmental Specialist. With the increased number of schools and growth among student and staff populations, there are no indications of a decrease in future school concerns. It is necessary to have a second trained and certified Environmental Specialist to respond to the expanding environmental workload. Safety issues have also become part of the responsibilities of the Environmental Specialist, and as such, the Environmental Specialist is a member of the Facilities Safety Committee.

During Fiscal Year 2012, the Environmental Specialist responded to 456 environmental work orders. Currently, for FY2013, 166 environmental work orders have required a response. Copies of the work order summary are attached. These environmental and indoor air quality work orders are in addition to the routine work performed by the Environmental Specialist including:
• Preparing, updating and distributing Manufacturer Safety Data Sheet manuals required by OSHA for chemicals used in schools
• Managing all asbestos abatement projects
• Conducting asbestos awareness training for Facilities personnel, and the school custodial staff
• Conducting Radon monitoring
• Inspecting, sampling, and managing abatement projects for lead based paint
• Hazardous waste identification and disposal
• Registering and managing above ground storage tanks new and existing schools with the Commonwealth of Virginia Department of Environmental Quality

All of these responsibilities make it difficult to meet all scheduled inspections and reporting for government required environmental programs. Records maintenance for all of the aforementioned tasks is critical.

**General Maintenance Workers** – The budget requests three (3) additional General Maintenance Worker positions, one (1) General Maintenance Worker I and two (2) General Maintenance Worker II positions. A second maintenance team would be formed with one (1) General Maintenance Worker II position and a General Maintenance Worker I and would be assigned to the schools in the Ashburn/Lansdowne area to proactively address minor maintenance tasks such as repair plumbing fixtures, change or rebuild flush valves, change washers, replace switches and receptacles, replace light tubes and ballasts, adjust door closers, replace damaged ceiling tile. The first maintenance team has worked in the Leesburg area for over two (2) years, proactively identifying and repairing plumbing, electrical, and structural items before they become an issue to the schools and affect instruction. This program releases trades technicians to perform more skilled repairs to boilers, irrigation systems, electrical systems, and doors. The program has also eliminated the “summer maintenance list” submitted by teachers thus freeing staff during the summer break to work on larger projects.

The second General Maintenance Worker II will be an additional roof repair technician. With the increasing number of schools, we have an increasing number of roof preventive maintenance inspections to perform to prevent roof leaks impacting instruction. Also, if we do have a roof leak, an additional roof repair technician will enable a quicker response. Because a General Maintenance Worker is capable of performing semi-skilled repairs in several trades, this individual would perform other general maintenance worker tasks if no roof repair work is required.

**HVAC Technician II** – Since 2009, LCPS had added seven (7) schools with sophisticated HVAC systems (solar panels for domestic hot water heating; energy recovery air handlers; six (6) additional cooling towers in the last three (3) years; and 160 additional exhaust fans controlled by automated building systems) but no additional staffing has been added to maintain this equipment. In addition, the equipment in our older schools is becoming more prone to problems because of its age increasing the number of work orders throughout the division. The existing HVAC staff has handled this repair work, but our response time has diminished, except for emergencies. It now takes up to three (3) days to respond to an HVAC heating or air conditioning call. This position would enable Facilities Services to return to the one- (1) to two- (2) day response time provided in 2009. This will enhance the comfort in our schools and improve the instructional environment.

**Electrician** – The electrical trade staff has experienced diminishing response time for work orders due to the increasing number of schools and without any increase in staff. With the increasing amount of technology in our older schools, we have added circuits and receptacles to provide power to these devices. One major example is power for “Smart Boards”. Additional code compliance or preventative maintenance work that has been added since 2009 include: electrical switch gear maintenance (over the last four years); infrared scanning of existing electrical panels; upgraded grounding of all fire cabinets; increased preventative maintenance of parking lot pole lights; additional preventative maintenance for sports lighting in high and middle school gyms; preventative maintenance/repairs for dimmer systems (repairs are being completed in-house) and solar electrical/photo voltaic panel systems.
Custodians - Custodians are required for Discovery and Moorefield Station elementary schools, (four (4) at each school), to perform daytime and evening cleaning. Douglass School requires one (1) additional custodian and four (4) custodians are needed at John Champe High School due to more classrooms being utilized during the next school year to accommodate increasing enrollment.

Head Custodians – The hiring of Head Custodians for Trailside Middle School, HS-6, and ES-21 will be required during the second-half or Fiscal Year 2014 to assist and prepare for the opening of these schools in August 2014.

Substitute Custodians - The seven (7) additional substitute custodians will provide some relief for reduced evening custodian staffing at schools when custodians are not at work because they are on vacation, out due to illness, Workers’ Compensation or are on family medical leave. We currently have 12 substitute custodians who cover the average 54 daily absences. The custodian absentee rate has risen annually as the school division grows, while the pool of substitute custodians has remained constant.

Lead Custodian – The Lead Custodian conducts the custodian cleanliness audits, provides on-site training for custodians and lead cleaning crews during summer cleaning. The additional Lead Custodian will reduce the schools that an individual lead custodian must support from 28 schools per lead this year to 21 schools next year. Without this additional position, the three (3) existing leads will support 29 schools each, thus further reducing their effectiveness to assist, when required.
There are positions included on the General Education page (page 72) for which there is no Standards of Quality (SOQ) staffing standard. The following chart reconciles the General Education position totals and those shown on the SOQ chart:

<table>
<thead>
<tr>
<th>Position</th>
<th>General Education Page</th>
<th>SOQ Staffing Chart</th>
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<tbody>
<tr>
<td><strong>Teachers</strong></td>
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<td>Kindergarten</td>
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<tr>
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<tr>
<td>Teacher Grades 6-8</td>
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<tr>
<td>Teacher Grades 9-12</td>
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<td>82.2</td>
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<tr>
<td>Teacher Elementary Art, Music, PE</td>
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<td><strong>Teachers for which there is no SOQ</strong></td>
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<tr>
<td>Elementary Administrative Intern</td>
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<tr>
<td>Teacher, Aerospace Educator</td>
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<tr>
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<td>Teacher, Reading - Douglass</td>
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<tr>
<td>Teacher, Reading - High</td>
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<tr>
<td>Teacher, Reading - Middle</td>
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<tr>
<td>Teacher, Science Academy</td>
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<tr>
<td>Teacher, World Languages &amp; Cultures - FLES &amp; SAMs</td>
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<td>Trainer, Pathways to Reading &amp; Writing</td>
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<tr>
<td><strong>Total Teachers</strong></td>
<td>3,600.8</td>
<td>3,490.3</td>
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</table>

| **Teacher Assistants**                        |                        |                    |
| Kindergarten                                  | 130.0                  | 130.0              |
| **Teachers Assistants for which there is no SOQ** |                        |                    |
| Teacher Assistant, Grades 1-5                 | 38.0                   | -                  |
| Teacher Assistant, In School Restriction      | 15.0                   | -                  |
| Teacher Assistant, In School Restriction - High | 13.0              | -                  |
| Teacher Assistant, Middle                     | 1.0                    | -                  |
| Teacher Assistant, Study Hall-High            | 28.0                   | -                  |
| Teacher Assistant, Study Hall-Middle          | 42.0                   | -                  |
| Teacher Assistant, Tutor (Douglass)           | 3.0                    | -                  |
| **Total Teacher Assistants**                  | 270.0                  | 130.0              |

**Total Teachers and Teacher Assistants**

<table>
<thead>
<tr>
<th>General Education Page</th>
<th>SOQ Staffing Chart</th>
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<tr>
<td>Guilford</td>
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<td>Hamilton</td>
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<td>Horizon</td>
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<td>Middleburg</td>
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<td>Mill Run</td>
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<td>School</td>
<td>Enrollment</td>
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<tr>
<td>Mountain View</td>
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<td>Newton Lee</td>
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<td>Seldens Landing</td>
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<tr>
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<td>Steuart Weller</td>
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<td>Sugarland</td>
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<td>Tolbert</td>
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<tr>
<td>Waterford</td>
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<tr>
<td><strong>Elementary Totals</strong></td>
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<table>
<thead>
<tr>
<th>Middle Schools</th>
<th>Enrollment</th>
<th>Over</th>
<th>%</th>
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<tbody>
<tr>
<td>Belmont Ridge</td>
<td>1477</td>
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<td>0.61%</td>
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<tr>
<td>Blue Ridge</td>
<td>926</td>
<td>9</td>
<td>0.97%</td>
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<tr>
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<tr>
<td>Farmwell Station</td>
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<tr>
<td>Harper Park</td>
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<tr>
<td>Harmony</td>
<td>1090</td>
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<tr>
<td>J.L. Simpson</td>
<td>1022</td>
<td>25</td>
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<tr>
<td>J. Michael Lunsford</td>
<td>1287</td>
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<td>1.32%</td>
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<tr>
<td>Mercer</td>
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<tr>
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<td><strong>677</strong></td>
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<table>
<thead>
<tr>
<th>High Schools</th>
<th>Enrollment</th>
<th>Over</th>
<th>%</th>
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<tr>
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<td>John Champe</td>
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<tr>
<td>Loudoun County</td>
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School Board Question #52
Attachment #6A
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<th>School District</th>
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<tr>
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<td>High School Break Out</td>
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<td>Schools</td>
<td>ELL's Eligible Receiving Services</td>
<td>Teachers</td>
<td>Teacher Assistants</td>
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</tr>
<tr>
<td><strong>Elementary</strong></td>
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<td></td>
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</tr>
<tr>
<td>Aldie</td>
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<tr>
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<td>2</td>
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<tr>
<td>Arcola</td>
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<td>1</td>
<td>1</td>
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<tr>
<td><strong>Ashburn (56) / Hillside (17)</strong></td>
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<td>2</td>
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<td>Ball's Bluff</td>
<td>77</td>
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<td>3</td>
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<tr>
<td>Banneker (see Middleburg)</td>
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<tr>
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<td>Buffalo Trail</td>
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<td>Catoctin</td>
<td>62</td>
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<td>2</td>
</tr>
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<td>Creightons' Corner</td>
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<td>3</td>
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<tr>
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A Guide to Contracting Out School Support Services: Good for the School? Good for the Community?

William J. Mathis, Ph.D.  Rutland Northeast Supervisory Union
Lorna Jimerson, Ed. D.  Champlain Valley Union High School

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March 2008
Guide to Contracting Out School Support Services: Good for the School? Good for the Community?

William J. Mathis, Superintendent of Schools, Rutland Northeast Supervisory Union
Lorna Jimerson, Champlain Valley Union High School, Board of School Directors

Executive Summary

Contracting out—using private contractors to provide support services—has received increasing attention in the nation’s public schools. In a climate promoting market models and privatization, the increasing popularity of school choice and education management organizations has encouraged countless vendors to attempt privatizing a wide array of public school services. The largest and most visible efforts have targeted food, transportation and custodial services. International and national mega-corporations are increasingly consolidating the food services and transportation industries, in particular.

Virtually all school systems have historically used and continue to use private vendors to some degree. In many cases, contracting out is simply the most efficient, practical and prudent path. Yet, the appealing promises of commercial vendors to provide higher quality services at cheaper prices while relieving administrative headaches are not always realized.

This paper reviews critical considerations for school officials considering contracting out. These include hidden costs, quality control, impact on administrative time, social costs, and loss of control and restricted flexibility.

When deciding whether to contract out, it is recommended that school leaders first:

- Analyze the reasons for considering a private vendor and determine whether underlying administrative and cost issues might be more efficiently and economically resolved internally. Often, a consultant can expedite this review.
- Conduct a careful cost analysis of contractor proposals, including hidden, indirect, and administrative costs to the district. Such an analysis is essential to determine if contracting out is cost-effective.
- Weigh the social costs of privatization, such as possible economic harm to employees and to the community and potential disruption of school-community relations.
- Determine if there are enough qualified potential bidders to provide the effective competition and substantial cost reduction that the market model promises. When a decision to contract out has been made, school leaders should:

- Develop requests for proposals (RFPs) using independent resources and advice rather than a vendor’s model contract or specification materials.
• Have an outside expert in the service area as well as legal counsel review the RFP and the proposals.

• Assure that sufficient quality control measures are in the contract. For example, effective monitoring, dispute resolution procedures, cost penalties and provisions for contract cancellation must be explicit, clear and free of excessive conditions.

• Check the contractor’s performance with other districts and the appropriate state agency. It is important to look beyond the references on the vendor’s list.

• Examine the contractor’s plans and guarantees regarding the district’s existing, new, and future employees. Determine whether a cost reduction will come at the expense of employees and the social wellbeing of the community.

• In the district’s cost analysis, determine what new costs the district may incur as a result of contracting out. For example, will the district have to hire a program monitor, buy supplies, or provide maintenance?

• To avoid unanticipated and unbudgeted bills, check the vendor’s cost estimates on staffing, wages, inflation, energy costs and the like for reasonableness. Assure that such costs are appropriately capped. Ascertain if the thresholds for additional billed services are realistic and fairly priced.

• Check cancellation provisions to prevent the district from being held captive to a contractor. Districts should avoid selling assets like kitchen equipment and bus fleets, which would effectively prevent their return to the district’s own operation.
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Rutland Northeast Supervisory Union
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Board of School Directors

Introduction

Across the country, school boards and school administrators are continuously barraged with demands from political groups and low-tax advocates for high quality education at the lowest possible price. Concurrently, the federal *No Child Left Behind* accountability system places pressures and penalties on already stretched school systems to introduce new, intensive and expensive programs, particularly for poor, special education, and minority students as well as English Language Learners. The costs of health care and utilities continue to explode, consuming ever-increasing shares of educational budgets. Increases in special education expenditures, coupled with federal under-funding, out run inflation and now approach 20% of school budgets. New and expanded mandates in areas such as air quality, allergy prevention, bus idling, bullying, equal opportunities, family leave, gender equity, hazing and harassment, school lunches, bookkeeping, sports, and still other areas all add costs to a district’s bottom line. Into this context come privatization advocates and vendors, extolling how much money can be saved by contracting out school support services.

Certainly such promises are exceptionally attractive to people in dire circumstances. But such promises must be examined carefully. This brief is intended to help school leaders—superintendents, school board members, school business officials and principals—who are considering contracting out support services. The goal is to provide relevant background and context, discuss some potential problems, and pose critical considerations to help leaders make good decisions.

Methods

The recommendations made in this paper are based on a review of research literature related to the practice of contracting out support services in public schools. Studies were included in the review if they met one or more of the following criteria:
• Addressed contracting out for student support services within a public school context, especially for the major contracting areas of transportation, food services and custodial support.
• Offered concrete data on the incidence of contracting out and trends over time.
• Presented empirical and objective evidence of the success or failure of privatized services in terms of cost savings and quality.
• Were relatively current, generally (though not exclusively) having been published within the past ten years.
• Had practical value for educational leaders relative to contracting out.

We found few research studies in peer-reviewed journals and literature that met our criteria. Typically, we found case studies. Somewhat puzzling was the lack of research after 2000. Much more numerous were papers written by pro-privatization and anti-privatization organizations. Most of these, however, promoted a particular position without offering supporting empirical data. Some were nevertheless included in our review if they amplified the context of privatization or supplied specific examples that illuminated a particular discussion. Otherwise, they were excluded.

A few pre-existing literature reviews, surveys and case studies informed our work. Warner and Hefetz present a comprehensive review of literature on privatized services. Although not specific to schools, they analyzed data from a large national survey administered every five years to local governments, and their work highlights the important issues of cost savings, transactional costs, community values and stability of contracts.

In addition, we frequently refer to a multiple-case study from Oregon. This research is unique in that it explicitly examines the actual language within contracts and the data used in cost-benefit presentations. This work is specific to non-instructional school support services and is, therefore, especially relevant to our intended audience of school practitioners and board members.

Materials reviewed also included survey data published by the Mackinac Center, American School & University magazine, and School Bus Fleet magazine. We also found, and occasionally cite, media reports that provided examples of specific situations and concerns that school districts encountered.

Finally, though we were particularly interested in non-instructional, or student support services, we briefly review literature on the privatization of entire school systems. This literature is essential in placing the contracting out of support services within the larger movement to privatize education.
Background and Context of Contracting Out

The Appeal of Privatization

Contracting out is widely touted as a way for school districts to save money, increase efficiency and improve the quality of services. It also purportedly frees school leaders from non-instructional responsibilities so that they can concentrate on their primary mission of ensuring that children are learning. On their face, these are compelling and appealing arguments.

Vendors, therefore, frequently find school leaders a willing audience. For example, district or school officials looking at costs for a subsidized hot lunch program are attracted to the idea of ridding themselves of this money-loser. Besides being costly, such lunch programs involve handling labor issues, recruiting employees, assuring well-balanced meals, and dealing with federal and state regulations—a major administrative headache.

As alluring as such promises can be, school boards and administrators must be extremely careful as they consider contracting out. It is true that in many cases service contracts have proven mutually advantageous and delivered the advertised advantages. However, it is also true that contracts have often produced lower savings and less freedom from administrative burdens than the salesperson promised. In fact, as illustrated below, many districts have experienced higher costs for a poorer product. In addition, private contracts may create new issues for school leaders who remain legally responsible for a vital public function but who have lost effective control of the domain. Further, school leaders may face a resentful public if individuals and the community are adversely affected by the change. Decision makers must consider all of these issues before they can decide whether the promised benefits are likely to materialize—and whether the gains outweigh the losses.

The Context of Schools in Communities

Schools play a vital role in the life of a community that includes, but is much broader than, teaching children and improving test scores. The school is an integral part of the community. The school is not only in the community; it must be of the community.

Even free-market advocate Milton Friedman recognized that parental and community involvement is vital to the effectiveness of public schools. Schools must involve parents and other community members in building and maintaining a mutually supportive environment. A school cannot be merely a collection of sub-contractors providing services at the same location. This fundamental consideration of community and of purposes necessarily influences decisions on contracting out school functions.
Schools and their communities intertwine and support one another in various ways:

**Health, Safety and Nutrition.** No factor is as vital as the health and safety of children. An increasing number of states require parental advisory committees on issues of health and safety. Such committees support effective interaction in areas such as providing a healthy, nutritious and balanced menu that exceeds minimum federal requirements. Schools, parents and the community all have an interest in ensuring children are well-nourished and safe. If a vendor’s contract shuts school personnel and parents out of discussions of improvements in the quality of school food programs, however, an essential area requiring communication and cooperation is closed. As a result, the community can experience deep divisiveness and disempowerment.

**The Community’s Economic Engine.** In many communities, schools are the largest single employer in the region. More than 80% of school budgets are dedicated to personnel costs and benefits. Most of the operations and maintenance budget ultimately goes to school employees or small local vendors who provide such services as roofing, plumbing, repairs and maintenance. Thus, schools are an essential part of the community’s economy, making the community itself an important stakeholder. If local parents and community members are put out of work by an out-of-state or international contractor, or if they suffer a cut in wages or health insurance, the community at large suffers. Public support and felt ownership of the schools is immediately damaged. Further, the welfare of the community is diminished.

**The School as Guardian of Community Social Health.** While the United States is virtually the only developed country that does not provide universal health care, public schools provide this vital social requirement to almost all employees. Businesses increasingly do not provide adequate health insurance or retirement programs. Schools usually do, however. Teachers, aides, kitchen workers, bus drivers and custodians typically receive health and retirement benefits, with part-time employees often getting these benefits on a pro-rated basis.

In addition, besides their role as major employers, schools can help channel funds into the hands of community members who most need them. For example, one family may have had a contract to mow a school lawn for generations. The board and administration might be familiar with the family as one continually plagued by dire need for work and income. When the school maintains its mowing contract with the family, it is functioning as part of a community that takes care of its own.

Thus, simple ideological mandates that insist private sector capitalism is always the preferred practice or, to the contrary, that private vendors should never be employed, oversimplify an elaborate set of interactions. Decisions on whether to privatize a support function must be based on careful consideration of how the new arrangement will enhance or detract from the complex and mutually reinforcing web of school and community interactions.
The Evolution of Privatization in Education

**History.** Public school operations have always included some degree of privatization. In the late nineteenth and early twentieth centuries, community participation was essential to building, operating and maintaining schools. Hiring local workers or builders for such specific tasks has long been a common practice, particularly in rural areas. Such workers have typically handled such jobs as maintaining heating systems, carpentry and repairs, cleaning and painting buildings, and the like. Calling the local plumber was just more sensible than keeping a person on staff.

During the late nineteenth and early twentieth century, just as universal public education was becoming a reality, privatization was the dominant model. However, rampant corruption and inefficiency in the private provision of public services led to a backlash, leading to services being brought back under the umbrella of government.

By mid-century, however, with the perceived failings of schools, particularly in the cities, the climate shifted. Milton Friedman first espoused the full privatization of education in 1955. He claimed that privatizing schools would produce better education at lower costs by letting Adam Smith’s invisible hand of the market assure efficiency and economy. A few decades later, in 1981, Ronald Reagan provided significant impetus for a general privatization movement when he declared in his first inaugural address that “government is the problem” and that all things are best done through capitalist market models.

From about 1980 onward, the political movement to reduce the size and scope of government dominated the political landscape. Pragmatic judgment gave way to a new partisan ideology. In short, the capitalist, market-driven private corporate model was accepted as the best method for all things, including government operations—which, of course, included public schooling. A vociferous debate about the issue continues, with passionate partisans on both sides.

**Privatizing Public Education** The growth of privatized support services must be seen within the broader political movement toward privatization, of which it is a part. Many believe that education would benefit if more services were transferred from public providers to private ones. They argue that competition for students will inevitably improve schools—in part by causing the failure of poor schools. They further contend that parents have a private right to choose schools for their children at public expense.

Three forms of school privatization dominant the debate:
Vouchers or “Choice.” In practice, school choice means parents can choose the school within the system they want the child to attend. Few of the myriad systems tried from 1970 to 2008 operated in such a pristine fashion. Enrollment limits, transportation and a host of other factors complicate realities. Despite intense examination, there is no consistent body of evidence that show vouchers or choice systems provide higher test scores. Evidence to date suggests social segregation is the result and cost-savings have not been established.

Charter Schools. In theory, the state provides a charter to a school to provide defined educational services in exchange for public funding. Often these schools have an organizational theme. Again, the variations are considerable and no clear evidence has emerged that academic outcomes are increased, while many studies find the result is greater segregation.

Educational Management Organizations (EMO). An EMO is contracted to manage and govern the schools under the theory that private management is more efficient than public management. Chris Whittle is the most prominent actor in this area. However, the results from EMO efforts in major cities such as San Francisco, Baltimore and Philadelphia have been highly controversial and benefits have not been conclusively established.

Readers who wish to further review independent and non-partisan research on school privatization would be well served to go to the National Center for the Study of Privatization in Education (www.ncspe.org).

The Privatization Continuum. Currently, privatization of school services occurs along a continuum. On one end, entire school systems are managed by private entities (see EMOs above). On the other, some schools contract only for specific purchases, such as cleaning supplies, copier maintenance, instructional supplies or furniture. In the middle of the continuum, contracts are issued for sporadic needs or in emergencies. For example, an outside contractor might be scheduled to service the heating system, or might be called upon to repair a flooding sewage system. Districts have also typically paid tuition for special-needs students to attend other private or public institutions when their needs could not be met in a regular environment—essentially contracting out educational services for those students.

In contrast to such support activities or special needs, contracting for services integrated into the daily life of a school is a relatively new and qualitatively different arrangement. Day-to-day tasks like transportation, food services, and custodial services are essential school functions. They tend to require a number of minimally supervised people ranging about the school and they consume a considerable portion of the budget. Most importantly, daily service providers have regular direct contact with students and staff. Safety and proper role models become more imperative considerations than financial savings or efficiency.
Thus, the term “privatization” might include anything from hiring a plumber to unplug a drain to completely turning the management of a school over to a for-profit organization. Obviously, there are great differences in management implications at different points along the continuum, each with its own unique complexities.

**Forms of Privatized or Contracted Support Services**

The Education Industry Association reports 800 corporate and individual members. The range of activities includes management, bookkeeping, special education, tutoring, professional development and a host of other areas. Not all of these forms are equal in frequency or intensity, however. According to a 2001 survey, the ten most common services that public schools secure from private vendors include:

1. Transportation
2. Vending
3. Heating, ventilating and air-conditioning (HVAC) maintenance
4. Computer servicing
5. Office-equipment upkeep
6. Food service
7. Printing
8. Security
9. Grounds maintenance
10. Custodial service

Source: American School & University Magazine, 2001

All of these services can be considered “non-instructional.” Only three of them, transportation, food service and custodial, are needed on a daily basis. (Depending on the context, “ground maintenance” and “security” may also be services needed every day.) None of them are “instructional” and consequently would not typically intersect with what is taught and by whom.

That situation, however, is changing. New state and federal mandates and policies exert enormous pressure on districts to raise test scores. They are also increasingly prescriptive about curricular content. These policy shifts, among others, have generated a new array of vendors. It has become common to privatize not merely non-instructional services, but other services directly related to teaching and learning processes. The following list offers some idea of the range of instruction-related services now being marketed to public schools.

**Curriculum.** High accountability systems and technologies have encouraged textbook manufacturers to expand their traditional (and already influential) products with a wide range of new ones, including scripted lessons, professional development activities, and electronic record keeping.
Professional Development. The line between professional development and commercialization has been blurred by the availability of paid platform speakers, school success recipes, and commercial programs like Reading Recovery, Success for All, and Total Quality Management. When schools employ heavily prescriptive pedagogical products, they move closer toward EMO management and substantive privatization. This product area has provoked much controversy and many lawsuits.

Tutoring. The No Child Left Behind law has established a new niche for state-approved “supplemental service providers.” These vendors essentially tutor children from schools with inadequate scores on a state’s annual tests. About 12% of the nation’s districts have been required to fund supplemental services, although only one-fifth of eligible children have enrolled. Since half of the providers in this rapidly expanding area have been for-profit corporations, it is not surprising that 41 states have reported that monitoring these programs presents a serious or moderate challenge.

Substitute teachers. Personnel firms like Kelly Services have become engaged in securing, screening and training substitute teachers.

Special education. For many years, some schools have dedicated themselves to serving children with special emotional or physical needs (or both). They are generally non-profit institutions with a history beginning before mainstreaming became the law of the land.

Specialized teachers. Particularly in special education, teachers are contracted to provide occupational therapy, physical therapy, speech language, and the like.

This paper focuses primarily on the three most prominent outsourced areas: transportation, food services, and custodial services. The reader should note, however, that the scope and frequency of contracted services is growing significantly. Thus, contracting decisions are becoming a much more frequent—and important—responsibility for school leaders.

Research on Contracting Out

“There is almost no published literature in academic journals on potential cost-savings from contracting out ...” Belfield wrote, based on an extensive search of social science literature. The Cornell Center on Restructuring Local Governance similarly reports that research on contracting out consists primarily of case studies. The Center further predicts that the lack of empirical data is unlikely to slow the growth of privatization: “Although empirical studies do not provide clear evidence on the costs and benefits of privatization, public perception and pressure for improved government efficiency will keep privatization on the government agenda.”
A study by Sclar\textsuperscript{24} underscores the fact that research on contracting out is inconclusive. Based on three case studies, Sclar’s research found privatization producing a wide range of cost outcomes. In Albany, N.Y., outsourcing municipal vehicle maintenance increased costs by 20%. Similarly, in Massachusetts, outsourcing highway maintenance increased costs by 9% to 20% (the difference depends on costing assumptions). In Indianapolis, however, outsourcing vehicle maintenance reduced costs between 8% and 29% (again, depending on costing assumptions). It is interesting to note that, despite these savings, Indianapolis later returned to internal servicing.

A few more extensive studies do exist, consisting primarily of surveys; their results are also inconsistent. For example, one survey by LaFaive, who is associated with the pro-privatization Mackinac Center, suggests that most districts are pleased with their outsourcing arrangements. LaFaive’s study indicated that 90.9 \% of districts “said they were satisfied with the results of their contracting.”\textsuperscript{25} LaFaive also proposes that general satisfaction can be inferred, at least in Michigan, because the rate of contracting out is increasing. Other surveys contradict this trend, however. A 2001 national survey published in \textit{American School & University} found that since 1993, the percentage of schools opting to outsource services has dropped. Similarly, annual national surveys by a bus outsourcing trade publication, \textit{School Bus Fleet}, indicate that the percentage of privately owned school buses decreased between 1996 and 2005.\textsuperscript{27}

Most contracting out literature appears in articles in trade magazines that enjoy heavy sponsorship by the larger vendors.\textsuperscript{28} Many “testimonial” pieces favoring privatization appear in such periodicals, and serve essentially as policy advocacy pieces. More even-handed informational brochures have been published by professional groups (the American Association of School Administrators and the National Association of Elementary and Secondary Principals, for example). While the professional association articles more objectively tally the pluses and minuses of outsourcing, they are not research documents. Objective analysis of the issue overall is limited.

Extensive anecdotal evidence suggests that, despite vendors’ predictions, some districts have not saved money by privatizing. In fact, some districts have lost money. Cost-cutting is not a certain outcome. The Mackinac report itself says that privatized bus contracting in Louisiana cost 10\% more than district-operated systems. In addition, as Belfield noted, since Mackinac did not survey non-outsourcing districts, there is no way to know whether districts relying on internal personnel are more or less satisfied than contracting districts. Some of these districts might even be former “customers” that tried privatizing but reverted to in-house arrangements. Similarly excluded might be districts that considered outsourcing but found the expected price or quality of the services to be unsatisfactory. Thus, the exclusion of non-outsourcing districts leaves claims about near-universal district satisfaction open to some question.
In the absence of conclusive research evidence, school leaders are wise to be cautious about claims made by privatizing companies and advocates. They should also note that virtually all analyses of privatization have found that transaction costs—costs for writing, evaluating, monitoring, staffing and supervising the contract—are ignored in cost analyses. Yet, these costs often prove the tipping point between a perceived cost savings and a loss. Indeed, even pro-privatization advocates suggest that superintendents and school board members must be vigilant in critically examining all elements of a contract. 

Readers interested in deeper examination of the research may want to examine the Cornell Center’s annotated privatization bibliography (http://government.cce.cornell.edu/doc/viewpage_r.asp?ID=Privatization). Although a number of references are old, the listings are comprehensive.

**Critical Considerations in Contracting Out**

At first, contracting out may appear an ideal arrangement. Someone else provides services. Administrative problems disappear. Costs drop. The vendor guarantees quality and cost savings. Newly freed from responsibilities in contracted areas, superintendents, principals and school boards have more time to focus on educating children.

Unfortunately, the ideal does not always translate to the real. Many districts find that contracting out brings negative effects as well—sometimes serious ones. Potential problems generally fall into five categories: hidden costs; quality control; impact on administrative time; social costs; and loss of control and restricted flexibility.

**Hidden Costs**

“We've been duped, we've been had, we've been hoodwinked, we've been suckered.”

Those were the sentiments of a school board member in Richmond, Va., in 2005, just before the board voted to cancel a contract with Chartwells, a large international food service provider. District officials found that after less than one year, contracting out had caused the district to lose over $900,000. Other examples confirm that this is not an isolated case.

- When it contracted out custodial services to Sodexho, the Guilford County (N.C.) school district originally expected to save $1.2 million over four years. Instead, it actually saved only $120,000 the first year—and then lost money the following year.
- In Texas, the Carroll School District contracted out food services to Aramark. A district audit subsequently uncovered an $80,000 deficit due to contract overruns.
At the end of a billing cycle, a district may experience “sticker shock,” when contracting a vendor submits a much higher invoice than expected. Cost overruns, which are fairly common, come from several areas. Contract language can contain loopholes. Cost-benefit analyses may be misleading. Indirect costs may be ignored. Monitoring costs may be disregarded. Contractors may present initial “low-ball” bids. A lack of competition may curtail theoretical market-based benefits.

**Loopholes in the Contract.** Typically, contract loopholes take the form of specific contractual conditions that allow private service providers to bill districts for more than the base amount. These are not always obvious or clearly explained when the vendor pitches the contract.

Some contracts place no caps on costs, so that there is no maximum on what a provider can charge. Many contracts cap services, giving vendors a right to impose additional charges after a certain point. Service caps are especially problematic. Districts have experienced higher costs when they unexpectedly needed additional work. While rates for special events, like an annual picnic, may be included in the contract, vendors often charge a much higher rate for services that are unexpected, “uncovered,” or both.

Other possible loopholes include charging retail rates for supplies, or charging a non-contracted, walk-in rate for uncovered services. Myriad possibilities for loopholes exist. Thus, careful contract review by qualified attorneys and business officials is essential.

**Misleading Cost-Benefit Analyses.** Projected savings for districts can prove unrealistic if the vendor’s—or the district’s—analysis uses questionable financial data, ignores additional costs for uncovered services, or makes inaccurate assumptions about future trends.

When district officials in Brandon, Vt., examined a Honeywell proposal for privatizing energy management they found that the vendor assumed the district would save $46,000 per year in avoided maintenance costs. There was no basis for this assumption in the district’s maintenance records or in the vendor’s proposal. Thus, rather than realizing the proposal’s projected savings of $23,995 per year, the district was more likely to incur a $22,000 annual loss.

In another example, a Sodexho food service contract estimated management fees of $40,000, a figure based on the number of meals to be served. However, the estimate was based on old data, and it did not account for enrollment growth in the district. A more realistic estimate showed management fees far more likely to reach $80,000, or double the amount the contractor estimated.

Another Sodexho contract offers a case of inaccurate assumptions. Service costs were projected, at least in part, on the assumption that Oregon's minimum wage would remain fixed. Existing Oregon law, however, already specified that the minimum wage would increase annually with inflation. Because the contract specified renegotiation would be required if any costing assumptions proved inaccurate, eventual renegotiation—and higher costs—were certain.
**Indirect Costs.** Indirect costs, often called transaction costs, are expenses the district must pay in addition to contracted service fees. Typically, indirect expenses average an additional 20% of the “bottom line” of the contract. For example, someone—perhaps district administrators or attorneys—must prepare the request for proposals (RFPs), publish them for bids, review competing proposals, check references, and carefully and continuously monitor the services. The district’s costs for the time and expertise necessary for such work are seldom included in cost-benefit analyses. In addition, many contracts require that districts supply equipment, facilities and custodial services in addition to specific administrative work.

The Sodexho contract for food services in Lincoln County, Ore., for example, includes these district responsibilities (among others):

- Repair and maintenance of all facilities involved in food preparation, storage and delivery
- Determining and verifying students’ application and eligibility for free or reduced priced meals and milk
- Developing, distributing and collecting parental letters and applications for subsidized food service...
- Resolving program review and audit issues
- Monitoring food service operation and guaranteeing everything in the contract is being carried out
- Providing contractor with office space, furnishings and equipment, including telephone service...

**Monitoring Responsibilities.** Oversight cannot end simply because a contract has been awarded. Even the pro-market Mackinac think-tank cites the crucial need for districts to “Monitor, Monitor, Monitor.” Mackinac suggests that a “centralized monitor,” a district employee in charge of contract compliance, might provide impartial oversight. A large urban district with multiple contracts might reasonably support such a position. However, the same cannot be said for small districts, rural districts, and districts with only a few contracts. Since the average U.S. school district has fewer than 3000 students, the question of who will monitor contracted services is a common one. The task might fall to the superintendent or building-level principal, or it might require a new hire. In any event, personnel costs for monitoring reduce, and in many cases eliminate, the potential savings of contracting out.

**Unrealistic Introductory Rates: “Low-ball bids.”** Like credit card companies, school service vendors frequently offer reduced rates for a first contract cycle in order to attract new customers. Typically, these initially low contracts can be renewed only at much higher rates in later years. This practice, often called low-balling, is used across many fields, including, but not limited to, health care, construction, insurance, and communication. The premise behind this approach, though usually unstated, is that privatization creates a dependency on outsourcing. Reverting to in-house services can become inconvenient or very difficult; and, if there are no other vendors in the area, the school district is captive.
Lack of Competition. At least in theory, competition is claimed to be the vital force that enables a free market to produce high quality at a low cost. Without adequate competition, there is little reason to expect that privatization will produce significant savings. Two factors work to decrease the level of competition for school districts when contracting out. First, in many rural or small districts, few, or even no, qualified vendors respond to RFPs. Larger companies often consider profit margins in less-populated areas too small to warrant the investment. Second, the school service industry has experienced an increasing number of mergers and consolidations. This trend has reduced the number of private contractors and lessened competition. For example, FirstGroup recently acquired Laidlaw Education Services. As a result, a FirstGroup subsidiary (FirstStudent) will now operate 12% of all school buses in the United States and Canada. Not surprisingly, this consolidation sparked an 11-state antitrust suit, with states asserting they faced a virtual transportation monopoly, sure to increase bids and higher education costs. A settlement in a Massachusetts federal court required FirstGroup to pay $1.1 million for the states’ legal costs and to offer concessions to various states. Such concessions included transferring property to local districts and selling existing contracts to local bus operators.

Quality Control

Ensuring quality is another major concern in contracting out. Again, it would be wrong to imply that all contracting out arrangements lead to lower and/or poor quality services. Some districts are undoubtedly pleased with vendors’ performance. On the other hand, there are numerous examples of districts finding that the quality of services provided by outside vendors is disappointing—in some cases, so poor that they present serious health and safety concerns.

For example:

- In Western Oaks Middle School, located in suburban Oklahoma City, a contractor left meals in food warmers over a winter break, resulting in several students becoming ill.
- In New Orleans, human feces were found in sinks in the gym facility after the private contractor finished cleaning the area.
- In Richmond, Va., parents and students complained about food quality after a private vendor took over. One lunch meal consisted of “a pretzel, vegetable and fruit.”
Personnel Practices. In these labor-intensive areas, private companies reduce their costs and increase their profits primarily by reducing personnel expenses. As the Social Costs section below details, contractors often pay low salaries and offer few benefits. In addition, private service providers sometimes hire too few employees, fail to hire replacements when an employee leaves, and insufficiently screen or train new hires. While such strategies reduce the vendor’s overhead, they are potentially disastrous for school districts.

What develops is a circular process: Privatization reduces salary and benefits, which leads to high turnover, which creates the frequent need to fill vacancies quickly, which leads to hiring workers without adequate background checks, or training, which increases turnover...and so on.

Just such a cyclical downward spiral was described in school board testimony about a custodial contract in Lincoln, Ore.:

This representative of the contracting company reported that SBM [a large California-based national custodial/facility management company] admitted it had a 50 percent turnover rate, compared with average tenure of 13 years on the job for the district custodians who were replaced. She states that the company had faced trouble filling vacancies and, as a result, had reduced training and had hired unscreened temporary employees, some of which were found to have criminal records after placement on the job. Similarly...employees were hired from temporary agencies and allowed to work prior to drug testing, following which at least one employee was dismissed for drug use.

Portland, Ore., offers further illustration of the high turnover that plagues contracted-out operations. That district uses both in-house and outsourced buses. Turnover rate among outsourced bus drivers is 30%—compared with 5% for district-run bus services. National data also confirms the chronic difficulty private vendors have in retaining employees.

Impact of Non-qualified Employees. In schools, it is critical that individuals who interact with children be good role models and not pose potential harm to students, staff or property. Unfortunately, the hiring merry-go-round described above that funnels non-qualified persons into the school environment can have serious consequences for districts. A few specific examples indicate the nature of this problem.
In New Jersey, an audit revealed that a custodial vendor failed to complete criminal records checks on employees. The audit occurred after workers were caught stealing laptops. The same company later fired 39 employees for drug use and other problems. In New York State, a Laidlaw school bus driver was arrested for possession of child pornography. In New Haven, Conn., when school officials decided not to renew a contract with Aramark, they cited poor quality service, inadequate staffing, lack of hiring for empty positions, and failure to “rectify equipment shortages.”

These examples should cause concern for school leaders when contemplating privatization. And while cost overruns may be somewhat avoided by scrutinizing contract language, ensuring quality is much more difficult. Once a contractor takes over a service, the locus of control for quality is removed from the district, though the district still maintains the ultimate legal (and moral) responsibility. It is very difficult to assure a high quality operation when you have no control over the hiring, training and supervision of those who actually do the work.

Quality of Vendor Products. Because vendors maximize profit by minimizing their expenses, they may cut costs in areas that are invisible— but essential—to the district. For example, the vendor might use a lower quality and less expensive school bus brake lining than the district would have chosen itself. Or, lower quality custodial supplies might lessen a school’s overall cleanliness. Of even greater concern is whether the custodial supplies are noxious; carpet-cleaning materials, for example, must be safe for the children who will lie on the carpets. A national recall of improperly slaughtered beef in February 2008 revealed much of the meat had already been consumed by children in schools. In Leicester, Vermont, a food contract was cancelled because of an over-reliance on government commodities and starches. In this instance, the international company was unresponsive to requests for a high-quality menu.

This is not to suggest that all vendors, or even most vendors, would use such dangerous practices. Nevertheless, such documented incidents indicate that contractual arrangements must assure quality products, and the district must have an effective way to monitor this quality.

Impact on Administrative Time

As appealing as freedom from administrative burdens may be, contracting out still requires significant and ongoing administrative work. Carefully specifying tasks, writing RFPs, evaluating bids, writing and revising contracts, evaluating services, and continuous monitoring all consume time and resources. Often, program monitoring can be complex and time-consuming, especially in such highly regulated domains as transportation and food services.
In transportation, for example, bus drivers must be trained in school disciplinary procedures, first aid, bus accident protocols, school bus inspections, emergency preparedness, evacuations, driver drug and alcohol screening, state laws such as prohibitions against idling, restraint procedures, special education needs and proper methods, student drug and alcohol behaviors, bullying, hazing and harassment. The school either has to provide this training or ensure that the contractor provides it and meets all other regulatory requirements. And clearly, either way, the district is liable for shortcomings. Thus, although administrators may expect a decrease in demands on their time, a contracting agreement may make “risk management” significantly more complicated and time-consuming than anticipated.

Although the district receives complaints, it may be unable to easily remedy the problem. Principals find themselves in an awkward position when parents demand a cleaner school but the custodian reports to an unresponsive, out-of-state mega-company that will not allocate sufficient personnel resources. Likewise, administrators may spend a great deal of time trying to change a lunch menu that includes three carbohydrates per day when corporate commodity buyers are dictating menu decisions. And, as previously noted, some contracts specify that the district continue to handle significant administrative work. Typically, districts complete state and federal reports, keep financial records, and communicate with parents. These continuing responsibilities require some administrator’s time, or may even require the district to hire additional personnel, such as a food service coordinator or transportation director.

Outsourcing, then, neither automatically nor assuredly lessens demands on administrative time or administrative costs.

Social Costs

Problems associated with contracting out go beyond the district’s cost, quality and time considerations. Contracting out can have significant negative impact on society itself. Although sometimes difficult to quantify, social costs must also be considered during decision-making.

Low wages and poor benefits. The low wages and poor benefits contractors typically offer employees, as noted above, have consequences beyond high turnover and other staffing problems. Impact on the community’s workforce can be severe, as is evident in the following examples.

- In Pleasant Hill, Ore., average wages for new bus drivers fell 42%, from $11.37/hour to $8/hour. Since bus drivers work only about four hours per day, income from the new wage fell far below any subsistence standard of living.
- In Collinsville, Ill., a Sodexho food service contract promised to save the district $225,000. The anticipated savings were to come primarily from a 53% reduction in salaries, from an average of $16 to $7.50 per hour.
- In Lake Oswego, Ore., full time employees of a privatized provider received $50 per month towards health insurance. Prior to privatization, they had comprehensive coverage for physician, prescription, vision and dental services. In addition, the contract only guaranteed “insurance...coverage for the first year...leaving open the possibility that even this diminished coverage could be reduced.”
Offers of low salary and reduced, or non-existent, benefits place veteran employees in difficult situations. They must choose between continuing to work in the district under significantly reduced conditions or seeking a new job, perhaps in a new community. Knowing that contracting out will place employees in this difficult situation, districts must decide how important the social good, goodwill and loyalty to veteran school employees is compared to the size of the anticipated savings.

Some privatized service providers try to sidestep the employee replacement problem by including provisions in the contract that “grandfather in” former employees. These contractual elements may guarantee previous workers wages at least equal to what they previously earned, if hired. However, this is an area where school leaders need to be particularly cautious about contract language. It is important to determine whether former employees are guaranteed employment or just given preference; whether benefit packages are equal; whether the contractor can reduce salaries and benefits in later years; and whether new employees will be paid at an unconscionably low rate.

Cafeteria staff, bus drivers and custodians—the three groups of employees most likely to be affected by contracting out—are not high-wage professions. District-operated employment in these areas provides good, stable jobs for community people looking for part-time work, for those with less formal education, for single parents etc., coupled with reasonable salaries and good benefits. Mistreatment of local employees not only creates a public relations nightmare for the district, but also harms the social well being of the community. Other social and health problems follow.

The economic fallout of low wages and benefits extends beyond the individual worker to many facets of society. Minimum- and low-wage jobs sustain a struggling disadvantaged underclass and create conditions that eventually are costly to society. Those at the bottom of the salary scale pay less income tax, are more dependent on social services, have higher health costs due to underinsurance, and contribute less to the local economy.

An economic analysis in Oregon found that For every 25 jobs that are contracted out, there is a loss of $165,000 in wages to local employees, a loss of $18,000 in state income tax revenues, and a loss of $233,000 in earnings that would have been spent in the local economy.
High Turnover. Similarly, the high turnover that accompanies low salary and poor benefits has an impact beyond the training and screening issues discussed earlier. High turnover leads to low morale, loss of institutional knowledge, and lower overall service quality.

Moreover, this revolving door of school service providers precludes establishing long-term, trusting relationships among school staff, parents and students. Prior to outsourcing, many custodians, bus drivers and cafeteria workers have extensive employment history in their districts. Most live in the local community. And through these sustained interactions, these school employees have become more than bus drivers, custodians and food servers. One veteran custodian described her relationship to the students this way, “I’m mother, father, sister, brother, aunt, uncle, counselor.... if you need me, I'm here. We can talk. I feel like it’s a village and everybody has a part.”

Corporate Implications for the Community. The growing incidence of mergers, buyouts and consolidation of outsourcing corporations frequently affects who responds to district RFPs. A mega-company or competing mega-companies may prove the only bidders. Service providers are increasingly large, multi-service corporations, with central offices far removed from the school district. While many of these corporations have regional offices and are responsive to customer complaints, greater centralization reduces both competition and incentive for high quality. In many cases, vendors hold a de facto monopoly.

The largest food-service company in the country is Sodexho, whose corporate headquarters are in France. Likewise, the largest school bus company, Laidlaw, is a Canadian company; its recent acquisition by FirstStudent removes its central office still further, to the United Kingdom. And Chartwells, another food service giant, which operates in Mexico and Canada as well as the U.S., is a subsidiary of the Compass Group, also headquartered in Great Britain.

The size of some of these operations is astounding. Compass, for example, also operates franchises for Burger King, Wendy's, Starbucks and twenty other brands. And Sodexho, now rapidly branching out from food services, offers facility maintenance, senior services, laundry operations and stadium concessions, among many other services. Aramark, with a main office in Philadelphia, similarly contracts out a wide variety of services ranging from uniforms, facility and ground maintenance, and vending machines to the operation of conference and recreation centers. These are all obviously high-revenue businesses. Last year, Sodexho had consolidated revenue of $17.7 billion dollars, while Aramark says it is an $11 billion operation.
There are at least two potential social disadvantages to contracting out with such very large, and often international, companies.

**Responsiveness.** Far-removed, huge organizations have limited ability to respond to local concerns and contexts. Districts are unique in the services they want and need and in the innate resources and strengths of their communities. Providers need to be knowledgeable and sensitive to local values—something that becomes increasingly unlikely as the locus of corporate control is further removed. For example, a district may want to serve locally grown food in its cafeteria. A mega-company is unlikely to agree, however, when its profits depend in part on standardizing menus and buying supplies in bulk. These “efficiency” practices limit the ability of businesses to be mindful of local traditions and responsive to local needs.

**An extraction industry?** Mega-businesses can be viewed as a form of extractive industry. Outsourcing to mega-companies takes local resources, in this case, taxpayer dollars and local manpower, and generates profits that go elsewhere—in some cases, out of the state; in other cases, out of the country. Locally owned small businesses typically can’t compete with these huge conglomerates and are frequently forced out of business or subsumed in buyouts. For example, Atlantic Express, the fastest growing bus company in the country in 1999, acquired Mountain Transit in rural Vermont. At the time, Mountain Transit was operating 100 buses and had been named *School Bus Fleet*’s “contractor of the year” in 1998.

School district leaders contemplating outsourcing, therefore, need to consider the size and location of providers in order to anticipate and assess possible negative impact on the local economy and reduced responsiveness to the local context.

**Loss of Control and Restricted Flexibility**

The efficient operation of schools demands both reliability and stability of support services—and simultaneously, the ability to respond quickly and appropriately to unanticipated day-to-day situations. The unexpected does occur. Outsourced control may impede a district's ability to make quick modifications.

For example, a leaky roof may require immediate and additional cleanup. Some contracts, however, exempt their employees from performing these non-specified duties, even during regular hours. Likewise, a school might have a last-minute opportunity for a valuable field trip but be unable to arrange bus service. When services are contracted out, districts may find themselves unable to make quick adjustments in a timely manner—at least without incurring additional, and sometimes prohibitive, costs. Similarly, contracts can restrict more longterm policy shifts. For example, a school district may find itself unable to change its daily class schedule in response to new research on adolescent sleep needs because of a restrictive transportation contract.
Inability to Terminate Contracts: The Black Hole Contract. Districts experience the ultimate lack of flexibility and loss of control when districts cannot get out of contracts once they are initiated. Districts may wish to terminate contracts prior to the end of the contract cycle, but find themselves sucked into the “Black Hole” of privatizing, with no available or affordable exit route.

These contracts are legal agreements and breaking them can be time-consuming, unpleasant and costly. For example, in 2001, the Dayton, Ohio, school district paid $1.5 million to break a contract with ServiceMaster that was costing the district an estimated $1 million extra per year.

In addition to the deterrent of legal expenses incurred in trying to void a contract, districts may have made decisions that effectively make it nearly impossible to reinstate in-house services. This is especially so when a district outsources transportation and sells its bus fleet, or when it contracts for food service and sells its kitchen equipment. In such cases, the cost to restore in-house capacity may be prohibitive, and former employees may also be unavailable or unwilling to return. The loss of the institutional knowledge in former employees adds new start-up costs if the district returns to an internal operation.

Thus contracting out may lead to inflexibility and an inability to implement positive modifications either in the short or the long term. And terminating the contract earlier (or not renewing it) may be problematic. These constraints are certainly not in the best interest of the students or of the school district.

Summary and Conclusions

Virtually all school districts contract for some types of services. It is practical, expedient and fiscally prudent to do so. In recent years, however, the dynamic has shifted toward major national or international corporations marketing long-term contracts to provide school support services. This is different in kind and in implications. The number and types of support services now being marketed continues to expand, but transportation, food and custodial services are the major areas of attention.

For some districts, for some services and with specific vendors, contracting out might make sense and provide good service for reduced costs. But in many cases, contracting out is not good for either the school district or the community.

Making a wise decision depends on the degree to which school leaders dispassionately, objectively, and wisely review the circumstances. They must distance themselves from undue influence, particularly by vendors. Such distancing is simply good management. In some circumstances, it is a legal requirement. Careful review of financial terms and conditions, along with a close review of potential cost savings, is mandatory. Hidden or supervisory costs, along with optimistic projections of savings, can turn what was an attractive proposal into a financial sinkhole.
The social costs to the community are frequently overlooked in vendor proposals. Saving the schools money is important, but not always at the cost of the social health of the community or at the cost of the complex inter-relationship between a school and a community. School leaders, in conjunction with their communities, need to closely examine the considerations posed in the preceding section and weigh all anticipated benefits against potential problems.

There is a fundamental clash between the primary mission of schools and for-profit enterprises. Schools exist to enhance the common good through teaching children. They also teach by modeling healthy social behavior as an institution and being a vital member of their community. Private companies focus on increasing profits. Their incentive is to expand revenues and decrease costs. Responsible corporations pay attention to customer need and community values, but that is typically a secondary focus.

In some situations, with some vendors, and around some tasks, the two purposes may be mutually supportive. But in many cases, the goals may prove too divergent and basically incompatible. It is the requirement of school leaders to take a broad, expansive and careful look when considering these decisions.

**Recommendations**

As this discussion has demonstrated, school leaders need to carefully consider a wide variety of issues when contemplating contracting out. If outsourcing appears to be the best solution for your circumstances, then further considerations come into play. The following sections offer recommendations to guide school leaders through this process.

**Recommendations for decision-making**

- Analyze the reasons for considering a private vendor. Determine whether underlying cost and quality issues might be more rapidly and economically resolved in another way. While contracting out may appear to be a simple way to resolve a personnel or management problem, it may actually be faster, less costly, and more efficient to have an outside auditor or investigator evaluate a program and offer suggestions. Often, state departments of education can perform such audits. State school board associations or superintendent associations can often direct you to a qualified outside expert.
- Conduct a careful cost analysis of the existing program as well as the contractor’s proposed costs. Close attention must be paid to hidden and indirect costs under both scenarios. When considering the contractor’s offer, determine what additional costs the district will incur for tasks it will have to accomplish such as administration, legal and regulatory compliance, and on-going program monitoring.
- Evaluate the social costs of privatization. Weigh the degree of disruption to school-community relations. Take special care to examine long and short-term impacts on current and future employees. Determine if salary and benefit reductions will occur and analyze the impact on the health and well-being of the community. Determine whether the cost reductions and tax savings are really a shift of the community’s tax burden onto low-paid workers.
- Consider whether there are enough qualified potential bidders to provide the effective
competition and substantial cost reduction that the market model promises.
Recommendations for Contracting

- Use a request for proposals (RFP). Develop the RFP using independent resources and advice, not a vendor’s materials. Many states have bidding laws, and it may be not only unwise but illegal to accept an unsolicited proposal or have a vendor define RFP specifications.

- Secure expert review of your RFP. Have either your school district’s attorney or an outside attorney with experience in outsourcing review the RFP and the contract. Make sure your business office and other internal experts carefully review contract terms for practicality. If your district lacks unbiased expertise in the service area, call on an outside expert.

- Insist on sufficient contract control measures. Contract monitoring, evaluation, complaint resolution, cost penalties and provisions for contract cancellation are all necessary elements for ensuring effective quality control.

- Check the contractor’s prior performance with other districts and with appropriate state agencies. Since the contractor’s incentive is to provide glowing references, make sure to check with previous customers who are not on the contractor’s reference list.

- Evaluate the contractor’s specific plans and guarantees in relation to employees. Examine the contract provisions for how the vendor will address salaries and benefits for existing employees both for the short term as well as in future years. Determine how new employees will be compensated. See if the contract specifies a sufficient number of employees to successfully accomplish the tasks. Ensure that personnel screening procedures are timely and meet requirements of state and federal law as well as standards of good practice.

- Consider any new costs the district may incur as a result of contracting out. See if the district will have to hire a new food supervisor(s), transportation coordinator(s), record-keeping personnel, etc. Determine how the district will meet safety, health and supervision responsibilities. Examine the effects of these costs on the vendor’s cost-savings proposal.

- If questions remain about a contractor’s proposal, do not hesitate to hire an expert to check a vendor’s cost estimates for realistic assumptions about such areas as wages, inflation, and energy costs.

- Determine if the caps on services and the provisions allowing excess billing are based on realistic figures. Be especially wary of guaranteed savings and of the conditions which the district must meet to be able to realize these savings.

- Be sure cancellation provisions are feasible and that district actions don’t undermine them. Avoid excessive cancellation fees, guaranteed future payments, and lengthy cancellation timelines. Think carefully before taking actions such as selling assets like kitchen equipment and bus fleets. Replacement could be so expensive that contract cancellation would become impractical.
Notes and References

William J. Mathis is Superintendent of Schools for the Rutland Northeast Supervisory Union, Brandon Vermont. He has served as President of the Vermont Superintendents’ Association and was superintendent of the year for the state and a national superintendent of the year finalist. Bill has also served as a speaker and consultant with groups across the nation on the costs of an adequate education. He is a member of the board of directors of the American Education Finance Association and has published extensively on the cost of No Child Left Behind, rural finance matters, and assessment and evaluation. He also teaches education finance and law at the University of Vermont.

Lorna Jimerson has been a school board member for over 15 years, including ten years as chair. She also served as president of the Vermont School Boards Association, as well as holding other statewide offices in the organization. Lorna received her doctorate in Educational Policy and Leadership Studies from the University of Vermont. Her research interests include the impact of No Child Left Behind on rural districts, rural teacher compensation, educational equity, the effectiveness of small schools, school choice and the impact of Vermont's Act 60. Lorna worked for ten years in the Policy Program of the Rural School and Community Trust as coordinator of the Information and Analysis unit. In this capacity, she assisted groups in a number of states across the nation.


8 Lafer, G. & Bussel, R. (June 2004). All costs considered: a report on the contracting out of
School Support Services in Oregon. Salem, Oregon: Oregon School Employees Association


For example, the lawsuits and controversies involving “Success for All” and the fight for “Reading Recovery” to be accepted by the federal department of education. Note also, the controversies regarding the federal government’s “What Works” clearinghouse.

Center on Educational Policy (March 2006). From the Capital to the Classroom: Year 4 of the No Child Left Behind Act. Washington: Center on Education Policy.


tization


Honeywell (June 26, 2006). Proposal to provide energy management services for the Brandon Town School District. Delivered to author William Mathis.


50 School Bus Fleet (2007, November). *FirstGroup closes Laidlaw acquisition.* Retrieved February 18, 2008 from


58 School Bus Fleet, a trade organization for private school bus contractors, annually surveys its members. The latest survey, 2005-2006, reports great improvement of the driver shortage, with “only” 53% reporting a driver shortage. As reported in the December, 2005 *School Bus Fleet Magazine*, “Driver hiring and retention and fuel prices were the top challenges” experienced by districts with large privatized fleets. Retrieved February 25, 2008 from http://www.schoolbusfleet.com/t_research.cfm?researchID=10067&popup=1


Alta Survey: a land survey conducted to the American Land Title Association specifications. It is needed for title and/or mortgage insurance. The data to be shown on the survey includes boundary lines, location of the main building including improvements, location of ancillary buildings, the identification of any easements (access rights by service companies such as water, gas, telephone, railways and other utilities). The ALTA survey identifies any easements or improvements that could be an impediment to utilizing the property for the purpose intended.

Phase I Environmental: an environmental site analysis of property to identify and record any existing, potential, or suspect conditions that could result in an environmental liability or restrict the use of the property. The study is looking for toxic and/or hazardous waste on the site which may inhibit or preclude development. This is the first step in a property’s environmental review. If potential contaminants are found, a Phase II or III may be required.

Phase I Archaeological: an evaluation of property to determine if there are cultural resources on site and what their respective cultural significance may or may not be. The investigation includes a review of records as well as field work. If a resource is found that is thought to have the potential to contribute to the local, state, or national history, and may be eligible for a listing on the National Register of Historic Places, a Phase II is conducted. A Phase III may also be undertaken if the resource is to be documented and removed prior to development.

Threatened & Endangered Species: an evaluation of the property to determine if there are any state or federal listed rare and endangered plant and animal species present or habitat where they would likely be present (natural heritage resources). The initial analysis is a review of the records to determine the property’s location relative to documented habitats. If the records indicate the site may be home to rare and endangered species then a field evaluation is undertaken for listed species.

Wetlands Investigation: a site evaluation to determine if jurisdictional wetlands or other waters of the U.S. are present on the property. Certain waters of the U.S. and wetlands are regulated by the Clean Water Act and may not be disturbed without proper permits.

Preliminary Geotechnical Analysis: an initial analysis of a property’s subsurface characteristics including geology, rocks, and/or hydrogeology to determine the site’s suitability for development. Depth to bedrock, soil type, amount of rock present on a site, permeability of the soil and similar traits will determine requirements for development (i.e., whether blasting is required, and design of foundations). Depending on the site, a more detailed geotechnical (soil borings) or geophysical study may be necessary that includes seismic wave or electromagnetic surveys prior to land acquisition.

Tree Inventory: a study to determine the location and type of tree cover on the property including an inventory of evergreen trees with a caliper of 14 inches or greater and deciduous trees with a caliper of 22 inches or greater. Specimen trees are located and the general health of the tree defined.

Preliminary Traffic Study: initial review of the road network, existing traffic volumes, access points, capacity analysis of proximate intersections and potential roadway improvements.

Traffic Study: detailed traffic analysis of the proposed use in relation to the adjacent road network that includes an evaluation of existing conditions, future conditions without the proposed use and future conditions with the proposed use. The scope of the study is determined by the County and VDOT. A typical study encompasses new traffic counts, the study of identified intersections, traffic volume projections including development in the area and background growth, traffic distribution, review of any safety issues, level of service analysis, and mitigation measures.
Topographical Study: survey of site to determine the topographical contours of the site in two foot intervals and to identify any steep (15-25%) and very steep slopes (>25%).

Acoustical Analysis: A study to determine existing noise levels, model future noise levels and determine appropriate mitigation measures as appropriate for properties located on major collector or arterial roadways.

Hydrogeological Testing: a study of the water properties of a site to determine if suitable water quality and quantity is available to serve the proposed use. This is typically undertaken when central utilities are not present.

Sewage Disposal Feasibility: a study of the soils and their percolation capability to determine if a site can support an on-site sewage disposal system for the proposed use. This study determines the type of system that may be utilized and whether the land can support the use needs. This is typically undertaken when central utilities are not present.

Commission Permit Application: Documents required for filing and processing of a commission permit, a review required for all public uses to determine if the use is in conformance with the adopted comprehensive plan. Documents include a plan of the proposed use, statement of justification describing the use and how it complies with the adopted comprehensive plan policies. In order to determine if a use is consistent a number of the due diligence studies are required to evaluate the site in relation to the policies.

Question 255. Assuming the Board of Supervisors allows for by-right development (with performance standards) for public use facilities, including new schools, what would be the estimated cost savings annually for LCPS? Where would those cost savings be manifest within the operating budget and for what types of line items (O&M, Personnel, etc.)? (Hornberger, March 24, 2012)

The cost savings are difficult to estimate as a consequence of each parcel’s unique qualities. Based upon comments to date, staff assumes that a commission permit will still be required for all public school sites that are not a feature shown on the adopted Comprehensive Plan map. BOS comments clearly suggest they want an opportunity for public input which the commission permit process affords.

Nor does the “by-right” use eliminate the need for zoning concept plan amendments, rezoning, or proffer amendments. Six of the last 14 school applications (2003-present) involved a ZMAP or a ZCPA (1-Newton Lee, MS-6, 2-Lansdowne-NCC, HS-8, 3portion of John Champe, HS-7, 4-Sycocin Creek, ES-13, 5-Loudoun Valley Estates, Rosa Lee Carter & HS-6, 6-Belmont Greene, Belmont Station, ES-10).

Many of the studies required at the legislative level are now (by amendment to the Facilities Standards Manual) also required at site plan. In fact, most of these studies are needed for due diligence to insure that a potential site is suitable for the intended use. The following are a list of studies that will still be required:

Alta Survey Phase I Archeological (and potentially Phase II, III or Architectural Analysis) Phase I Environmental Wetlands Study Rare and Endangered Species Tree Inventory/Tree Conservation & Landscape Plan Acoustical Study (adjacent to certain roads) Lighting Study (high school competition fields) Traffic Analysis

VDOT’s revised traffic study requirements present an opportunity for significant savings in that a regional “527” study would no longer be required for school uses. Local studies are significantly cheaper and may halve the typical traffic study costs which now range from $45-50,000. Again, this savings is ultimately dependent upon the performance standards adopted by the B.O.S.
Given the information cited above, staff estimates that the School Board may save $4050,000 per application. If the local traffic study requirements are adopted, an additional $20-25,000 in savings may be garnered from each application. The savings would appear in the Professional, Architectural, and Engineering Services budget item. This year’s current funding of $431,665 is almost exhausted. If and when the new rules are implemented, the savings would most likely be in this area. What cannot be quantified is the speed and predictability associated with the proposed processing change. The switch from a SPEX to a by-right process will save significant amounts of time, even if only half of our sites fall under this category. Although the Commission Permit will be required for virtually all projects, it has a shorter timeline.

Personnel reductions are not anticipated in that many of the core components of the work will still remain. Public hearings will not cease for Commission Permits and Zoning related changes. It is noted that up until 2005, LCPS hired outside consultants to prepare and process the limited number of legislative applications required. As proffered sites became less available and LCPS began to acquire more land, it quickly became apparent that having in-house staff to manage the required legislative applications would be more efficient and economical. This would remain true for the processing of CMPT and ZMAP applications. Based on market rates for this type of work, we would only be able to secure one third to one-half of the current full time equivalent position (based on total compensation, not just salary). It should also be noted that with the retirement of Planning’s Land Acquisition person, those duties have been absorbed by current planning staff.

In summary, cost savings of $40-50,000 per application could be seen with an additional $20-25,000 with the traffic study requirements change (total $40-75,000). These savings would be reflected in the Professional, Architectural, and Engineering Services budget item. Time and predictability savings would be significant.
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### Response: Q-104 - Chart Specifying Model/Age/Years of Service/Mileage /Reason for Decommissioning (Busses)

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## FY/14 Lease Purchase
Revised: 10/26/2012

### Replacements

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**Total Replacements, 105**

$8,573,000

### Additions

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**Total Additions, 15**

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### Grand Total FY/14 Lease Purchase

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<td>15-19 yrs 40%</td>
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<td>10-14 yrs 20%</td>
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<tr>
<td>(LCPS Years (% of Active ER Only)) 10%</td>
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Pre-Medicare Retiree Plan Options and Total Monthly Premiums

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<th>Arlington Schools</th>
<th>Fairfax Schools</th>
<th>Prince William Schools</th>
<th>Alexandria City Schools</th>
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<td>UHC Medicare Advantage Plan Plus Dental</td>
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<td>CIGNA Medicare Surround Plus RX and Dental</td>
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<td>Blue Preferred PPO Supplemental Medicare Plan plus Dental</td>
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<td>Based on Service Years Retiree pays $104 to $200 for Flat and $473 to $569 for Rate only and $473 to $569 for Rate + spouse</td>
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EMPLOYER CONTRIBUTES TO MEDICARE RETIREE

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<th>Fairfax Schools</th>
<th>Prince William Schools</th>
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* Expressed as percent passing.

* TS = Too Small

W = USED waived the calculation of AMAO 1 for the 2008-2009 school year; therefore, reflecting no progress for the 2009-2010 school year.

If current year is less than benchmark, AMAO may still indicate Met if safe harbor or three year average was used. See AMO Detail Report for more details.

C.O. - Although the division did not meet the AMAO on an individual basis, the division is considered to have met the AMAO based on consortium-level results.
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| Studies for Areas w/o Utilities          |     |     |     |     |       |           |          |        |            |           |          |               |                       |       |             |          |      |         |
| Hydrogeological Testing                   | 150,000| 170,000| N/A |       |       |           |          |        |            |           |          |               |                       |       |             |          |      |         |
| Sewage Disposal Feasibility               | 90,000| 100,000| N/A |       |       |           |          |        |            |           |          |               |                       |       |             |          |      |         |

√ = Study Completed  
● = Used Previous Study  
X = To Be Done

* CLOMAR = Conditional Letter of Floodplain Map Revision/FEMA (Federal Emergency Management Agency)  
** FDES Costs include studies and site plan work. In order to open the school on time Planning money was used.
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**Planning & Legislative Services Project Cost Estimates for FY 2014**

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**Typical Budget Range**
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#### Projected Enrollment

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<td>1.0</td>
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</tr>
<tr>
<td>TRT</td>
<td>0.5</td>
<td>$37,250</td>
</tr>
<tr>
<td>Principal</td>
<td>0.5</td>
<td>$61,200</td>
</tr>
<tr>
<td>Secretary</td>
<td>1.0</td>
<td>$53,600</td>
</tr>
<tr>
<td>Librarian</td>
<td>0.5</td>
<td>$37,250</td>
</tr>
<tr>
<td>Library Assistant</td>
<td>0.5</td>
<td>$17,250</td>
</tr>
<tr>
<td>Health Clinic Assistant</td>
<td>1.0</td>
<td>$34,500</td>
</tr>
<tr>
<td>Technology Assistant</td>
<td>1.0</td>
<td>$34,500</td>
</tr>
<tr>
<td>Teacher Assistant, K</td>
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<td>$17,250</td>
</tr>
<tr>
<td>Custodian</td>
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<td>$60,150</td>
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8.0 $427,450

#### Utilities and Insurance

$47,844

#### Custodial Supplies

$45,864

#### Maintenance Costs

$29,202

#### Total Potential Savings

$550,360

#### Cafeteria Worker (not in operating budget)

<table>
<thead>
<tr>
<th>FTE</th>
<th>Cost</th>
</tr>
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<tbody>
<tr>
<td>2.0</td>
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### Loudoun County Public Schools

FY 2014 Operating Budget

Operating Costs
Loudoun County Public Schools  
FY 2014 Operating Budget  
Operating Costs

Hamilton

<table>
<thead>
<tr>
<th>FTE Cost</th>
<th>Projected Enrollment</th>
<th>Staff Savings</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>Classroom Teachers 1.0 $74,500</td>
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<tr>
<td></td>
<td></td>
<td>TRT 0.6 $44,700</td>
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<td>Secretary 1.0 $53,600</td>
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<td></td>
<td></td>
<td>Librarian 0.5 $37,250</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Library Assistant 0.5 $17,250</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Health Clinic Assistant 1.0 $34,500</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Technology Assistant 1.0 $34,500</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Teacher Assistant K 0.5 $17,250</td>
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<td></td>
<td></td>
<td>Custodian 2.5 $100,250</td>
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<tr>
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<td>9.6 $536,200</td>
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| Utilities and Insurance $70,811 |
| Custodial Supplies $71,162 |
| Maintenance Costs $30,468 |

| Total Potential Savings $708,641 |

Cafeteria Worker (not in operating budget) 2.0 $57,600
### Potential Savings

<table>
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<tr>
<th>FTE</th>
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<tbody>
<tr>
<td>1.0</td>
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<tr>
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<td>$29,800</td>
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<td>0.5</td>
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<td>1.0</td>
<td>$53,600</td>
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<tr>
<td>0.5</td>
<td>$37,250</td>
</tr>
<tr>
<td>0.5</td>
<td>$17,250</td>
</tr>
<tr>
<td>1.0</td>
<td>$34,500</td>
</tr>
<tr>
<td>0.5</td>
<td>$17,250</td>
</tr>
<tr>
<td>2.0</td>
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<td>$60,150</td>
</tr>
<tr>
<td>8.9</td>
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- **Utilities and Insurance**: $29,214
- **Custodial Supplies**: $45,749
- **Maintenance Costs**: $21,544

**Total Potential Savings**: $551,007

**Cafeteria Worker** (not in operating budget) 1.0 $28,800
## Loudoun County Public Schools
### FY 2014 Operating Budget
#### Operating Costs

<table>
<thead>
<tr>
<th>School: Lincoln</th>
</tr>
</thead>
</table>

**Projected Enrollment**: 136

### Staff Savings

<table>
<thead>
<tr>
<th>Position</th>
<th>FTE</th>
<th>Cost</th>
</tr>
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<tr>
<td>Classroom Teachers</td>
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<tr>
<td>TRT</td>
<td>0.4</td>
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<tr>
<td>Principal</td>
<td>0.5</td>
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</tr>
<tr>
<td>Secretary</td>
<td>1.0</td>
<td>$53,600</td>
</tr>
<tr>
<td>Librarian</td>
<td>0.5</td>
<td>$37,250</td>
</tr>
<tr>
<td>Library Assistant</td>
<td>0.5</td>
<td>$17,250</td>
</tr>
<tr>
<td>Health Clinic Assistant</td>
<td>1.0</td>
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</tr>
<tr>
<td>Technology Assistant</td>
<td>1.0</td>
<td>$34,500</td>
</tr>
<tr>
<td>Teacher Assistant, K</td>
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<td>$17,250</td>
</tr>
<tr>
<td>Custodian</td>
<td>1.5</td>
<td>$60,150</td>
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</table>

**Total Potential Savings**: 6.9 FTE, $345,500

- **Utilities and Insurance**: $28,204
- **Custodial Supplies**: $45,875
- **Maintenance Costs**: $26,987

**Total Potential Savings**: $446,566

- **Cafeteria Worker** (not in operating budget): 2.0 FTE, $57,600
### Loudoun County Public Schools
#### FY 2014 Operating Budget
##### Operating Costs

**Middleburg**

<table>
<thead>
<tr>
<th>Potential Savings</th>
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**Staff Savings**

<table>
<thead>
<tr>
<th>Position</th>
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<th>Cost</th>
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<tr>
<td>Classroom Teachers</td>
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<tr>
<td>TRT</td>
<td>0.4</td>
<td>$29,800</td>
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<tr>
<td>Principal</td>
<td>0.5</td>
<td>$61,200</td>
</tr>
<tr>
<td>Secretary</td>
<td>1.0</td>
<td>$53,600</td>
</tr>
<tr>
<td>Librarian</td>
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<td>$37,250</td>
</tr>
<tr>
<td>Library Assistant</td>
<td>0.5</td>
<td>$17,250</td>
</tr>
<tr>
<td>Health Clinic Assistant</td>
<td>1.0</td>
<td>$34,500</td>
</tr>
<tr>
<td>Technology Assistant</td>
<td>1.0</td>
<td>$34,500</td>
</tr>
<tr>
<td>Teacher Assistant, Grade 1-5</td>
<td>2.0</td>
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</tr>
<tr>
<td>Custodian</td>
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<td>$60,150</td>
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|  | 8.4 | $397,250 |

| Utilities and Insurance       |       | $26,964  |
| Custodial Supplies            |       | $45,676  |
| Maintenance Costs             |       | $21,065  |

| Total Potential Savings       |       | $490,955 |

<p>| Cafeteria Worker (not in operating budget) | 2.0 | $57,600 |</p>
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<thead>
<tr>
<th>School</th>
<th>CAPP</th>
<th>FY14</th>
<th>FY15</th>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
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<tr>
<td>Electrical</td>
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<td>Structure Repair</td>
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<td>82.5%</td>
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<td>$0</td>
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<tr>
<td><strong>Total 5 Year CAPP</strong></td>
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<td>56.1%</td>
<td>56.8%</td>
<td>53.1%</td>
<td>54.2%</td>
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<td>Electrical</td>
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<td>Roofing</td>
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<tr>
<td>Structure Repair</td>
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<td><strong>Total 5 Year CAPP</strong></td>
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<td><strong>Middleburg ES</strong></td>
<td>CAPP</td>
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<td>Resurfacing</td>
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<td></td>
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<tr>
<td><strong>Total 5 Year CAPP</strong></td>
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<tr>
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</table>
## New Positions

<table>
<thead>
<tr>
<th>Position</th>
<th>FTE</th>
<th>Salary &amp; Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account clerk</td>
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<tr>
<td>Accountant</td>
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<td>Custodians</td>
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</tr>
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</tr>
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<td>Elementary music teachers</td>
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<td>Elementary physical education teachers</td>
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<tr>
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<td>Psychologist</td>
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## New Positions

<table>
<thead>
<tr>
<th>Position</th>
<th>FTE</th>
<th>Salary &amp; Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety and security specialists</td>
<td>3.0</td>
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</tr>
<tr>
<td>Safety and security technician</td>
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</tr>
<tr>
<td>Senior financial analyst</td>
<td>1.0</td>
<td>$75,900</td>
</tr>
<tr>
<td>Senior network engineer</td>
<td>1.0</td>
<td>$75,900</td>
</tr>
<tr>
<td>Social Worker</td>
<td>2.0</td>
<td>$142,857</td>
</tr>
<tr>
<td>Special Education Behavioral Specialist</td>
<td>1.0</td>
<td>$97,900</td>
</tr>
<tr>
<td>Special education teacher assistants</td>
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</tr>
<tr>
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<td>Warehouse assistant</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td>333.0</td>
<td><strong>$19,700,000</strong></td>
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THE ECONOMIC IMPACT OF
LOUDOUN COUNTY PUBLIC SCHOOLS

Michael L. Walden, Ph.D.
Economic Consultant
September 2012
EXECUTIVE SUMMARY

Loudoun County Public Schools (LCPS) have large and significant economic impacts on the local economy. Every $1.00 spent and retained in the local economy from the LCPS operating budget results in total county spending of $1.59, and every one direct LCPS job is associated with another 0.28 jobs in the Loudoun County economy. Also, every $1.00 spent and retained from the LCPS capital budget results in total county spending of $1.58, and every $1 million of LCPS capital spending is associated with 10.5 jobs in the region.

More important are the three major outputs of LCPS: the economic value of degrees awarded, the future reduction in public costs associated with individuals attaining a high school degree, and the impact on local property values and revenues from the academic performance of LCPS students.

The economic value of degrees awarded by LCPS is measured as the expected increase in lifetime earnings of high school graduates compared to high school dropouts. For each of the recent five LCPS graduating classes, this value is calculated as between $700 million and $1000 million (in current 2012 dollars). Also, as a result of recent improved academic performance of LCPS graduates, their increased likelihood of graduating from college is valued at $122 million for the last five graduating classes.

Considerable research has found that individuals graduating from high school are less likely to engage in criminal behavior and require public assistance, and are more likely...
to lead healthy lifestyles, compared to high school dropouts. This means high school graduates reduce future public crime costs, public welfare costs, and public health costs. For each of the recent LCPS graduating classes, the reduction in these costs is estimated at between $220 million and $300 million (in current 2012 dollars).

Lastly, LCPS can impact local wealth – specifically real property values – in two ways. One is through the additional spending that high school graduates create compared to high school dropouts. This impact was estimated to create $60 million in additional county property values and $0.6 million in higher county real property tax revenues for each recent class of LCPS graduates.

The second and more significant local wealth impact comes from the positive response of residential property values to improved academic performance of LCPS students. All standard measures of academic performance of LCPS seniors have improved – on trend - in recent years. Research shows that improved academic performance of public school students has significant positive impacts on local residential property values. Using the results of this research, it is found that LCPS’ recent improved academic results has cushioned the adverse impacts of the recession on the local residential real estate market. It is calculated that the improved LCPS test scores between 2006 and 2011 have resulted in Loudoun County residential property values that are between $4.7 billion and $5.9 billion higher compared to the levels without the improvement in academic performance. The corresponding gain in property tax revenues to Loudoun County is between $47 million and $59 million.
The economic impact of LCPS is summarized as follows:

**Inputs**

- Every $1 spent and retained in Loudoun County by the LCPS operating budget results in $1.59 of regional spending
- Every direct LCPS job is associated with another 0.28 regional jobs
- Every $1 spent and retained in the region by the LCPS capital budget results in $1.58 of regional spending
- Every $1 million spent by the LCPS capital budget results in 10.5 regional jobs

**Outputs**

- Each recent LCPS graduating class generated between $700 million and $1000 million ($1 billion) in additional lifetime income (2012 $)
- As a result of improved academic performance of recent LCPS graduates, their increased likelihood of completing college is valued at $122 million for the last five graduating classes
- Each recent LCPS graduating class is associated with a lifetime reduction in public crime costs, welfare, and public health care costs of between $220 million and $300 million (2012 $)
- The additional spending of each LCPS graduating class adds $60 million to regional property values
- The recent improvement in LCPS academic performance is estimated to have resulted in Loudoun County residential property values that are between $4.7 billion and $5.9 billion higher compared to levels without the improvement in academic performance
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GENERAL LIMITING CONDITIONS

All practical and reasonable efforts have been used to make the analysis and conclusions developed in this study reflect the best possible estimates of economic impact. The study is based on numerous data, assumptions, and parameters provided by the client and other sources cited in the study. No responsibility is assumed for inaccuracies reported by the client or any other data source used in developing and preparing the study. No warranty or representation is made by Michael L. Walden that any of the values or estimations in the report has been, or will be, actually achieved.
ACKNOWLEDGEMENTS

Much thanks is due to E. Leigh Burden, Assistant Superintendent for Business and Finance at Loudoun Public Schools, for the initial contact about the study and for supplying the necessary data and information for its completion. Assistant Superintendent Burden was always prompt with responses to my inquiries and diligent in answering questions and meeting requests in a timely manner. Thanks are also due to Assistant Superintendent Burden’s staff in facilitating the study. Gratitude is also extended to Loudoun Public Schools Superintendent Edgar B. Hatrick III for supporting the study and supplying the resources to conduct it.

ABOUT THE AUTHOR

Michael L. Walden is a William Neal Reynolds Distinguished Professor at North Carolina State University, where he has taught since 1978. The author of eight books and over 250 articles and reports, among Walden’s specialties is economic impact analysis, particularly for public and educational institutions. His most recent book is North Carolina in the Connected Age (The University of North Carolina Press, 2008). The winner of several national and state awards, he was the recipient of the UNC Board of Governors Award for Excellence in Public Service in 2010. Walden frequently comments about the economy in the media, writes a biweekly newspaper column, broadcasts a daily radio program, and makes scores of public presentations each year in various forums.
INTRODUCTION

Loudoun County Public Schools (LCPS) is the fourth largest public school system in Virginia and among the 75 largest systems in the country. It serves approximately 66,000 students in 80 schools. It is the largest employer in the county along with a substantial payroll. Given its size and vital task of educating students for both the workforce and further training in college, the economic impact of LCPS is certainly large. However, no specific measures of this impact are currently available.

The objective of this report is to provide such impact measures for the local economy. Here, “local” is defined simply as Loudoun County. This geographic focus is appropriate given that the major source of funding for LCPS is from taxpayers in Loudoun County. Economic impacts are measured both in terms of dollars and employment and, where appropriate and possible, locally generated and received public revenues.

The economic impacts of LCPS are measured in four categories as illustrated in Figure 1:

1. **Impact 1.** The impact on county spending and employment of LCPS’ annual budgets, including the spending by LCPS on salaries, supplies, and other operational support which generates income to employees and vendors. Employees and vendors will, in turn, re-spend a portion of these funds in the local economy, thereby establishing a “ripple”, or “multiplier” total impact of LCPS’ budget. The components of this total

---

1 From a broader geographic perspective, Loudoun County is part of the Washington Metropolitan Area, a region of 5.5 million people and the seventh largest metropolitan area in the country.
impact of LCPS’ budget – as well as the total impact itself – are estimated. The analysis is performed separately for the LCPS operating budget and capital budget.

**Impact 2.** Economic value of degrees awarded: There are two components to this impact. First, as a result of the skills they acquire in school, the graduates of LCPS have a higher economic value in the job market than individuals who have not attained a high school diploma. This value is approximated by the difference in lifetime incomes of LCPS graduates and non-graduates. Second, research has shown that improved academic performance of high school graduates leads to improved academic performance in college and a greater likelihood of attaining a college degree. This means improved academic performance of LCPS graduates who attend college can be linked to a portion of the added lifetime earnings received by college graduates.

**Impact 3.** Future reduction in public costs: Increases in high school graduates have been shown to be associated with positive public outcomes, such as reduction in crime rates and welfare and public health care costs. Estimates are calibrated for these benefits.
Figure 1. Economic Impacts of LCPS.

- SPENDING IMPACT IN LOCAL ECONOMY
- ECONOMIC VALUE OF DEGREES AWARDED
- FUTURE REDUCTION IN PUBLIC COSTS
- ECONOMIC IMPACT ON LOCAL WEALTH
Impact 4. Economic impact on local wealth: Considerable research also indicates citizens value well-performing schools. Economically, this value is incorporated into a premium in local property values. The impact on local property values indicated by recent trends in the performance of LCPS is estimated.

Taken collectively, these four impacts will show the economic clout of LCPS is large and significant.

For ease of presentation, the report is divided into several sections. The next section provides context for the LCPS impact assessment by summarizing recent trends in the economy of Loudoun County. Then follow four sections, each with one section devoted to results for the aforementioned economic impacts. The final section provides conclusions and a summary of the findings.

LOUDOUN COUNTY

Loudoun County is located in the northern section of Virginia and is part of the Washington, DC Metropolitan Area. It contributes an estimated $16 billion in annual economic output. Figure 2 shows the location of Loudoun County in the state.

---

2 The Washington, DC Metropolitan Area annual economic output is estimated at $408 billion. Data are for 2009 (latest available) and are from the U.S. Department of Commerce and IMPLAN for Virginia.
Although the county certainly suffered during the recent nationwide recession, it weathered the downturn relatively better than the nation. The Loudoun County unemployment rate peaked at 5.4% in early 2010, compared to 10% for the nation. By the middle of 2012, the Loudoun County unemployment rate had dropped to under 4%, less than half the national rate.³

³ Unemployment rate numbers are not seasonally adjusted and are from the U.S. Department of Commerce.
A major reason for Loudoun County’s better relative economic performance in recent years is its economic structure. Table 1 compares the county’s employment profile by industry to that of the nation. Loudoun County has relatively fewer of its workers employed in the manufacturing sector and relatively more in the information and professional/business services sectors. Manufacturing is always more adversely affected during recessions because buyers can more easily postpone purchases of manufactured products. In contrast, professional

### Table 1. Economic Structure of Loudoun County Compared to the Nation, 2010.

<table>
<thead>
<tr>
<th>Sector</th>
<th>Loudoun County</th>
<th>U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>2.8</td>
<td>8.9</td>
</tr>
<tr>
<td>Trade, Transportation, Utilities</td>
<td>19.3</td>
<td>19.0</td>
</tr>
<tr>
<td>Information</td>
<td>4.6</td>
<td>2.1</td>
</tr>
<tr>
<td>Financial Services</td>
<td>8.7</td>
<td>5.9</td>
</tr>
<tr>
<td>Construction</td>
<td>9.6</td>
<td>4.8</td>
</tr>
<tr>
<td>Professional and Business Services</td>
<td>20.0</td>
<td>12.8</td>
</tr>
<tr>
<td>Education and Health Services</td>
<td>8.3</td>
<td>15.1</td>
</tr>
<tr>
<td>Leisure and Hospitality</td>
<td>9.0</td>
<td>10.0</td>
</tr>
<tr>
<td>Other Services</td>
<td>5.2</td>
<td>4.1</td>
</tr>
<tr>
<td>Federal Government</td>
<td>3.0</td>
<td>2.3</td>
</tr>
<tr>
<td>State and Local Government</td>
<td>9.5</td>
<td>15.0</td>
</tr>
</tbody>
</table>

Construction includes natural resource employment; data are based on place of work

Source: U.S. Department of Commerce
and information services sector jobs are less affected and more stable during economic downturns. Therefore, Loudoun County has an economic structure that is better able to withstand recessions.

Table 2. Key Socioeconomic and Demographic Data of Loudoun County Compared to the Nation, 2010.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Loudoun County</th>
<th>U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>315,305</td>
<td>309,349,689</td>
</tr>
<tr>
<td>Median earnings</td>
<td>$61,372</td>
<td>$28,889</td>
</tr>
<tr>
<td>% of population aged 65 and over</td>
<td>6.5</td>
<td>13.1</td>
</tr>
<tr>
<td>% of persons aged 25 and over with a high school degree</td>
<td>93.4</td>
<td>85.6</td>
</tr>
<tr>
<td>% of persons aged 25 and over with a bachelor’s degree</td>
<td>58.4</td>
<td>28.2</td>
</tr>
<tr>
<td>Population growth rate, 2000-2010 (%)</td>
<td>84.2</td>
<td>9.9</td>
</tr>
</tbody>
</table>

Sources: U.S. Census Bureau; U.S. Department of Commerce

Table 2 compares key socioeconomic and demographic information between Loudoun County and the nation. Median earnings in Loudoun County are more than twice the national average. Loudoun County is a young area, with the relative size of the elderly population half the rate for the nation. Loudoun County is also a very educated area – the percentage of adults with a bachelor’s degree or more is twice the national rate – and this characteristic is directly linked to the county’s high earnings and comparatively low unemployment rate. Population

4 Indeed, in 2009 median household income in Loudoun County was the highest among all counties in the nation, according to the U.S. Census. If independent cities are included in the rankings, the City of Falls Church, Virginia, did have a higher median household income than Loudoun County.
growth in Loudoun County in the last decade (2000-2010) has – amazingly – been almost ten times faster than for the nation.

SPENDING AND EMPLOYMENT IMPACTS OF LOUDOUN COUNTY PUBLIC SCHOOLS

Economists group economic impact of spending by either a private firm or public institution (like the LCPS) into three categories (Figure 3). The first is the direct economic impact (“direct spending” in Figure 3). This is the spending that goes to salaries of LCPS faculty and staff and businesses selling directly to LCPS. It can be thought of as the “first round” of economic impact.

The indirect economic impact (“indirect spending” in Figure 3) calibrates the additional spending and jobs created from the direct spending that is made to local supplier firms and subsequent spending interactions between those firms. For example, the local firm that maintains the LCPS copying machines may, in turn, spend additional funds on parts, and so local firms supplying such parts would realize an increase in revenue and may add jobs as a result. The indirect economic impacts are often called “second round” effects.

The third category is the induced economic impact (“induced spending” in Figure 3). Considered to be the “third round” impact, this impact accounts for spending and job creation resulting from consumer retail spending associated with both the direct and indirect effects. For example, LCPS employees will spend a significant part of their salaries in the local economy on various consumer products and services. Likewise, the employees associated with the firms of
the “indirect effect” will do the same. This induced local spending becomes revenues to local firms that then serve as the basis for further job creation.

Figure 3. Flowchart of Economic Impact of LCPS Spending.
Notice in Figure 3 there are four ovals labeled “leakage”. This is spending which goes to businesses and vendors outside the region and therefore is not available for “re-cycling” within the region. Taxes paid to the federal and state governments, purchases made from out-of-region suppliers, and mortgage payments made to an out-of-region investor are good examples of leakage. Leaked funds reduce the total economic impact of any initial amount of spending.

“Multipliers” are commonly used to estimate indirect and induced economic impacts from the direct effects. The multipliers give the additional, or multiple, effects of the indirect and induced impacts over and above the direct effect. Multipliers are based on the economic structure of the local economy and so vary by region. In this report, multipliers for Loudoun County are taken from IMPLAN (“impact planning”), a software developed for local economic impact analysis and unique for each county.5

This section documents the total economic impacts – direct, indirect, and induced – of LCPS on the local economy. The analysis will reveal the relative importance of LCPS’ expenditures to local businesses and vendors. Impacts are displayed in both dollar and employment terms. Impacts are also calculated separately for the LCPS operating budget and LCPS capital (construction) expenditures.

5 IMPLAN is developed by MIG, Inc., Minneapolis, MN.
**Impact of the LCPS Operating Budget**

The LCPS operating budget is large. Over the last five fiscal years (2009 – 2013) LCPS has spent an average annual amount of $772.4 million. However, as related above, this spending does not capture the full economic impact of LCPS. LCPS spending sets off a chain reaction of other spending and re-spending in the county economy as businesses and households alike take funds received from LCPS and purchase products and services from vendors in the area.

Eighty-eight percent (88%) of the LCPS operating budget goes to employees in the form of salaries and benefits.\(^6\) Hence, the major broader regional impact of the LCPS operating budget will be from the spending and re-spending of employee compensation. However, all employee compensation will not be available for recirculation through the county economy. Federal and state taxes will come “off the top” and will immediately flow outside the county with no assurance of returning. Mortgage payments made to an out-of-county lender, insurance premiums paid to a provider in another state, and on-line purchases to out-of-county sellers are other examples of funds that won’t be recycled locally. Based on an analysis of county spending patterns, the total of such “leaked” funds are set at 35% of the LCPS operating budget.\(^7\)

Table 3 shows the county impact of the five-year annual LCPS operating budget separately for direct, indirect, induced, and total spending and employment impacts after

\(^6\) Loudoun County Public Schools, *Appropriated Budgets, Fiscal Years 2009-2013*.

\(^7\) Derived by using the IMPLAN data for Loudoun County, Virginia.
subtracting the initial leakage. The average annual budget over the five-year period of $772.4 million; after subtracting the leakage rate of 35%, becomes a direct effect of $502 million. The spending creates an indirect effect of $98.7 million and an induced effect of $197.5 million, for a total effect of $798.2 million. Comparing the total spending effect of $798.2 million to the direct effect of $502 million, the results indicate that:

\[
\text{EVERY OPERATING } $1.00 \text{ SPENT BY LCPS AND RETAINED IN THE COUNTY RESULTS IN TOTAL COUNTY SPENDING OF $1.59}
\]

Table 3. Annual Spending and Employment Impacts of Average LCPS Operating Budget Remaining in Loudoun County for Spending.

<table>
<thead>
<tr>
<th>Impact</th>
<th>Spending ($ millions)</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct effect</td>
<td>502.0</td>
<td>8974</td>
</tr>
<tr>
<td>Indirect effect</td>
<td>98.7</td>
<td>882</td>
</tr>
<tr>
<td>Induced effect</td>
<td>197.5</td>
<td>1630</td>
</tr>
<tr>
<td>Total effect</td>
<td>798.2</td>
<td>11,486</td>
</tr>
</tbody>
</table>

Source: LCPS annual budgets; IMPLAN for Loudoun County, Virginia; and calculations by the author
The employment impacts shown in Table 3 are also substantial. The direct effect of 8974 jobs is the five year annual average employment at LCPS. To this is added 882 indirect effect jobs and 1630 induced effect jobs, for a total regional employment impact of 11,486 jobs. Therefore, on average:

EVERY ONE JOB IN LCPS IS ASSOCIATED WITH A TOTAL OF 1.28 JOBS IN THE COUNTY. OR, STATED ANOTHER WAY, EVERY ONE JOB IN THE LCPS CREATES ANOTHER 0.28 JOBS IN THE COUNTY.

It is also instructive to see the impact of the LCPS operating budget on individual economic sectors within the region. This information is provided in Table. 4. On the spending side, the top five sectors impacted are professional services, real estate, transportation, trade, and state/local government. Since almost all of the LCPS operating budget spending is ultimately generated through consumer spending, it is logical these are the top impacted sectors. On the employment side, the top five sectors impacted are professional services, leisure/hospitality, real estate, state/local government, and transportation. The rankings of spending impacts and

---

8 The economic sectors are defined in Appendix A.
employment impacts by economic sector do not exactly correspond due to differences in the labor intensity of different industries.

Table 4. Annual Spending and Employment Impacts of Average LCPS Operating Budget Remaining in Loudoun County for Spending, by Economic Sector.

<table>
<thead>
<tr>
<th>Sector</th>
<th>Spending ($ millions)</th>
<th>Employment¹</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture</td>
<td>0.2</td>
<td>0.0</td>
</tr>
<tr>
<td>Natural resources</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Public utilities</td>
<td>15.2</td>
<td>8.4</td>
</tr>
<tr>
<td>Construction</td>
<td>8.9</td>
<td>27.7</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>9.9</td>
<td>21.5</td>
</tr>
<tr>
<td>Trade</td>
<td>51.0</td>
<td>279.8</td>
</tr>
<tr>
<td>Transportation</td>
<td>79.3</td>
<td>199.2</td>
</tr>
<tr>
<td>Communications</td>
<td>47.0</td>
<td>69.3</td>
</tr>
<tr>
<td>Financial services</td>
<td>47.5</td>
<td>119.2</td>
</tr>
<tr>
<td>Real estate</td>
<td>187.2</td>
<td>212.6</td>
</tr>
<tr>
<td>Professional services</td>
<td>197.1</td>
<td>954.5</td>
</tr>
<tr>
<td>Health care</td>
<td>27.9</td>
<td>113.4</td>
</tr>
<tr>
<td>Leisure/hospitality</td>
<td>39.8</td>
<td>213.9</td>
</tr>
<tr>
<td>Personal services</td>
<td>5.0</td>
<td>18.3</td>
</tr>
<tr>
<td>State/local government</td>
<td>49.8</td>
<td>207.4</td>
</tr>
<tr>
<td>Federal government</td>
<td>22.4</td>
<td>66.8</td>
</tr>
<tr>
<td>Total</td>
<td>798.2</td>
<td>2512 (indirect + induced)</td>
</tr>
</tbody>
</table>

¹Omitting the direct employment of LCPS.
Clearly, however, the results in Table 4 show:

THE OPERATING BUDGET SPENDING BY LCPS HAS WIDE AND DEEP IMPACTS ON OTHER ECONOMIC SECTORS IN THE COUNTY, PARTICULARLY PROFESSIONAL SERVICES, REAL ESTATE, TRANSPORTATION, TRADE, AND STATE/LOCAL GOVERNMENT

Impact of the LCPS Capital Budget

LCPS also makes capital expenditures, and these capital expenditures also have broad county impacts. In the past five years (2009-2013), yearly capital spending has averaged $91.4 million.\(^9\)

Capital spending is inherently “lumpy”. This means that, unlike operational spending, capital spending tends to progress in a pattern of high spending in some years followed by low

---

\(^9\) Includes both construction and maintenance expenditures, and are from the Loudoun County Public Schools’ Capital Funds and Improvement and Asset Preservation budgets.
spending in other years. Therefore, rather than look at capital spending for a typical year (as was done with the operating budget), this section will evaluate the impact of aggregate LCPS capital spending for projects completed over the last five fiscal years (2009-2013).

LCPS spent $456.8 million for capital projects completed from 2009 to 2013. Before calibrating the impacts of this spending, two questions must be addressed – the amount of funds for land acquisition, and leakage. Funds used for land acquisition have no economic impact because they simply represent payment for transfer of ownership. There is no resulting net impact on the county economy. Therefore, spending for land purchases must be subtracted before economic impact is calculated. In the case of the recent LCPS capital expenditures, data indicate only a small percentage (5.7%) has been for land acquisition. The $456.8 million recent five year capital project budget is reduced by 5.7% (to $430.6 million) before the economic impact calculations are commenced.

As with the operating budget, the issue of leakage deals with initial (direct) payments to out-of-county vendors. Such funds are not available for re-circulating in the county economy. The model of the Loudoun County economy shows 48% of non-residential construction spending is paid to out-of-county firms. Therefore, a leakage rate of 48% is used for non-land capital spending. For the five-year period of fiscal years 2009-2013, the direct capital spending retained in the county economy is therefore $223.9 million ($430.6 x 0.52).

---

10 Ibid.

11 Information provided by Assistant Superintendent Burden of the LCPS.

12 IMPLAN for Loudoun County, Virginia.
Table 5 shows the total regional spending impact of the five-year LCPS capital budget is $360 million and 2455 jobs. As would be expected, the largest component of both the spending and employment impacts is from the direct construction activities. However, indirect and induced effects increase the spending impact by 58% and increase the employment impact by 48%.

### Table 5. Total Loudoun County Economic Impact of LCPS Recent Five-Year (2009-2013) Capital Spending.

<table>
<thead>
<tr>
<th>Impact</th>
<th>Spending ($ millions)$^{1}$</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct effect</td>
<td>233.9</td>
<td>1664</td>
</tr>
<tr>
<td>Indirect effect</td>
<td>64.6</td>
<td>354</td>
</tr>
<tr>
<td>Induced effect</td>
<td>71.5</td>
<td>437</td>
</tr>
</tbody>
</table>

$^{13}$ 2455 jobs divided by direct spending of $233.9 million gives 10.5 jobs for every $1 million of LCPS capital spending.

THE CONCLUSION IS THAT EVERY $1 OF CAPITAL BUDGET SPENDING BY LCPS ON NON-LAND PURCHASES AND RETAINED IN THE COUNTY RESULTS IN $1.58 OF TOTAL COUNTY SPENDING. ALSO, EVERY $1 MILLION OF CAPITAL SPENDING BY LCPS IS ASSOCIATED WITH 10.5 JOBS IN THE REGION.
Table 6 divides the impacts of the LCPS capital budget by economic sector. After construction, the sectors most affected are real estate, professional services, trade, health care, and financial services for spending, and trade, professional services, health care, leisure/hospitality, and personal services for employment. So, just as for the operating budget:

**THE LCPS CAPITAL BUDGET HAS WIDE IMPACTS ACROSS MULTIPLE ECONOMIC SECTORS IN LOUDOUN COUNTY**

| Total effect | 370.0 | 2455 |

1 Omits funds for land acquisition.

Source: LCPS annual budgets; IMPLAN for Loudoun County, Virginia; and calculations by the author.
Table 6. Total Loudoun County Economic Impact of LCPS Recent Five-Year (2009-2013) Capital Spending by Economic Sector.

<table>
<thead>
<tr>
<th>Sector</th>
<th>Spending ($ millions)</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture</td>
<td>0.1</td>
<td>1.0</td>
</tr>
<tr>
<td>Natural resources</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Public utilities</td>
<td>2.4</td>
<td>2.9</td>
</tr>
<tr>
<td>Construction¹</td>
<td>233.3</td>
<td>1597.9</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>8.4</td>
<td>19.2</td>
</tr>
<tr>
<td>Trade</td>
<td>17.1</td>
<td>192.3</td>
</tr>
<tr>
<td>Transportation</td>
<td>3.7</td>
<td>19.7</td>
</tr>
<tr>
<td>Communications</td>
<td>4.4</td>
<td>13.6</td>
</tr>
<tr>
<td>Financial services</td>
<td>12.7</td>
<td>41.2</td>
</tr>
<tr>
<td>Real estate</td>
<td>25.7</td>
<td>62.4</td>
</tr>
<tr>
<td>Professional services</td>
<td>22.3</td>
<td>191.4</td>
</tr>
<tr>
<td>Health care</td>
<td>13.2</td>
<td>113.3</td>
</tr>
<tr>
<td>Leisure/hospitality</td>
<td>6.4</td>
<td>89.2</td>
</tr>
<tr>
<td>Personal services</td>
<td>7.3</td>
<td>88.5</td>
</tr>
<tr>
<td>State/local government</td>
<td>1.8</td>
<td>15.8</td>
</tr>
<tr>
<td>Federal government</td>
<td>1.2</td>
<td>6.6</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>370.0</strong></td>
<td><strong>2455</strong></td>
</tr>
</tbody>
</table>

¹ Includes expenditures for feeder school districts.
DEVELOPMENT OF HUMAN CAPITAL

Economic relationships can be viewed in an input-output format. Consider the production of vehicles. They are the output made from the inputs of steel, rubber, electronics, glass, machinery, and workers. Buyers value the vehicles, not the inputs. It is the value of vehicles made and sold which is part of the national accounts of aggregate economic output of the nation.

Education can also be usefully viewed in an input-output form. Inputs are the classrooms, books, computers, learning programs, and – of course – teachers and staff. The output is the knowledge and skills acquired by the students. Economists term such knowledge and skills “human capital”. It is the output – the “human capital” – that is valued by the students, their parents, and the community. In the modern economy, students with more “human capital” tend to be more successful, earn higher salaries, and are able to attract better-paying jobs to the community.

So, while the economic impacts measured in the previous section are important and useful, their calculation was an analysis of inputs. People are most interested in what the use of those inputs achieves. That is, what is the output of the inputs? The focus of this section is to

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1 includes indirect and induced effects in non-LCPS construction

Source: LCPS annual budgets; IMPLAN for Loudoun County, Virginia; and calculations by the author
measure the economic impact of LCPS by measuring the *gain in human capital* of the System’s students. The next two sections discuss and measure other *outputs* of LCPS.

The focus on outputs is in line with the current national interest in measuring the results of public schools. Most states and local school systems now consistently test students throughout the year to measure progress and achievement. Test results can be used to pinpoint areas where students may need further assistance in meeting the goal of graduation and successful entry into the workforce or college.

Even accepting that development of student human capital and successful completion of a K-12 program are the output goals of a public school system, such as LCPS, a challenge is establishing a measure or measures of the output. Two approaches are used in this report. The first borrows from numerous studies of the output of universities and colleges.\(^{14}\) Here, the financial value for a student attaining a college degree is the expected increase in lifetime income from a typical job obtained by a college graduate compared to the typical job obtained by a high school graduate. For K-12 school systems like LCPS, the same approach can be used with one change – the comparison is between the likely income earned by a high school graduate to the probable income earned by a high school dropout.\(^{15}\)


\(^{15}\) For an example of an application to public schools, see Economic Modeling Specialists, Inc., *The Economic Impact of Communities in Schools, May 2012*. 

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Economic Impact of Loudoun County Public Schools
Recognize that such a measure has some inherent issues and so it will only be an approximation to the real value of LCPS’ output. One important issue is that the measure does not separate the lifetime increment to income between that from the inherent talents of the student and that received from the school’s (here LCPS) training. Researchers have struggled with this issue without finding a suitable solution.

Another issue is the assumption that graduates effectively received all their training through LCPS, and therefore LCPS has a “claim” on the lifetime income increment. Certainly this is not the case for all students. Students frequently move in and out of school districts. For students who graduated from LCPS but received some of their K-12 training at another school district, their lifetime income increment overstates the contribution of LCPS. However, there will also be students who received some training in LCPS but moved away and graduated from another district. LCPS will not receive credit for the share of additional lifetime income it helped such students achieve. A large amount of data processing of student records – beyond the scope of this study – would have been necessary to sort these factors.

Therefore, the value of the additional human capital created by LCPS is calculated by assuming an average work life and applying the expected annual increase in earnings between a high school graduate and a high school dropout to the number of LCPS graduates. This procedure is applied to each of the five graduating classes from 2007 to 2011. A work life of 47 years (age 18 to 65) is assumed. The most recent data show the increment in annual earnings
between a high school dropout and high school graduate is approximately $9000.\textsuperscript{16} The lifetime (during 47 years) value of this annual increment in earnings is converted to a single value today (2012) using a technique called present value. The concept of present value accounts for the lower value of future dollars due to continuing inflation. An appropriate long-term interest rate is used as the “discount rate” to reduce the levels of future dollars. A long-term interest rate of 2.5% is used in the calculations. This was the annual rate on 30-year constant maturity Treasury bonds in the summer of 2012.\textsuperscript{17}

Table 7 gives the results of the calculations.\textsuperscript{18} The value ranges between $700 million and $1000 million depending on the number of graduates. The value has trended upward over time as the number of LCPS graduates has increased. However, the conclusion is clear.

\begin{center}
\textbf{IN RECENT YEARS, LCPS HAS ANNUALLY GRADUATED STUDENTS WHO WILL REALIZE AN ESTIMATED TOTAL PRESENT VALUE OF LIFETIME INCREMENT TO THEIR INCOME OF BETWEEN $700 MILLION AND $1000 MILLION ($1 BILLION)}
\end{center}

\textsuperscript{16} The annual earnings increment is specifically for Loudoun County (U.S. Census, \textit{American Community Survey}). It is slightly higher than the $8000 annual increment for the nation. This increment – in inflation-adjusted dollars – is assumed to be maintained throughout the graduate’s work career.

\textsuperscript{17} Federal Reserve System, at www.federalreserve.gov

\textsuperscript{18} See Appendix B for details on the calculations in Table 7.
Of course, many LCPS graduates go on to college. In the last five years, approximately sixty percent (70%) of LCPS graduates have entered college.\textsuperscript{19} Students successfully completing a college degree will further enhance their human capital and add to their lifetime income. For example, the average worker with a four-year college degree earns over $22,000 more annually than a worker with a high school diploma, while the average worker with a two-year degree earns over $10,000 more annually than a worker with a high school diploma.\textsuperscript{20}

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Graduates</th>
<th>Value ($ millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>3926</td>
<td>971.0</td>
</tr>
<tr>
<td>2010</td>
<td>3676</td>
<td>909.1</td>
</tr>
<tr>
<td>2009</td>
<td>3534</td>
<td>874.0</td>
</tr>
<tr>
<td>2008</td>
<td>3341</td>
<td>826.3</td>
</tr>
<tr>
<td>2007</td>
<td>2879</td>
<td>712.0</td>
</tr>
</tbody>
</table>

Source: LCPS, U.S. Census; calculations by author (Appendix B).

It makes logical sense that students performing better in high school will also perform at a higher level academically in college. This implies that high schools doing a better job

\textsuperscript{19} LCPS data.

\textsuperscript{20} U.S. Census, \textit{American Community Survey}.
training their students can “claim” some of the additional lifetime income earned by their college graduates. One recent study found a strong link between improvement in a student’s high school grade point average (GPA) and the student’s successful completion of college.21

Using an average annual earnings increment of $18,000 for a college graduate compared to a high school graduate, a work lifetime of 43 years (age 22 to 65), and the findings of the

Table 8. Present Value (2012$) of Estimated Increment to Lifetime Income of LCPS College Graduates Due to Improved High School Performance in Each Year.

<table>
<thead>
<tr>
<th>Year</th>
<th>LCPS Graduates Initially Attending College</th>
<th>Value ($ millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>2762</td>
<td>18.5</td>
</tr>
<tr>
<td>2010</td>
<td>2478</td>
<td>33.2</td>
</tr>
<tr>
<td>2009</td>
<td>2362</td>
<td>35.8</td>
</tr>
<tr>
<td>2008</td>
<td>2325</td>
<td>7.8</td>
</tr>
<tr>
<td>2007</td>
<td>1972</td>
<td>26.6</td>
</tr>
</tbody>
</table>

Source: U.S. Census; LCPS; calculations by author (Appendix C).

recent study linking improved high school performance to an increased likelihood of graduation from college, Table 8 gives the present value of additional lifetime earnings attributable to the LCPS for each graduating class.22 The values are based on the annual change in the GPA of

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**BASED ON IMPROVED ACADEMIC PERFORMANCE OF LCPS STUDENTS, ALMOST $122 MILLION OF ADDITIONAL LIFETIME INCOME OF RECENT LCPS GRADUATES WHO ARE FORECASTED TO COMPLETE COLLEGE CAN BE ATTRIBUTABLE TO THE LCPS.**
seniors planning to attend college. For all other years the values are positive and sum to $121.9 million for the five graduating classes examined. Therefore:

DEVELOPMENT OF SOCIAL CAPITAL

*Human capital* relates to the individual skills and training received by students to make them more productive workers and therefore able to command higher salaries. As such, human capital is an individual characteristic that applies specifically to individual rewards in the workplace.

In contrast, *social capital* refers to characteristics and actions of individuals which have wider public implications. For example, individuals with higher levels of social capital would be more likely to participate in the electoral process, less likely to engage in criminal activity, less likely to require public financial assistance, and more likely to lead healthy lifestyles so as to make fewer demands on the health care system.
There is a body of academic research indicating that education is linked to the development of social capital.\textsuperscript{23} That is, individuals with more education are more likely to vote and to be healthy and less likely to be involved in crime and to receive public assistance. Since these beneficial behaviors and circumstances are likely to reduce costs for the public sector (government), it can be implied that institutions promoting educational attainment – such as LCPS – have a positive economic impact of developing social capital and thereby reducing public costs.

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Graduates</th>
<th>Crime Cost Savings ($ millions)</th>
<th>Public Health Care Cost Savings ($ millions)</th>
<th>Welfare Cost Savings ($ millions)</th>
<th>Total Savings ($ millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>3926</td>
<td>$198.6</td>
<td>$86.1</td>
<td>$16.6</td>
<td>$301.3</td>
</tr>
<tr>
<td>2010</td>
<td>3676</td>
<td>$186.0</td>
<td>$80.7</td>
<td>$15.5</td>
<td>$282.2</td>
</tr>
<tr>
<td>2009</td>
<td>3534</td>
<td>$178.8</td>
<td>$77.4</td>
<td>$14.9</td>
<td>$271.1</td>
</tr>
<tr>
<td>2008</td>
<td>3341</td>
<td>$169.0</td>
<td>$73.2</td>
<td>$14.1</td>
<td>$256.3</td>
</tr>
<tr>
<td>2007</td>
<td>2879</td>
<td>$145.7</td>
<td>$63.1</td>
<td>$12.2</td>
<td>$221.0</td>
</tr>
</tbody>
</table>

Source: Lochner and Moretti; Alliance for Excellent Education; Levin, et. al.; calculations by author (Appendix D).

A comprehensive study of the impacts of educational attainment on crime found that for every additional high school graduate, annual spending on crime is reduced by $1841.24 Converting this annual amount for a period of 47 years (each 18 year old high school graduate lives to retirement age of 65) and using a discount rate of 2.5%, the annual lifetime savings per high school graduate is $50,591.25 After multiplying by the number of LCPS graduates in each of the last five years, Table 9 shows that annual savings have ranged between $145 million and $199 million.

Similarly, a recent study concluded that every student who graduates from high school is associated with a lifetime reduction of $21,940 (2012 $) in Medicaid and uninsured medical coverage costs.26 Table 9 indicates the associated savings in public health care costs for recent LCPS graduating classes range between $63 million and $86 million.

Finally, research has shown high school graduates reduce welfare (TANF: Temporary Aid to Needy Families) public costs relative to non-graduates, amounting to lifetime savings of $4225 per graduate.27 These aggregate benefits are also shown in Table 9.

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24 Lochner, Lance, and Enrico Moretti, “The Effect of Education on Crime: Evidence from Prison Inmates, Arrests, and Self Reports,” UCLA and the University of Western Ontario, October 2003. The authors’ monetary results have been updated to 2011 dollars using the Consumer Price Index. The authors’ lower range of findings is used.

25 See Appendix D for details on the calculations. Levin, et. al. argue the benefits for reduced crime expenditures end at age 65.

26 Alliance for Excellent Education, Healthier and Wealthier: Decreasing Health Care Costs by Increasing Educational Attainment”. Issue Brief, November 2006. The result is specifically for Virginia and has been updated to current (2012) dollars and interest rates.

27 Levin, et. al., Table 11. Dollar amounts have been updated to 2012 values and current discount rates.
Taken together, the last column of Table 9 shows the estimated lifetime savings in public costs for crime prevention, health care, and welfare associated with recent LCPS graduating classes. Therefore, the important conclusion is:

**IMPACT ON LOCAL WEALTH**

Local schools can have an impact on local wealth – primarily in terms of property wealth – in two ways. First, as local schools generate graduates who remain in the local economy, those graduates will spend more money. This additional spending generates more local economic activity which, in turn, makes local property more valuable. So there is a positive correlation between the higher spending from high school graduates (as compared to high school drop-outs) and local property values. Economists call this relationship “capitalization”, meaning the additional spending is “capitalized” into local property values.
The second effect comes from school quality – as indicated by various performance measures. A substantial literature review has found that homebuyers prefer to locate in localities with better quality schools, and they are willing to pay a higher price for the home to be in such a location. This means the value of better performing schools will also be “capitalized” into local property values.

Capturing these effects is challenging. For the first effect, the most direct way is to use comparisons of local property values to local income to gauge the change in property values when future incomes rise as a result of students graduating from high school. An examination of Virginia tax records shows that, prior to the real estate boom of the mid 2000s, the ratio of real (land and structures) property values to income in Loudoun County was 1.8. This suggests that every additional dollar of local income is capitalized into local property values at the rate of $1.80. The same tax records indicate that every dollar of real property in the region is taxed at a rate of 1.0 cents.

As indicated earlier, the annual earnings premium for high school graduates over high school dropouts is approximately $9000. If the high school graduate remains working in the


county, then this premium will be spent in the area and will be capitalized into county real property values. If the graduate acquires further education but remains in the county upon completion, the capitalized value of the high school earnings premium will remain. This premium – and its impact on real property values – will only be lost if LCPS graduates leave the county permanently. However, since the county is growing faster than the nation, such losses will be relatively small and will be counterbalanced by high school graduates from other regions moving to Loudoun County. Therefore Table 10 presents both the real property value and property tax values for the county using the entire earnings premium for each LCPS graduating class.\textsuperscript{31}

The annual impact on real property values ranges between $47 million and $64 million, and the annual impact on property tax revenues is near $0.6 million. While important, the values should be kept in perspective. A real property value of $60 million is 0.01\% of total county real property values in 2010. Nonetheless:

\begin{center}
THE CONTINUING GRADUATION OF FUTURE WORKERS AND CONSUMERS FROM LCPS HAS A POSITIVE IMPACT ON BOTH LOCAL REAL PROPERTY VALUES AND PROPERTY TAX REVENUES. EACH RECENT GRADUATING CLASS HAS ADDED CLOSE TO $60 MILLION IN COUNTY REAL PROPERTY VALUES AND $0.6 MILLION IN REAL PROPERTY TAX REVENUES IN LOUDOUN COUNTY.
\end{center}

\textsuperscript{31} See Appendix E for details on the calculations.
Table 10. Loudoun County Real Property Value and Property Tax Revenue Impacts of the Earnings Premium of LCPS Graduates

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Graduates</th>
<th>Associated Increase in Real Property Values ($ millions)</th>
<th>Associated Increase in Property Tax Revenues ($ millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>3926</td>
<td>$63.6</td>
<td>$0.64</td>
</tr>
<tr>
<td>2010</td>
<td>3676</td>
<td>$59.6</td>
<td>$0.60</td>
</tr>
<tr>
<td>2009</td>
<td>3534</td>
<td>$57.3</td>
<td>$0.57</td>
</tr>
<tr>
<td>2008</td>
<td>3341</td>
<td>$54.1</td>
<td>$0.54</td>
</tr>
<tr>
<td>2007</td>
<td>2879</td>
<td>$46.6</td>
<td>$0.47</td>
</tr>
</tbody>
</table>

Source: Virginia Department of Taxation; author’s calculations (Appendix E).

Before estimating the second impact of school performance on residential property values, it’s important to examine recent trends in measures of school performance for LCPS. Figures 4, 5, 6, and 7 show changes in four measures – the Scholastic Aptitude Test (SAT) total test score for reading and math, the SAT total test score for reading, math, and writing, the ACT (American College Testing), and the senior class grade point average (GPA). Two versions of the SAT are provided because a writing section was added in 2006. Some observers may be concerned this addition makes the total SAT not comparable over the entire time period. To
address this, both total SAT scores are given, with – of course – the score including the writing component only since 2006. All data are from LCPS.\footnote{New grading scales and weights were applied to the GPA scores in 2009.}

Each of the measures shows an improving trend over time; thus, using all measures, it can generally be concluded that LCPS performance has risen. If this improved performance is valued by homeowners – and research suggests it is – then residential property values in Loudoun County would respond in a positive way. Using the most research calibrating such a response and applying it to an estimate of residential property values in Loudoun County suggest that:\footnote{See Appendix F for details on the calculations.}

\begin{center}
\textbf{DUE TO IMPROVING ACADEMIC PERFORMANCE IN LCPS BETWEEN 2006 AND 2011, LOUDOUN COUNTY RESIDENTIAL PROPERTY VALUES ARE BETWEEN $4.7 AND $5.9 BILLION HIGHER THAN WITHOUT THE BETTER ACADEMIC RESULTS, AND ANNUAL LOUDOUN COUNTY PROPERTY TAX REVENUES ARE UP BY BETWEEN $47 AND $59 MILLION.}
\end{center}

\begin{figure}
\centering
\includegraphics[width=\textwidth]{figure4.png}
\caption{Figure 4. Trends in LCPS SAT-Reading and Math Scores.}
\end{figure}
Figure 5. Trends in LCPS SAT - Reading, Math, Writing Scores.

Figure 6. Trends in LCPS ACT Scores
**Figure 7.** Trends in LCPS GPA.

**SUMMARY**
LCPS has a large and varied economic impact in Loudoun County. This study has estimated those impacts in two broad categories: the economic effects of LCPS spending as an input in the K-12 educational system, and the economic effects of the outputs of LCPS. While both are important, it is the output measures which address the ultimate goal of LCPS: educated students who contribute to an improved standard-of-living and enhanced wealth in the local community.

As a major employer with a significant budget in the community, the economic impact of LCPS is substantial. Using the recent five-year budget average, it was found that every $1.00 of LCPS operating budget spending which is retained in the county economy results in total county spending of $1.59. Likewise, every one direct LCPS job is associated with another 0.28 jobs in the county economy.

Similar effects result from the LCPS capital budget. Every $1.00 of capital spending by LCPS and retained in the local economy results in a total of $1.58 of spending in the Loudoun County economy, and every $1 million of capital spending by LCPS is associated with an additional 10.5 jobs in the county.

Both the operating and capital budgets of LCPS were found to impact a large and varied number of economic sectors in the county economy, but particularly the professional services, real estate, trade, and state/local government sectors.

The report identified three important outputs of LCPS and estimated dollar values for each: the economic value of degrees awarded, the future reduction in public costs associated
with individuals graduating from college, and the impact on local wealth as a result of the academic performance of LCPS.

The economic value of degrees awarded by LCPS was measured by the lifetime increment in earnings of high school graduates compared to high school dropouts. For each of the past five graduating classes, this increment (in present value 2012 $) is between $700 and $1000 million ($1 billion). The academic performance of LCPS graduating seniors has also been improving, on trend, in recent years. This improvement – in turn – has increased the likelihood that LCPS students will complete a college degree. The value of this increased probability of completing college was estimated at an aggregate value of $122 million for the last five classes of LCPS seniors.

Considerable research has found that individuals graduating from high school are less likely to engage in criminal behavior and are more likely to lead healthy lifestyles and use less public financial assistance compared to high school dropouts. This means high school graduates reduce future public crime costs, public welfare, and public health costs. For each of the recent LCPS graduating classes, the reduction in these costs is estimated at between $220 million and $300 million (in present value 2012 $).

Lastly, LCPS can impact local wealth – specifically real property values – in two ways. One is through the additional spending that high school graduates create compared to high school dropouts. This impact was estimated to be near $60 million in additional county real property values and $0.6 million in higher county real property tax revenues for each recent class of LCPS graduates. The second, and more significant, impact comes from the positive response of
residential property values to improved academic performance of LCPS students. All standard measures of academic performance of LCPS seniors show improved trends in recent years. It is calculated that as a result of this improvement, Loudoun County property values are between $4.7 billion and $5.9 billion higher compared to the levels without the improvement in academic performance during 2006 to 2011. The corresponding increase in property tax revenues to Loudoun County is between $47 million and $59 million.

APPENDIX A: DEFINITIONS OF ECONOMIC SECTORS
Agriculture – commercial livestock, crop, forestry, and fishing activities

Natural resources – extraction of natural resource commodities

Public utilities – electric power generation, transmission, and distribution; natural gas distribution; and water and sewage treatment and delivery systems

School construction – construction of non-residential school structures

Other construction – construction, maintenance, and repair of residential and non-residential structures

Manufacturing – all manufacturing operations, including both durable and non-durable manufacturing

Trade – wholesale and retail trade

Transportation – air, rail, water, and truck transportation; couriers and messengers; and warehousing and storage

Communications – newspapers, periodicals, book, and software publishers; audio and video industries; cable programming; internet publishing and broadcasting; telecommunications; and data processing

Financial services – depository and non-depository intermediation institutions; securities, commodities, and insurance activities

Real estate – institutions involved in ownership and rental activities of real and personal property

Professional services – business, scientific, educational and management services and support staff

Health care – offices of physicians; hospitals, nursing, residential care, and child care services; individual and family services

Leisure/hospitality – performing arts; spectator sports; museums and parks; fitness and recreational sports centers; amusement parks; hotels and motels; food services and
drinking places

*Personal services* – machinery and electronic repair and maintenance; personal care services; religious, civic, social, and professional organizations

*Public schools* – public K-12 educational institutions

*State/local government* – transit, electric, and other local government enterprises; local public good provision

*Federal government* – U.S. Postal service; federal government enterprises; military installations; federal public good provision

### APPENDIX B: CALCULATION OF THE INCREMENT TO LIFETIME EARNINGS FROM HAVING A HIGH SCHOOL DEGREE
The dollar values in Table 7 were generated in the following way. First, the annual income increment of $9000 was multiplied by the number of graduates in each year.

Second, the present value factor sum corresponding to an interest rate of 2.5% and a 47 year time period was calculated. This value is the sum of the individual present value factors – assuming an interest rate of 2.5% - for each of 47 years. The interest rate indicates how much $1.00 declines in purchasing power in future years. So, for example, one year in the future $1.00 will have a purchasing power of 97.6 cents, and two years in the future $1.00 will have a purchasing power of 95.2 cents, etc. These purchasing power values are calculated for each of 47 years in the future and then summed.

Lastly, the present value factor sum derived in the second step is multiplied by the result of the first step (# graduates x $9000) to derive the results in the third column of Table 7.

APPENDIX C: CALCULATING THE IMPACT OF IMPROVED HIGH SCHOOL PERFORMANCE ON THE LIFETIME INCOME OF COLLEGE

34 The purchasing power one year ahead is found from the calculation \( \frac{1}{1.025} \), and the purchasing power two years ahead is found from the calculation \( \frac{1}{(1.025)^2} \). The “power” term corresponds to the number of years ahead.
GRADUATES

Geiser and Santelices’ research tested the effects of alternative measures of almost 80,000 high school students’ performance on their eventual likelihood of completing college. Four measures of the students’ high school performance – their high school grade point average (GPA), SAT verbal score, SAT math score, and SAT writing score – together with socioeconomic characteristics such as parent’s education and income, were used to predict each student’s probability of graduating from college. Among the high school performance measures, the student’s GPA was “consistently the strongest predictor of the four-year college outcomes for all academic disciplines and campuses.” Based on a four point scale for the GPA, the study found that for every one point increase in a student’s GPA, the student’s probability of graduating from college increased by 34%.

This information was used to calculate LCPS’ “claim” on the increase in lifetime income due to a college degree for a given LCPS graduating class using the following equation:

\[
\text{CHGGPA} \times \#\text{COL} \times \$18,000 \times 27.5 \times 0.34,
\]

where:

\[
\text{CHGGPA} = \text{change in the GPA from the previous year, in points (e.g., } 2.77 - 2.07 = 0.70), \text{ of seniors planning to attend college,}
\]

\[
\#\text{COL} = \text{number of LCPS graduating seniors planning to attend college,}
\]

\[
\$18,000 = \text{weighted average annual increase in earnings of a worker with a college}
\]

---

35 Geiser and Santelices, op. cit., 1.
degree (bachelor’s or associate’s degree) and a high school degree,

27.5 = present value factor sum for interest rate of 2.5% and a work life of 43 years,

0.34 = proportion of lifetime income increment due to improved high school performance.

Data for CHGGPA and #COL were provided by LCPS.

APPENDIX D: CALCULATING THE IMPACT OF A HIGH SCHOOL GRADUATE ON
REDUCED FUTURE PUBLIC CRIME COSTS, WELFARE AND PUBLIC HEALTH EXPENDITURES

To calculate the reduction in public crime costs associated with each high school graduate, Lochner and Moretti’s lower annual estimate, which was calculated in 1993-valued dollars, was first converted to 2012 dollars. This resulted in an annual reduction of $1841. To convert to a lifetime amount, the high school graduate’s age (18) was subtracted from the current retirement age (65 years) to derive a future period over which the annual savings would be realized of 47 years. The present value factor sum associated with a 2.5% interest rate and 47 year period was multiplied by the annual amount of $1841 to give a lifetime reduction in crime costs (in 2012 $) associated with each high school graduate of $50,591. Multiplying $50,591 by the number of annual LCPS graduates gave the total savings reported in the third column of Table 9.

The public health care cost savings per high school graduate calculated by the Alliance for Education Excellence are already in lifetime amounts. The monetary value was in 2005 dollars, so this amount was converted to 2012 dollars to give a lifetime value of $17,669. Multiplying $17,669 by the number of LCPS graduates gave the total savings reported in the third column of Table 9.

Similarly, the estimates of Levin, et. al. of welfare savings are in lifetime amounts per graduate, which have been updated to 2012 dollar values and applied to LCPS graduates.

APPENDIX E: CALCULATING THE IMPACT OF HIGH SCHOOL GRADUATES’
ANNUAL EARNINGS PREMIUM ON LOCAL REAL PROPERTY
VALUES AND PROPERTY TAX REVENUES

The annual earnings premium of a high school graduate over a high school dropout ($9000) is multiplied by the average ratio of real property value to personal income for the Loudoun County (1.8) and further by the number of LCPS graduates in each year to give the values in the third column of Table 10.

The values in the third column of Table 10 are multiplied by the tax rate of 0.01 (1.0 cents per $1) to derive the associated real property tax revenues in the fourth column of Table 10.
PERFORMANCE ON LOUDOUN COUNTY PROPERTY VALUES

The value of Loudoun County residential real estate is estimated at $42 billion in 2006. This is based on a total real property value for Loudoun County of $58.3 billion (Virginia Department of Taxation, Annual Report, Fiscal Year 2007) and a ratio of residential property value to total property value of 0.72 (Board of Governors of the Federal Reserve System, Flow of Funds Accounts).

The research by Brasington et. al. suggests a one standard deviation improvement in test scores is associated with a 7% increase in residential property values. Between 2006 and 2011, the LCPS SAT-math & reading average score increased 1.6 standard deviations; the SAT-math & reading & writing was up 1.9 standard deviations; the ACT rose 1.9 standard deviations; and the GPA increased 2.0 standard deviations. Thus, using the low and high standard deviation trends, the lower and upper bounds for the impact on residential property values and property taxes in Loudoun County as a result of the improved academic performance of LCPS students are:

Lower bound on increase in property value:  $42 billion x 1.6 x 0.07 = $4.7 billion

Lower bound on increase in property tax revenues:  $4.7 billion x 0.01 = $47 million

Upper bound on increase in property value:  $42 billion x 2.0 x 0.07 = $5.9 billion

Upper bound on increase in property tax revenues:  $5.9 billion x 0.01 = $59 million
# History of FTEs

<table>
<thead>
<tr>
<th>Position</th>
<th>FY10 Revised</th>
<th>FY11 Revised</th>
<th>FY12 Revised</th>
<th>FY13 Revised</th>
<th>FY14 Proposed</th>
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<tbody>
<tr>
<td><strong>School Based</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instruction</td>
<td>4,811.6</td>
<td>4,841.5</td>
<td>5,041.3</td>
<td>5,188.6</td>
<td>5,382.4</td>
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<tr>
<td>Bus Drivers &amp; Attendants</td>
<td>866.5</td>
<td>904.5</td>
<td>899.5</td>
<td>876.5</td>
<td>893.5</td>
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<tr>
<td>Teacher Assistants</td>
<td>1,116.2</td>
<td>1,142.7</td>
<td>1,213.3</td>
<td>1,255.6</td>
<td>1,310.7</td>
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<tr>
<td>Custodians</td>
<td>451.5</td>
<td>485.0</td>
<td>494.5</td>
<td>510.5</td>
<td>525.0</td>
</tr>
<tr>
<td>Other School Support</td>
<td>341.0</td>
<td>357.8</td>
<td>382.4</td>
<td>394.9</td>
<td>404.4</td>
</tr>
<tr>
<td>Administration</td>
<td>260.0</td>
<td>266.0</td>
<td>277.0</td>
<td>283.0</td>
<td>293.0</td>
</tr>
<tr>
<td>Instructional Support</td>
<td>151.5</td>
<td>154.0</td>
<td>187.7</td>
<td>191.1</td>
<td>201.1</td>
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<tr>
<td>Nurses &amp; Health Clinic Assistants</td>
<td>83.8</td>
<td>86.8</td>
<td>87.8</td>
<td>90.4</td>
<td>92.4</td>
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<tr>
<td><strong>Total School Based FTE's</strong></td>
<td>8,082.1</td>
<td>8,238.3</td>
<td>8,583.5</td>
<td>8,790.6</td>
<td>9,102.5</td>
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<tr>
<td><strong>Non-School Based</strong></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Secretarial/Clerical</td>
<td>154.2</td>
<td>150.2</td>
<td>144.5</td>
<td>140.0</td>
<td>142.5</td>
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<tr>
<td>Other Support Staff</td>
<td>316.3</td>
<td>303.3</td>
<td>324.7</td>
<td>338.2</td>
<td>356.2</td>
</tr>
<tr>
<td>Administration</td>
<td>147.5</td>
<td>141.7</td>
<td>124.7</td>
<td>128.0</td>
<td>129.0</td>
</tr>
<tr>
<td><strong>Total Non-School Based FTE's</strong></td>
<td>618.0</td>
<td>595.2</td>
<td>593.9</td>
<td>606.2</td>
<td>627.7</td>
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<td><strong>Total FTE's</strong></td>
<td>8,700.1</td>
<td>8,833.5</td>
<td>9,177.4</td>
<td>9,396.8</td>
<td>9,730.2</td>
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<tr>
<td>GROUPS</td>
<td>COUNTY GOVERNMENT OPEB REFORM</td>
<td>SUPERINTENDENT PROPOSED OPEB RETIREE PLAN CONSIDERATION</td>
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<td>--------------------------------------------------------</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Current Retirees</td>
<td>Current Retirees</td>
<td>Current Retirees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pre-65:</td>
<td>25 + LCPS Yrs</td>
<td>25 + LCPS Yrs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>85% of Full Active Rate</td>
<td>100% of Retiree Only rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>20-24 LCPS Yrs</td>
<td>20-24 LCPS Yrs</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>75% of Full Career ER Rate</td>
<td>50% of Retiree Only rate</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>15-19 LCPS Yrs</td>
<td>15-19 LCPS Yrs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>40% of Full Career ER Rate</td>
<td>50% of Retiree Only rate</td>
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<tr>
<td></td>
<td>10-14 LCPS Yrs</td>
<td>10-14 LCPS Yrs</td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>20% of Full Career ER Rate</td>
<td>30% of Retiree Only rate</td>
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<td></td>
</tr>
<tr>
<td>Annual cap 5%/overall cap 150%</td>
<td>Medicare eligible, ER contribution set at ‘Retiree Only’ rate. Future increases capped at 150% of 1/1/2014 rate.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Current Retirees</td>
<td>Current Retirees</td>
<td>Current Retirees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pre-65:</td>
<td>25 + LCPS Yrs</td>
<td>100% of Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>20-24 LCPS Yrs</td>
<td>90% of Rate</td>
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</tr>
<tr>
<td></td>
<td>15-19 LCPS Yrs</td>
<td>50% of Rate</td>
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<td></td>
<td>10-14 LCPS Yrs</td>
<td>30% of Rate</td>
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<td>Medicare eligible:</td>
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<td></td>
<td>25 + LCPS Yrs</td>
<td>25 + LCPS Yrs</td>
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<tr>
<td></td>
<td>90% of Full Active Rate</td>
<td>90% of Full Active Rate</td>
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<tr>
<td></td>
<td>20-24 LCPS Yrs</td>
<td>80% of Full Career ER Rate</td>
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<td></td>
<td>15-19 LCPS Yrs</td>
<td>40% of Full Career ER Rate</td>
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<tr>
<td></td>
<td>10-14 LCPS Yrs</td>
<td>20% of Full Career ER Rate</td>
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<td></td>
</tr>
<tr>
<td>Annual cap 5%/overall cap 150%</td>
<td>Minimum 15 years LCPS years to qualify for retiree health care benefit.</td>
<td></td>
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</tr>
<tr>
<td>Current Employees</td>
<td>Current Employees</td>
<td>Current Employees</td>
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<tr>
<td>35 yrs or older as of 1/1/13, excluding those in above group.</td>
<td>35 yrs or older as of 1/1/13, excluding those in above group.</td>
<td>35 yrs or older as of 1/1/13, excluding those in above group.</td>
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</tr>
<tr>
<td>New Hires on or after 1/1/2013</td>
<td>New Hires on or after 1/1/2013</td>
<td>New Hires on or after 1/1/2013</td>
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</tr>
<tr>
<td>$2700 per year into a Retiree Health Savings Account for first 15 years. Then $2100 per year afterwards until retirement.</td>
<td>$2100 per year into a Retiree Health Savings Account. Must have 15 years of Service to continue plan into retirement.</td>
<td>$2100 per year into a Retiree Health Savings Account. Must have 15 years of Service to continue plan into retirement.</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>New Hires on or after 1/1/2014</td>
<td>New Hires on or after 1/1/2014</td>
<td>New Hires on or after 1/1/2014</td>
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<tr>
<td>$2700 per year into a Retiree Health Savings Account.</td>
<td>$2100 per year into a Retiree Health Savings Account. Must have 15 years of Service to continue plan into retirement.</td>
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</tbody>
</table>
County ARC Compared to Funding

Loudoun County Public Schools ARC Compared to Funding
2011
Catalog of
State and Federal Mandates
on Local Governments

Commission on Local Government
Department of Housing and Community Development
Commonwealth of Virginia
http://www.dhcd.virginia.gov

September 2011
### Catalog of State and Federal Mandates on Local Governments - 2011

#### Superintendent of School Division Required

**SOE.DOE001**

School divisions are required to have a superintendent of schools. The superintendent must be appointed by the school board of the school division from the entire list of eligible candidates certified by the State Board of Education. Each school division shall provide for the necessary travel and office expenses of the superintendent.

- **Type:** Compulsory Order
- **Agency:** Department of Education
- **Secretariat:** Education
- **Authority:** Code of Virginia §§ 22.1-58 et seq.; State Board of Education Regulations 8 VAC 20-22-10 et seq., 8 VAC 20-390-10 et seq.
- **Last Assessment Period:** 4/1/2006 to 5/31/2006
- **Last Assessment Finding:** Retain
- **Current Assessment Period**
- **Comment:**

#### School Board Employee Grievance Procedure

**SCE.DOE002**

School divisions must have prescribed grievance procedures covering all school employees except superintendents and probationary employees.

- **Type:** Compulsory Order
- **Agency:** Department of Education
- **Secretariat:** Education
- **Authority:** Code of Virginia §§ 22.1-79, 22.1-306 et seq.; State Board of Education Regulation 8 VAC 20-90-10 et seq.
- **Last Assessment Period:** 4/1/2005 to 5/31/2005
- **Last Assessment Finding:** Retain
- **Current Assessment Period**
- **Comment:**

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Catalog of State and Federal Mandates on Local Governments - 2011

Felony/Child Abuse/Molestation/Crime of Moral Turpitude Offense Certification Required

School boards shall require on applications for employment certification that the applicant has not been convicted of a felony or any offense involving the sexual molestation, physical or sexual abuse, or rape of a child; whether the applicant has been convicted of a crime of moral turpitude; and that the applicant has not been the subject of a founded case of child abuse and neglect. School boards must determine whether the applicant was the subject of a founded case of abuse and neglect by searching the in-state registry maintained by DSS, and take reasonable steps to determine whether the applicant was the subject of a founded case in another state. An applicant or employee who is the subject of a founded complaint of child abuse or neglect shall be denied employment. Prior to awarding a contract for services that requires a contractor or his employees to have direct contact with students, school boards must require the contractor and said employee to certify that he has not been convicted of a felony involving the sexual molestation, physical or sexual abuse, or rape of a child, and whether he has been convicted of a crime of moral turpitude.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education

Authority: Code of Virginia §§ 22.1-296.1, 22.1-296.4; State Board of Education Regulation 8 VAC 20-22-10 et seq.

Last Assessment Finding: Retain
Current Assessment Period 7/1/2011 to 8/31/2011

Comment: Scheduled for FY12 assessment.

Teacher License Required

School divisions may only employ as teachers those persons who hold licenses or provisional licenses issued by the State Board of Education, or those who hold a three-year eligibility license issued by the division. School divisions must provide the State Board of Education information regarding the issuance of local eligibility licenses. Teachers employed under federal Title I programs must be fully licensed and teaching in their areas of endorsement.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education

Authority: Code of Virginia §§ 22.1-299 et seq.; State Board of Education Regulations 8 VAC 20-22-10 et seq., 8 VAC 20-440-10 et seq.; P.L. 89-10 (Fed.); P.L. 107-110 (No Child Left Behind Act of 2001) (Fed.)

Last Assessment Period: 5/1/2001 to 6/30/2001
Last Assessment Finding: Retain
Current Assessment Period

Comment:
Catalog of State and Federal Mandates on Local Governments - 2011

Licensed Principals and Assistant Principals

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia §§ 22.1-293 et seq.; State Board of Education Regulations 8 VAC 20-22-10 et seq., 8 VAC 20-440-10 et seq.

Last Assessment Finding: Retain
Current Assessment Period

Comment:

School Board Background Checks for Employees and Contractors

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education

Last Assessment Period: 5/1/2003 to 6/30/2003
Last Assessment Finding: Retain
Current Assessment Period 8/1/2011 to 9/30/2011

Comment: Scheduled for FY12 assessment.
Catalog of State and Federal Mandates on Local Governments - 2011

Minimum Instructional Personnel Requirements

School divisions are required to employ a minimum number of licensed, full-time equivalent instructional personnel deemed sufficient to meet the instructional needs of students attending public schools as set forth in the Standards of Quality. School divisions receiving federal funds must comply with certain employment requirements set forth in the No Child Left Behind Act of 2001.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education

Last Assessment Period: 2/1/2002 to 3/31/2002
Last Assessment Finding: Retain
Current Assessment Period

Comment:

Pupil/Teacher Ratios

School divisions are required to assign licensed instructional personnel in a manner that produces division-wide ratios of students in average daily membership to full-time equivalent teaching positions, excluding special education teachers, principals, assistant principals, counselors, and librarians, according to ratios prescribed in the Code of Virginia. In addition, instructional personnel must be assigned in a manner that produces school-wide ratios of 21 to 1 in middle schools and high schools. Annual reports on actual elementary school pupil/teacher ratios are required.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education

Last Assessment Period: 2/1/2002 to 3/31/2002
Last Assessment Finding: Retain
Current Assessment Period

Comment:

Provision of School Support Services

School divisions are required to provide those support services necessary for the efficient and cost-effective operation and maintenance of public schools.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-253.13:2; State Board of Education Regulation 8 VAC 20-131-240

Last Assessment Period: 2/1/2002 to 3/31/2002
Last Assessment Finding: Retain
Current Assessment Period

Comment:
### Catalog of State and Federal Mandates on Local Governments - 2011

#### Professional Development for School Board Members

School divisions must require their school board members to participate annually in in-service programs on personnel, curriculum, current issues in education, and other areas as specified in the Standards of Quality as part of their service on the local board. In addition, they must require the division superintendent to participate annually in professional development activities at the local, State, or national levels.

<table>
<thead>
<tr>
<th>Type</th>
<th>Compulsory Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency</td>
<td>Department of Education</td>
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<tr>
<td>Secretariat</td>
<td>Education</td>
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<td>Authority</td>
<td>Code of Virginia § 22.1-253.13:5</td>
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<td>3/1/2002 to 4/30/2002</td>
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<td>Current Assessment Period</td>
<td></td>
</tr>
<tr>
<td>Comment</td>
<td></td>
</tr>
</tbody>
</table>

#### Management of Student Scholastic Records

School divisions must comply with State and federal requirements for the management of students’ scholastic records. When a student transfers from a local school division, that local school division shall obtain written or electronic documentation of the student’s transfer before making any status classification in an information management system prescribed by the Board of Education.

<table>
<thead>
<tr>
<th>Type</th>
<th>Compulsory Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency</td>
<td>Department of Education</td>
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<tr>
<td>Secretariat</td>
<td>Education</td>
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<tr>
<td>Authority</td>
<td>Code of Virginia §§ 16.1-305.1, 22.1 3.1, 22.1 254.02, 22.1-287 et seq., 32.1-36.1; State Board of Education Regulations 8 VAC 20-150-10 et seq.; Family Educational Rights and Privacy Act (Fed.); 20 USC 1232g (Fed.); 34 CFR 99 (Fed.)</td>
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<td>Last Assessment Period</td>
<td>5/1/2003 to 6/30/2003</td>
</tr>
<tr>
<td>Last Assessment Finding</td>
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<tr>
<td>Current Assessment Period</td>
<td></td>
</tr>
<tr>
<td>Comment</td>
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</tr>
</tbody>
</table>

#### Comprehensive Plan

School divisions are required to adopt biennially a division-wide comprehensive plan that shall be developed with staff and community involvement, including public comment. Each public school shall prepare a comprehensive plan that shall be given consideration by its school board in the development of the division-wide comprehensive plan. The plan must include strategies for improving student achievement, particularly the achievement of educationally-at-risk students.

<table>
<thead>
<tr>
<th>Type</th>
<th>Compulsory Order</th>
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</thead>
<tbody>
<tr>
<td>Agency</td>
<td>Department of Education</td>
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<tr>
<td>Secretariat</td>
<td>Education</td>
</tr>
<tr>
<td>Last Assessment Period</td>
<td>3/1/2002 to 4/30/2002</td>
</tr>
<tr>
<td>Last Assessment Finding</td>
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</tr>
<tr>
<td>Current Assessment Period</td>
<td></td>
</tr>
<tr>
<td>Comment</td>
<td></td>
</tr>
</tbody>
</table>
# Catalog of State and Federal Mandates on Local Governments - 2011

## Annual Report on Schools

School divisions are required to submit an annual report to the State Board of Education providing statistical information on enrollment in certain specified categories.

| Type:       | Compulsory Order  |
| Agency:     | Department of Education |
| Secretariat:| Education          |
| Authority:  | Code of Virginia §§ 22.1-81, 22.1-259, 22.1-260 |
| Last Assessment Finding: | Retain |
| Current Assessment Period | |
| Comment:    | |

## Records of Non-Resident Students with Disabilities

School divisions are required to keep an accurate record of each child with a disability who is not a resident of the school division but who is attending a school in the division. School divisions are also required to certify their records and plans for educating such children to the State following the end of the school year.

| Type:       | Compulsory Order  |
| Agency:     | Department of Education |
| Secretariat:| Education          |
| Last Assessment Period: | 6/1/2006 to 7/31/2006 |
| Last Assessment Finding: | Retain |
| Current Assessment Period | |
| Comment:    | |

## Verification of Student Immunization

School divisions must determine that students have been immunized before they can be admitted into the public school system. Certain medical and religious exemptions are allowed. Compliance with the McKinney-Vento Homeless Education Assistance Improvements Act is required when admitting students who are homeless and in need of immunizations.

| Type:       | Compulsory Order  |
| Agency:     | Department of Education |
| Secretariat:| Education          |
| Authority:  | Code of Virginia § 22.1-271.2; 42 USC 11431 et seq. (McKinney-Vento Homeless Education Assistance Improvements Act) (Fed.) |
| Last Assessment Period: | 6/1/2006 to 7/31/2006 |
| Last Assessment Finding: | Retain |
| Current Assessment Period | |
| Comment:    | |
Catalog of State and Federal Mandates on Local Governments - 2011

Attendance Guidelines for HIV-Infected Student and Persons with Infectious Diseases

School divisions must adopt guidelines for school attendance for children with human immunodeficiency virus. Guidelines must be consistent with the model developed by the State Board of Education. School divisions must provide training to school personnel having direct contact with students on the effects of blood-borne pathogens or certain other infections. School division superintendents shall report to their local health director any incident in which any employee is involved in a possible exposure-prone incident. Persons suffering with contagious or infectious diseases shall be excluded from public schools while in that condition.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Last Assessment Period: 4/1/2005 to 5/31/2005
Last Assessment Finding: Retain
Current Assessment Period

Comment:

Provision of Free Education

School divisions must provide free education to each person of school age, to include school-age persons who are homeless children or youth, and localities must appropriate funds for this purpose. School divisions shall not charge tuition to children of active members of the military who are ordered to locate to military housing located in a different school division than the one the child is attending at the time of the order to relocate. These children shall be allowed to continue attending school in the school division they attended immediately prior to the relocation.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Last Assessment Period: 6/1/2006 to 7/31/2006
Last Assessment Finding: Retain
Current Assessment Period

Comment:
## Catalog of State and Federal Mandates on Local Governments - 2011

### Provision of Free Textbooks

School divisions must provide free textbooks and workbooks required for courses of instruction for all public school children. Local school boards shall either enter into written term contracts or issue purchase orders on an as-needed basis with publishers of textbooks approved by the Board of Education for use in the public schools. Every school board shall order directly from the respective publishers the books needed to supply the public schools in the school division. With the approval of the local school board and the publisher, any private school within the school division that so requests may purchase from the local school board’s contract with the publisher.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** The Constitution of Virginia, Article VIII, § 3; Code of Virginia §§ 22.1-238, 22.1-241, 22.1-243  
**Last Assessment Period:** 6/1/2006 to 7/31/2006  
**Last Assessment Finding:** Retain  
**Current Assessment Period**  
**Comment:**

### Use of Approved Textbooks

School divisions must select and utilize instructional materials approved by the Board of Education, except that school divisions may utilize textbooks not approved by the Board provided such books are selected in accordance with regulations promulgated by the Board.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia §§ 22.1-8, 22.1-238 et seq.; State Board of Education Regulations 8 VAC 20-220-10 et seq., 8 VAC 20-270-10 et seq.  
**Last Assessment Period:** 4/1/2005 to 5/31/2005  
**Last Assessment Finding:** Retain  
**Current Assessment Period**  
**Comment:**

### Length of School Term

In order for a school division to receive its full allocation of State aid, all schools within the division must maintain a length of term that does not fall below 180 days or 990 hours in any year.

**Type:** Non-Discretionary Condition of Aid  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia § 22.1-98; State Board of Education Regulations 8 VAC 20-521-10 et seq., 8 VAC 20-131-10 et seq.  
**Last Assessment Period:** 8/1/2006 to 9/30/2006  
**Last Assessment Finding:** Retain  
**Current Assessment Period**  
**Comment:**

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Local School Division Policies

School divisions are required to maintain and follow up-to-date policies and ensure that policies take into account the views of teachers, parents, and other concerned citizens. The public must be annually advised of the placement and availability of policies. A current copy of the school division’s policies, including the Student Conduct Policy, must be posted on the school divisions’ Websites. School divisions must develop policies regarding the distribution of political materials by students and the administration of surveys or questionnaires to students. In addition, in any case in which a questionnaire or survey requesting sexual information of students is to be administered, the school division shall notify the parents in writing. School boards also must develop policies and procedures to address complaints of sexual abuse of a student by a teacher or other school board employee, as well as policies and procedures regarding the identification and handling of suspected concussions in student athletes.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education


Last Assessment Period: 3/1/2002 to 4/30/2002
Last Assessment Finding: Retain
Current Assessment Period

Comment:

Professional Development for Teachers and Administrators

School divisions are required to provide a program of high quality professional development, as specified in the Standards of Quality, and must review their professional development program annually.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education


Last Assessment Period: 3/1/2002 to 4/30/2002
Last Assessment Finding: Retain
Current Assessment Period

Comment:

Standards of Accreditation Requirements

School divisions shall maintain schools that are fully accredited pursuant to the Standards of Accreditation as prescribed by the Board of Education. When failure of schools within a division to achieve full accreditation status is related to division-level failure to implement the Standards of Quality, the Board may require a division-level academic review and submission of a division corrective action plan.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education

Authority: Code of Virginia §§ 22.1-19, 22.1-253.13:3; State Board of Education Regulations 8 VAC 20-131-10 et seq.

Last Assessment Period: 4/1/2002 to 5/31/2002
Last Assessment Finding: Retain
Current Assessment Period

Comment:
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<tr>
<th>Elementary and Secondary Education Act Regulations</th>
<th>SOE.DOE031</th>
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<td>School divisions receiving funds from the Elementary and Secondary Act of 1965, reauthorized by the No Child Left Behind Act of 2001, must follow certain federal laws and administrative regulations with respect to student achievement, accountability, teacher quality, parental options, and other requirements.</td>
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<td><strong>Type:</strong></td>
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<tr>
<th>Minimum Standards for New Construction and Renovation of School Facilities</th>
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<tr>
<td>All school construction or renovation plans must be approved by the division superintendent to insure compliance with minimum standards adopted by the State Board of Education and the Uniform Statewide Building Code, and must be submitted to the Superintendent of Public Instruction.</td>
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<td><strong>Type:</strong></td>
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<tr>
<td><strong>Authority:</strong></td>
<td>Code of Virginia §§ 22.1-138, 22.1-140, Code of Virginia Title 36, Ch. 6; State Board of Education Regulation 8 VAC 20-131-260</td>
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<tr>
<th>Nondiscriminatory Access to Vacation School or Summer Camp</th>
<th>SOE.DOE033</th>
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<tr>
<td>Any vacation school or summer camp operated by a school division or any other local agency, department, or board shall be available to persons of school age within the applicable jurisdiction on a nondiscriminatory basis regardless of whether a person attends public or private schools.</td>
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<tr>
<td><strong>Type:</strong></td>
<td>Regulation of Optional Activity</td>
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#### Radon Testing of Public Schools

All public school buildings must have been tested for radon by July 1, 1994. Buildings and additions opened after that date must also be tested. Radon tests shall be conducted pursuant to Environmental Protection Agency procedures for radon measurements in schools, and the division superintendent must report test results to the Department of Health. Each school is to maintain files on its radon test results and make these files available for review.

- **Type:** Compulsory Order
- **Agency:** Department of Education
- **Secretariat:** Education
- **Authority:** Code of Virginia § 22.1-138
- **Last Assessment Period:** 6/1/2005 to 7/31/2005
- **Last Assessment Finding:** Retain
- **Current Assessment Period:**
- **Comment:**

#### School Transportation

School divisions must comply with Federal Motor Vehicle Safety Standards and State laws and regulations for school buses, equipment, insurance, and driver qualifications if transportation is provided for children. Persons under age 18 are not permitted to drive school buses. School boards may enter into agreements with nonpublic schools in the school division to provide student transportation for a fee to and from nonpublic schools. School boards may display decals regarding local school division bus safety hotlines. Local school divisions must bear the cost. Any new bus placed into service after July 1, 2007 must be equipped with certain warning devices. In addition, a school division may use video-monitoring systems to assist with convicting drivers who pass stopped school buses, provided that the equipment captures specific information and that the local governing body has authorized the use of such equipment by ordinance.

- **Type:** Regulation of Optional Activity
- **Agency:** Department of Education
- **Secretariat:** Education
- **Authority:** Code of Virginia §§ 22.1-176 et seq., 33.1-223.2:18, 40.1-100, 46.2-328, 46.2-339 et seq., 46.2-844, 46.2-859, 46.2-919, 46.2-1055, 46.2-1089, 46.2-1090, 46.2-1090.1, 46.2-1091, 46.2-1105; State Board of Education Regulation 8VAC 20-70-10 et seq.; P. L. 103-272 (Fed.); 49 USC 105 (Fed.); 49 USC 30125 (Fed.); 49 CFR 571 et seq. (Fed.)
- **Last Assessment Period:** 10/1/2001 to 12/31/2001
- **Last Assessment Finding:** Retain
- **Current Assessment Period:**
- **Comment:**
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### School Nutrition Programs

**SOE.DOE039**

School divisions that agree to participate in the federal school nutrition programs must comply with regulations covering meal requirements; determination and service of free, reduced price, and paid meals served; financial and resource management; nonprofit status; procurement; effective use of commodity foods; record keeping; and sanitation and health standards.

- **Type:** Non-Discretionary Condition of Aid
- **Agency:** Department of Education
- **Secretariat:** Education
- **Authority:** Child Nutrition Act of 1966 (Fed.); National School Lunch Act (Fed.); 42 USC 1751 et seq. (Fed.); 42 USC 1771 et seq. (Fed.); P.L. 108-265; 7 CFR 210 et seq. (Fed.)
- **Last Assessment Period:** 1/1/2002 to 3/30/2002
- **Last Assessment Finding:** Retain
- **Current Assessment Period**
- **Comment:**

### Regulation of Food and Drink Sales

**SOE.DOE042**

School divisions must comply with State and federal requirements regulating the sale of food and drink during lunch periods.

- **Type:** Compulsory Order
- **Agency:** Department of Education
- **Secretariat:** Education
- **Authority:** State Board of Education Regulation 8 VAC 70-290-10 et seq.; National School Lunch Act (Fed.); Child Nutrition Act of 1966 (Fed.); 42 USC 1751 et seq. (Fed.); 42 USC 1771 et seq. (Fed.); 7 CFR 210.11 (Fed.); P.L. 108-265 (Fed.)
- **Last Assessment Period:** 2/1/2002 to 4/30/2002
- **Last Assessment Finding:** Retain
- **Current Assessment Period**
- **Comment:**

### School Breakfast Programs

**SOE.DOE043**

School divisions are required to establish school breakfast programs in any school in which 25 percent or more of the students are approved in the federally funded free or reduced-price lunch program. Further, school divisions also must annually report on their school breakfast programs to the Department of Education, including the numbers and socioeconomic characteristics of the students participating in the program.

- **Type:** Compulsory Order
- **Agency:** Department of Education
- **Secretariat:** Education
- **Authority:** Code of Virginia § 22.1-207.3; State Board of Education Regulation 8 VAC 20-580-10 et seq.; National School Lunch Act (Fed.); Child Nutrition Act of 1966 (Fed.); 42 USC 1751 et seq. (Fed.); 42 USC 1771 et seq. (Fed.); 7 CFR 210 et seq. (Fed.); P.L. 108-265 (Fed.)
- **Last Assessment Period:** 3/1/2002 to 4/30/2002
- **Last Assessment Finding:** Retain
- **Current Assessment Period**
- **Comment:**

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Program of Instruction for Grades K-12

School divisions must develop and implement a program of instruction that is aligned to the Standards of Learning for grades K through 12, as prescribed by the Code of Virginia, and meets or exceeds the requirements of the Board of Education. The program of instruction shall emphasize essential knowledge and skills, concepts and processes, and the development of the ability to apply such skills and knowledge to the preparation for eventual employment or appropriate training and lifelong learning. In addition, school divisions must collect and use data to make decisions about the instructional program.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-253.13:1
Last Assessment Period: 4/1/2002 to 5/31/2002
Last Assessment Finding: Retain
Current Assessment Period
Comment:

Instruction Standards for K-3

School divisions are required to implement programs in grades K through 3 that emphasize developmentally appropriate learning to enhance success.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-253.13:1(1)
Last Assessment Period: 4/1/2002 to 5/31/2002
Last Assessment Finding: Retain
Current Assessment Period
Comment:

Programs to Increase Numbers of Students Earning Diplomas

School divisions are required to implement programs based on prevention, intervention, or remediation designed to increase the number of students who earn a high school diploma and prevent them from dropping out of school.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-253.13:1(D)(2)
Last Assessment Period: 5/1/2002 to 6/30/2002
Last Assessment Finding: Retain
Current Assessment Period
Comment:
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Drugs, Substance Abuse, and Drunk Driving

School divisions are required to provide instruction concerning drugs, substance abuse, and the public safety hazards and dangers of substance abuse, underage drinking, and drunk driving.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia §§ 22.1-205 and 22.1-206; State Board of Education Regulations 8 VAC 20-310-10 et seq.

Last Assessment Period: 6/1/2005 to 7/31/2005
Last Assessment Finding: Retain
Current Assessment Period
Comment:

Physical and Health Education

School divisions are required to emphasize physical and health education throughout their curricula in accordance with State regulations. Each division must establish an advisory board to assist with the development of health policy and evaluate the status of school health education, environment, and health services. In addition, local school boards must implement a program of physical fitness available to all students with a goal of at least 150 minutes per week on average during the regular school year.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education

Last Assessment Period: 6/1/2005 to 7/31/2005
Last Assessment Finding: Retain
Current Assessment Period
Comment:

Funds for Driver Education Standards

School divisions must comply with the standardized program and regulations established by the Board of Education for driver education programs in order to receive State funds for driver education programs.

Type: Non-Discretionary Condition of Aid
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia §§ 22.1-205, 46.2-334; State Board of Education Regulation 8 VAC 20-340-10 et seq.

Last Assessment Period: 8/1/2006 to 9/30/2006
Last Assessment Finding: Retain
Current Assessment Period
Comment:
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Identification and Enrollment of Gifted Students

School divisions are required to provide a plan of services for gifted students from grades K through 12, and must implement early identification of gifted students and the enrollment of such students in appropriately differentiated instructional programs. Local school divisions must report annually to the State on such programs.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education

Last Assessment Period: 5/1/2002 to 6/30/2002
Last Assessment Finding: Retain
Current Assessment Period

Comment:

Educational Alternatives for Students

School divisions are required to implement educational programs for students whose needs are not met in programs prescribed in the Standards of Quality. Such students shall be counted in average daily membership in accordance with the regulations of the Board of Education.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia §§ 22.1-200.1:2, 22.1-253.13:1(D); State Board of Education Regulation 8 VAC 20-330-10 et seq.

Last Assessment Period: 5/1/2002 to 6/30/2002
Last Assessment Finding: Retain
Current Assessment Period

Comment:

Programs for Educationally At-Risk Students

School divisions are required to develop and implement programs of prevention, intervention, and remediation, including summer school, for students who are educationally at-risk, including but not limited to those who fail to achieve a passing score on any Standards of Learning assessment in grades three through eight; or who fail an end-of-course test required for the award of a verified unit of credit required for the student's graduation. Prevention, intervention, and remediation programs must include components that are research based. Local school boards must offer an early identification program for students with difficulties in reading and mathematics.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-253.13:1(C) and (D)

Last Assessment Period: 5/1/2002 to 6/30/2002
Last Assessment Finding: Retain
Current Assessment Period

Comment:
### Plans and Procedures for Measuring Progress of At-Risk Students

**SOE.DOE054**

School divisions are required to implement a plan to make achievements for educationally at-risk students a division-wide priority. The plan must include procedures for measuring the progress of such students. A local school board may establish after school programs designed to prevent at-risk youth from engaging in illegal or gang-related activities for school aged children. Local funds appropriated for K through 12 education may be used to support such after-school programs.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia §§ 22.1-253.13:1(D) and 22.1-199.5; State Board of Education Regulations 8 VAC 20-630-10 et seq.; Item 132, Chapter 890, 2011 Acts of Assembly.

**Last Assessment Period:** 6/1/2002 to 7/31/2002  
**Last Assessment Finding:** Alter  
**Current Assessment Period**  
**Comment:**

### Adult Education Programs

**SOE.DOE055**

School divisions are required to implement education programs for adults functioning below the high school completion level.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia § 22.1-253.13:1(D); State Board of Education Regulation 8 VAC 20-30-10 et seq.; Workforce Investment Act of 1998 (Fed.); P.L. 105-220 (Fed.)

**Last Assessment Period:** 6/1/2002 to 7/31/2002  
**Last Assessment Finding:** Retain  
**Current Assessment Period**  
**Comment:**

### Pupil Personnel Services in Grades K-12

**SOE.DOE058**

School divisions are required to provide a program of pupil services for grades K through 12 that shall be designed to aid students in their educational, social, and career development.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia § 22.1-253.13:1

**Last Assessment Period:** 7/1/2002 to 8/31/2002  
**Last Assessment Finding:** Retain  
**Current Assessment Period**  
**Comment:**

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#### Administration of Assessment Instruments

**SOE.DOE059**

School divisions are required to administer appropriate assessments which may include criterion-referenced tests, teacher-made tests, and alternative assessment instruments, and shall include the Standards of Learning Assessments and the National Assessment of Educational Progress State-by-State Assessment. Each school division shall analyze and report annually to the public, in compliance with any criteria that may be established by the Board of Education, the results from the Stanford 9 Assessment, if administered, industry certification examinations, and the Standards of Learning Assessments.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia § 22.1-253.13:3; State Board of Education Regulation 8 VAC 20-131-10 et seq.; Individuals with Disabilities Education Improvement Act of 2004 (Fed.); 20 USC 1412 (Fed.); 34 CFR 300.320 (Fed.)

**Last Assessment Period:** 7/1/2002 to 8/31/2002  
**Last Assessment Finding:** Retain  
**Current Assessment Period**

**Comment:**

#### Student Achievement and Graduation Requirements

**SCE.DOE061**

School divisions are required to have procedures for locally awarded verified units of credit, and to award diplomas to all secondary school students who earn the units of credit prescribed by the Board of Education, pass the prescribed tests, and meet such other requirements as may be prescribed by the school division and approved by the Board of Education. For students needing credits for graduation, school divisions shall notify parents of the need and the student's right to remain in school in accordance with specified provisions of the law. In addition, if a school division offers elective courses in American Sign Language, it must grant academic credit for course completion on the same basis as the successful completion of a foreign language course.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia §§ 22.1-207.5 and 22.1-253.13:4; Chapter 473, 2004 Virginia Acts of Assembly; State Board of Education Regulation 8 VAC 20-131-10 et seq.

**Last Assessment Period:** 7/1/2002 to 8/31/2002  
**Last Assessment Finding:** Retain  
**Current Assessment Period**

**Comment:**

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Competency-Based Career and Technical Education Program and Standards

School divisions are required to develop a plan for and implement competency-based career and technical education programs to promote knowledge of careers and types of employment, and to ensure that students are prepared to enter employment and continue formal education. The programs must include instruction about employment opportunities, labor market needs, applied basic skills, job-seeking skills, and career guidance for all secondary students, including those identified as disabled. Plans for such programs must be submitted to the Superintendent of Public Education.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education

Last Assessment Period: 7/1/2002 to 8/31/2002
Last Assessment Finding: Retain
Current Assessment Period

Comment:

Career and Technical Advisory Council

School divisions must establish a general advisory council to provide advice on current job needs and the relevancy of career and technical programs offered to assist in the development of the local plan and application. Councils must be composed of representatives from business, industry, and labor including representation of both sexes and racial and ethnic minorities. A report must be provided annually to the Department of Education describing activities of the advisory council.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: State Board of Education Regulation 8 VAC 20-120-40, 50, and 70

Last Assessment Period: 8/1/2006 to 9/30/2006
Last Assessment Finding: Retain
Current Assessment Period

Comment:
## Career and Technical Education Student Organizations

Career and technical student organizations must be an integral and active part of each career and technical program established by school divisions. All career and technical students must be provided opportunities to participate in instructional activities of the organization whether or not dues are paid.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia § 22.1-227, State Board of Education Regulation 8 VAC 20-120-160; Carl D. Perkins Vocational and Technical Education Act of 1998 (Fed.); P.L. 105-332 (Fed.); 20 USC 2301 (Fed.); 34 CFR 400 et seq. (Fed.)  
**Last Assessment Period:** 8/1/2006 to 9/30/2006  
**Last Assessment Finding:** Retain  
**Current Assessment Period**

## Early Identification and Provision of Special Education Services for Students with Disabilities

School divisions are required to implement early identification of students with disabilities and to enroll such students in appropriate instructional programs consistent with State and federal law.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia §§ 22.1.215, 22.1-253.13:1(D); State Board of Education Regulation 8 VAC 70-80-10 et seq.; Individuals with Disabilities Education Improvement Act of 2004 (Fed.); P. L. 108-446 (Fed.); 20 USC 1400 et seq. (Fed.); 34 CFR 300, 303 (Fed.)  
**Last Assessment Period:** 8/1/2002 to 9/30/2002  
**Last Assessment Finding:** Retain  
**Current Assessment Period**

## Special Education Plan

School divisions are required to submit an annual plan for special education for the following year and a report indicating the extent to which the plan required by law for the preceding year has been implemented. The plan must be acceptable to the State Board of Education.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia §§ 22.1-215; State Board of Education Regulations 8 VAC20-80-10 et seq.; Individuals with Disabilities Education Improvement Act of 2004 (Fed.); 20 USC 1400 et seq. (Fed.); 34 CFR 300, 303 (Fed.)  
**Last Assessment Period:** 10/1/2006 to 11/30/2006  
**Last Assessment Finding:** Retain  
**Current Assessment Period**

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### Special Education Program Standards

**SOE.DOE074**

School divisions are required to follow the special education program standards that specify criteria for class size maximums and the operations of programs for students with disabilities. In addition, criteria for special education teacher endorsements and educational interpreters for students with hearing impairments are provided.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** State Board of Education Regulations 8 VAC 20-80-10 et seq.; Individuals with Disabilities Education Improvement Act of 2004 (Fed.); P. L. 108-446 (Fed.); 20 USC 1400 et seq. (Fed.); 34 CFR 300, 303 (Fed.)

**Last Assessment Period:** 10/1/2006 to 11/30/2006  
**Last Assessment Finding:** Retain  
**Current Assessment Period**

**Comment:**

### Reduced Class Size Grant

**SOE.DOE075**

School divisions receiving Reduced Class Size grant funds to reduce pupil-teacher ratios in grades K through 3 are required to match the grant funds on the basis of the locality's composite index of local ability to pay.

**Type:** Non-Discretionary Condition of Aid  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia § 22.1-199.1; Item 132 (C)(10), Chapter 890, 2011 Acts of Assembly.

**Last Assessment Period:** 8/1/2002 to 9/30/2002  
**Last Assessment Finding:** Retain  
**Current Assessment Period**

**Comment:**

### At-Risk Four-Year-Old Preschool Grant

**SOE.DOE076**

School divisions receiving At-Risk Four-Year-Old Preschool grant funds to provide quality preschool programs for at-risk four-year-olds and five-year-olds not served by other programs are required to match the grant funds on the basis of the locality's composite index of local ability to pay.

**Type:** Non-Discretionary Condition of Aid  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia § 22.1-199.1; Item 132 (C)(13), Chapter 890, 2011 Acts of Assembly.

**Last Assessment Period:** 8/1/2002 to 9/30/2002  
**Last Assessment Finding:** Retain  
**Current Assessment Period**

**Comment:**
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#### Virtual Virginia and Multi-Division Online Providers

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#### Limited English Proficient Students

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</table>
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Family Life Education Materials

School divisions may implement the Standards of Learning for the Family Life Education program as established by the State Board of Education or a Family Life Education program consistent with the guidelines developed by the Board. The guidelines must include information regarding mental health education and awareness. School divisions are required to develop a summary of the family life education program and to distribute the summary to parents or guardians on request. A complete copy of all printed materials and a description of all audiovisual materials must be kept in the school library or office and made available for review to any parent or guardian during school office hours before and during the school year.

Type: Regulation of Optional Activity
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia §§ 22.1-207.1, 22.1-207.2; State Board of Education Regulation 8 VAC 20-131-170

Last Assessment Period: 9/1/2002 to 10/31/2002
Last Assessment Finding: Retain
Current Assessment Period

Comment:

Reenrollment Plans

School division superintendents or their designee are required to participate in the development of reenrollment plans for juveniles who are released from a juvenile correctional center.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education

Last Assessment Period: 8/1/2003 to 9/30/2003
Last Assessment Finding: Retain
Current Assessment Period

Comment:

Reports of Certain Acts in Schools

School division superintendents are required to report certain incidents such as assaults resulting in bodily injury, threats against school personnel, bomb threats, found weapons, student possession of weapons, the possession of certain substances, stalking, and the theft of prescription medications to the Department of Education annually, and to make such information available to the public. School principals must also report such incidents to local law enforcement and, except where prohibited by law, to the parents of any minor student who is the object of such act.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-279.3:1; State Board of Education Regulation 8 VAC 20-560-10 et seq.

Last Assessment Period: 4/1/2003 to 5/31/2003
Last Assessment Finding: Retain
Current Assessment Period

Comment:
## Notice of Parental Involvement in Schools

School divisions are required to distribute to all parents notice of the requirements of State law relating to parental involvement, a copy of school board standards of student conduct, and a copy of the compulsory school attendance law. Additionally, schools are required to follow certain procedures regarding parental involvement in enforcing standards of conduct.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia §§ 22.1-276.2, 22.1-279.3, 22.1-279.6  
**Last Assessment Period:** 4/1/2003 to 5/31/2003  
**Last Assessment Finding:** Retain  
**Current Assessment Period**  
**Comment:**

## Prevention of Violence and Crime on School Property

School divisions are required to develop programs to prevent violence and crime on school property and at school-sponsored events.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia § 22.1-279.3:1; § 22.1-279.9  
**Last Assessment Period:** 4/1/2003 to 5/31/2003  
**Last Assessment Finding:** Retain  
**Current Assessment Period**  
**Comment:**

## Sight and Hearing of Pupil to be Tested

School divisions are required to test the sight and hearing of students. The screening shall assure the identification of children with disabilities, including those related to fine and gross motor functions.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia § 22.1-273; State Board of Education Regulations 8 VAC 20-250-10 et seq., 8 VAC 20-80-50  
**Last Assessment Period:** 8/1/2003 to 9/30/2003  
**Last Assessment Finding:** Retain  
**Current Assessment Period**  
**Comment:**
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#### Sale of School Property

School divisions that sell surplus real property must establish a capital improvement fund in which the proceeds of such sale accrue. The fund shall only be used for new school construction, school renovation, and major school maintenance projects.

- **Type:** Compulsory Order
- **Agency:** Department of Education
- **Secretariat:** Education
- **Authority:** Code of Virginia § 22.1-129
- **Last Assessment Period:** 8/1/2003 to 9/30/2003
- **Last Assessment Finding:** Retain
- **Current Assessment Period**
- **Comment:**

#### School Crisis, Emergency Management, and Medical Emergency Response Plan

School divisions are required to conduct safety audits in all public schools in accordance with a list of audit items developed by the Virginia Center for School Safety, and must develop a written school crisis, emergency management, and medical emergency response plan. A copy of all school safety audits must be made available for public review, and copies of such audits must be submitted to the Virginia Center for School Safety by the division superintendent no later than August 31 of each year. Each school must annually review the written school crisis, emergency management, and medical emergency response plans. The school division must certify this review in writing.

- **Type:** Compulsory Order
- **Agency:** Department of Education
- **Secretariat:** Education
- **Authority:** Code of Virginia § 22.1-279.8
- **Last Assessment Period:** 4/1/2003 to 5/31/2003
- **Last Assessment Finding:** Retain
- **Current Assessment Period**
- **Comment:**

#### Early Reading Intervention Program Grant

This program is designed to reduce the number of students needing remedial reading services. Program funds are used by local school divisions for: special reading teachers; trained aides; volunteer tutors under the supervision of a certified teacher; computer-based reading tutorial program; aides to instruct in class groups while the teacher provides direct instruction to the students who need extra assistance; or extended instructional time in the school day or year for these students.

- **Type:** Non-Discretionary Condition of Aid
- **Agency:** Department of Education
- **Secretariat:** Education
- **Authority:** Item 132 (C)(14), Chapter 890, 2011 Acts of Assembly.
- **Last Assessment Period:** 10/1/2002 to 11/30/2002
- **Last Assessment Finding:** Retain
- **Current Assessment Period**
- **Comment:**
# Catalog of State and Federal Mandates on Local Governments - 2011

**Notification to Parents of Students with Vision/Hearing Impairments**  
**SOE.DOE093**

School divisions are required to annually distribute to parents of eligible students information made available by the Department of Education describing the services available through the Virginia School for the Deaf and the Blind, the Virginia Department for the Deaf and Hard-of-Hearing, and the Virginia Department for the Blind and Vision Impaired.

- **Type:** Compulsory Order
- **Agency:** Department of Education
- **Secretariat:** Education
- **Authority:** Code of Virginia § 22.1-217.01
- **Last Assessment Period:** 10/1/2006 to 11/30/2006
- **Last Assessment Finding:** Retain
- **Current Assessment Period**
- **Comment:**

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**Home Instruction**  
**SOE.DOE094**

Local school division superintendents are required to monitor the progress of home-schooled students, and must notify the Superintendent of Public Instruction of the number of students in the division receiving home instruction. School boards must implement a plan to notify students receiving home instruction and their parents of the availability of Advanced Placement and Preliminary Scholastic Aptitude Test examinations and financial assistance for low-income and needy students who wish to take them. School boards must implement a plan to make these tests available to children who are home-schooled.

- **Type:** Compulsory Order
- **Agency:** Department of Education
- **Secretariat:** Education
- **Authority:** Code of Virginia § 22.1-254.1
- **Last Assessment Period:** 8/1/2005 to 9/30/2005
- **Last Assessment Finding:** Retain
- **Current Assessment Period**
- **Comment:**

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**Required Local Funding Effort for School Division**  
**SOE.DOE095**

Local governing bodies must appropriate funds for the operation of local school divisions at a level not less than that apportioned in compliance with the Code of Virginia for meeting the Standards of Quality in local educational programs. School boards shall submit a report of all expenditures to the governing body annually at a specified time, using a template prescribed by the state Department of Education. School divisions shall annually publish their approved budgets, including local match, and expenditure reports, on the school division websites and make the approved budget available in hard copy as needed to the public for inspection.

- **Type:** Compulsory Order
- **Agency:** Department of Education
- **Secretariat:** Education
- **Authority:** Code of Virginia §§ 22.1-90, 22.1-93, 22.1-94, 22.1-115, 22.1-97, 15.2-2503
- **Last Assessment Period:** 8/1/2005 to 9/30/2005
- **Last Assessment Finding:** Retain
- **Current Assessment Period** 9/1/2011 to 10/31/2011
- **Comment:** Amended 7/1/09. Scheduled for FY12 assessment.
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Fees and Charges

School divisions may charge only those fees authorized by the Board of Education. Scholastic records may not be withheld for nonpayment of fees or charges.
Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-6; 8 VAC 20-370-10 et seq.
Last Assessment Period: 8/1/2005 to 9/30/2005
Last Assessment Finding: Retain
Current Assessment Period
Comment:

Suspension, Expulsion, Exclusion, and Readmission of Pupils

School divisions must adhere to procedures as set forth in the Code of Virginia in the suspension, expulsion, exclusion, and the readmission of students regarding school attendance.
Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Last Assessment Period: 10/1/2005 to 11/30/2005
Last Assessment Finding: Retain
Current Assessment Period
Comment:

Jointly Owned and Operated Schools or Programs

School divisions are required to obtain Board of Education consent when operating jointly owned schools, including regional public charter schools or regional residential charter schools. The treasurer of a city or county in which a joint school is located shall be the school's fiscal agent. However, the participating school boards may by agreement select the fiscal agent for the joint school from among the treasurers of the participating divisions.
Type: Regulation of Optional Activity
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia §§ 22.1-26 and 22.1-118; 8 VAC 20-280-10 et seq.
Last Assessment Period: 10/1/2005 to 11/30/2005
Last Assessment Finding: Retain
Current Assessment Period
Comment:
## Catalog of State and Federal Mandates on Local Governments - 2011

### School Activity Funds

**SOE.DOE100**

School divisions must follow Board of Education regulations in handling funds derived from extracurricular school activities and activities involving school personnel, students, and property.

Type: **Compulsory Order**

Agency: **Department of Education**

Secretariat: **Education**


Last Assessment Period: 10/1/2005 to 11/30/2005

Last Assessment Finding: Retain

Current Assessment Period

Comment:

### Student Code of Conduct

**SOE.DOE103**

School divisions shall adopt and revise regulations governing student conduct consistent with the guidelines of the Board of Education. The code of conduct regulations shall include proceedings for suspension, expulsion, and exclusion decisions. The code of conduct shall be reviewed biennially to incorporate discipline options and alternatives to preserve a safe, non-disruptive environment.

Type: **Compulsory Order**

Agency: **Department of Education**

Secretariat: **Education**


Last Assessment Period: 10/1/2005 to 11/30/2005

Last Assessment Finding: Retain

Current Assessment Period

Comment:

### Virginia Public School Construction Grants

**SOE.DOE104**

School divisions eligible to receive construction grants must follow the guidelines as issued by the Board of Education, and must provide matching funds based on the locality's composite index of ability to pay.

Type: **Non-Discretionary Condition of Aid**

Agency: **Department of Education**

Secretariat: **Education**

Authority: Code of Virginia §§ 22.1-175.1 through 22.1-175.4; State Board of Education Regulations 8 VAC 20-100-100, 120, 150, 280

Last Assessment Period: 10/1/2006 to 11/30/2006

Last Assessment Finding: Retain

Current Assessment Period

Comment:
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<table>
<thead>
<tr>
<th>Internet Use Policy</th>
<th>SOE.DOE105</th>
</tr>
</thead>
<tbody>
<tr>
<td>An Internet use policy is required to be adopted by local school boards and posted on the school division's website. The policy shall contain provisions regarding illegal material, material that could be harmful to juveniles, the blocking of inappropriate websites, disciplinary measures for violations of the policy, and a curriculum component on Internet safety.</td>
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<tr>
<td>The policy must be reviewed, amended if necessary, and approved by the local school board every two years. Compliance shall be certified to the Department of Education annually.</td>
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<tr>
<td>Type: Compulsory Order</td>
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<tr>
<td>Agency: Department of Education</td>
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<td>Secretariat: Education</td>
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<tr>
<td>Authority: Code of Virginia § 22.1-70.2; Children's Internet Protection Act (P.L. 106-554) (Fed.)</td>
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<td>Last Assessment Period: 10/1/2002 to 11/30/2002</td>
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<td>Last Assessment Finding: Retain</td>
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<td>Current Assessment Period</td>
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<td>Comment:</td>
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<thead>
<tr>
<th>Remediation Programs Evaluation</th>
<th>SOE.DOE107</th>
</tr>
</thead>
<tbody>
<tr>
<td>School divisions are required to annually evaluate remediation programs based on criteria established by the State Board of Education in terms of the pass rate on the Standards of Learning tests, and the demographic and educational characteristics of those students identified for remediation.</td>
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<tr>
<td>Type: Compulsory Order</td>
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<td>Agency: Department of Education</td>
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<td>Secretariat: Education</td>
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<tr>
<td>Authority: Code of Virginia § 22.1-199.2; State Board of Education Regulations 8 VAC 20-630-10 et seq.; Item 132(C)(9), Chapter 890, 2011 Acts of Assembly.</td>
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<thead>
<tr>
<th>Literary Fund Loan</th>
<th>SOE.DOE108</th>
</tr>
</thead>
<tbody>
<tr>
<td>A school board's application for a loan from the Literary Fund must be authorized by the governing body and the school board. School divisions receiving Literary Fund loans must provide an opinion of bond counsel as to the validity of the loan and the status under federal income tax laws of the interest on the loan.</td>
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<tr>
<td>Type: Regulation of Optional Activity</td>
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<td>Agency: Department of Education</td>
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<td>Secretariat: Education</td>
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<tr>
<td>Authority: Code of Virginia §§ 22.1-153 and 22.1-146</td>
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<td>Last Assessment Period: 11/1/2002 to 12/31/2002</td>
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<td>Last Assessment Finding: Retain</td>
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<td>Current Assessment Period</td>
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<td>Comment:</td>
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Virginia Public School Educational Technology Grants Program

School divisions receiving grants from the Virginia Public School Educational Technology Trust Fund must provide a 20% local match based on the composite index of ability to pay, and must meet State Board of Education program guidelines. At least 25% of the local match shall be used for teacher training in the use of the technology.

Type: Non-Discretionary Condition of Aid
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia §§ 22.1-175.6 through 22.1-175.9; Item 132 (C)(12), Chapter 890, 2011 Acts of Assembly.

Last Assessment Period: 11/1/2002 to 12/31/2002
Last Assessment Finding: Retain
Current Assessment Period
Comment:

Evaluation of Superintendent, Teachers, and Administrators

School divisions must evaluate the division superintendent, teachers, and administrators annually consistent with the performance objectives set out in the guidelines for Uniform Performance Standards and Evaluation Criteria for Teachers, Administrators, and Superintendents.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education

Last Assessment Period: 11/1/2002 to 12/31/2002
Last Assessment Finding: Retain
Current Assessment Period
Comment:

Asthma and Anaphylaxis Medication Policy

School divisions must develop and implement a policy permitting a student with a diagnosis of asthma or anaphylaxis, or both, to possess and self-administer inhaled asthma medications or auto-injectable epinephrine, or both, while at school, at school-sponsored activities, or on a school bus or other school property. Each policy shall include the development of an individualized student health care plan.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-274.2

Last Assessment Period: 8/1/2003 to 9/30/2003
Last Assessment Finding: Retain
Current Assessment Period
Comment:
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Student Searches

School divisions must adopt and revise regulations governing student searches that are consistent with the guidelines established by the Board of Education.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-279.7
Last Assessment Period: 5/1/2003 to 6/30/2003
Last Assessment Finding: Retain
Current Assessment Period

Comment:

Commercial, Promotional, and Corporate Partnership Policy

School divisions are required to develop and implement a policy relating to commercial, promotional, and corporate partnerships and sponsorships in their public schools.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-89.4
Last Assessment Finding: Retain
Current Assessment Period

Comment:

Optional K-5 Education Programs

School divisions establishing optional education programs away from the regular classroom for students in grades K-5 who need to be redirected toward appropriate classroom decorum and acceptable behavior must provide services that will enable the students to benefit from a public education while away from the regular classroom. Such programs must be adequately staffed and facilitate parent participation.

Type: Regulation of Optional Activity
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-200.1
Last Assessment Finding: Retain
Current Assessment Period

Comment:
### Teacher Intervention/Remediation Training

School divisions are required to provide training in instructional strategies and techniques for intervention for remediation of students who fail or are at risk of failing the Standards of Learning assessments.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia § 22.1-303  
**Last Assessment Period:** 4/1/2004 to 5/31/2004  
**Last Assessment Finding:** Retain  
**Current Assessment Period**  
**Comment:**

### Posting of the National Motto/Bill of Rights/Other Documents

School divisions are required to post the Bill of Rights of the Constitution of the United States; the statement, In God We Trust, the National Motto, enacted by Congress in 1956; and a notice of duty to report child abuse or neglect in a conspicuous place in each school of the locality.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia § 22.1-291.3; Chapter 902, 2003 Virginia Acts of Assembly  
**Last Assessment Period:** 7/1/2008 to 8/31/2008  
**Last Assessment Finding:** Retain  
**Current Assessment Period**  
**Comment:**

### Charter School Applications

Public charter school applications shall be received and reviewed by the Board of Education and local school boards. The Board of Education and each local school board shall establish procedures for receiving, reviewing, and in the case of local school boards, ruling upon the applications.

**Type:** Compulsory Order  
**Agency:** Department of Education  
**Secretariat:** Education  
**Authority:** Code of Virginia §§ 22.1-212..9 et seq.  
**Last Assessment Period:** 7/1/2008 to 8/31/2008  
**Last Assessment Finding:** Retain  
**Current Assessment Period**  
**Comment:**
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Scoliosis Screening  

School divisions shall provide parent educational information or implement a program of regular screening for scoliosis of pupils in grades five through ten. Excepted from this requirement are pupils admitted for the first time to a public school who have been so tested as part of the comprehensive physical examination or whose parents have indicated the preference that their children not participate in such screening. Local divisions shall develop procedures for parents to indicate such preference.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-273.1
Last Assessment Period: 9/1/2008 to 10/31/2008
Last Assessment Finding: Retain
Current Assessment Period
Comment:

Identification of Critical Shortages of Teachers and Administrators

School divisions shall annually survey the division to identify critical shortages of teachers and administrative personnel by subject matter, and report such critical shortages to the local school board, the Superintendent of Public Instruction, and to the Virginia Retirement System.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Last Assessment Period: 9/1/2008 to 10/31/2008
Last Assessment Finding: Retain
Current Assessment Period

Alternatives to Animal Dissection

School divisions shall provide students with alternatives to animal dissection techniques within the relevant public school curriculum or course in accordance with Board of Education guidelines.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-200.01
Last Assessment Period: 11/1/2008 to 12/31/2008
Last Assessment Finding: Retain
Current Assessment Period
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<table>
<thead>
<tr>
<th>Instruction Requirements in Public Schools</th>
<th>SOE.DOE123</th>
</tr>
</thead>
<tbody>
<tr>
<td>School divisions are required to emphasize moral education, to establish a character education program, and to instruct middle and high school students in economics education and financial literacy.</td>
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<tr>
<td>Type: Compulsory Order</td>
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<tr>
<td>Agency: Department of Education</td>
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<td>Secretariat: Education</td>
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<tr>
<td>Authority: Code of Virginia §§ 22.1-200.03, 22.1-208, 22.1-208.01</td>
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<td>Last Assessment Period: 11/1/2008 to 12/31/2008</td>
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<td>Last Assessment Finding: Retain</td>
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<table>
<thead>
<tr>
<th>Leave Without Pay for School Division Employees</th>
<th>SOE.DOE124</th>
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<tbody>
<tr>
<td>School divisions are required to adopt policies that allow its employees to take leave without pay in the case of a debilitating or life-threatening illness or injury.</td>
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<tr>
<td>Type: Compulsory Order</td>
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<tr>
<td>Agency: Department of Education</td>
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<td>Secretariat: Education</td>
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<tr>
<td>Authority: Code of Virginia § 22.1-296</td>
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<td>Last Assessment Period: 11/1/2008 to 12/31/2008</td>
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<thead>
<tr>
<th>Enrollment of Children Placed in Foster Care</th>
<th>SOE.DOE125</th>
</tr>
</thead>
<tbody>
<tr>
<td>School divisions are required to cooperate in facilitating the enrollment of a child placed in foster care when the placement occurs across jurisdictional boundaries and to expedite the transfer of the school records of the affected foster child. In addition, school divisions must jointly determine with local departments of social services whether it is in the best interest of the child to remain enrolled at the school where he was previously enrolled prior to the most recent foster care placement.</td>
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<td>Type: Compulsory Order</td>
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<tr>
<td>Agency: Department of Education</td>
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<tr>
<td>Secretariat: Education</td>
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<tr>
<td>Authority: Code of Virginia §§ 22.1-3.4 and 63.2-900.3</td>
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<td>Last Assessment Period: 11/1/2008 to 12/31/2008</td>
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<td>Last Assessment Finding: Retain</td>
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## Severance Benefits

<table>
<thead>
<tr>
<th>Section</th>
<th>SOE.DOE126</th>
</tr>
</thead>
<tbody>
<tr>
<td>School boards must publicly announce any severance benefits provided to an official appointed by that board prior to that individual's departure.</td>
<td></td>
</tr>
<tr>
<td>Type</td>
<td>Compulsory Order</td>
</tr>
<tr>
<td>Agency</td>
<td>Department of Education</td>
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<tr>
<td>Secretariat</td>
<td>Education</td>
</tr>
<tr>
<td>Authority</td>
<td>Code of Virginia § 15.2-1510.1</td>
</tr>
<tr>
<td>Last Assessment Period</td>
<td>7/1/2009 to 9/30/2009</td>
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<td>Last Assessment Finding</td>
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<tr>
<td>Comment</td>
<td>Effective July 1, 2007.</td>
</tr>
</tbody>
</table>

## Planning Time for Elementary School Teachers

<table>
<thead>
<tr>
<th>Section</th>
<th>SOE.DOE127</th>
</tr>
</thead>
<tbody>
<tr>
<td>School boards must ensure that all elementary school teachers are provided at least an average of 30 minutes per day as planning time during the students' school week.</td>
<td></td>
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<tr>
<td>Type</td>
<td>Compulsory Order</td>
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<tr>
<td>Agency</td>
<td>Department of Education</td>
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<tr>
<td>Secretariat</td>
<td>Education</td>
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<tr>
<td>Authority</td>
<td>Code of Virginia § 22.1-291.1</td>
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<td>10/1/2011 to 11/30/2011</td>
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<tr>
<td>Comment</td>
<td>Scheduled for FY12 assessment.</td>
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## Classroom Placement of Twins and Other Multiples

<table>
<thead>
<tr>
<th>Section</th>
<th>SOE.DOE128</th>
</tr>
</thead>
<tbody>
<tr>
<td>School boards must develop and implement policies to allow a parent of twins or higher order multiples in the same grade level to request that the children be placed in the same classroom or in separate classrooms if they are at the same elementary school.</td>
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<td>Type</td>
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<tr>
<td>Agency</td>
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<tr>
<td>Secretariat</td>
<td>Education</td>
</tr>
<tr>
<td>Authority</td>
<td>Code of Virginia § 22.1-291.1</td>
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<tr>
<td>Last Assessment Finding</td>
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<tr>
<td>Comment</td>
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</table>
School Board Question #148
Attachment #23

Catalog of State and Federal Mandates on Local Governments - 2011

Supplemental Pay for Employees in Military Service

School divisions must provide supplemental pay to public school employees on active duty with the armed forces if the military compensation of such employee is less than the regular salary paid to such employee by the school division.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-289.2
Last Assessment Period: 7/1/2010 to 9/30/2010
Last Assessment Finding: Retain
Current Assessment Period
Comment:

Single-Sex Education

School boards may establish a single-sex class or school in a school division. Participation must be voluntary and the school division must provide a substantially equal coeducational school or class.

Type: Regulation of Optional Activity
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-212.1:1
Last Assessment Period:
Last Assessment Finding:
Current Assessment Period
Comment:

School Performance Report Card

At the beginning of each school year, each school shall provide to its students’ parents or guardians information regarding availability of and source for receiving: (1) the learning objectives to be achieved at their child’s grade level or, in high school, a copy of the syllabus for each of their child’s courses, and a copy of the school division promotion, retention, and remediation policies; (2) the Standards of Learning applicable to the child’s grade or course requirements and the approximate date and potential impact of the child’s next SOL testing; and (3) notice to students in all grade levels of all requirements for Standard, Standard Technical, Advanced Studies, Advanced Technical and Modified Standards Diplomas, and the board’s policies on promotion and retention.

Type: Compulsory Order
Agency: Department of Education
Secretariat: Education
Authority: Code of Virginia § 22.1-253.13:3; 8 VAC 20-131-270
Last Assessment Period:
Last Assessment Finding:
Current Assessment Period
Comment:
## Catalog of State and Federal Mandates on Local Governments - 2011

### School Year to begin after Labor Day

Local school boards shall set the school calendar so that the first day for students is after Labor Day. This requirement may be waived by the Board of Education if a school board certifies that it has had a history of excessive closures due to severe weather or emergency situations, if it is involved in dependent programs that would otherwise require the system to begin school before Labor Day, if it offers approved experimental or innovative programs, or if it is entirely surrounded by a school division that opens prior to Labor Day.

<table>
<thead>
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<tr>
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<td>Code of Virginia § 22.1-79.1</td>
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### Hiring of Teachers, Contracts

Local school divisions must hire teachers using a contract form prescribed by the Board of Education, utilize a three-year probationary period, and follow criteria upon not renewing a contract.

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<tr>
<td>Authority:</td>
<td>Code of Virginia §22.1-302 et seq.; 8 VAC 20-440-10 et seq.</td>
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### Virginia Index of Performance Recognition

Local school boards shall have policies to recognize and reward individual schools for fully accredited schools and those that are making significant progress toward advanced proficiency.

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<tr>
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<tr>
<td><strong>Catalog of State and Federal Mandates on Local Governments - 2011</strong></td>
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<tr>
<td><strong>Minute of Silence</strong></td>
<td>SOE.DOE135</td>
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<tr>
<td>Local school divisions must establish the daily observance of one minute of silence in each classroom of the division.</td>
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<td><strong>Type:</strong></td>
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<td><strong>Comment:</strong></td>
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<tr>
<td><strong>Pesticide Application Reporting</strong></td>
<td>SOE.DOE136</td>
</tr>
<tr>
<td>Local school divisions shall keep records of any pesticide application on school property.</td>
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<td><strong>Comment:</strong></td>
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<tr>
<td><strong>Absences to Observe a Religious Holiday</strong></td>
<td>SOE.DOE137</td>
</tr>
<tr>
<td>Local school boards must develop policies for excusing students who are absent for observance of a religious holiday. The policies shall ensure that a student shall not be deprived of any award or of eligibility or opportunity to compete for any award, or of the right to take an alternate test or examination, for any which he missed by reason of such absence, if the absence is verified in a manner acceptable to the school board.</td>
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<td><strong>Type:</strong></td>
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<tr>
<td><strong>Agency:</strong></td>
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<td>---------------------------------------------------------------</td>
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<tr>
<td><strong>College and Career Preparation Planning and Programs</strong></td>
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<tr>
<td>S0E.DOE138</td>
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<tr>
<td>Beginning with the 2012-2013 academic year, all schools shall begin development of a personal academic and career plan for each seventh-grade student with completion by the fall of the student's eighth-grade year.</td>
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<td>Authority: Code of Virginia § 22.1-253.13:4 (D); 8 VAC 20-131-140.</td>
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County ARC Compared to Funding

Loudoun County Public Schools ARC Compared to Funding
Loudoun County Public Schools Projects Tasked to K12 *Insight*

- **Survey of Surveyors** (March, 2012) – provides a comprehensive audit of surveys administered in the district. It is used to identify duplication and redundancy of surveys in an effort to move towards a systematic, more streamlined approach to engaging stakeholders.
  - Deployed survey to district leadership and provided report
  - Developed and delivered an LCPS Engagement Calendar for 2012-2013 (attached)

- **Student Engagement Survey** (April, 2012) - Engagement is the sense of connection that students have with their school and their studies and is a primary indicator of academic success.
  - Deployed district-wide survey to all secondary students (grades 6-12)
  - Delivered district-wide and school-level reports which identify areas where engagement can be improved.

- **Teacher Engagement Survey** (April, 2012) - Engagement is the sense of connection that individuals have with their profession in general and with their current jobs in particular. Fully engaged teachers are essential to helping students achieve their full potential.
  - Deployed district-wide survey to all teachers.
  - Delivered district-wide and school-level reports which identify areas where engagement can be improved.

- **Community Priorities Survey** (May, 2012) – drafted survey topics and questions to gather input from parents and community members in order to prioritize initiatives and programs for budget and allocation of resources for upcoming budget deliberations. (To be deployed)

- **Employee Exit Survey** (May, 2012) – A final assessment of the employee’s experience with the school and district. This was requested in order to improve efficiency and reporting of exit data.
  - Designed jointly with the Assistant Superintendent of Personnel (To be deployed)
  - Used to determine the reason staff are separating from the district, uncover any issues within certain sites or departments, and identify areas for improvement

- **Opening of Schools Survey** (August, 2012)
  - Created an on-line version of the Department of Instruction’s Opening of Schools paper survey in order to collect data and report out division-wide results more easily. (To be deployed)

- **Teacher Performance Evaluation Survey** (November, 2012)
  - Designed with the Department of Personnel Services to collect input from teachers and administrators on the new teacher performance evaluation process. (To be deployed)

Our contract with K12 *Insight* provides unlimited access to the survey tool which integrates with mobile and social media by allowing LCPS to migrate all surveys conducted by schools and departments into one technology platform. This will help to reduce data silos and costs by eliminating multiple survey tools currently used in LCPS (i.e., Survey Monkey, CMS, Teleforms, Moodle, CLARITY, Zoomerang, etc.). The agreement sets no limits on the number of surveys we conduct. As we ramp up, we expect to conduct 10 to 14 distinct initiatives each year.

- The following two-minute video highlights the value proposition for K12 *Insight*:
  http://vimeo.com/k12insight/candidconversations
### Loudoun County Public Schools
#### 2012-13 Engagement Calendar

<table>
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<th>Study #</th>
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<th>Study</th>
<th>Respondent Group</th>
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<tr>
<td></td>
<td></td>
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<td>Students</td>
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<tr>
<td></td>
<td>Oct</td>
<td>Community Priorities Survey</td>
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<td></td>
<td>Nov</td>
<td>Teacher Evaluation Study</td>
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<td>Nov</td>
<td>Principal Evaluation Input</td>
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<td></td>
<td>Feb</td>
<td>Employee Engagement</td>
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<td>Student Engagement</td>
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<td></td>
<td>April</td>
<td>Professional Development Needs Assessment</td>
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<td></td>
<td>April</td>
<td>Senior Exit Survey or College/Workforce</td>
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<td></td>
<td>May</td>
<td>Annual Customer Satisfaction Survey (Internal: for principals and APs)</td>
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<td></td>
<td>Jan &amp; May</td>
<td>New Hire Mentoring Effectiveness</td>
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<tr>
<td></td>
<td>Ongoing</td>
<td>Exit Survey</td>
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**Total number of studies**: 2+1 1 3+5 1 1

**Survey Respondents Key:**

- Students
- Alumni
- Staff
- Select Staff
- Parents
- Community
K12 Insight Value Proposition for Loudoun County Public Schools

- **Neutral Third-Party:** K12 Insight provides an external means to gather feedback on critical issues, especially where a third party is necessary to ensure reliable, confidential and anonymous information.

- **Benchmarking Data:** K12 Insight provides baseline data from their extensive work with nearly 300 school districts. Such benchmarking data lend context to survey data, making the findings meaningful and useful.

- **Beyond Surveys to Creating a Culture of Transparency and Collaborative Decision-Making:** K12 Insight’s comprehensive approach helps the district develop a calendar of prioritized topics to ensure every stakeholder group is included on key issues that impact them. Beyond just survey data, this approach promotes a culture of transparency and collaborative decision-making. Adopting a more transparent and collaborative approach improves efficiency in decision-making and limits divisiveness in response to conflicting perspectives on sensitive issues. By working with a well-planned calendar, each survey is aligned with School District initiatives and priorities. This approach also eliminates multiple conflicting conversations which come about when surveys are conducted in silos.

- **Emphasis on Communication and Outreach:** K12 Insight’s approach goes beyond surveys and data. Due to its extensive experience, K12 Insight has developed techniques that enable a high participation rate from all stakeholder groups, helping the district develop partnerships with civic and community groups, churches, etc. They provide the district with communication expertise on how to ensure the survey is seen in the broader context of respect for every voice through a comprehensive pre-survey communication. Upon concluding the survey, they help develop a post-survey communication plan and provide all the materials necessary to close the loop with survey participants. This comprehensive approach builds lasting engagement with survey participants.

- **A Technology Platform for Efficiency and Greater Effectiveness:** K12 Insight’s YourVoice technology allows the District to maintain a narrative of all past survey results on the district’s website — which serves as a strong statement of the district’s commitment to transparency and collaborative decision-making. K12 Insight’s technology also allows more people to access the survey electronically through mobile devices, thereby increasing participation rates and lowering costs associated with paper surveys.
<table>
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<tr>
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<th>VEHICLE</th>
<th>CURRENTLY HAS LIEN</th>
<th>ACQUIRE DATE</th>
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** Planned replacement in FY14
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<th>Item Number</th>
<th>Page Number</th>
<th>Question</th>
<th>Supervisor</th>
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<tr>
<td>1</td>
<td>1</td>
<td>FY14 School Board's Proposed Operating Budgets Executive Summary, page 5 – If LCPS were to fully implement the same health insurance, VRS and OPEB reforms currently applicable to County employees, what would the savings be in FY14? What would the savings be by FY19?</td>
<td>Williams</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>FY14 School Board's Proposed Operating Budgets Executive Summary, page 10 – What accounts for the 10.35% increase in Operations and Maintenance costs from FY13 to FY14?</td>
<td>Williams</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>Provide a list of exempt (salary) and nonexempt (hourly eligible for overtime) for Loudoun County Public School employees. This list should be broken down by department.</td>
<td>Volpe</td>
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<td>4</td>
<td>4</td>
<td>Provide a detailed description of the Student Information System? What system is currently utilized by LCPS? Will this new system replaced the current established system infrastructure?</td>
<td>Volpe</td>
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<td>5</td>
<td>7</td>
<td>Provide specific details on the technology pilot program. How are you planning to implement this? In what areas? What is the basis for the 650 items that have been requested? Are that many devices really needed for a pilot program?</td>
<td>Letourneau</td>
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<tr>
<td>6</td>
<td>8</td>
<td>What would the savings be if LCPS were to implement the same OPEB changes to current retirees that the county did this year? This would be in addition to those changes already proposed in FY14 LCPS budget.</td>
<td>Letourneau</td>
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<tr>
<td>7</td>
<td>8</td>
<td>What would the savings be by not grandfathering current LCPS employees from the proposed tiered system for health benefit eligibility?</td>
<td>Letourneau</td>
</tr>
<tr>
<td>8</td>
<td>9</td>
<td>What would the savings be by not grandfathering current LCPS employees from the proposed change in the definition of full-time employee?</td>
<td>Letourneau</td>
</tr>
<tr>
<td>9</td>
<td>9</td>
<td>LCPS runs its own trash and recycling trucks throughout the county. What is the cost, including all capital, personnel and operations and maintenance associated with this? How does this cost compare to contracting for service through a private vendor?</td>
<td>Letourneau</td>
</tr>
<tr>
<td>10</td>
<td>10</td>
<td>How many CDL licenses did LCPS pay for in each fiscal year FY11, FY12 and so far in FY13? How many of these licensees were assigned runs? What is the total that LCPS spent on CDL training for each of those fiscal years?</td>
<td>Letourneau</td>
</tr>
<tr>
<td>11</td>
<td>10</td>
<td>Please provide graduation rates and college attendance statistics for the past couple years. Are they trending down?</td>
<td>Higgins</td>
</tr>
<tr>
<td>12</td>
<td>11</td>
<td>What is the cause of the 8% increase in the LCPS central vehicle maintenance costs?</td>
<td>Higgins</td>
</tr>
<tr>
<td>Item Number</td>
<td>Page Number</td>
<td>Question</td>
<td>Supervisor</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>----------</td>
<td>------------</td>
</tr>
<tr>
<td>13</td>
<td>11</td>
<td>What has the County and LCPS done to curtail construction budgeted resources since the audit findings that cost of construction did not exceed 90% of budgeted amounts which affects the depreciation of the facility?</td>
<td>Letourneau</td>
</tr>
<tr>
<td>14</td>
<td>12</td>
<td>Please clarify how many employees are affected by the 17.5 to 20 hour change in VRS? Given two answers, for which one was 59 employees.</td>
<td>Letourneau</td>
</tr>
<tr>
<td>15</td>
<td>12</td>
<td>If LCPS did not grandfather current employees and implemented the VRS eligibility changes, what are the resulting cost savings for FY 2014?</td>
<td>Letourneau</td>
</tr>
<tr>
<td>16</td>
<td>12</td>
<td>Please provide the training costs for helping school bus drivers attain a CDL license, and provide retention rate for those that received CDL training over the past three years. How many stayed 3 months, 6 months, 1 year, or more? What is average tenure for those trained in past 3 years?</td>
<td>Letourneau</td>
</tr>
<tr>
<td>17</td>
<td>12</td>
<td>Please provide the student to Guidance Counselor ratio for the LCPS.</td>
<td>Reid</td>
</tr>
<tr>
<td>18</td>
<td>13</td>
<td>Please provide the number of LCPS employees deemed instructional per the State definition.</td>
<td>Reid</td>
</tr>
<tr>
<td>19</td>
<td>13</td>
<td>Please provide an expanded cost per pupil with all known costs (debt service, capital, etc.) included. Also, please provide the total enrollments and tax rates for the Northern Virginia regional jurisdictions. Also provide average class size for each jurisdiction.</td>
<td>Volpe</td>
</tr>
<tr>
<td>20</td>
<td>14</td>
<td>Please provide a breakdown of the different classifications of students that result in LCPS receiving state and federal funding, and the corresponding “cost recovery” of the known LCPS costs associated with each program. (i.e. free/reduced lunch)</td>
<td>Volpe</td>
</tr>
<tr>
<td>21</td>
<td>15</td>
<td>How do small schools affect overall class size ratios for the system?</td>
<td>Volpe</td>
</tr>
<tr>
<td>22</td>
<td>15</td>
<td>How is the structure of exempt/non-exempt determined, and when is the last time that structure was reviewed?</td>
<td>Volpe</td>
</tr>
<tr>
<td>23</td>
<td>15</td>
<td>What are the transportation costs for WHS and LVHS swim practices to Claude Moore and Ida Lee and any other pools they practice at?</td>
<td>Clarke</td>
</tr>
<tr>
<td>24</td>
<td>15</td>
<td>What are the costs associated with using the pools for practice for WHS and LVHS?</td>
<td>Clarke</td>
</tr>
<tr>
<td>25</td>
<td>16</td>
<td>I understand from Jill Turgeon that revenue for the turf field usage for Tuscarora and Woodgrove combined was $35,937 for the 11/12 school year. Was there any income from John Champe?</td>
<td>Clarke</td>
</tr>
<tr>
<td>26</td>
<td>16</td>
<td>Can you give a list of the 8 orgs that used the stadiums?</td>
<td>Clarke</td>
</tr>
<tr>
<td>27</td>
<td>16</td>
<td>What is the hourly rate charged to use the turf stadiums?</td>
<td>Clarke</td>
</tr>
<tr>
<td>28</td>
<td>16</td>
<td>What are the hours that the stadiums are available to the leagues?</td>
<td>Clarke</td>
</tr>
<tr>
<td>Item Number</td>
<td>Page Number</td>
<td>Question</td>
<td>Supervisor</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------</td>
</tr>
<tr>
<td>29</td>
<td>17</td>
<td>Please categorize the $7.6 million by source and by facility countywide. How much of the $7.6 million comes from driver education, parking, athletics, advanced placement tests, adult education classes, facility use fees etc.. by school?</td>
<td>Higgins</td>
</tr>
<tr>
<td>30</td>
<td>18</td>
<td>What are the fee structures for these revenue sources? For instance, how much is the fee per student/adult for driver education, parking, and athletics? How much is the facility use fee?</td>
<td>Higgins</td>
</tr>
<tr>
<td>31</td>
<td>18</td>
<td>Are these fees designed to cover costs for the sources from which they are collected? (parking fees for parking lots, athletic fees for athletic programs)</td>
<td>Higgins</td>
</tr>
<tr>
<td>32</td>
<td>19</td>
<td>How is this revenue spent? How much of the revenue collected is returned for use to the category from which it was collected?</td>
<td>Higgins</td>
</tr>
<tr>
<td>33</td>
<td>19</td>
<td>When were each of these fees implemented?</td>
<td>Higgins</td>
</tr>
<tr>
<td>34</td>
<td>19</td>
<td>Please provide a list of the fees for each of these sources by year for every year for the last five years?</td>
<td>Higgins</td>
</tr>
<tr>
<td>35</td>
<td>19</td>
<td>Are all students required to pay the fee? Are any students exempt from fee payment?</td>
<td>Higgins</td>
</tr>
<tr>
<td>36</td>
<td>20</td>
<td>Who is required to pay facility use fees? Are any entities exempt from this fee?</td>
<td>Higgins</td>
</tr>
<tr>
<td>37</td>
<td>20</td>
<td>“Other Revenue” increased to $7.6 million in FY2014 from $6.8 million in FY2013. What was the reason(s) for this increase?</td>
<td>Higgins</td>
</tr>
<tr>
<td>38</td>
<td>21</td>
<td>What was the funding level for “Other Revenue” in FY2012, FY2011 and FY 2010?</td>
<td>Higgins</td>
</tr>
</tbody>
</table>
1. FY14 School Board’s Proposed Operating Budgets Executive Summary, page 5 – If LCPS were to fully implement the same health insurance, VRS and OPEB reforms currently applicable to County employees, what would the savings be in FY14? What would the savings be by FY19? (Williams/Feb. 22, 2013)

Overall, the changes that have been proposed to the LCPS healthcare plan for active employees and retirees (OPEB) and the VRS phase-in of the LCPS employee share result in greater savings to LCPS than the changes made to the County plans. Thus, to make changes aligning our plans with the County actually results in a need for more funds, not less. Details below:

**HEALTH INSURANCE**

It is our understanding that the County’s healthcare plan employer share is funded at a greater level than the LCPS employer share approved by the School Board. Thus, to implement the same employer share currently applicable to active County employees would cost an additional $9.4 million for the health insurance plan in year 2014. Since changes to health insurance premiums become effective at the beginning of the healthcare plan year, January 1, the increase in costs for FY 14 would be $4.7 million (half of $9.4).

**OPEB**

The County’s OPEB reform plan is not believed to be a viable option for LCPS due to the volume of employees and potential impact on the School Operating Fund.

Our understanding of the County’s plan is that employees under age 35 will have a fund established with $2,700 annually put into the fund on behalf of these employees for healthcare in retirement. LCPS has approximately 2,500 employees under age 35, so this plan would result in an increase in the School Operating Budget of $6.7 million. Additionally our understanding is that the County’s plan funds healthcare benefits in retirement for new hires (after Jan 1, 2013), by contributing $2,100 annually, also into this fund. Both plans have a vesting requirement of 15 years. LCPS has about 2,000 employees terminate each year, so that the first year cost to the School Operating Fund would be about $4.2 million.

These two components of the County’s plan combined, allocating $2,700 annually to those under 35 and $2,100 to all new employees could potentially increase the FY 14 School Operating Budget by almost $11 million.

**VRS**

VRS rate contributions for K-12 school divisions across the Commonwealth are set by the VRS Board of Trustees and confirmed by the General Assembly. These rates differ from those experienced by County Governments and other public entities, so it would not be possible to adopt the same VRS plan as the County.

If the VRS reference is to the transition of the 5% employee share, the LCPS plan is to phase-in the conversion of 1% each year as allowed by the General Assembly until FY 2017. The first 1% was shifted in FY 13, the second 1% in FY 14 and so on. It is our understanding that the County phased in all 5% in FY 13. For LCPS to complete the full 5% in FY 14 would increase the budget by approximately $3 million due to the increased cost of FICA and the VRS employer share.
Since there would be no savings in FY 14, we did not attempt to calculate FY 19.

2. **FY14 School Board's Proposed Operating Budgets Executive Summary, page 10 – What accounts for the 10.35% increase in Operations and Maintenance costs from FY13 to FY14? (Williams/Feb. 22, 2013)**

Generally, “Operations & Maintenance” usually refers to non-salary costs throughout the budget. On page 10 of the FY 14 Executive Summary “Operations & Maintenance” refers to a State Category that includes all expenditures including salaries and benefits in the Support Services Department excluding Transportation and Construction which have specific State Categories of their own. The total increase of the State Category “Operations and Maintenance” budget is $7.3 million or 10.35%. The following are the causes of that increase:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional custodial, maintenance and safety staff for enrollment growth and new schools</td>
<td>$2.60</td>
</tr>
<tr>
<td>Part time and overtime to cover building use and peak work periods.</td>
<td>$0.90</td>
</tr>
<tr>
<td>Employee benefit increases such as health insurance rate increases and the cost of VRS implementation</td>
<td>$1.20</td>
</tr>
<tr>
<td>Building and grounds maintenance supplies, new and replacement equipment, and utilities.</td>
<td>$1.00</td>
</tr>
<tr>
<td>State required arc flash testing for 13 high schools</td>
<td>$0.20</td>
</tr>
<tr>
<td>New and replacement safety equipment for buses and schools</td>
<td>$1.40</td>
</tr>
</tbody>
</table>
3. Provide a list of exempt (salary) and nonexempt (hourly eligible for overtime) for Loudoun County Public School employees. This list should be broken down by department.  (Volpe/Feb. 22, 2013)

<table>
<thead>
<tr>
<th>Department</th>
<th>Exempt</th>
<th>Non-Exempt</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating Fund</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business and Financial Services</td>
<td>11.0</td>
<td>46.0</td>
</tr>
<tr>
<td>Deputy Superintendent</td>
<td>2.0</td>
<td>7.0</td>
</tr>
<tr>
<td>Grants</td>
<td>137.7</td>
<td>16.1</td>
</tr>
<tr>
<td>Instruction</td>
<td>4,558.5</td>
<td>933.8</td>
</tr>
<tr>
<td>Personnel Services</td>
<td>8.0</td>
<td>33.0</td>
</tr>
<tr>
<td>Planning and Legislative Services</td>
<td>4.0</td>
<td>3.0</td>
</tr>
<tr>
<td>Public Information Office</td>
<td>2.0</td>
<td>4.0</td>
</tr>
<tr>
<td>Pupil Services</td>
<td>1,214.9</td>
<td>913.3</td>
</tr>
<tr>
<td>School Board</td>
<td>1.0</td>
<td></td>
</tr>
<tr>
<td>Superintendent</td>
<td>2.0</td>
<td>2.0</td>
</tr>
<tr>
<td>Support Services</td>
<td>15.0</td>
<td>1,710.0</td>
</tr>
<tr>
<td>Technology Services</td>
<td>8.0</td>
<td>83.0</td>
</tr>
<tr>
<td><strong>Central Vehicle Maintenance</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Central Vehicle Maintenance</td>
<td>2.0</td>
<td>73.0</td>
</tr>
<tr>
<td><strong>Food Services</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food Services</td>
<td>1.0</td>
<td>434.0</td>
</tr>
</tbody>
</table>
4. **Provide a detailed description of the Student Information System? What system is currently utilized by LCPS? Will this new system replace the current established system infrastructure?** (Volpe/Feb. 22, 2013)

Below is the requested information regarding the status of the current LCPS Student Information System (SIS):

A focus group from LCPS Department of Technology Services (DTS), Loudoun County Department of Information Technology (DIT), and current SIS software providers conducted a SWOT analysis (strengths, weaknesses, opportunities, and threats) to examine the consequences of Pearson Education’s recent purchase of Star-Web, the current LCPS Student Information System (SIS). This analysis was necessitated by Pearson Educations’ announcement that they will “Sunset” the existing SIS as of August 2014. The effect of the “sunset” decision is to cease all SIS software upgrades, enhancements, and patches as of August 2014. The consensus and recommendation of the focus group is to secure funding in the FY14 budget and begin implementing a Student Information System (SIS) immediately.

### SWOT Analysis for Star-Web

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• User familiarity with Star-Web (Installed 1999)</td>
<td>• Reduce cost by eliminating 3rd party bolt-on (e.g. gradebook, curriculum management system, student and teacher reporting)</td>
</tr>
<tr>
<td>• DIT is responsible for the technical functionality of the program</td>
<td>• Improve staff efficiencies by eliminating time-consuming custom interfaces</td>
</tr>
<tr>
<td>• DTS supports content and functions</td>
<td>• Enhance communication between teachers and parents through a unified parent portal</td>
</tr>
<tr>
<td>• Knowledgeable and experienced staff</td>
<td>• Increase productivity by eliminating manual and redundant processes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Weaknesses</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>• SIS is no longer supported by vendor</td>
<td>• Loss of Average Daily Membership (ADM) and special program funding from VDOE (Title 1, Special Education, Gifted, etc.)</td>
</tr>
<tr>
<td>• Current version of Oracle database is no longer supported</td>
<td>• Inability to modify the existing database structure to accommodate future State, Federal, and Local mandates</td>
</tr>
<tr>
<td>• Poor integration with existing enterprise systems</td>
<td>• Limited support depth in key functional areas</td>
</tr>
<tr>
<td>• Numerous manual and redundant processes</td>
<td>• Loss of key staff</td>
</tr>
<tr>
<td>• Limited access to student data by teachers</td>
<td>• Inability to secure FY14 funding</td>
</tr>
<tr>
<td>• External applications are required for analytical reporting</td>
<td>• 12-18 month implementation schedule for new SIS</td>
</tr>
</tbody>
</table>
History

Since 1999, Century Consultant’s Star Web has been the SIS used by LCPS. During 2011 and 2012, DIT and LCPS were deeply involved in a mandatory upgrade of Star_Web to SISExpress because Star_Web was slated to go out of vendor support in July 2014.

In August, 2012, Century Consultants was acquired by Pearson Education. Pearson notified all Century Consultant customers (LCPS) that they would cease all development, modifications, and enhancements as of August 2014.

LCPS immediately began a marketplace review of current integrated K-12 SIS replacement products. The urgency of replacement of this mission critical system is driven by no vendor support, limited functionality and criticality of effective state, federal and local student, staff and revenue reporting.

The SIS is the official certified source for all LCPS student and staff records used to obtain funding from United States Department of Education and the Virginia Department of Education. It is critical for LCPS to create accurate and secure data that supports building utilization and capacity planning, staffing information based on student enrollment, highly qualified teacher reporting, longitudinal data for analysis, and the ability to extract, transfer and load data to a number of 3rd party operational systems.

The following stakeholders rely on the accuracy and accessibility of the SIS:

- Teachers
- Parents
- Students
- Department of Instruction
- Department of Pupil Services
- Department of Personnel Services
- Department of Support Services
- Loudoun County Department of Economic Development
- Department of Planning & Legislative Services
- LCPS Public Information Office
- Department of Education (US and Virginia)
- Department of Technology Services

The SIS system decision-drivers include, but are not limited to improving, functionality, reliability, scalability, ease of use, cost, implementation and on-going support. Due to the size and complexity of the SIS, LCPS will require between 12 and 18 months for implementation.
Proposed:

5. Provide specific details on the technology pilot program. How are you planning to implement this? In what areas? What is the basis for the 650 items that have been requested? Are that many devices really needed for a pilot program? (Letourneau/Feb. 22, 2013)

The goal of this pilot is to ensure when a device is given to a teacher or student it is cost-effective, practical, manageable, scalable, durable, and user-friendly resulting in increased instructional value. Considering a combined student and teacher population of over 75,000, a 650 device sample will adequately correlate and qualify independent variables (operating systems, hardware, software, etc.) with the dependent variable of an appropriate “one-to-one” student and teacher device. Using this process will assist LCPS in minimizing project risks experienced by other school districts’ one-to-one initiatives that were poorly implemented resulting in limited value and runaway cost.

Operationally, the technology pilot will develop a robust, scalable, and manageable technology environment that ensures an effective, efficient and economical deployment of one-to-one devices for LCPS students and teachers. The LCPS Technology Plan identifies that all students and teachers, in grades 4 – 12, will have one-to-one devices within the next five years. In anticipation of the FY14 pilot, LCPS is currently in the process of creating a one-to-one implementation team comprised of technology, instructional, teachers, students, and school based support personnel to develop the template for a user-friendly teacher and student device that transforms instruction preparing students for the global work force and economy.
LCPS' technology vision is transitioning toward a blended array of both print and digital materials. This environment will facilitate dynamic, multimedia digital resources which will require a mobile device for each teacher and student. This device will provide tools for authoring, creating and publishing products that reflect student learning. Also included in this vision is the district's ability to move toward a blended learning environment which incorporates face-to-face and online distance instruction. The one-to-one initiative will support both common assessments and SOL testing.

Working collaboratively with Principals' Technology Committee, the 650 devices will be placed in eight strategically selected elementary, middle and high schools. It is anticipated that there will be approximately three classes / subjects identified and monitored during the pilot depending on grade level. A rubric will be created to determine best hardware platform, user-experience, security, durability, effective operating system, software and instructional integration, network scalability, teacher and student training, monitoring, and assessment. The evaluation rubric will determine anticipated total cost of ownership (TCO) and project return on investment (ROI).

6. **What would the savings be if LCPS were to implement the same OPEB changes to current retirees that the county did this year? This would be in addition to those changes already proposed in FY14 LCPS budget.** (Letourneau/Feb. 22, 2013)

Based on current retirees only, if LCPS contributed the County retiree health insurance percentages instead of those proposed, plan year costs would be reduced by $393,000. The fiscal year 2014 impact would be a reduction of $196,000.

7. **What would the savings be by not grandfathering current LCPS employees from the proposed tiered system for health benefit eligibility?** (Letourneau/Feb. 22, 2013)

The savings without any grandfathering would be $2,700,000. The following number of staff members would receive reduced contributions toward group health insurance:

<table>
<thead>
<tr>
<th>Employer GHI Contribution</th>
<th>85%</th>
<th>70%</th>
<th>0%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher</td>
<td>32</td>
<td>25</td>
<td>71</td>
</tr>
<tr>
<td>Bus Driver and Attendants</td>
<td>125</td>
<td>225</td>
<td>29</td>
</tr>
<tr>
<td>Cafeteria Staff</td>
<td>36</td>
<td>30</td>
<td>1</td>
</tr>
<tr>
<td>Psychologist/Social Worker</td>
<td>1</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>194</td>
<td>285</td>
<td>101</td>
</tr>
</tbody>
</table>
8. What would the savings be by not grandfathering current LCPS employees from the proposed change in the definition of full-time employee? (Letourneau/Feb. 22, 2013)

$7.2 million, 580 staff members would no longer be eligible for healthcare benefits or VRS.

<table>
<thead>
<tr>
<th>Role</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bus Drivers &amp; Attendants</td>
<td>379</td>
</tr>
<tr>
<td>Food Services</td>
<td>67</td>
</tr>
<tr>
<td>Psychologist/Social Wkr</td>
<td>6</td>
</tr>
<tr>
<td>Teachers</td>
<td>128</td>
</tr>
<tr>
<td>Total</td>
<td>580</td>
</tr>
</tbody>
</table>

9. LCPS runs its own trash and recycling trucks throughout the county. What is the cost, including all capital, personnel and operations and maintenance associated with this? How does this cost compare to contracting for service through a private vendor? (Letourneau/Feb. 22, 2013)

The 2012 expenditures for trash removal and recycling for Loudoun County Public Schools and the County of Loudoun are as follows:

**Capital:**
- Refuse Trucks: $90,799
- Recycling Truck: $22,978
- Total Capital: $113,777

**Operation / Maintenance:**
- Trash Removal: $123,588
- Recycling: $34,848
- Total Operation / Maintenance: $158,436

**Labor:**
- Trash Removal: $164,757
- Recycling: $58,406
- Total Labor: $223,263

**Total Capital, Operation/Maintenance/Labor:** $495,476

**Contracting for services through a private vendor:**
- Trash Removal: $1,024,400
- Recycling: $123,000
- Total Private Vendor Services: $1,147,400
10. How many CDL licenses did LCPS pay for in each fiscal year FY11, FY12 and so far in FY13? (Letourneau/Feb. 22, 2013)

LCPS did not pay for any CDL licenses during the fiscal years listed above. Fees associated with the CDL licenses are paid by the trainee, not LCPS.

How many of these licensees were assigned runs?

FY11 - 46
FY12 - 68
FY13 - 59

*Not all employees who complete the required training and obtain a CDL license take an assigned run (become a contracted employee), some elect to be a substitute bus driver.

What is the total that LCPS spent on CDL training for each of those fiscal years?

<table>
<thead>
<tr>
<th>Year</th>
<th>FY11</th>
<th>FY12</th>
<th>FY13</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$85,062</td>
<td>$162,429</td>
<td>$95,166</td>
</tr>
</tbody>
</table>

CDL training is required for all new drivers and is a requirement for the annual continuing education of all (750) CDL drivers.

11. Please provide graduation rates and college attendance statistics for the past couple years. Are they trending down? (Higgins/March 4, 2013)

LCPS Graduation Rates: 4 year cohort groups

<table>
<thead>
<tr>
<th>Year</th>
<th>4 year cohort graduation rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>95.1</td>
</tr>
<tr>
<td>2011</td>
<td>95.4</td>
</tr>
<tr>
<td>2010</td>
<td>94.5</td>
</tr>
<tr>
<td>2009</td>
<td>93.7</td>
</tr>
<tr>
<td>2008</td>
<td>93.6</td>
</tr>
</tbody>
</table>

College Attendance rate (according to senior survey exit information)

<table>
<thead>
<tr>
<th>Year</th>
<th>Total # grads</th>
<th>4 year college</th>
<th>2 year college</th>
<th>% of total grads</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>4102</td>
<td>2579</td>
<td>1102</td>
<td>89.7%</td>
</tr>
<tr>
<td>2011</td>
<td>3926</td>
<td>2466</td>
<td>1091</td>
<td>90.6%</td>
</tr>
<tr>
<td>2010</td>
<td>3676</td>
<td>2231</td>
<td>1047</td>
<td>89.2%</td>
</tr>
<tr>
<td>2009</td>
<td>3534</td>
<td>2210</td>
<td>973</td>
<td>90.0%</td>
</tr>
<tr>
<td>2008</td>
<td>3341</td>
<td>1971</td>
<td>1034</td>
<td>89.9%</td>
</tr>
</tbody>
</table>
12. What is the cause of the 8% increase in the LCPS central vehicle maintenance costs? (Higgins/March 4, 2013)

The Central Vehicle budget for vehicle maintenance costs is based on the combined fleets for the school division and the County of Loudoun.

The FY2013 appropriated budget for central vehicle maintenance is $21,353,168. The 2014 budget request is for $23,039,040. The overall requested increase is $1,685,872 or 7.9%.

A number of factors influence the FY14 vehicle maintenance and fuel budget request. Some of these include the potential cost of fuel, continually increasing parts prices, an increase in the number of extensive repairs due to fleet age, and increased fleet usage (miles traveled).

A breakdown of costs includes:
- Salary and Benefits (with no change in FTE’s): $122,888 increase (2.2% increase)
- Gasoline & Diesel Fuel: $1,350,732 increase (12.8% increase)
  This is based on projected FY14 combined County of Loudoun and LCPS fleet vehicle count x projected gallons per vehicle x $3.65 per gallon.
- Vehicle Parts & Supplies: $160,987 increase (5.1% increase)
  This is based on FY12 actual times 3% increase.
  For FY11, the central garage average price per part = $15.90
  For FY12, the central garage average price per part = $18.57 (up 16.8% over FY11)
  YTD FY13, the central garage average price per part = $19.82 (up 6.7% to date)
- Repairs by commercial providers: $51,265 increase (2.6% increase)
  Repairs of specialized pieces of large equipment (i.e., fire trucks / ladder trucks, fire apparatus equipment.)

13. What has the County and LCPS done to curtail construction budgeted resources since the audit findings that cost of construction did not exceed 90% of budgeted amounts which affects the depreciation of the facility? (Letourneau/March 4, 2013)

Neither the original policy referenced in the finding, nor the current policy impact the budgeting process for construction projects. The audit finding does not imply the necessity to curtail budgeting resources for construction. LCPS has and will continue to review each active construction project to return to the County any authorized funding that will not be necessary to complete the project.

The audit finding referenced an original County policy requiring new construction be transferred to an asset account when expenditures reached 95% of the project budget. This would then initiate the recording of depreciation for the facility. The auditors recommended a correction that begins recording depreciation when a facility is placed in service. The correction was made in both School and County accounts.
14. Please clarify how many employees are affected by the 17.5 to 20 hour change in VRS? Given two answers, for which one was 59 employees. (Letourneau/March 4, 2013)

The number of LCPS employees who work less than 20 hours per week and would therefore be impacted by the change to tiered health insurance contributions is 101. This is also the number impacted by the change in the definition of full-time for VRS benefits.

The number of LCPS employees who work 17.5 hours per week (a subset of the number above) is 59.

There are another 42 employees who work more than 17.5 but less than 20 hours per week.

15. If LCPS did not grandfather current employees and implemented the VRS eligibility changes, what are the resulting cost savings for FY 2014? (Letourneau/March 4, 2013)

If LCPS employees were not grandfathered for the VRS changes, the savings would be $1.7 million.

16. Please provide the training costs for helping school bus drivers attain a CDL license, and provide retention rate for those that received CDL training over the past three years. How many stayed 3 months, 6 months, 1 year, or more? What is average tenure for those trained in past 3 years? (Letourneau/March 4, 2013)

CDL training costs for 79 new trainees and renewal costs for existing licensed bus drivers for FY2010: $123,072*
CDL training costs for 94 new trainees and renewal costs for existing licensed bus drivers for FY2011: $85,062*
CDL training costs for 102 new trainees and renewal costs for existing licensed bus drivers for FY2012: $162,429*
CDL training costs for 73 new trainees and renewal costs for existing licensed bus drivers for FY2013: $95,166*

The retention rate for the past three years (FY2010, FY2011, and FY2012) is 64.7%. Of the 275 employees trained, 178 were still employed by LCPS as a driver at the end of the third year.

For the current school year (FY2013), of the 73 trainees, 13 resigned within 3 months, 2 resigned between 3 and 6 months, and 7 resigned between 6 and 12 months.

We are unable to provide a more detailed breakdown for previous years as records were not maintained in a manner that allows for this type of data retrieval.

*Includes training costs for new CDL trainees and annual continuing education of all 750 CDL drivers.

17. Please provide the student to Guidance Counselor ratio for the LCPS. (Reid/March 4, 2013)

Elementary: average 460
Middle: average 321
High: average 331
18. Please provide the number of LCPS employees deemed instructional per the State definition. (Reid/March 4, 2013)

The Virginia Department of Education’s definition of Instruction is the following:

“Instruction includes the activities that deal directly with the interaction between teachers and students. Instruction may be provided for students in a school classroom, in another location such as a home or hospital, or in other learning situations such as those involving co-curricular activities. Instruction may also be provided through another approved medium such as television, Internet, radio, telephone, or correspondence. The activities of aides or classroom assistants of any type (clerks, graders, etc.) that assist in the instructional process are included in this category.”

In the LCPS FY14 Operating Budget, 7,640 positions are in the Instruction state category.

19. Please provide an expanded cost per pupil with all known costs (debt service, capital, etc.) included. Also, please provide the total enrollments and tax rates for the Northern Virginia regional jurisdictions. Also provide average class size for each jurisdiction. (Volpe/March 4, 2013)

<table>
<thead>
<tr>
<th>FY 13 All Funds CPP</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexandria</td>
<td>$23,294</td>
</tr>
<tr>
<td>Arlington</td>
<td>$24,789</td>
</tr>
<tr>
<td>Fairfax</td>
<td>$16,005</td>
</tr>
<tr>
<td>Loudoun</td>
<td>$17,049</td>
</tr>
<tr>
<td>Prince William</td>
<td>$14,309</td>
</tr>
</tbody>
</table>

Source: FY13 WABE Guide

<table>
<thead>
<tr>
<th>FY 13 Enrollment</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexandria</td>
<td>12,798</td>
</tr>
<tr>
<td>Arlington</td>
<td>22,723</td>
</tr>
<tr>
<td>Fairfax</td>
<td>181,536</td>
</tr>
<tr>
<td>Loudoun</td>
<td>68,170</td>
</tr>
<tr>
<td>Prince William</td>
<td>84,178</td>
</tr>
</tbody>
</table>

Source: FY13 WABE Guide
Real Estate Tax Rates (per $100 of assessed value)

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
<th>Increase/ (Decrease)</th>
<th>Increase/ (Decrease)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexandria</td>
<td>1.048</td>
<td>0.998</td>
<td>5 ¢ 5.0%</td>
<td></td>
</tr>
<tr>
<td>Arlington</td>
<td>1.003</td>
<td>0.971</td>
<td>3.2 ¢ 3.3%</td>
<td></td>
</tr>
<tr>
<td>Fairfax</td>
<td>1.095</td>
<td>1.075</td>
<td>2 ¢ 1.9%</td>
<td></td>
</tr>
<tr>
<td>Prince William</td>
<td>1.201</td>
<td>1.209</td>
<td>&lt; 1¢ -0.7%</td>
<td></td>
</tr>
</tbody>
</table>

Source: FY 14 County Proposed Budgets

FY 13 Average Class Size

<table>
<thead>
<tr>
<th></th>
<th>Elementary</th>
<th>Middle</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexandria</td>
<td>20.9</td>
<td>18.0</td>
<td>19.7</td>
</tr>
<tr>
<td>Arlington</td>
<td>20.8</td>
<td>20.4</td>
<td>19.5</td>
</tr>
<tr>
<td>Fairfax</td>
<td>21.4</td>
<td>24.4</td>
<td>24.9</td>
</tr>
<tr>
<td>Loudoun</td>
<td>24.7</td>
<td>24.3</td>
<td>25.8</td>
</tr>
<tr>
<td>Prince William</td>
<td>22.8</td>
<td>28.8</td>
<td>21.3</td>
</tr>
</tbody>
</table>

Source: FY13 WABE Guide

20. Please provide a breakdown of the different classifications of students that result in LCPS receiving state and federal funding, and the corresponding “cost recovery” of the known LCPS costs associated with each program. (i.e. free/reduced lunch) (Volpe/March 4, 2013)

LCPS receives federal funding to assist in addressing the needs of Special Education students (IDEA and Pre-school Incentive Grants), students that are disadvantaged economically or eligible for free or reduced cost meals (Title I and Head Start) and students whose native language is not English (Title III). LCPS also receives state funding for these populations to support SOQ staffing requirements.

Federal Funding for Selected Student Populations

<table>
<thead>
<tr>
<th>Population</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>IDEA</td>
<td>$9,312,526</td>
</tr>
<tr>
<td>Pre-school Incentive</td>
<td>$143,672</td>
</tr>
<tr>
<td>Head Start</td>
<td>$1,463,955</td>
</tr>
<tr>
<td>Title I</td>
<td>$1,330,153</td>
</tr>
<tr>
<td>Title III</td>
<td>$532,876</td>
</tr>
<tr>
<td>School Lunch &amp; Breakfast</td>
<td>$4,600,000</td>
</tr>
</tbody>
</table>
21. **How do small schools affect overall class size ratios for the system? (Volpe/March 4, 2013)**

   The few small classes that exist in the elementary schools have little influence on the overall class averages because we assign staff to each elementary school individually, striving for as close to the average of 24 per grade level and 24 as an overall per school average, as space allows. In the smallest schools we have reduced the staffing in general education to 3.5 FTEs resulting in two combination classes across grades 1-5 (2/3 combination and 4/5 combination most frequently). Although these schools may have an overall average well below 24 students, these few classes do not have a significant impact on the entire elementary school ratios.

22. **How is the structure of exempt/non-exempt determined, and when is the last time that structure was reviewed? (Volpe/March 4, 2013)**

   All non-exempt employees (eligible for overtime) reside on the hourly classified salary schedule. Exempt employees (those not eligible for overtime) include teachers and administrators or those who reside on the instructional and auxiliary salary schedules or administrative salary schedule. The designation of exempt/non-exempt was last reviewed in 2010.

23. **What are the transportation costs for WHS and LVHS swim practices to Claude Moore and Ida Lee and any other pools they practice at? (Clarke/March 7, 2013)**

   Loudoun Valley High School = $3,537.93

   Woodgrove High School = $4,077.05

24. **What are the costs associated with using the pools for practice for WHS and LVHS? (Clarke/March 7, 2013)**

   LVHS and WGHS used Ida Lee for practices a total of 3 hours per week at $72.00 per hour for 12 weeks. The total rental for practices for both at Ida Lee is $2,592. The rest of the practice time for the two schools is at Claude Moore which does not charge us. They rotate between Ida Lee and Claude Moore. One week LVHS is at Ida Lee 2 hours and WG one hour. The next week the schedule is reversed. They pick up the additional hours at Claude Moore on a rotating schedule.
25. I understand from Jill Turgeon that revenue for the turf field usage for Tuscarora and Woodgrove combined was $35,937 for the 11/12 school year. Was there any income from John Champe? (Clarke/March 7, 2013)

John Champe High School was not open during the 2011-2012 school year. (Opened Fall 2012)

During the 2012-2013 school year (to date) fees paid = $14,125.00

26. Can you give a list of the 8 orgs that used the stadiums? (Clarke/March 7, 2013)

Groups utilizing Tuscarora and Woodgrove High School turf fields during the 2011-2012 school year are as follows:

- Central Loudoun Youth Football
- Fuze Lacrosse
- Loudoun County Department of Parks, Recreation and Community Services
- Loudoun Youth Lacrosse
- Loudoun Youth Soccer
- Old Dominion Football Club
- U19 Rugby
- Upper Loudoun Youth Football
- Virginia Youth Soccer Association
- Vision Sports
- Vista Infinity Soccer

27. What is the hourly rate charged to use the turf stadiums? (Clarke/March 7, 2013)

Turf Use Fee = $125.00 per hour (minimum 2-hours)
Supervision Fee = $40.00 per hour (minimum 2-hours)

28. What are the hours that the stadiums are available to the leagues? (Clarke/March 7, 2013)

When not in use for school activities, stadiums are available 8:00AM until 11:00PM for use by the Loudoun County Department of Parks, Recreation and Community Services (PRCS). Many league schedules are administered by PRCS.
29. Please categorize the $7.6 million “other” revenue category by source and by facility countywide. How much of the $7.6 million comes from driver education, parking, athletics, advanced placement tests, adult education classes, facility use fees etc. by school? (Higgins/March 15, 2013)

The following is a breakdown of the other revenue included in the School Board’s Proposed FY14 Operating Budget:

<table>
<thead>
<tr>
<th>FY14 Proposed</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Howard Hughes Foundation</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>Apple Credit Union</td>
<td>$50,372</td>
</tr>
<tr>
<td>PAVAN</td>
<td>$50,000</td>
</tr>
<tr>
<td>Junior Navy ROTC Program</td>
<td>$18,000</td>
</tr>
<tr>
<td>Athletic Fees</td>
<td>$820,000</td>
</tr>
<tr>
<td>Advanced Placement Test Fees</td>
<td>$1,060,000</td>
</tr>
<tr>
<td>Parking Fees</td>
<td>$500,000</td>
</tr>
<tr>
<td>Tuition-Adult Education</td>
<td>$115,000</td>
</tr>
<tr>
<td>Tuition-Day School</td>
<td>$140,000</td>
</tr>
<tr>
<td>Tuition-Summer in the Arts</td>
<td>$185,000</td>
</tr>
<tr>
<td>Tuition-Summer School</td>
<td>$615,000</td>
</tr>
<tr>
<td>Tuition-Driver Education</td>
<td>$145,000</td>
</tr>
<tr>
<td>Rebates, Refunds &amp; Recoveries</td>
<td>$200,000</td>
</tr>
<tr>
<td>Sale of Textbooks</td>
<td>$40,000</td>
</tr>
<tr>
<td>E-Rate Reimbursement</td>
<td>$700,000</td>
</tr>
<tr>
<td>Use of Building</td>
<td>$1,250,000</td>
</tr>
<tr>
<td>Transportation Services to County</td>
<td></td>
</tr>
<tr>
<td>Park and Rec Program</td>
<td>$500,000</td>
</tr>
<tr>
<td>On-line Payments</td>
<td>$23,100</td>
</tr>
<tr>
<td>Sale of Equipment</td>
<td>$190,000</td>
</tr>
<tr>
<td></td>
<td>$7,601,472</td>
</tr>
</tbody>
</table>

The “other” revenue estimates are prepared in total for LCPS and are therefore not available by school.
30. What are the fee structures for these revenue sources? For instance, how much is the fee per student/adult for driver education, parking, and athletics? How much is the facility use fee? (Higgins/March 15, 2013)

### Fee Structures:

<table>
<thead>
<tr>
<th>Service</th>
<th>Fee Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Athletic Fees</td>
<td>$100 per student; per sport</td>
</tr>
<tr>
<td>Advanced Placement Test Fees</td>
<td>Fee per Advanced Placement Exam (based on cost of exam)</td>
</tr>
<tr>
<td>Parking Fees</td>
<td>$200 per year ($25 stays at the high school)</td>
</tr>
<tr>
<td>Tuition-Adult Education</td>
<td>Based on the cost of the course</td>
</tr>
<tr>
<td>Tuition-Day School</td>
<td>Based on the cost per pupil calculated as part of the previous year's Annual State Report. FY13 rates are $12,514 for out of state students and $8,817 for out of county students.</td>
</tr>
<tr>
<td>Tuition-Summer in the Arts</td>
<td>$425 per student</td>
</tr>
<tr>
<td>Tuition-Summer School</td>
<td>Elementary summer school $325, middle summer school $500, and high summer school $650 per student.</td>
</tr>
<tr>
<td>Tuition-Driver Education</td>
<td>$195 per student</td>
</tr>
<tr>
<td>Use of Building</td>
<td>Custodial or supervision fee of $40 per hour</td>
</tr>
</tbody>
</table>

### Facility use fees:

- Cafeteria (including kitchen):
  - ES & MS $79 per hour
  - HS $106 per hour
- Cafeteria (excluding kitchen):
  - ES & MS $66 per hour
  - HS $99 per hour
- Gym
  - ES, MS & HS Auxiliary $66 per hour
  - MS & HS Main Gym $106 per hour
- Auditorium:
  - ES & MS $66 per hour
  - HS $106.00 per hour

31. Are these fees designed to cover costs for the sources from which they are collected? (parking fees for parking lots, athletic fees for athletic programs) (Higgins/March 15, 2013)

Advanced Placement fees, Summer in the Arts, Driver Education, and Adult Education Community Interest Courses are self-supporting. All other tuition and fees charged by LCPS are meant to minimally, partially cover the costs of the related services and are treated as general revenue for the Operating fund.
32. How is this revenue spent? How much of the revenue collected is returned for use to the category from which it was collected? (Higgins/March 15, 2013)

See Question 31.

33. When were each of these fees implemented? (Higgins/March 15, 2013)

Athletic Fees 2009
Advanced Placement Test Fees 2009
Parking Fees 2009
Tuition-Adult Education 1972
Tuition-Day School 1970
Tuition-Summer in the Arts 1999
Tuition-Summer School 1970
Tuition- Driver Education 1970
Use of Building 1970

34. Please provide a list of the fees for each of these sources by year for every year for the last five years? (Higgins/March 15, 2013)

The following is a 5 year history of the revenue generated by tuition and fees:

<table>
<thead>
<tr>
<th></th>
<th>FY08 Actual</th>
<th>FY09 Actual</th>
<th>FY10 Actual</th>
<th>FY11 Actual</th>
<th>FY12 Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Athletic Fees</td>
<td>$0</td>
<td>$0</td>
<td>$741,786</td>
<td>$844,723</td>
<td>$831,920</td>
</tr>
<tr>
<td>Advanced Placement Test Fees</td>
<td>$0</td>
<td>$4,293</td>
<td>$917,315</td>
<td>$936,348</td>
<td>$1,045,196</td>
</tr>
<tr>
<td>Parking Fees</td>
<td>$0</td>
<td>$0</td>
<td>$428,006</td>
<td>$454,639</td>
<td>$493,479</td>
</tr>
<tr>
<td>Tuition-Adult Education</td>
<td>$192,327</td>
<td>$192,084</td>
<td>$197,273</td>
<td>$194,515</td>
<td>$253,098</td>
</tr>
<tr>
<td>Tuition-Day School</td>
<td>$260,923</td>
<td>$249,328</td>
<td>$235,804</td>
<td>$52,611</td>
<td>$92,923</td>
</tr>
<tr>
<td>Tuition-Summer in the Arts</td>
<td>$0</td>
<td>$0</td>
<td>$7,475</td>
<td>$185,368</td>
<td>$202,992</td>
</tr>
<tr>
<td>Tuition-Summer School</td>
<td>$639,514</td>
<td>$388,682</td>
<td>$619,975</td>
<td>$444,703</td>
<td>$557,737</td>
</tr>
<tr>
<td>Tuition-Driver Education</td>
<td>$85,928</td>
<td>$124,637</td>
<td>$122,043</td>
<td>$145,629</td>
<td>$190,157</td>
</tr>
<tr>
<td>Use of Building</td>
<td>$1,237,782</td>
<td>$1,088,718</td>
<td>$1,135,453</td>
<td>$1,205,273</td>
<td>$1,057,984</td>
</tr>
</tbody>
</table>

35. Are all students required to pay the fee? Are any students exempt from fee payment? (Higgins/March 15, 2013)

All high school students who wish to park on school property must pay the parking fee. Fees for athletics and AP exams are waived for students who qualify for free or reduced meals.
36. Who is required to pay facility use fees? Are any entities exempt from this fee? (Higgins/March 15, 2013)

LCPS School Board Policy §6-27 and §6-28 state that not for profit organizations can be allowed to use school facilities when they are not in use for educational purposes and that they must pay both the custodial/supervisory and building use fee.

Groups whose use are entirely or primarily for the support or benefit of students, school personnel, or the school (PTA/PTO, Boy and Girl Scouts, 4-H Clubs, YMCA and the Loudoun County Department of Parks, Recreation and Community Services), may use school facilities without payment of fees except necessary custodial fees.

37. “Other Revenue” increased to $7.6 million in FY2014 from $6.8 million in FY2013. What was the reason(s) for this increase? (Higgins/March 15, 2013)

The estimated “other revenue” estimated increase is based on historical trends. The majority of the increase is accounted for as follows:

- Athletic Fees $20,000
- Advanced Placement Test Fees $140,000
- Tuition-Summer in the Arts $85,000
- E-Rate Reimbursement $200,000
- Transportation Services to County $160,000
- Sale of Equipment $120,000

The remaining increases are small changes throughout the other categories.
38. What was the funding level for “Other Revenue” in FY2012, FY2011 and FY 2010? (Higgins/March 15, 2013)

<table>
<thead>
<tr>
<th></th>
<th>FY10 Actual</th>
<th>FY11 Actual</th>
<th>FY12 Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Howard Hughes Foundation</td>
<td>$680,305</td>
<td>$833,231</td>
<td>$1,084,944</td>
</tr>
<tr>
<td>Apple Credit Union</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>PAVAN</td>
<td>$42,920</td>
<td>$95,756</td>
<td>$30,022</td>
</tr>
<tr>
<td>Junior Navy ROTC Program</td>
<td>$85,362</td>
<td>$77,890</td>
<td>$97,438</td>
</tr>
<tr>
<td>PEP (Carol White)</td>
<td>$0</td>
<td>$103,265</td>
<td>$0</td>
</tr>
<tr>
<td>Local Grants &amp; Contributions</td>
<td>$0</td>
<td>$8,009</td>
<td>$19,097</td>
</tr>
<tr>
<td>Athletic Fees</td>
<td>$741,786</td>
<td>$844,723</td>
<td>$831,920</td>
</tr>
<tr>
<td>Advanced Placement Test Fees</td>
<td>$917,315</td>
<td>$936,348</td>
<td>$1,045,196</td>
</tr>
<tr>
<td>Parking Fees</td>
<td>$428,006</td>
<td>$454,639</td>
<td>$493,479</td>
</tr>
<tr>
<td>Tuition-Adult Education</td>
<td>$197,273</td>
<td>$194,515</td>
<td>$253,098</td>
</tr>
<tr>
<td>Tuition-Day School</td>
<td>$235,804</td>
<td>$52,611</td>
<td>$92,923</td>
</tr>
<tr>
<td>Tuition-Summer in the Arts</td>
<td>$7,475</td>
<td>$185,368</td>
<td>$202,992</td>
</tr>
<tr>
<td>Tuition-Summer School</td>
<td>$619,975</td>
<td>$444,703</td>
<td>$557,737</td>
</tr>
<tr>
<td>Tuition-Driver Education</td>
<td>$122,043</td>
<td>$145,629</td>
<td>$190,157</td>
</tr>
<tr>
<td>Rebates, Refunds &amp; Recoveries</td>
<td>$833,225</td>
<td>$271,841</td>
<td>$499,524</td>
</tr>
<tr>
<td>Sale of Textbooks</td>
<td>$39,207</td>
<td>$28,063</td>
<td>$64,985</td>
</tr>
<tr>
<td>E-Rate Reimbursement</td>
<td>$865,605</td>
<td>$409,339</td>
<td>$720,890</td>
</tr>
<tr>
<td>Use of Building</td>
<td>$1,135,453</td>
<td>$1,205,273</td>
<td>$1,057,984</td>
</tr>
<tr>
<td>Transportation Services to County Parks &amp; Rec Program</td>
<td>$389,431</td>
<td>$767,679</td>
<td>$904,088</td>
</tr>
<tr>
<td>On-line Payments</td>
<td>$0</td>
<td>$70,872</td>
<td>$0</td>
</tr>
<tr>
<td>Sale of Equipment</td>
<td>$250,467</td>
<td>$174,116</td>
<td>$312,818</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$7,591,652</strong></td>
<td><strong>$7,303,870</strong></td>
<td><strong>$8,459,292</strong></td>
</tr>
</tbody>
</table>