



SARASOTA
County Schools

December 12, 2017
Materials Management
Purchasing Department
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MEMORANDUM

TO: Members of the School Board
Dr. Todd Bowden, Superintendent
Mitsi Corcoran, Assistant Superintendent Chief Financial Officer

FROM: Carol A. Lichon, CPPO, Director of Materials Management

TITLE: APPROVAL OF THE 2016-2017 DATA COLLECTION REVIEW
COMMITTEE REPORT

In accordance with Florida Statute 1008.385, the report of the activities of the Data Collection Review Committee is presented. The goal of the committee is to review and approve all district forms and achieve standardization.

Requested by:

Carol Lichon

Fiscal Impact:

N/A

Recommended Motion: That the 2016-2017 Data Collection Review Committee Report be approved as presented.

DATA COLLECTION REVIEW COMMITTEE

YEAR END REPORT

2016-2017

TO

THE SCHOOL BOARD OF SARASOTA COUNTY, FLORIDA

**Bridget Ziegler, Chair
Jane Goodwin, Vice Chair
Shirley Brown
Eric Robinson
Caroline Zucker**

**Dr. Todd Bowden
Superintendent of Schools**

**Prepared by:
Sally M. Frank, Supervisor
Record Retention Center**

DATA COLLECTION REVIEW COMMITTEE
YEAR END REPORT 2016-2017

SPECIFIC AUTHORITY –

Guidelines from Florida Statute Chapter 1008.385 Educational Planning and Information Systems:

1008.385 (2)(b)1. The specific responsibilities of each district school system shall include:
1.Establishing, at the district level, a reports-control and forms-control management system committee composed of school administrators and classroom teachers. The district school board shall appoint school administrator members and classroom teacher members or, in school districts where appropriate, the classroom teacher members shall be appointed by the bargaining agent. Teachers shall constitute a majority of the committee membership. The committee shall periodically recommend procedures to the district school board for eliminating, reducing, revising, and consolidating paperwork and data collection requirements and shall submit to the district school board an annual report of its findings.

Guidelines from The School Board of Sarasota County, School Board Policies Manual Chapter 8.00-Auxiliary Services:

8.81 Report and Forms Management Committee

Policy:

The School Board shall establish and maintain a reports and forms management control system committee to ensure that forms are prepared in a logical and uncomplicated format and efficiently handle data, thus resulting in a reduction of duplication in the collection of data and ensuring that reports contain accurate data.

COMMITTEE MEMBERSHIP FOR 2016-2017

- Kimberly Reifert, Teacher, Ashton Elementary, Chair
- Victoria Stillo-Gross, Program Specialist, Pupil Support Services, Vice Chair
- Gary French, Teacher, Woodland Middle
- Christine Mayer, Sarasota Classified Teachers Association
- Sally Frank, Supervisor, Record Retention Center
- Jeanne Torres, Supervisor, Print Shop

COMMITTEE MEETINGS HELD FOR 2016-2017

September 15, 2016	October 20, 2016	November 17, 2016
December 15, 2016	January 19, 2017	February 16, 2017
March 23, 2017	May 18, 2017	

DATA COLLECTION REVIEW COMMITTEE
YEAR END REPORT 2016-2017

REPORT OF ACTIVITIES FOR 2016-2017

- Reviewed 231 new or revised forms, created on-line fill-in versions of these forms and posted forms to SharePoint.
- Sent email communications to district staff to reinforce the importance of using only district approved forms.
- Worked with Print Shop to provide a consistent response to requests for printing of unapproved forms.
- Provided unscheduled review of forms as needed for minor updates and corrections
- Posted additional forms to SharePoint Forms Repository - 793 forms in total now posted
- Met with Executive Directors regarding the forms approval process
- Met with High School Principals regarding the forms approval process
- Prepared and delivered 6 Records and Forms Management Workshops for the following:
New Records Coordinators (two sessions)
South County School Records Coordinators (including Charter and Alternative Schools)
North County School Records Coordinators (including Charter and Alternative Schools)
South County Department Records Coordinators
North County Department Records Coordinators
- Maintained a standard checklist for review of forms to be used for all new forms design and all form revisions
- Participated in Registrar and Bookkeeper meetings to review records and forms management procedures

PROPOSED CALENDAR FOR 2017-2018

August 24, 2017	September 21, 2017	October 19, 2017
November 16, 2017	December 14, 2017	January, 18, 2018
February 16, 2018	March 23, 2018	April 20, 2018
May 18, 2018		

DATA COLLECTION REVIEW COMMITTEE
YEAR END REPORT 2016-2017

COMMITTEE RECOMMENDATIONS FOR 2017-2018

- Continue to work with district and school administrators to get approval for all forms being used and look for opportunities to standardize forms.
- Work with Information Technology to create new External Forms Repository
- Work with new Discipline Administrator to review and update all discipline forms
- Communicate with other school districts to learn how their committee operates and look for efficiencies to improve our processes
- Update the standard checklist for review of forms as appropriate
- Reinforce the use of District forms within all schools and departments at all levels.
- Continue to keep District Records Coordinators informed regarding changes in record-keeping and forms standards
- Update Records and Forms Management Manual as needed
- Work with Print Shop and Warehouse to control use of unauthorized forms in District
- Conduct workshops for new Records Coordinators to provide training in basic records and forms management
- Conduct workshops for returning Records Coordinators to update them on Federal, State, and District changes in records and forms management
- Meet with Registrars and Bookkeepers to review records and forms management procedures