



**SARASOTA**  
County Schools

**Materials Management**  
Purchasing Department  
101 Old Venice Road, Osprey, FL 34229  
Phone 941-486-2183 • Fax 941-486-2188  
[SarasotaCountySchools.net](http://SarasotaCountySchools.net)

December 6, 2016

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**MEMORANDUM**

**TO: Members of the School Board**  
**Lori White, Superintendent**  
**Mitsi Corcoran, Chief Financial Officer**

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

**TITLE: APPROVAL OF THE 2015-2016 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 2015-2016 Data Collection Review Committee Report be approved as presented.

**DATA COLLECTION REVIEW COMMITTEE**

**YEAR END REPORT**

**2015-2016**

**TO**

**THE SCHOOL BOARD OF SARASOTA COUNTY, FLORIDA**

**Shirley Brown, Chair  
Caroline Zucker, Vice Chair  
Jane Goodwin  
Frank H. Kovach, Chair  
Bridget Ziegler**

**Lori M. White  
Superintendent of Schools**

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

**DATA COLLECTION REVIEW COMMITTEE**  
**YEAR END REPORT 2015-2016**

**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 2015-2016**

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

**COMMITTEE CALENDAR FOR 2015-2016**

September 17, 2015	October 15, 2015	November 19, 2015
December 17, 2015	January 21, 2016	February 18, 2016
March 3, 2016	May 17, 2016	

**DATA COLLECTION REVIEW COMMITTEE**  
**YEAR END REPORT 2015-2016**

**REPORT OF ACTIVITIES FOR 2015-2016**

- Reviewed 506 new or revised forms for the following departments and schools, created on-line fill-in versions of these forms and posted forms to SharePoint.

Departments:

Curriculum	Professional Development
District Discipline	Pupil Support
District Schools	Purchasing
Exceptional Student Education	Record Retention
Facilities	Research and Assessment
Financial Services	Risk Management
Fixed Asset Accounting	Safety and Security
Food and Nutrition Services	School Choice
Health Department	Student Services
Human Resources	Suncoast Technical College
Information Technology	Transportation
Media & Instructional Materials	

Schools:

Ashton Elementary	Phillippi Elementary
Brookside Middle	Sarasota High
Cranberry Elementary	Sarasota Middle
Emma E. Elementary	Venice Middle
Lakeview Elementary	

- Sent email communications to staff to reinforce the importance of using only district approved forms.
- Worked with Print Shop to develop a consistent response to requests for printing of unapproved forms.
- Worked with Print Shop to develop a process to access master files.
- Provided unscheduled review of forms as needed for minor updates and corrections
- Worked with IT to address issues on internal District Forms Repository
- Posted additional forms to SharePoint Forms Repository - 740 forms in total now posted
- Worked extensively with Supervisor of Pupil Support Services and Athletics to update the student athletic packets and re-design the student discipline form.

**DATA COLLECTION REVIEW COMMITTEE**  
**YEAR END REPORT 2015-2016**

- Prepared and delivered 7 Records and Forms Management Workshops for the following:  
New Records Coordinators  
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  
Records Coordinator Make-up Session
- Met with Middle School Principals to review Forms Management procedures.
- 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 2016-2017**

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

**COMMITTEE RECOMMENDATIONS FOR 2016-2017**

- 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 Supervisor to review and update all discipline forms
- 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 unauthorized forms in District
- Conduct workshops for new Records Coordinators to train them in basic records and forms management
- Conduct workshops for returning Records Coordinators to keep them informed of Federal, State, and District changes in records and forms management
- Meet with Registrars and Bookkeepers to review records and forms management procedures