



SARASOTA
County Schools

Enc. _____
October 6, 2015

Materials Management Department
101 Old Venice Road, Osprey, FL 34229
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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 2014-15 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 2014-15 Data Collection Review Committee Report be approved as presented.

DATA COLLECTION REVIEW COMMITTEE

YEAR END REPORT

2014-2015

TO

THE SCHOOL BOARD OF SARASOTA COUNTY, FLORIDA

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

**Lori M. White
Superintendent of Schools**

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

DATA COLLECTION REVIEW COMMITTEE
YEAR END REPORT 2014-2015

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 2014-2015

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

DATA COLLECTION REVIEW COMMITTEE
YEAR END REPORT 2014-2015

COMMITTEE CALENDAR FOR 2014-2015

September 18, 2014	October 16, 2014	December 18, 2014
January 15, 2015	February 19, 2015	April 9, 2015
May 11, 2015		

REPORT OF ACTIVITIES FOR 2014-2015

- Reviewed 301 new and revised forms for the following departments, created on-line fill-in versions of these forms and posted forms to SharePoint:

Communications	Media & Instructional Materials
Curriculum	Professional Development
District Discipline	Pupil Support
District Schools	Record Retention
ESOL	Research and Assessment
Exceptional Student Education	Safety and Security
Facilities	School Board Office
Financial Services	Secondary Schools
Fixed Asset Accounting	Student Services
Health Department	Suncoast Technical College (formerly SCTI)
Human Resources	Transportation
Information Technology	
- Provided unscheduled review of forms as needed for minor updates and corrections
- Worked with IT to finalize internal District Forms Repository, including search capability
- Posted additional forms to SharePoint Forms Repository - 609 forms in total now posted
- Worked with the Athletic Directors to update standardized athletic packets for middle school and high school reviewed and updated all district field trip forms.
- Prepared and delivered 6 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 & Alternative Schools)
South County Department Records Coordinators
North County Department Records Coordinators
Records Coordinator Make-up Session
- 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

DATA COLLECTION REVIEW COMMITTEE
YEAR END REPORT 2014-2015

PROPOSED CALENDAR FOR 2015-2016

September 17, 2015	October 15, 2015	November 19, 2015
December 17, 2015	January, 21, 2016	February 18, 2016
March 24, 2016	April 21, 2016	May12, 2016

COMMITTEE RECOMMENDATIONS FOR 2015-2016

- 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
- Continue to standardize forms, create on-line fill-in forms, and post forms in repository
- Reinforce the use of District forms
- 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