



**THE SCHOOL BOARD OF SARASOTA COUNTY, FLORIDA**  
MATERIALS MANAGEMENT DEPARTMENT  
101 OLD VENICE ROAD • OSPREY, FLORIDA 34229  
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**MEMORANDUM**

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

**FROM:** Pat Black, CPPB, Director of Materials Management

**TITLE:** APPROVAL OF THE 2013-14 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:**  
Pat Black

**Fiscal Impact:** N/A

**Recommended Motion:** That the 2013-14 Data Collection Review Committee Report be approved as presented.

**DATA COLLECTION REVIEW COMMITTEE**

**YEAR END REPORT**

**2013-2014**

**TO**

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

**Jane Goodwin, Chair  
Frank H. Kovach, Vice Chair  
Shirley Brown  
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 2013-2014**

**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 2013-2014**

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

**DATA COLLECTION REVIEW COMMITTEE**  
**YEAR END REPORT 2013-2014**

**COMMITTEE CALENDAR FOR 2013-2014**

September 19, 2013	October 17, 2013	November 21, 2013
December 19, 2013	January 16, 2014	February 20, 2014
March 20, 2014	April 17, 2014	May 15, 2014

**REPORT OF ACTIVITIES FOR 2013-2014**

- Reviewed 238 forms for the following departments, created on-line fill-in versions of these forms and posted forms to SharePoint:

Academic Intervention	Integrated Instructional Services
Communications	Media & Instructional Materials
Curriculum	Professional Development
District Schools	Purchasing
Exceptional Student Education	Record Retention
Facilities	Research and Assessment
Financial Services	Safety and Security
Health Department	Sarasota County Technical Institute
Human Resources	Secondary Schools
Information Technology	Student Services
	Transportation

- Provided unscheduled review of forms as needed for minor updates and corrections
- Posted additional forms to SharePoint Forms Repository - 460 forms in total now posted
- Worked with the Athletic Directors to create standardized athletic packets for middle school and high school.
- Finalized the Student Registration Form and Student Re-Registration Form to correlate with the new ESD Student Information System
- Prepared and delivered 5 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
- 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 2013-2014**

**PROPOSED CALENDAR FOR 2014-2015**

September 18, 2014	October 16, 2014	November 20, 2014
December 18, 2014	January, 15, 2015	February 19, 2015
March 19, 2015	April 16, 2015	May 21, 2015

**COMMITTEE RECOMMENDATIONS FOR 2014-2015**

- Finalize new Internal Forms Repository in Sharepoint and continue to post additional 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
- 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