

Oklahoma **School Performance Review**



Mid-Del Public Schools

Office of Educational Quality & Accountability

June 2021



OFFICE OF EDUCATIONAL QUALITY & ACCOUNTABILITY

June 2021

Fellow Oklahomans:

The Office of Educational Quality & Accountability is pleased to present the Mid-Del Public Schools Performance Review upon the request of Mid-Del Public Schools (MDPS).

Mid-Del Public Schools (MDPS) has a number of commendable programs and enjoys support from district residents; however, it is faced with some challenges. The review contains recommendations to help MDPS meet those challenges and improve the efficiency of their operations. The review also highlights a number of “Commendable Practices” in programs, operations, and services provided by the administration, teachers, and staff.

We are grateful for the cooperation of MDPS board, administration, staff, parents, and students for their input into this review. The administration and staff are also to be commended for their dedication toward improving educational opportunities for all students.

We are pleased to announce that this review is available in hardcopy through the Office of Educational Quality & Accountability and on the office’s web site at www.oeka.ok.gov

Respectfully yours,

Dr. Daniel Craig
Executive Director

Oklahoma School Performance Review

Mid-Del Public Schools

June 2021



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The Office of Educational Quality and Accountability supports high level student performance by ensuring quality evidence based educator preparation, improving P20 school efficiency and effectiveness, and providing comprehensive statistical information for all stakeholders.



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Table of Contents

	Page
Executive Summary	1
Acknowledgements	1
Mid-Del Public Schools	1
Commendations	5
Recommendations and Projected Costs and Savings	7
 Chapter 1:	
Management, Personnel, and Communications	1-1
A. Governance	1-9
B. Organization & Management	1-14
C. Planning and Evaluation	1-20
D. Personnel Management	1-32
E. Community & Parent Involvement	1-47
F. Communications/Public Relations	1-49
 Chapter 2:	
Instructional Delivery System	2-1
A. Curriculum	2-1
B. Management and Oversight of Instructional Programs	2-29
C. Special Programs	2-47
D. Student Services - Guidance and Counseling	2-62
 Chapter 3:	
Business Operations	3-1
A. Organization, Management, and Staffing	3-14
B. Planning and Budgeting	3-19
C. Accounting/Internal Control and Payroll	3-40
D. External/Internal Auditing	3-45
E. Cash Management	3-46
F. Risk Management	3-48
G. Fixed Asset Management	3-50
H. Purchasing	3-51
I. Warehousing	3-52

Chapter 4:**Facilities Use and Management**

4-1

A. Facilities Planning and Construction

4-5

B. Maintenance and Custodial Operations

4-24

C. Energy Management

4-45

D. Safety and Security

4-50

Chapter 5:**Support Services**

5-1

A. Child Nutrition

5-1

B. Technology

5-35

C. Transportation

5-63

Appendices:

A. Staff Survey Results

A-1

B. Parent Survey Results

B-1

C. Student Survey Results

C-1

D. Community Focus Group

D-1

E. Sample Demographic Study

E-1

F. ASO Budget Award Criteria

F-1

G. Areas of Maintenance Need

G-1

Executive Summary

The Oklahoma School Performance Review (OSPR) Program was authorized by the Oklahoma Legislature during the 2001 session, amended during the 2005 session, and amended again during the 2012 session. The responsibility to conduct school performance reviews was originally assigned to the Office of Accountability, which is now the Office of Educational Quality and Accountability. The purpose of a performance review is to develop findings, commendations, and recommendations regarding (1) containing costs; (2) improving management strategies; and (3) promoting better education for Oklahoma children.

The Office of Educational Quality and Accountability began the performance review of Mid-Del Public Schools (MDPS) in December 2020. The Office of Educational Quality and Accountability (OEQA) contracted with Prismatic Services to assist with the review. The Prismatic consulting team conducted individual and focus group interviews with district personnel. The team also reviewed operations by touring facilities, observing cafeteria operations, and following school bus routes. Administrators, teachers, support staff, parents, and students completed confidential surveys. The consulting team tabulated the surveys and used the results in this review. Survey results are contained in **Appendices A** through **C**. The results of a focus group with community members are provided in **Appendix D**.

For comparison purposes, the Office of Educational Quality and Accountability selected five Oklahoma school districts as peer districts based upon size, geography, and demographics. They are Lawton, Moore, Norman, Putnam City, and Union. These districts are called peer districts throughout this report.

For further comparison, a Community Group average is also used throughout the report. MDPS falls into community group B2, which includes districts with an Average Daily Membership (ADM) of between 10,000-24,999 students. The “2” indicates that the percentage of MDPS students eligible to receive free or reduced price meals is above the state average.

During this review, 71 recommendations were developed; they were designed to improve operations and support increased academic performance. In some cases, these recommendations should result in a net savings to the district, in some cases a net cost, and in some cases they should have no fiscal impact but should improve district efficiency or effectiveness. A detailed list of costs and savings by recommendation appears in **Exhibit 5**.

ACKNOWLEDGMENTS

The Office of Educational Quality and Accountability and Prismatic wish to express their appreciation to the Board of Education of Mid-Del Public Schools, its superintendent, Dr. Rick Cobb, its central office staff, its principals, and the many district employees, students, parents, and community residents who supported and provided input for this review.

MID-DEL PUBLIC SCHOOLS

Located in the south west of Oklahoma City in the middle of Oklahoma, Midwest City and Del City are situated in Oklahoma County and in the vicinity of state Highway 62 and U.S. Highway

40. They are part of the Oklahoma City metropolitan area. Midwest City was developed in response to talk of an airfield being located nearby and named for the Tinker Air Force Base's original designation as the Midwest Air Depot. Del City was developed in 1946-47 by a home builder. Since its incorporation, Del City has expanded three times, first by annexing Carter Park in 1954, Midway Village in 1963, and the acquisition of an undeveloped piece of land between the city and Tinker Air Force Base. Both cities were impacted by the tornado that passed through the Oklahoma City Metro area in 1999. Del City has a population of 21,332 and Midwest City has a population of 57,288.

In 2018-19, the fall enrollment in MDPS was reported to be 14,097, spread across 21 schools (**Exhibit 1**). Midwest City and Parkview Elementary Schools, Midwest City High School, and Carl Albert Middle School had the highest enrollment.

Exhibit 1¹

Mid-Del Student Enrollment and Socioeconomic Characteristics, 2018-19

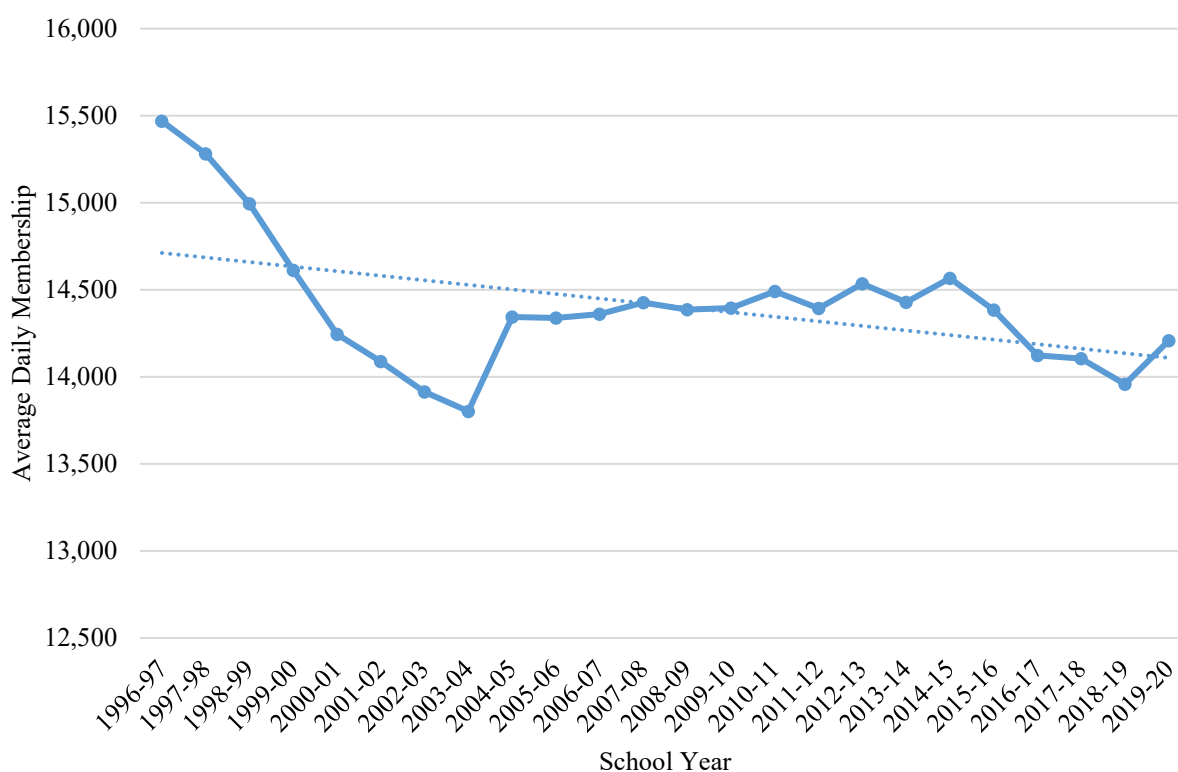
School	Grade Span	Fall Enr.	Caucasian	Black	Asian	Hispanic	Native Amer.	Two or More Races
Barnes ES	EC-5	384	63%	8%	0%	11%	4%	15%
Cleveland Bailey ES	EC-5	349	40%	40%	4%	5%	2%	10%
Country Estates ES	EC-5	439	45%	23%	1%	14%	4%	14%
Del City ES	EC-5	627	39%	25%	1%	15%	6%	14%
Epperly Heights ES	EC-5	650	32%	26%	1%	20%	4%	18%
Highland Park ES	EC-5	517	19%	52%	1%	13%	2%	14%
Midwest City ES	EC-5	831	40%	21%	1%	13%	5%	20%
Parkview ES	EC-5	668	25%	46%	6%	10%	2%	11%
Pleasant Hill ES	EC-5	212	5%	71%	1%	9%	0%	15%
Ridgecrest ES	EC-5	313	42%	26%	1%	14%	2%	15%
Schwartz ES	EC-5	343	73%	2%	1%	9%	4%	11%
Soldier Creek ES	EC-5	710	50%	18%	1%	11%	5%	15%
Steed ES	EC-5	413	27%	41%	1%	11%	4%	17%
Tinker ES	EC-5	479	38%	26%	2%	17%	2%	17%
Townsend ES	EC-5	403	33%	31%	3%	16%	5%	12%
Carl Albert MS	6-8	853	55%	19%	1%	9%	5%	11%
Del Crest MS	6-8	546	33%	35%	0%	17%	3%	11%
Jarman MS	6-8	533	33%	30%	2%	18%	5%	13%
Kerr MS	6-8	547	22%	42%	3%	15%	6%	13%
Monroney MS	6-8	587	33%	40%	0%	11%	3%	13%
Carl Albert HS	9-12	1,054	52%	22%	2%	9%	6%	9%
Del City HS	9-12	1,277	28%	43%	3%	12%	5%	9%
Midwest City HS	9-12	1,362	32%	43%	2%	11%	6%	6%

Source: Office of Educational Quality and Accountability, Profiles Database

¹ Jarman MS and Monroney MS were closed in the 2020-21 school year to form Midwest City MS. Del Crest MS and Kerr MS were closed in the 2020-21 school year to form Del City MS.

Exhibit 2 shows trends in average daily membership (ADM) among MDPS schools. Over the past five years, ADM has declined to levels that were last seen in 2003. Enrollment further declined in 2019-20 and into 2020-21, largely due to COVID-19. At the time of this report, any lasting impact of COVID-19 on MDPS' enrollment has yet to be determined.

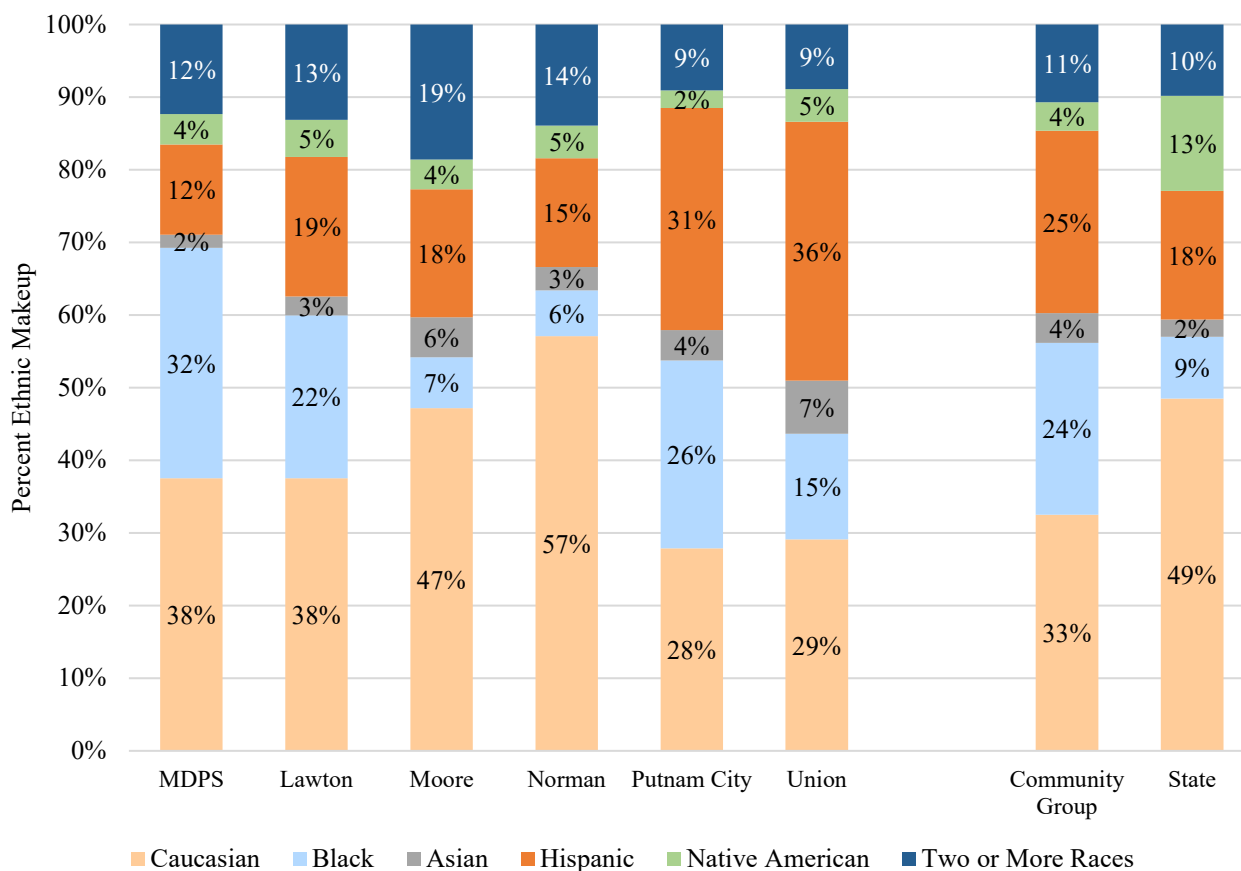
Exhibit 2
Trend in MDPS Average Daily Membership



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3 compares MDPS' demographics with its peers, the community group, and the state for 2018-19. All entities were fairly diverse. MDPS had the highest percentage of Black students.

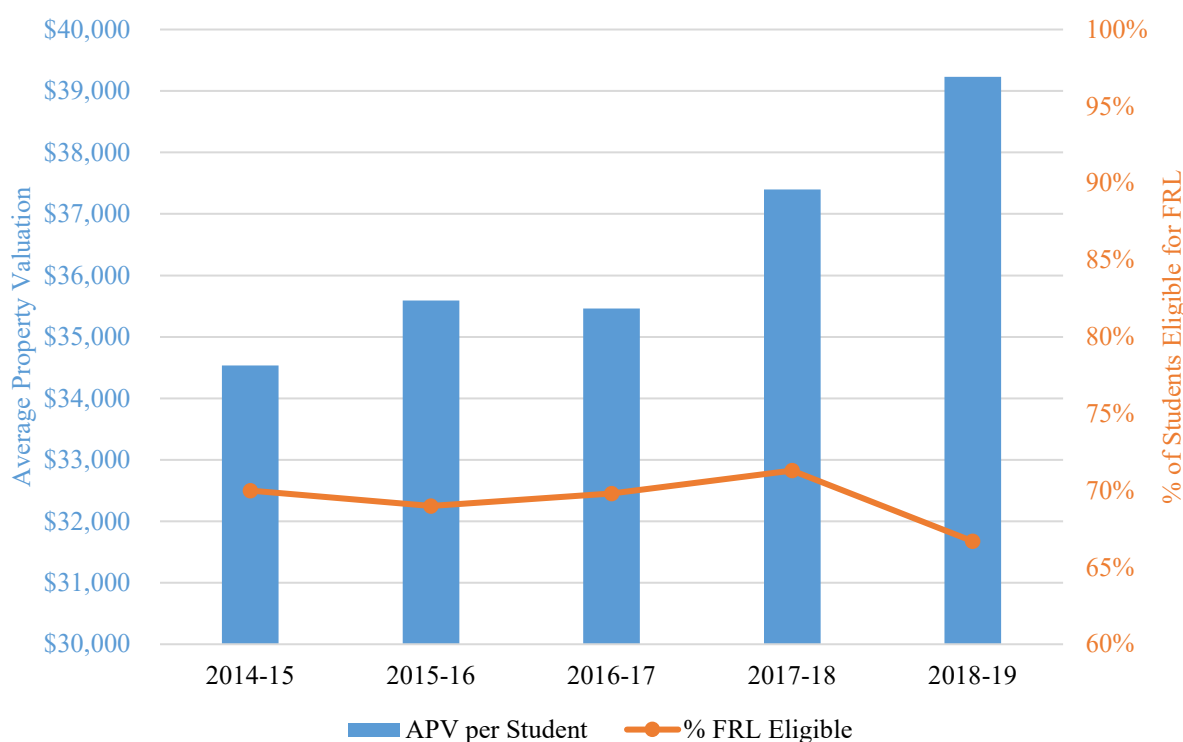
Exhibit 3
Comparison of Student Demographics, 2018-19



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 4 shows the trend in MDPS assessed property value per student and percent of students eligible for free/reduced-price meals over the last five years. Assessed property valuation has increased by 14 percent, while eligibility for free/reduced-price meals has decreased by several percentage points.

Exhibit 4
Trend in Assessed Property Value and Student Eligibility for Free/Reduced Meals



Source: Office of Educational Quality and Accountability, Profiles Database

COMMENDATIONS

The Office of Educational Quality and Accountability identified “exemplary” or “best practices” in Mid-Del Public Schools that led to 25 separate commendations. The Office of Educational Quality and Accountability recommends that other school districts throughout Oklahoma examine these exemplary programs and services to see if they could be adapted to meet their local needs. The commendations are listed below and explained in detail in each chapter.

Chapter 1: MANAGEMENT, PERSONNEL, AND COMMUNICATIONS

The MDPS BOE operates in a transparent and efficient manner.

The MDPS BOE and superintendent maintain and regularly review district policies.

The MDPS superintendent and board members are commended for recruiting and supporting a diverse membership that reflects the demographics of the district.

MDPS has made good efforts to develop leaders from within the teacher ranks.

The efforts of the MDPS HR department to guide and direct the creation and update of job descriptions are commendable.

The quality of work, commitment, and services provided by the staff of the MDPS HR Department is commendable.

MDPS has made good efforts to build community support for the school district.

MDPS uses a variety of technologies to communicate with district stakeholders.

Chapter 2: INSTRUCTIONAL DELIVERY SYSTEM

The superintendent and teaching and learning leadership team are commended for their shared vision for growing MDPS into a high performing school district.

The district is commended for implementing the Middle School Model for learning.

The district is commended for the development and implementation of the Multi-Tiered Systems of Support (MTSS) process.

Chapter 3: BUSINESS OPERATIONS

The MDPS finance department has cross-trained staff to perform different functions.

The MDPS finance department provides annual training that is appreciated by financial staff and activity fund sponsors across the district.

MDPS has developed a successful internal audit process.

Chapter 4: FACILITIES USE AND MANAGEMENT

The state-of-the-art and far-reaching renovations completed on the Performing Arts Centers at Carl Albert, Del City and Midwest City High Schools resulted in outstanding facilities that are capable of supporting most musical and theatrical curricula.

The district is commended for its commitment to detailed reviews by the maintenance trades during the design process to assure the architect and engineers respond to, and incorporate, the district's educational specifications in their design development work.

MDPS spends relatively little on utilities, freeing general funds for other uses.

Chapter 5: SUPPORT SERVICES

MDPS has implemented CEP in three schools, resulting in increases in breakfast and lunch participation, and eliminating the need for meal applications and costs to parents for student meals. The new director is to be commended for evaluating and comparing the financial benefits of it compared to Provision 2 with the intent of offering free meals to as many district students as possible.

MDPS child nutrition has developed an outstanding nutrition and nutrition education section on their website that is comprehensive, geared to all audiences, and user friendly.

The Mid-Del child nutrition department makes good use of technology to inform as well as market and advertise their menus to parents and students.

MDPS is commended for securing funding through E-Rate to fund technology equipment, networking, and connectivity.

The district is commended for having a technology inventory system that is up-to-date and maintained.

The MDPS transportation department is well-staffed, well-equipped, and well-organized.

MDPS has developed a plan to replace older school buses annually.

The MDPS transportation department provides effective bus maintenance.

RECOMMENDATIONS AND PROJECTED COSTS AND SAVINGS

A list of recommendations with their associated costs or savings is provided in **Exhibit 5**. In each chapter, implementation strategies and the estimates of fiscal impact follow each recommendation in this report. The implementation section associated with each recommendation highlights the actions necessary to achieve the proposed results. Many of the recommendations have no costs or savings associated with them, but are designed to formalize, improve, and streamline operations. In some cases, the consulting team has made recommendations that will likely generate savings for the district, but in an effort to be conservative, no specific savings were estimated.

It should be understood that not all of the recommendations can begin to be implemented at once. The consulting team did not want to place priorities by indicating which recommendations should be implemented immediately and which ones implemented later. It will be up to the district to decide which ones to implement and the timelines for beginning implementation.

The Office of Educational Quality and Accountability recommends that the Mid-Del Board of Education ask district administrators to review the recommendations, develop an implementation plan, and monitor its progress.

Exhibit 5
Summary of Costs and Savings by Recommendation

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2021-22	2022-23	2023-24	2024-25	2025-26	
Chapter 1	Management, Personnel, and Communications						
1	Establish processes and training to encourage site-based budgeting and allocation of resources.						\$0
2	Implement an ongoing strategic planning process involving community stakeholders, administration, faculty, and staff, which defines decision-making processes and provides governance and direction for long-range goals, implementation strategies, and accountability measures.	(\$10,000)	\$0	\$0	\$0	\$0	(\$10,000)
3	Complete a demographics study.	(\$25,000)	\$0	\$0	(\$25,000)	\$0	(\$50,000)
4	Adopt common metrics, policies, and procedures related to annual program evaluation.	(\$75,000)	(\$75,000)	(\$75,000)	\$0	\$0	(\$225,000)
5	Establish an executive position at the superintendent's cabinet level to lead equity, social justice, and diversity efforts.	(\$143,000)	(\$143,000)	(\$143,000)	(\$143,000)	(\$143,000)	(\$715,000)
6	Reduce the number of teachers at secondary schools by 60+ teachers.	\$1,579,920	\$3,159,840	\$3,159,840	\$3,159,840	\$3,159,840	\$14,219,280
7	Increase the beginning salary for certified teachers from \$38,300 to \$40,000.	(\$2,146,000)	(\$2,146,000)	(\$2,146,000)	(\$2,146,000)	(\$2,146,000)	(\$10,730,000)
	Subtotal	(\$819,080)	\$795,840	\$795,840	\$845,840	\$870,840	\$2,489,280
Chapter 2	Instructional Delivery System						
8	Evaluate all curricula and supplemental resources and programs to determine compatibility with implemented technology, cost effectiveness, and ensure rigor, relevancy, alignment with Oklahoma Academic Standards (OAS).	(\$15,000)	(\$15,000)	(\$15,000)	(\$15,000)	(\$15,000)	(\$75,000)
9	Develop and implement with fidelity a district comprehensive plan for teacher instructional delivery and facilitation best practices.	(\$7,000)	\$0	\$0	\$0	\$0	(\$7,000)
10	Continue the training and implementation of district-wide Professional Learning Communities (PLC) for teachers and administrators, with regularly scheduled release time, standardized norms, support structures, and a focus on best						\$0

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2021-22	2022-23	2023-24	2024-25	2025-26	
	instructional practices, increased student achievement, and continuous school improvement.						
11	Adopt and implement common formative assessments and continue implementing summative assessments using data results to align core curricula.	(\$6,000)	\$0	\$0	\$0	\$0	(\$6,000)
12	Review the ongoing effectiveness of the new coaching program design and the effectiveness of the coach to teacher process during the initial planning and implementation phase.						\$0
13	Continue to synchronize and coordinate communication, time frames, processes for resource/product delivery, along with functions and services delivered through instructional facilitators.						\$0
14	Continue to provide targeted systems of support and set high expectations for principals in their role as instructional leaders.						\$0
15	Continue to develop and implement updated Pre-K-12 standards-based core curriculum frameworks/scope-and-sequence, that horizontally and vertically align curricula, based on student data results, along with teacher accountability measures.						\$0
16	Continue the intentional focus to ensure the special education program is in compliance with all state and federal guidelines, IEP teams are high functioning, and all students are served in accordance with the written IEP.						\$0
17	Evaluate all aspects of current RtI services for efficacy and impact.						\$0
18	Continue to strengthen the Gifted and Talented Program through annual program review including clear procedures for identifying students and providing enriched learning environments for all students.						\$0
19	Continue to expand and strengthen the counseling program by offering expanded teacher training and services targeted to support and meet the academic, social, and emotional needs of students.						\$0

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2021-22	2022-23	2023-24	2024-25	2025-26	
20	Continue to market Career Tech courses while working with counselors to enroll students who benefit most from the relevancy, hands-on strengths, and life skills of the career tech coursework.						\$0
	Subtotal	(\$28,000)	(\$15,000)	(\$15,000)	(\$15,000)	(\$15,000)	(\$88,000)
Chapter 3	Business Operations						
21	Develop a desk procedures document for each position within the finance department.						\$0
22	Establish a budget development process that provides for input from the public and school and department staffs.						\$0
23	Develop a budget document that meets ASBO requirements and place it on the district website to provide stakeholders with information on how the district's financial resources are used.						\$0
24	Revise the MDPS general fund balance policy to provide guidance how on to achieve the minimum required balance, provide a desired fund balance range, and require fund balance status reports to the school board.						\$0
25	Develop reports to the school board that show actual revenues and expenditures compared to budgeted amounts.						\$0
26	Develop and present to the board reports for the child nutrition fund that show fund balances, revenues, expenditures and whether the program is making or losing money.						\$0
27	Provide additional training for Munis to staff and establish a process where monthly budget reports are processed at the department and site level.						\$0
28	Develop a process to import hours worked from VeriTime into Munis after each payroll period.						\$0
29	Develop a standardized procedures handbook for all district activity funds to help ensure that funds are administered properly.						\$0
30	Invest idle cash more aggressively.	\$305,124	\$305,124	\$305,124	\$305,124	\$305,124	\$1,525,620
31	Implement an alternative accounts payable solution that will generate rebates back to the district.	\$35,000	\$60,000	\$60,000	\$60,000	\$60,000	\$275,000

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2021-22	2022-23	2023-24	2024-25	2025-26	
32	Expand disaster recovery plans to include backing up financial data to a cloud solution.						\$0
33	Modify MDPS policy and require a physical fixed asset inventory for a specific portion of the district each year.						\$0
34	Create an MDPS purchasing procedures handbook and publish it on the district website.						\$0
35	Phase out the custodial inventory except for copy paper and implement a just-in-time ordering system for supplies that are delivered directly to the schools.	\$95,007	\$95,007	\$95,007	\$95,007	\$95,007	\$475,035
	Subtotal	\$435,131	\$460,131	\$460,131	\$460,131	\$460,131	\$2,275,655
Chapter 4	Facilities Use and Management						
36	Review and modify the current policy "Community Use of Facilities" policy to reflect the current facilities.						\$0
37	Adopt, implement, and use a continuous facility master planning protocol.	(\$45,000)	(\$45,000)	(\$40,000)	(\$40,000)	(\$40,000)	(\$210,000)
38	Institute regular building condition assessments and maintenance backlog management.						\$0
39	Make participation in design reviews by other building users and stakeholders mandatory.						\$0
40	Select four elementary schools for closure.	\$0	\$2,800,000	\$2,800,000	\$2,800,000	\$2,800,000	\$11,200,000
41	Outsource a higher percentage of maintenance work in order to reduce deferred maintenance in building inventory to an FCI of ten percent initially, and eventually to five percent or below.		(\$5,000,000)				(\$5,000,000)
42	Eliminate most mobile classrooms from school campuses.	\$10,000	\$20,000				\$30,000
43	Return custodial services back to in-house operations.	(\$122,792)	(\$245,583)	(\$368,375)	(\$368,375)	(\$368,375)	(\$1,473,500)
44	Continue to pursue prudently and yet aggressively energy conservation opportunities.						\$0
45	Request a Risk and Vulnerability Assessment to be conducted by staff of the Oklahoma School Security Institute (OSSI).						\$0
46	Perform a full audit and reorganization of the classroom chemical storage facilities in each high school.						\$0
	Subtotal	(\$157,792)	(\$2,470,583)	\$2,391,625	\$2,391,625	\$2,391,625	\$4,546,500

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2021-22	2022-23	2023-24	2024-25	2025-26	
Chapter 5	Support Services						
47	Examine policies and procedures that have impacted staffing and make adjustments and changes as needed with the goal to staff kitchens according to the Oklahoma recommended MPLH guidelines.						\$0
48	Reorganize the child nutrition central office.	(\$38,778)	(\$38,778)	(\$38,778)	(\$38,778)	(\$38,778)	(\$193,890)
49	Implement changes that will result in a more cost-effective child nutrition program.	\$500,000	\$500,000	\$500,000	\$500,000	\$500,000	\$2,500,000
50	Prepare department-level financial reports on a monthly basis and use them to monitor financial performance, assess if immediate changes are needed, and use for creating budgets.						\$0
51	Develop site-level financial and performance reports for each kitchen operation on a monthly basis and use them for program improvements as well as manager training.						\$0
52	Develop strategies for increasing breakfast participation.						\$0
53	Evaluate practices pre-COVID-19 that impacted participation levels and develop strategies for increasing meal participation.						\$0
54	Hire additional instructional technology specialists to assist teachers with one-to-one and Canvas implementation.	(\$80,000)	(\$80,000)	(\$80,000)	(\$80,000)	(\$80,000)	(\$400,000)
55	Develop and implement a “teachers teaching teachers” program to supplement technology integration and skill building at the sites.	(\$5,000)	(\$5,000)	(\$5,000)	(\$5,000)	(\$5,000)	(\$25,000)
56	Improve the technology planning process and create a long-term strategic plan for technology with input from a variety of stakeholders.						\$0
57	Develop and test a disaster recovery plan that includes the district’s critical data, systems, and programs.						\$0
58	Develop and implement an instructional technology plan in conjunction with the district’s professional development plan.						\$0
59	Develop a replacement cycle for technology equipment.	(\$100,000)	(\$150,000)	(\$250,000)	(\$375,000)	(\$375,000)	(\$1,250,000)
60	Improve policies and procedures regarding district technology resources.						\$0

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2021-22	2022-23	2023-24	2024-25	2025-26	
61	Develop and implement policies and procedures for the district's learning management system, Canvas.						\$0
62	Update and expand the district website.						\$0
63	Create a Parent Academy to build parents' computing skills with an ultimate goal of supporting students.	(\$2,100)	(\$2,100)	(\$2,100)	(\$2,100)	(\$2,100)	(\$10,500)
64	Develop procedures to assess technology use and satisfaction with the goal of establishing higher use.						\$0
65	Develop a district standard for technology equipment purchases.						\$0
66	Seek additional funding sources and grants to support long-range planning in technology.						\$0
67	Develop an operations manual specific to the MDPS pupil transportation department.						\$0
68	Hold drivers accountable for excessive absenteeism.						\$0
69	Implement an ongoing bus driver recruitment plan that includes a partnership with the Tech Center to develop a CDL training program, regular attendance at local recruiting events, advertising on the district's website, and annual verifications that the starting pay of MDPS bus drivers exceeds those of the neighboring districts.						\$0
70	Implement morning bus routes that drop students no earlier than 15 minutes prior to the start of school and afternoon bus routes that pick up students from their schools within five minutes of the end of school.	(\$40,000)	\$0	\$0	\$0	\$0	(\$40,000)
71	Clarify and implement effective bus discipline procedures.						\$0
	Subtotal	\$234,122	\$224,122	\$124,122	(\$878)	(\$878)	\$580,610
	Total savings	\$2,525,051	\$6,939,971	\$6,919,971	\$6,919,971	\$6,919,971	\$30,224,935
	Total costs	(\$2,860,670)	(\$7,945,461)	(\$3,163,253)	(\$3,238,253)	(\$3,213,253)	(\$20,420,890)
	Total net savings and costs	(\$335,619)	(\$1,005,490)	\$3,756,718	\$3,681,718	\$3,706,718	\$9,804,045

School Performance Review reports are typically lengthy and densely packed with information. They can at first be overwhelming to district stakeholders. For that reason, the Office of Educational Quality and Accountability has identified the most likely “tipping point” recommendations for each area reviewed. These are recommendations that the Office of Educational Quality and Accountability believes are the most important to implement and most likely to have the greatest organizational impact.

Of the 71 recommendations made, the Office of Educational Quality and Accountability believes these eight recommendations to be the most critical:

- **Establish an executive position at the superintendent’s cabinet level to lead equity, social justice, and diversity efforts.** Educational equity means every student has access to educational resources and rigor they need at the right moment in their education across race, gender, ethnicity, language, disability, sexual orientation, family background and/or family income. School leaders must engage with diverse audiences including families and communities, other educators, policy makers, private-sector leaders, and faith communities to forge a new commitment to educational equity. Nationally, school districts are establishing in-district departments to develop frameworks that use research-based tools and processes to study and translate data into transformational actions and activities that will promote educational equity systemwide. This position should be responsible for planning, directing, coordinating, assisting, and being the internal consultant to the superintendent, executive leadership team, directors, and principals regarding equity, social justice, and diversity matters concerning staff, students, and families.
- **Develop and implement with fidelity a district comprehensive plan for teacher instructional delivery and facilitation best practices.** The comprehensive instructional plan is the foundational document that leverages and designs all aspects of PreK-12 teaching and learning. It informs and coordinates curricula and instructional delivery through the work of instructional coaches, curriculum facilitators, special services, federal programs, technology, and PLC’s. The plan pragmatically details expectations for teaching standards and the assessment processes. It includes protocols for judicious vertical and horizontal communication.
- **Invest idle cash more aggressively.** With the receipt of additional funding from the state and federal levels, this will give the district the ability to invest available surplus funds and increase interest earnings to help support services across the district. The district will be receiving additional funding on a reimbursement basis from the recently approved Federal Stimulus packages. In addition, the Oklahoma legislature added additional funding for school districts. As funding increases, the district should seek opportunities to increase their return on all surplus or idle cash.
- **Establish a budget development process that provides for input from the public and school and department staffs.** The district should include a variety of stakeholders in the budgetary process. These stakeholders should include the members of the superintendent’s leadership group, principals, and directors. A teacher and parent representative could also be included in the process. The goal should have more transparency, communication, and input regarding the process.

- **Institute regular building condition assessments and maintenance backlog management.** The deferred maintenance backlog prevents MDPS from engaging in any meaningful preventative maintenance activity even with a cadre of maintenance staff considered sufficient for the conduct of a “full service” operations and maintenance program.
- **Implement changes that will result in a more cost-effective child nutrition program.** The child nutrition program has been operating at a loss over the past three years and requires general fund support to meet expenses of the 2020-21 school year. Changes in staffing, developing, and analyzing financial reports, and increasing participation will all serve to improve the financial position of the program.
- **Hire additional instructional technology specialists to assist teachers with one-to-one and Canvas implementation.** The district does not have sufficient staff to adequately support teachers with instructional technology. Given new district implementations and initiatives, hiring additional support staff should take precedence to ensure project success and attain staff buy-in.
- **Implement morning bus routes that drop students no earlier than 15 minutes prior to the start of school and afternoon bus routes that pick up students from their schools within five minutes of the end of school.** It is imperative the routes are redesigned to match the actual bell times by the school tier.

Chapter 1:
Management, Personnel, and
Communications

Chapter 1

Management, Personnel, and Communications

This chapter addresses the management, personnel, and communications of Mid-Del Public Schools (MDPS) in the following sections:

- A. Governance
- B. Organization and Management
- C. Planning and Evaluation
- D. Personnel Management
- E. Community and Parent Involvement
- F. Communications/Public Relations

The organization and management of a school district involves cooperation between elected members of the board of education (BOE) and staff of the district. The BOE's role is to establish goals and objectives for the district in both instructional and operational areas, determine the policies by which the district will be governed, approve the plans to implement those policies, provide the funding sources necessary to carry out the plans, and evaluate the results of the plans.

Once the board of education adopts goals and objectives for the district, it is the responsibility of the superintendent and staff to establish administrative policies and procedures to achieve the desired results. That achievement involves recommending the hiring and retention of employees, as well as ongoing communication with the community to ensure a clear understanding of the goals and the district's efforts to accomplish them.

Background

Located in the south west of Oklahoma City in the middle of Oklahoma, Midwest City and Del City are situated in Oklahoma County and in the vicinity of state Highway 62 and U.S. Highway 40. They are part of the Oklahoma City metropolitan area. Midwest City was developed in response to talk of an airfield being located nearby and named for the Tinker Air Force Base's original designation as the Midwest Air Depot. Del City was developed in 1946-47 by a home builder. Since its incorporation, Del City has expanded three times, first by annexing Carter Park in 1954, Midway Village in 1963, and the acquisition of an undeveloped piece of land between the city and Tinker Air Force Base. Both cities were impacted by the tornado that passed through the Oklahoma City Metro area in 1999. Del City has a population of 21,332 and Midwest City has a population of 57,288.

In 2018-19, the fall enrollment in MDPS was reported to be 14,097, spread across 21 schools (**Exhibit 1-1**). Midwest City and Parkview Elementary Schools, Midwest City High School, and Carl Albert Middle School had the highest enrollment. In 2019-20, MDPS consolidated its five middle schools into three.

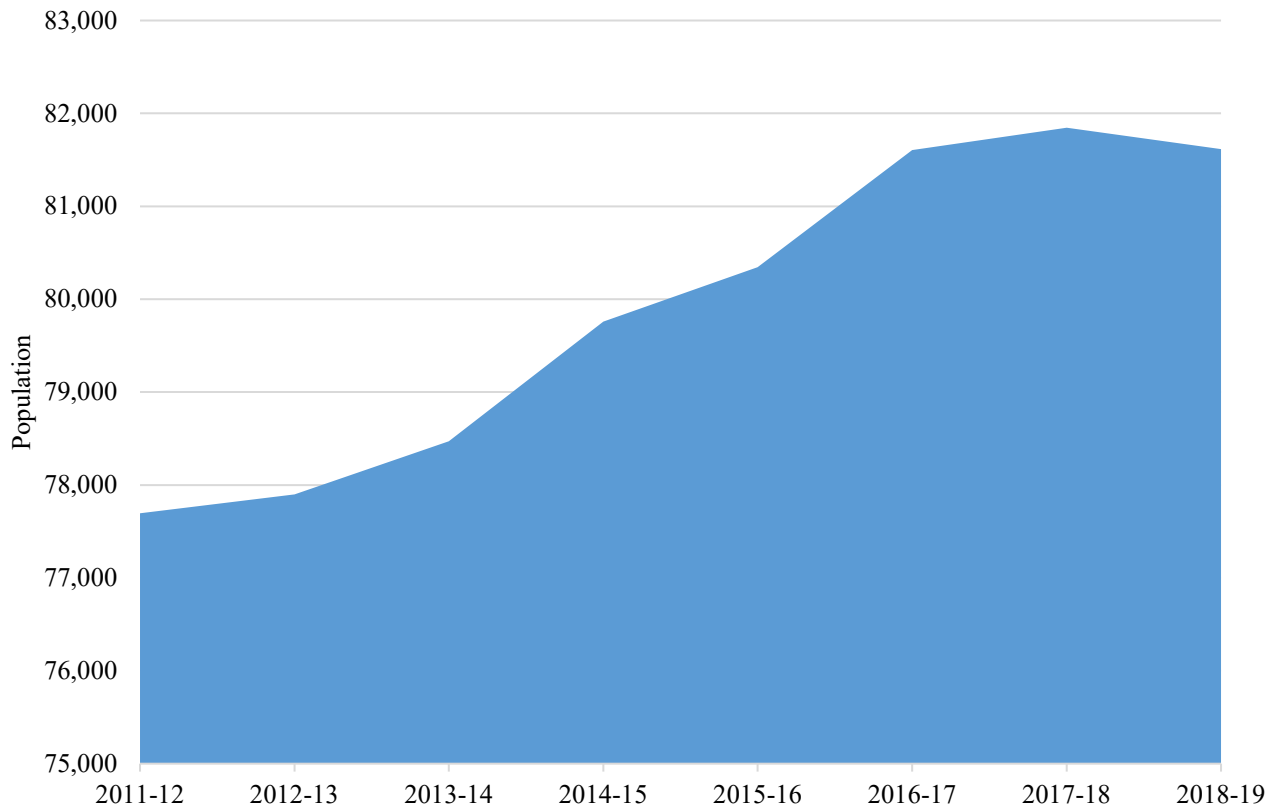
Exhibit 1-1
Mid-Del Student Enrollment and Socioeconomic Characteristics, 2018-19

School	Grade Span	Fall Enr.	Caucasian	Black	Asian	Hispanic	Native Amer.	Two or More Races
Barnes ES	EC-5	384	63%	8%	0%	11%	4%	15%
Cleveland Bailey ES	EC-5	349	40%	40%	4%	5%	2%	10%
Country Estates ES	EC-5	439	45%	23%	1%	14%	4%	14%
Del City ES	EC-5	627	39%	25%	1%	15%	6%	14%
Epperly Heights ES	EC-5	650	32%	26%	1%	20%	4%	18%
Highland Park ES	EC-5	517	19%	52%	1%	13%	2%	14%
Midwest City ES	EC-5	831	40%	21%	1%	13%	5%	20%
Parkview ES	EC-5	668	25%	46%	6%	10%	2%	11%
Pleasant Hill ES	EC-5	212	5%	71%	1%	9%	0%	15%
Ridgecrest ES	EC-5	313	42%	26%	1%	14%	2%	15%
Schwartz ES	EC-5	343	73%	2%	1%	9%	4%	11%
Soldier Creek ES	EC-5	710	50%	18%	1%	11%	5%	15%
Steed ES	EC-5	413	27%	41%	1%	11%	4%	17%
Tinker ES	EC-5	479	38%	26%	2%	17%	2%	17%
Townsend ES	EC-5	403	33%	31%	3%	16%	5%	12%
Carl Albert MS	6-8	853	55%	19%	1%	9%	5%	11%
Del Crest MS	6-8	546	33%	35%	0%	17%	3%	11%
Jarman MS	6-8	533	33%	30%	2%	18%	5%	13%
Kerr MS	6-8	547	22%	42%	3%	15%	6%	13%
Monroney MS	6-8	587	33%	40%	0%	11%	3%	13%
Carl Albert HS	9-12	1,054	52%	22%	2%	9%	6%	9%
Del City HS	9-12	1,277	28%	43%	3%	12%	5%	9%
Midwest City HS	9-12	1,362	32%	43%	2%	11%	6%	6%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-2 displays the population trend for the Mid-Del community since 2011-12. There has been a five percent increase in overall population.

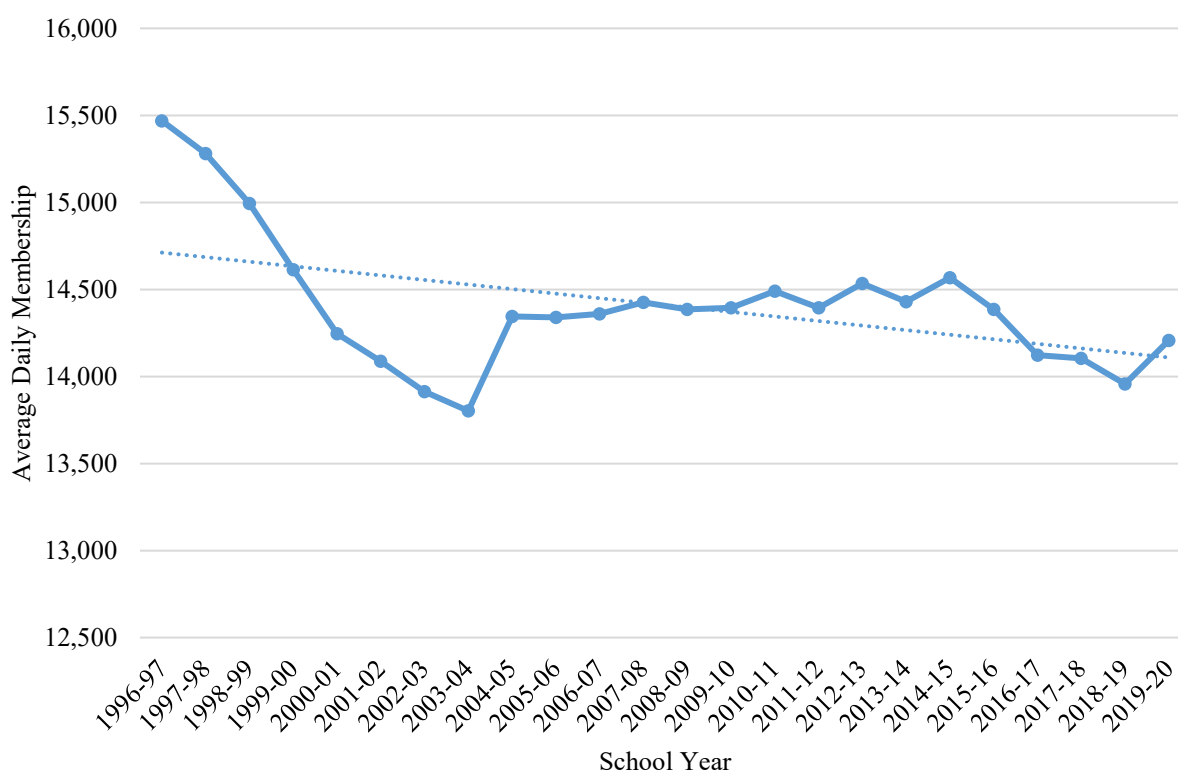
Exhibit 1-2
Population Trend for Mid-Del Community



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-3 shows trends in average daily membership (ADM) among MDPS schools. Over the past five years, ADM has declined to levels that were last seen in 2003. Enrollment further declined in 2019-20 and into 2020-21, largely due to COVID-19. At the time of this report, any lasting impact of COVID-19 on MDPS' enrollment has yet to be determined.

Exhibit 1-3
Trend in MDPS Average Daily Membership



Source: Office of Educational Quality and Accountability, Profiles Database

The data in **Exhibit 1-4** reflect ADM trends compared to the peers, community group, and state. MDPS saw a minor decline in ADM from 2014-15 to 2018-19, with the second largest decrease compared to peer districts. MDPS ADM decreased more than the community group and state.

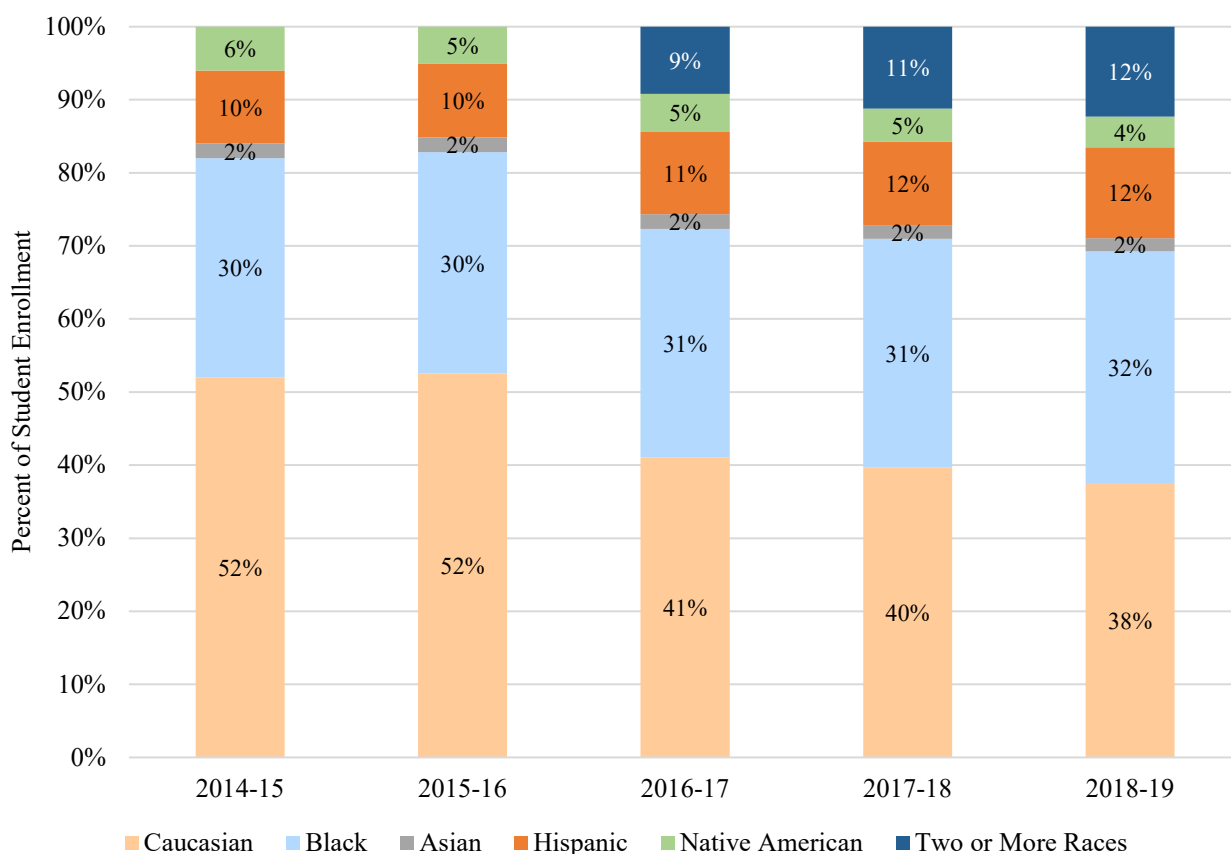
Exhibit 1-4
Mid-Del, Peer Districts, and State Student ADM Trends, 2014-15 to 2018-19

Entity	ADM					Percent Change
	2014-15	2015-16	2016-17	2017-18	2018-19	
Mid-Del	14,567	14,385	14,123	14,105	13,958	(4.2%) ▼
Lawton	15,060	14,747	14,533	13,849	13,596	(9.7%) ▼
Moore	23,437	23,797	24,174	24,550	24,546	4.7% ▲
Norman	15,726	15,921	15,860	15,963	16,032	1.9% ▲
Putnam City	19,250	19,239	19,335	19,324	19,241	0.0% ●
Union	15,700	15,919	15,800	15,761	15,656	(0.3%) ▼
Community Group	17,131	17,477	17,715	18,012	16,783	(2.0%) ▼
State	1,299	1,305	1,267	1,280	1,289	(0.8%) ▼

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-5 illustrates changes in MDPS student demographics over the past five years. The largest portion of district students were Caucasian, and the second largest demographic group was Black. As of 2016-17, Caucasian students no longer comprised the majority of the student body.

Exhibit 1-5
Trend in MDPS Student Demographics¹

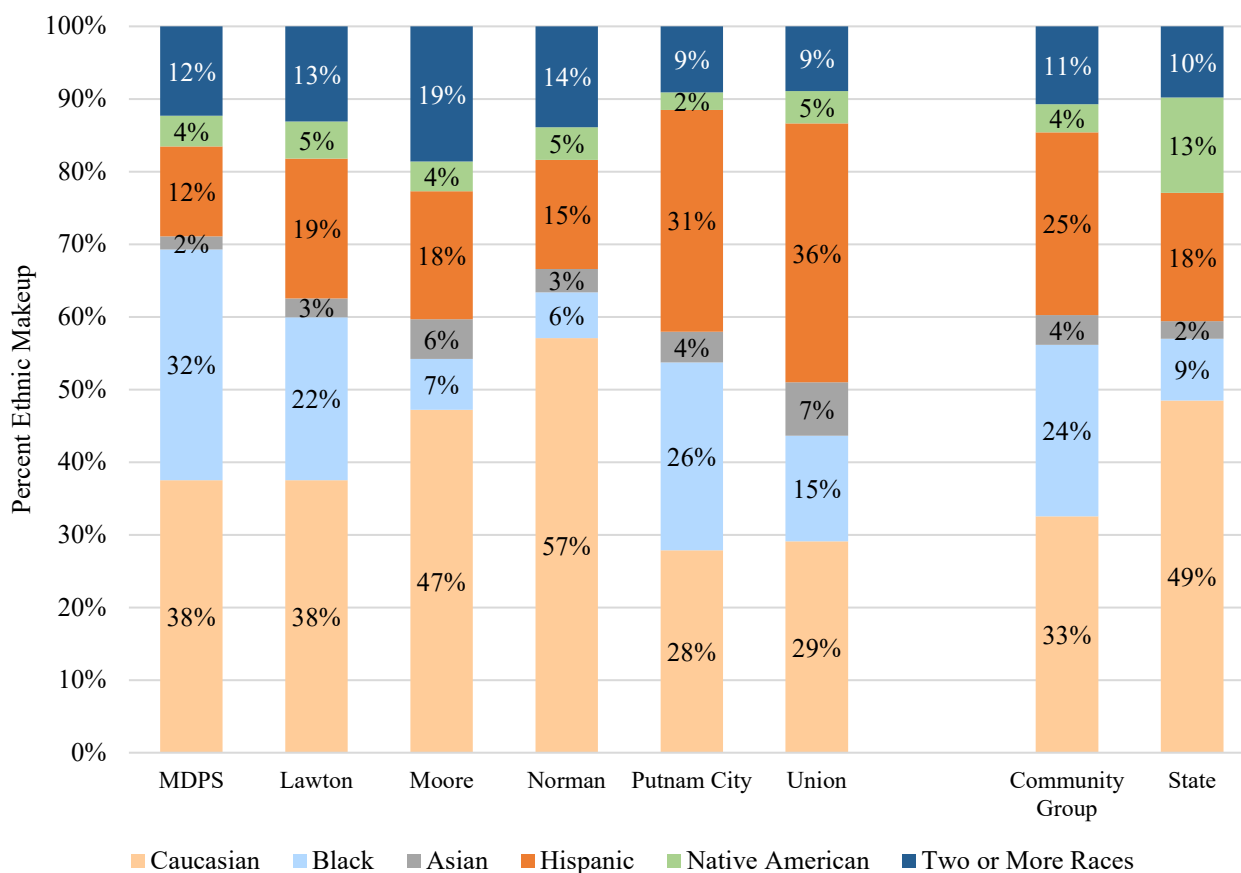


Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-6 compares MDPS' demographics with its peers, the community group, and the state for 2018-19. All entities were fairly diverse. MDPS had the highest percentage of Black students.

¹ "Two or More Races" was not reported as a category until 2016-17.

Exhibit 1-6
Comparison of Student Demographics, 2018-19

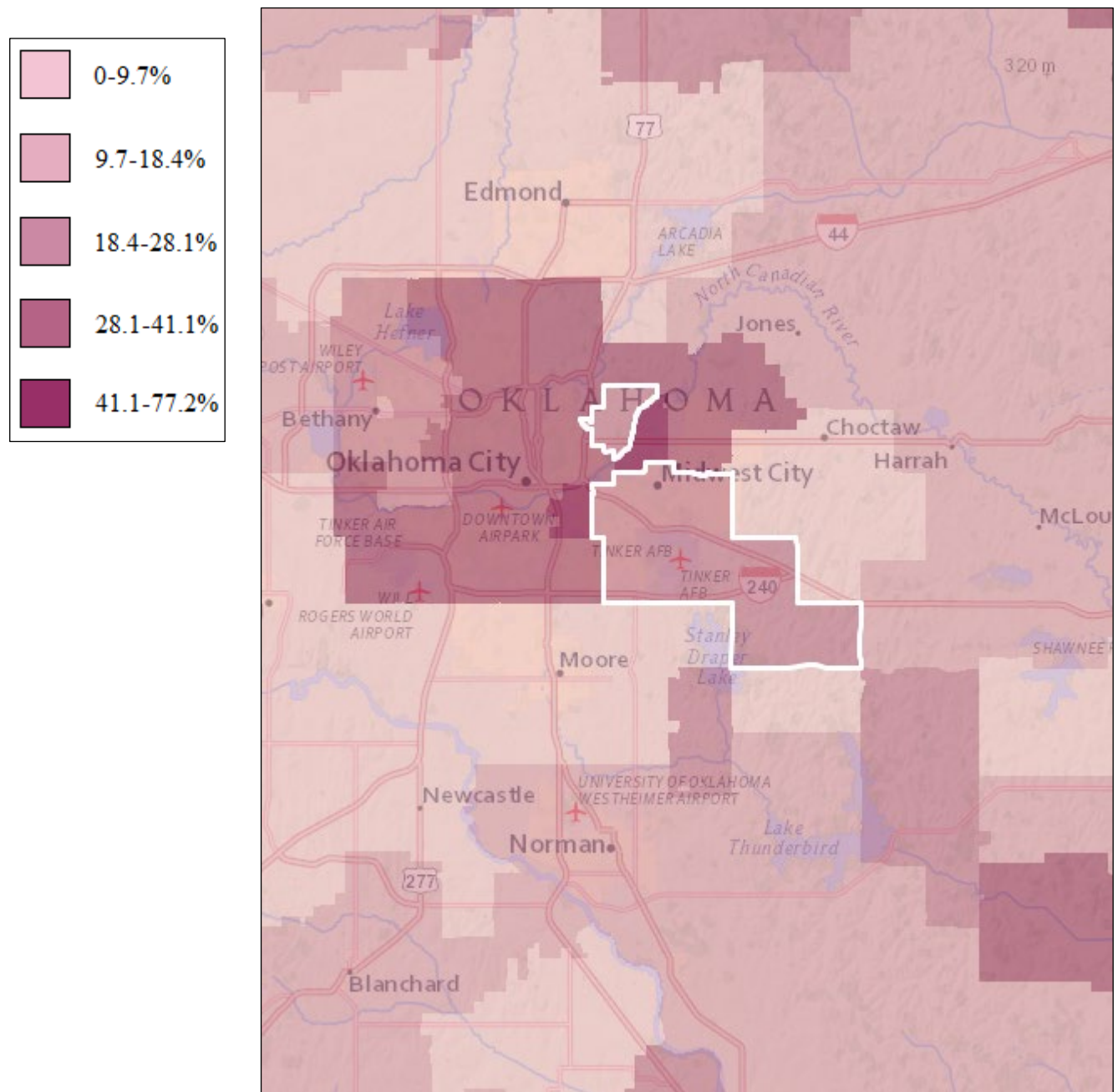


Source: Office of Educational Quality and Accountability, Profiles Database

Mid-Del is generally challenged by poverty. In 2018-19, the district reported a poverty rate of 15.3 percent. **Exhibit 1-7** displays a comparative map of the child poverty rate for Mid-Del and the surrounding districts.

Exhibit 1-7

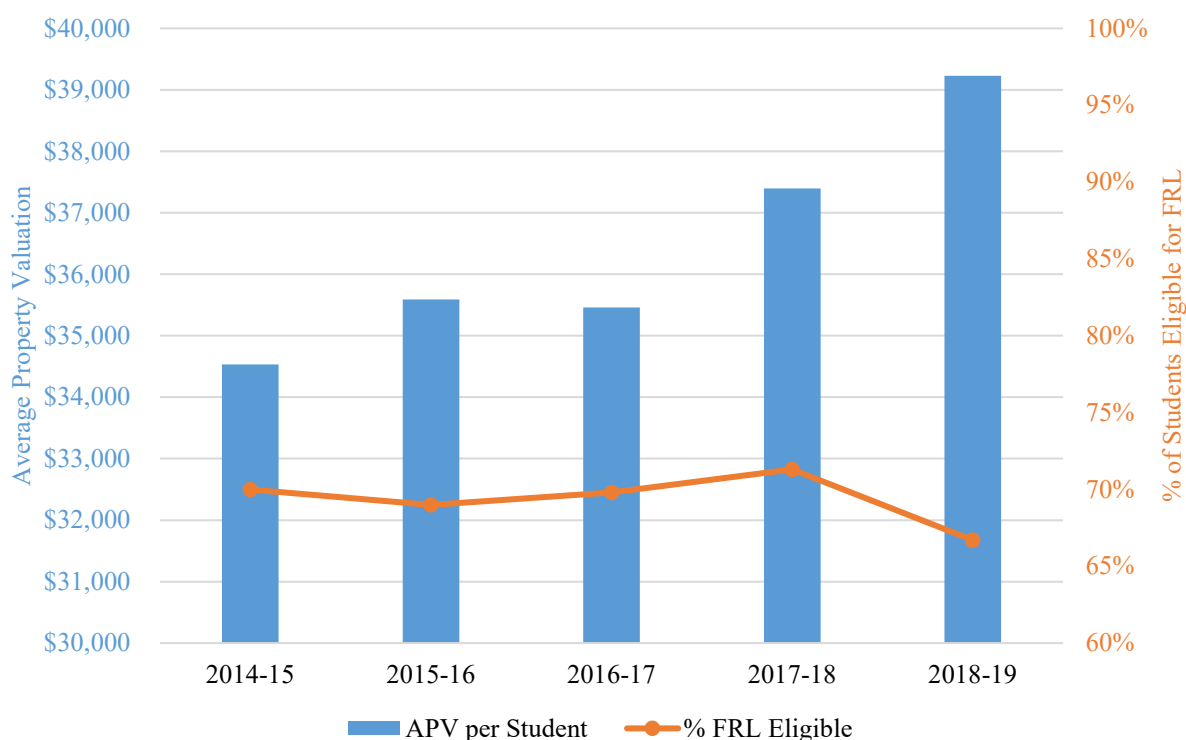
Rate of Child Poverty in Mid-Del Area



Source: <https://nces.ed.gov/programs/maped/ACSMaps/>

Exhibit 1-8 shows the trend in MDPS assessed property value per student and percent of students eligible for free/reduced-price meals over the last five years. Assessed property valuation has increased by 14 percent, while eligibility for free/reduced-price meals has decreased by several percentage points.

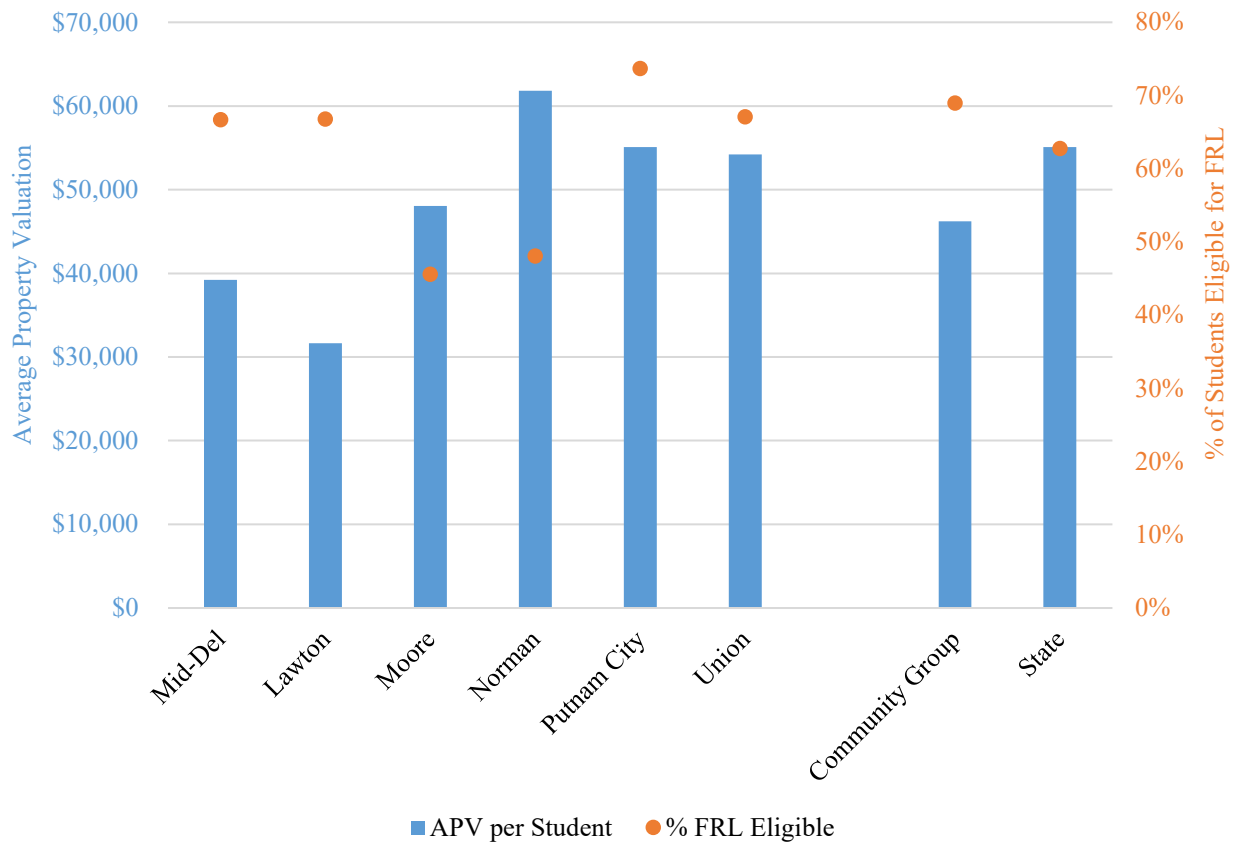
Exhibit 1-8
Trend in Assessed Property Value and Student Eligibility for Free/Reduced Meals



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-9 shows the comparison of MDPS Assessed Property Value (APV) and percent of student eligibility for free/reduced-price meals to its peer districts, community group, and state. MDPS had the second lowest APV and was tied for third highest percentage of students eligible for free/reduced-price meals.

Exhibit 1-9
Comparison of Assessed Property Valuation and
Student Eligibility for Free/Reduced Meals, 2018-19



Source: Office of Educational Quality and Accountability, Profiles Database

A. GOVERNANCE

Oklahoma state education laws, as codified in the Oklahoma State Department of Education (SDE) and district policies, establish the powers and responsibilities of the district board of education (BOE) and the superintendent. The School Law Book contains 1,469 sections numbered consecutively and each section provides legal guidance for school district governance and operations. The information provided in **Exhibit 1-10** reflects sections relevant to the board of education organization and basic governance principles.

Exhibit 1-10
OSC: Board of Education Governance and Organization

Topic	Section
School District – Definition	8
School System – Administered by State Department of Education, etc.	17
Positions in School System – Definitions	18
General Fund – Definition	22
Building Fund – Definition	23
State Board of Education – Powers and Duties	32
Governing Body of School District	117
Independent and Dependent School Districts – Board of Education – Members Election	120
Expansion of Board	121
Workshops for New Board Members – Expenses of Members Attending	122
Excluding Litigious Board Member from Proceedings	127
School District Treasurer – Assistant Local Treasurer	128
Local Treasurer – Surety Bond – Duties – Cash Investment Ledgers	129
Oath of Office	131
Requirements for Bonds for Employees and Officers	132
Powers and Duties of Local School Boards	134
Meetings of Board – Executive Sessions – Compensation of Members of Boards of Districts with ADA Exceeding 15,000 or Population Exceeding 100,000	150
Officers of Board	151
President – Duties	152
Vice President – Duties	153
Clerk – Duties	154
Oklahoma Open Meeting Act	509
Executive Sessions	511

Source: Oklahoma School Law Book, 2019

Powers and duties of the state BOE are contained in Section 32 of the School Law Book. These powers and duties cover all activities related to operating public school districts. Key powers and duties include:

- election of officers;
- establishing board of education policies;
- building and operating schools and related facilities; and
- contracting for an annual audit of all district and school activity funds.

Powers and duties of the BOEs of individual school districts are contained in section 134. Section 120 addresses the size and election of the BOE in Oklahoma. Section 151 provides a description of the required officers for the board, which consists of five members, each of whom

is elected to a five-year term. **Exhibit 1-11** reflects the year elected and the next election date for each board of education member.

Exhibit 1-11
Mid-Del Board of Education Members

Board Member	Board Position	Year of Election or Appointment	Term Expires
Le Roy Porter	President	2019	2025
Jimmie Nolen	Vice President	2018	2023
Julian Biggers	Clerk	2017	2024
Nathan McGuire	Member	2020	2021
Dr. Silvy Kirk	Member	2020	2022

Source: MDPS, February 2021

The district holds board of education elections each February unless otherwise changed by state directives. The board of education members swear in elected members and vote on officers at the next meeting. Sections 152, 153, and 154 list the duties of each officer of the board of education. The board must elect a clerk, who may or may not be a member of the board.

The Mid-Del Board of Education meets at 6:00 p.m. on the second Monday of the month at the Mid-Del Board of Education Center. The meeting place and time may be changed by agreement of a majority of the board members. Special meetings are held as needed, and board members receive agendas and any supporting information in advance of the meeting. Meetings are broadcast on the district's YouTube channel.

Section 122 outlines the training requirements for board members. Within 15 months following election, new board members are required to complete 12 hours of instruction on education issues in the areas of:

- school finance;
- legal issues (employment, due process, new laws, the Oklahoma Open Records Act, and the Oklahoma Open Meeting Act); and
- duties and responsibilities of district board of education members (including special education and ethics).

The 12 hours must include one hour of instruction in school finance, one hour of instruction in the *Oklahoma Open Records Act* and the *Oklahoma Open Meeting Act*, and one hour of instruction in ethics. The remaining hours may be satisfied by attending a two-day workshop to be held by the SDE or other workshops held by another organization or association approved by the Oklahoma State Board of Education.

Re-elected board members are required to complete six hours of instruction within 15 months of re-election. Included in these six hours is one hour of instruction in the following:

- school finance;
- the Oklahoma Open Records Act and the Oklahoma Open Meeting Act; and
- ethics.

The remaining hours may be satisfied by attending a workshop, class, or seminar addressing the education issues that new members must cover.

On the survey fielded as part of this review, parents gave MDPS school board members generally high marks (**Exhibit 1-12**). High proportions of parents felt that school board members listened to the community and understood the educational needs of MDPS students.

Exhibit 1-12
Parent Survey Responses Regarding School Board Members

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
School board members listen to the opinions and desires of parents and community members.	9%	35%	31%	16%	8%
School board members know and understand the educational needs of students in the district.	11%	42%	24%	16%	6%

Source: Prismatic Survey Results, February 2021

FINDING 1-1

The MDPS school board has been clear in its intent to govern with a focus on raising the achievement level of all students. Observations, review of documents, and interview responses indicate board members had an astute awareness of their role in governing the district. The board leverages technology to maintain transparent and open lines of communication and community engagement.

The consulting team found evidence that board members perform their duties with respect and transparency. Agenda and minutes are maintained in an online application provided by Oklahoma State School Boards Association (OSSBA). All non-confidential documents related to board meetings are accessible to the public through this application, which is searchable. The agenda and related documents are posted on Thursday of the week before the board meeting. Board members noted that this process provided sufficient time to prepare and review important information.

Transparency is built into all areas of the board's operations. The board promotes public participation and outlines guidelines for members of the public to provide input on the district's website. Faculty and staff noted awareness of the policy and processes necessary to submit items for board meetings. The meetings are broadcasted live through YouTube and recorded for later viewing on the district's website.

Building strong public transparency should be a key objective of school boards. Good board governance goes hand in hand with public transparency. Facilitating and promoting transparent operations for board business and decisions that impact the district builds trust with its citizens and stakeholders. Providing this kind of easy, intuitive public access opens other doors for civic trust and engagement and gives citizens from all perspectives equal opportunity to participate as well-informed contributors.

In addition, effective meetings by good school boards lead to informed decision-making, community transparency and trust, and improved student achievement. BOE members who fulfill their responsibilities conduct effective meetings to do their best work for the district and community.²

COMMENDATION

The MDPS BOE operates in a transparent and efficient manner.

FINDING 1-2

The district maintains current policies that are accessible to all. The board allows the administrative staff to gather information, research, and draft policy recommendations, as necessary. Based on interview responses, the consulting team found that proposals for new school district policy or updated school policy can also be generated through discussions with:

- school board members;
- other district staff;
- students and parents; and
- community members.

All MDPS policies are accessible online. The district contracts with OSSBA to provide online, searchable, and indexed access for their policy book. The contract includes yearly reviews and updates based on new legislation. Through interviews and focus group responses, the consulting team found that administrators and directors were comfortable suggesting updates when necessary and were aware of the process utilized by the district to update policy when applicable.

To govern properly, school boards must keep their policies current and relevant. If a district is sued, applicable board policies and implementing procedures will be scrutinized. Boards help themselves by closely examining policies and keeping policies current.

COMMENDATION

The MDPS BOE and superintendent maintain and regularly review district policies.

² <https://insights.diligent.com/meeting-management-public-education/how-run-school-board-meeting-effectively>

FINDING 1-3

Board members, MDPS administration, and the community have intentionally recruited for diversity among board applicants to the open seats in Ward #1 and Ward #2. The 2020-21 board membership is more reflective of the district's community diversity than it has been in the past several years.

The term of board seat #1 ends in 2020-21. The candidates running for this board seat represent minorities. Regardless of who wins, the newly elected candidate will maintain the diversity of the board membership. The superintendent and board have intentionally sought to have a school board that reflects the community and the students it serves. Interview responses from four of the five board members indicated they were approached or asked to run for that position. The district provided guidance for candidates, when requested, on the processes required to run for their seat.

Effective boards engage the communities they serve. There are established mechanisms for community involvement in setting the district's vision, representing the values of the community, and identifying the district's short- and long-term priorities.

Research shows that changing demographics have profound implications for all levels and functions of the school system. To create welcoming and equitable learning environments for diverse students and their families, school leaders must engage with the entire school community.

COMMENDATION

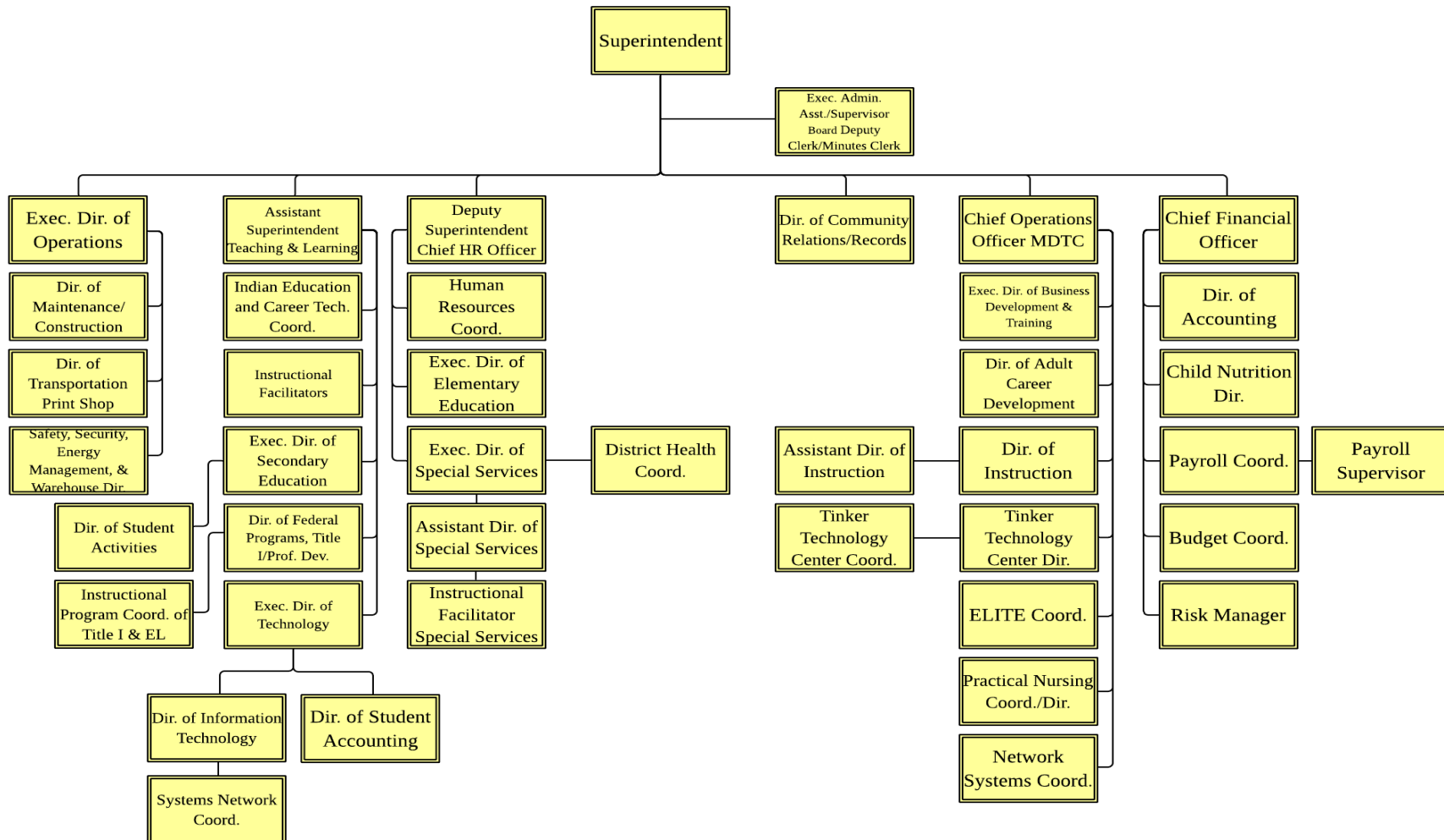
The MDPS superintendent and board members are commended for recruiting and supporting a diverse membership that reflects the demographics of the district.

B. ORGANIZATION AND MANAGEMENT

The superintendent of a school district serves as the chief executive officer and is the administrative leader responsible for policy implementation and day-to-day operations. An effective central office organizational structure is essential to the efficient delivery of services throughout a school district. Efficient central office organizational structures have the appropriate spans of control for district leadership and clearly defined lines of authority that are reflected in the district's organizational charts. Effective central office structures encourage communication at all levels.

The current MDPS superintendent is in his fifth year at the helm. **Exhibit 1-13** reflects the current organizational chart for MDPS.

Exhibit 1-13
MDPS District Organizational Chart



Source: Created by Prismatic, February 2021

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MDPS departments and functional areas. **Exhibit 1-14** provides the results for central office administration and the superintendent. A majority of staff gave the superintendent an A or B grade. Only 36 percent gave central office administration in general an A or B. The highest marks were given to school-level administrators, with 70 percent of staff awarding them an A or B. More than 70 percent of staff gave principals high marks as instructional leaders and managers as well.

Exhibit 1-14
Staff Survey Results Regarding Central Office Administration and Superintendent

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Superintendent's work as the educational leader of the district.	24%	27%	18%	11%	7%	12%
Superintendent's work as the chief administrator of the district.	25%	26%	19%	11%	7%	11%
Central office administration.	10%	26%	23%	12%	10%	19%
School-level administration.	36%	34%	13%	3%	2%	12%
Principals' work as instructional leaders.	38%	32%	14%	4%	2%	9%
Principals' work as managers of the staff and teachers.	42%	31%	14%	4%	2%	7%

Source: Prismatic Survey Results, February 2021

Similar to staff, a majority of parents gave the superintendent high marks (**Exhibit 1-15**). Only 13 percent of parents did not.

Exhibit 1-15
Parent Survey Responses Regarding School Board Members

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The superintendent is a respected and effective leader.	16%	37%	35%	8%	5%

Source: Prismatic Survey Results, February 2021

Exhibit 1-16 compares the MDPS ratio of administrative staff to teaching staff against the five peer districts. MDPS had the second lowest ratio of teachers to administrators, tied with Norman and behind Lawton.

Exhibit 1-16
Comparison of Teacher and Administrator Staffing, 2018-19

Entity	ADM	Number of Administrators (FTE)	Number of Classroom Teachers (FTE)	Ratio of Teachers to Administrators
Mid-Del	13,958	77.0	777	10:1
Lawton	13,596	81.3	718	9:1
Moore	24,546	92.8	1,150	12:1
Norman	16,032	81.9	832	10:1
Putnam City	19,241	82.8	1,078	13:1
Union	15,656	65.9	771	12:1
Peer Average	17,814	80.9	910	11:1

Source: Office of Educational Quality and Accountability, Profiles Database and Prismatic calculations

Exhibit 1-17 compares MDPS' administrator cost per student with that of its peers. As shown, MDPS' administrator cost per student was the highest of its peers, despite being the fourth largest gross salary total.

Exhibit 1-17
Administrative Expenditures Comparison, 2018-19

Entity	ADM	Number of Administrators (FTE)	Total Salary	Administrator Cost per Student
Mid-Del	13,958	77.0	\$6,913,214	\$495
Lawton	13,596	81.3	\$6,143,028	\$452
Moore	24,546	92.8	\$8,322,118	\$339
Norman	16,032	81.9	\$7,606,872	\$474
Putnam City	19,241	82.8	\$7,793,964	\$405
Union	15,656	65.9	\$6,851,491	\$438
Peer Average	17,814	80.9	\$7,343,495	\$412

Source: Office of Educational Quality and Accountability, Profiles Database

FINDING 1-4

MDPS does not effectively practice site-based budgeting nor analyze equity in allocating site-level resources. Surveys, focus groups, and interview responses reflected a lack of control by school administrators and staff on their budget and resources.

Focus group participants acknowledged some control over federal program funds. However, the distribution of Title I funds varied from school to school. Some schools receive a fairly large amount of Title I funds, while other schools may not receive any. In addition, the dedicated site allocated funds from the general budget were negligible.

Exhibit 1-18 provides staff survey results related to funding, budgets, and allocation of resources. A majority of staff members disagreed, strongly disagreed, or had no opinion on statements related to positive practices for managing funds and resources. As shown, only 25 percent of staff agreed or strongly agreed that funds are managed wisely to support education in the district. Only 20 percent agreed or strongly agreed that the budgeting process effectively involves administrators and staff. Only 34 percent agreed or strongly agreed their school or department allocates financial resources equitably and fairly.

Exhibit 1-18
Staff Survey Results Regarding Budgets and Allocation of Resources

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Funds are managed wisely to support education in this district.	3%	22%	39%	25%	11%
The budgeting process effectively involves administrators and staff.	3%	17%	44%	25%	12%
My school/department allocates financial resources equitably and fairly.	5%	29%	43%	16%	7%

Source: Prismatic Survey Results, February 2021

Exhibit 1-19 provides parent survey results related to allocation of resources. Only a slightly higher proportion of parents felt that the district spent its money wisely than did not. A majority felt that more should be spent on classroom supplies and more than one-third felt more should be spent on facilities. A higher proportion of parents said the district did not ask for input when developing its budget than said the district did seek input.

Exhibit 1-19
Parent Survey Results Regarding Budgets and Allocation of Resources

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The district spends its money wisely.	7%	21%	49%	15%	8%
The district needs to spend more of its budget on its facilities.	10%	26%	49%	13%	2%
The district needs to spend more of its budget on classroom supplies.	23%	44%	29%	4%	0.2%
The districts ask the community for input when developing its budget.	5%	15%	51%	21%	8%

Source: Prismatic Survey Results, February 2021

According to the Rennie Center for Education Research & Policy, the decentralization of district

budgets through the adoption of site-based budgeting has become a popular strategy among school leaders and staff. This budgeting strategy allows for more input in how resources are spent. Based on the Center's review of education finance researchers, the following practices guide resource allocation decisions when using site-based budgeting:

- decentralize spending authority to schools, in keeping with good managerial practice and school-based accountability for student learning;
- calculate school budgets based on individual students and their educational needs; and
- develop strong information systems and use them to support planning, monitoring, and evaluation of resource use.

The increasing demands, and conflicting priorities, of the modern education system requires a more strategic and deliberative approach to school budgeting that maximizes the use of resources and allows for more efficient and effective spending decisions.³

Districts that successfully implement site-based budgeting typically have "site councils" comprised of the school principal, some teachers, and some community members. The most effective site councils have these characteristics:

- a well-thought-out committee structure;
- enabling leadership;
- focus on student learning;
- focus on adult learning; and
- schoolwide perspective.

In addition to effective site councils, school-based budgeting is only successful when the school district provides support, including:

- long-term commitment – Site councils cannot evolve into effective decision-making bodies at the school site if the district pendulum swings from one extreme to the other every two or three years;
- curricular guidance – Schools need a substantive framework within which to make appropriate choices. The goal of site-based management is not to let each school do whatever it wants, without restrictions;

³ Rennie Center for Education Research & Policy. (October 2012). *Smart school budgeting: resources for districts*. Cambridge, MA: Rennie Center for Education Research & Policy.

- opportunities for learning and assistance – Schools need resources and learning opportunities for the adults in schools so that classroom practices can improve; and
- access to information. – A decentralized system can function well only when each school knows how it is doing. Schools need support in gathering and analyzing accountability information.⁴

RECOMMENDATION

Establish processes and training to encourage site-based budgeting and allocation of resources.

There are many variations of site-based budgeting. The school board, superintendent, CFO, and school principals should start by reviewing the toolkit available through the Rennie Center for Education Research & Policy. The district leadership team should then develop a plan to move into site-based budgeting within the next three years.

FISCAL IMPACT

This recommendation can be implemented with existing sources.

C. PLANNING AND EVALUATION

Planning, evaluating, correcting weaknesses, and supporting strengths through practice and re-teaching is common in the lexicon and repertoire of educators. However, planning and evaluation takes on a different meaning when it involves planning for change and improvement in a large entity, like a school district. In that case, there is a need to strategically plan when and how to change the district for the improvement of the student learning experience.

To be effective, a strategic plan must lay out key milestones to measure progress, establish a priority of the items to be accomplished, provide a timeline for which each item is to be accomplished, and assign accountability for each item to a specified position in the district's organization. Finally, the organization must provide periodic reports on the status of implementation and any changes that must be made due to changes in circumstances or changes in assumptions.

According to Cook (2000), strategic planning requires total concentration of the organization's resources on mutually pre-determined measurable outcomes.⁵ Strategic planning allows an organization to have a clear focus on what it is doing and what it intends to do based upon established and monitored goals. A strategic plan will include long-term goals, which typically

⁴ ASCD. (1995-96) "The who, what, and why of site-based management." *Educational Leadership*. 53-4. www.ascd.org/publications/educational_leadership/dec95/vol53/num04/The_Who_What_and_Why_of_Site-Based_Management.aspx.

⁵ Cook, Jr., W. (2000). *Strategics: The art and science of holistic strategy*. Westport, Connecticut: Quorum Books.

can be achieved in five to ten years. Short-term goals, which typically can be achieved in a year, support the attainment of the long-term goals.

FINDING 1-5

The district does not engage in ongoing strategic planning. Interviews of board members, superintendent, administrators, and faculty revealed a lack of knowledge of any current strategic plan driving the decisions, budgeting, or resource allocation of the district.

The superintendent, board, staffs, and stakeholders began strategic planning utilizing the OSSBA services in 2018-19. As noted in an MDPS FaceBook post in October 2018:

During the 2018-2019 school year, we will begin a Continuous Strategic Improvement (CSI) Plan to lay out a five-year vision for our district. “We are excited to be partnering with the Oklahoma State School Boards Association and the K20 Center at the University of Oklahoma to develop a long-term strategic plan for the Mid-Del school district. The Continuous Strategic Improvement (CSI) Process is an opportunity to set long-term goals for the district and annual benchmarks within those goals. We look forward to the involvement of our community, students, and staff over the next several months as we embark on this process together,” said Dr. Rick Cobb, Superintendent of Mid-Del Schools.⁶

However, responses from interviews and focus groups indicated that a strategic plan is not yet an active part of the district’s operations and management. This is in part due to the COVID-19 pandemic, which has stifled the district’s forward progress on their strategic plan. The board president and administrators indicated an intent to revisit the plan once the pandemic is over.

In 2007, Reeves summarized his work, which analyzed hundreds of strategic plans across 20 dimensions, controlled the study for school demographics, and compared student achievement to a baseline year. The study found that substantially higher student achievement was realized if strategic plans included:

- monthly monitoring of student performance, teacher strategies, and leadership practices;
- continued self-evaluation by teachers and administrators regarding every program initiative and strategy; and
- attribution by teachers and leaders that their work is the fundamental cause of student growth rather than demographics.⁷

Reeves concludes that school leaders must decide whether the strategic planning process is focused on achievement and therefore adds value. All too often, organizations develop strategic plans that are broad statements with no ties to specific goals. For example, a school district may

⁶ <https://www.facebook.com/middelschools/posts/mid-del-is-planning-for-the-future-and-needs-the-communitys-help-the-district-is/10156568547725320/>

⁷ Reeves, D.B. (2007). Leading to change/making strategic planning work. *Educational Leadership*, 65(4).

establish a goal of “improving student performance” without setting a target or identifying the strategies it plans to employ to achieve the desired outcome, or even fully defining “student performance.” A better goal would be “improving student achievement by 10 percent from last year to this year as measured by state standardized testing.” The district would then identify the means by which this goal would be achieved, such as through additional small group instruction with benchmark testing to monitor progress.

According to the Balanced Scorecard Institute:

There are many different frameworks and methodologies for strategic planning and management. While there are no absolute rules regarding the right framework, most follow a similar pattern and have common attributes. Many frameworks cycle through some variation on some basic phases:

1. analysis or assessment, where an understanding of the current internal and external environments is developed;
2. strategy formulation, where high level strategy is developed, and a basic organization level strategic plan is documented;
3. strategy execution, where the high level plan is translated into more operational planning and action items; and
4. evaluation or sustainment/management phase, where ongoing refinement and evaluation of performance, culture, communications, data reporting, and other strategic management issues occur.⁸

The graphic in **Exhibit 1-20** explains the logic of the balanced scorecard approach to strategic planning.

⁸<http://balancedscorecard.org/Resources/Strategic-Planning-Basics>

Exhibit 1-20
The Balanced Scorecard *Nine Steps to Success*TM Model



Source: <https://balancedscorecard.org/about/nine-steps/>

RECOMMENDATION

Implement an ongoing strategic planning process involving community stakeholders, administration, faculty, and staff, which defines decision-making processes and provides governance and direction for long-range goals, implementation strategies, and accountability measures.

MDPS should review their current strategic plan for relevance within each of the operational and instructional areas. This performance review may provide a basis for adjusting the plan and an opportunity to broaden the range of people involved in planning to guide continued positive growth. A strategic planning process can start with an annual superintendent's report to the board detailing all facets of the school system. The basic steps for a strategic planning effort are:

- convene an internal administrative staff planning group. They decide who will chair the main committee and/or serve as liaison to the group;

- establish a board-approved strategic planning committee heavily weighted to include teachers and parents. As many as two of the board members can serve if so desired. Given the racial and socioeconomic diversity in MDPS, the committee should also be diverse and reflective of the community it will serve;
- develop a committee meeting schedule and open the meetings to the public. Develop agendas and reports that provide detailed data regarding strengths and weaknesses of the district to the committee and public. Each operational and instructional area should be included;
- provide the committee with demographic studies;
- establish sub-committees to dig into data as necessary and have them report back to the main committee with findings;
- revise the existing vision statement, as needed;
- develop short- and long-range goals for the district. Convert these goals into action steps;
- assign staff to implement action steps;
- determine how to evaluate the progress; and
- develop follow-up and review procedures.

Once a strategic plan is established, a follow-up annual retreat, attended by the board, superintendent, and other key administrative staff, should be scheduled to review the district's progress and adjust goals accordingly. Such a review may include creating more specific short-term goals that support established long-range goals. Short-term goals should be "SMART": specific, measurable, achievable, relevant, and time-bound.

FISCAL IMPACT

The MDPS board of education and superintendent should move forward with activating their strategic plan. This recommendation can be implemented with existing sources.

Alternatively, the district may want assistance in finalizing/revising the existing strategic plan elements. This approach will have fiscal impact. The board can publish a request for proposals and enter a contract for services. Since the district recently went through a formal strategic planning process, the services may just be work for revising and developing a communication strategy. An estimated cost for facilitating revisions and developing a communication plan is \$10,000.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Develop a strategic plan.	(\$10,000)	\$0	\$0	\$0	\$0

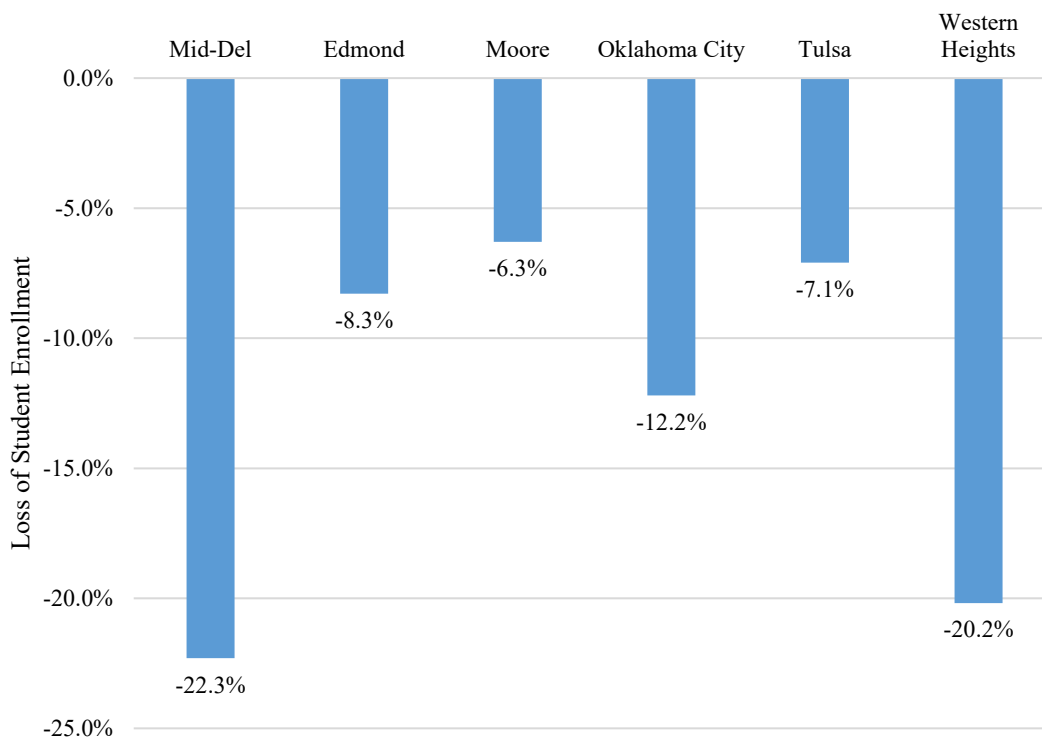
FINDING 1-6

The district lacks explicit, current, data-driven demographic projections. An in-depth study of demographics would provide a sound basis for future decision-making regarding the school district's plans.

The consulting team has not found evidence of any recent efforts by the district to study its likely enrollment trends based on demographic and economic projections of the area.

Data from SDE contain some insights into the situation facing MDPS and other large Oklahoma districts because of the pandemic.⁹ **Exhibit 1-21** shows the decline in enrollment attributable to this disruptive event. The steep declines in MDPS and Western Heights Public Schools stand out.

Exhibit 1-21
Selected Large Oklahoma School Districts with Enrollment Losses Due to COVID-19



Source: Prepared by Prismatic with data from SDE, February 2021

Over the long-term, the important questions are:

- what will be the profile of the enrollment recovery at MDPS; and

⁹ <https://nondoc.com/2021/01/07/oklahoma-public-school-enrollment-drops-significantly/>

- what is the enrollment projection for the areas served by the district?

Before the pandemic, the district's enrollment had already declined and is not, at this time, expected to rebound to levels of five or ten years ago. Two middle schools have been closed. One is scheduled to be repurposed and the disposition of the other appears not yet fully decided. Several elementary schools are possible closure candidates. Because the district does not engage in active and formal strategic and facilities master planning, sufficient demographic and other information are currently lacking for informed and justifiable decision-making.

It is urgent for the district to find reliable answers to these questions in the shortest possible time. Decisions on the disposition of schools and other facilities must largely rest on this information, but many other decisions concerning staffing, curriculum and other issues are also informed by demographic projections. Effective overall district planning requires annual enrollment projections at least five years into the future. Many school planners work in coordination with county and city planners to track growth patterns. Unfortunately, there are currently no state-level resources to assist Oklahoma school districts in this area.

School closures, school repurposing, replacement, expansion, or demolition must be based on trustworthy, reliable data. Although many such decisions have substantial political and emotional vectors, it is best if they can be defended based on credible and data-backed information. Effective strategic planning is largely based on an understanding of historical and projected student and community demographic changes. The district of Durant ISD recently published the results of a demographic study it undertook with an outside consulting firm.¹⁰ That study projected student enrollment growth of ten percent over the next five year and 18 percent over the next nine years. The results of the Durant study provide an example of the type of data a professional demographics study provides and how such a study can provide a firm footing for strategic planning.

RECOMMENDATION

Complete a demographics study.

The district may use the enrollment projections provided by the state, but for a more complete set of projections that also predict lower grade enrollments by utilizing birth records, the district should contract with a company that specializes in school enrollment projections. The gold standard in demographic studies is the cohort-component method by school attendance area, which is generally far more accurate than an average annual increase. Recent data with projections out five to ten years will help MDPS plan better. The district should use the results to inform strategic planning, bond development, facilities master planning, future classroom construction activities, transfer policies, and all aspects of instructional and operational decisions.

To implement the recommendation, MDPS should find a contractor with experience in providing demographic studies for schools. This is typically accomplished through a request for proposals.

¹⁰ http://www.durantisd.org/web/district/DISD_growth2018.pdf. A copy of the DISD report presentation is contained in **Appendix E**.

Following board approval of a time-limited contract, a meeting should then be held with administrative staff and no more than two board member advisers. This meeting should profile MDPS expectations and what will be needed from MDPS by the researchers and what they will go out and get on their own. At the conclusion of the study, researchers should provide a complete written report, an explanatory meeting with administrative staff, and an oral report to the board in a public board meeting.

FISCAL IMPACT

Given the size of the district, the consulting team estimates that a demographic study can be obtained for approximately \$25,000. The study should be updated every three years at a minimum.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Contract for a demographic analysis.	(\$25,000)	\$0	\$0	(\$25,000)	\$0

FINDING 1-7

MDPS does not have a formalized process for evaluation of its various academic and social programs. There are no common metrics, consistent procedures, or policy to collect, analyze, and use data to systematically and routinely assess the effectiveness and efficiency of implemented programs. The consulting team found no evidence to indicate program evaluations are used to measure the cost-benefits, effects on student learning, or provide recommendations to improve program implementation.

State testing did not take place in 2019-20. Focus group responses indicated that the district has not implemented common benchmark assessments or common metrics to measure programs or student achievement. This lack of student achievement data has limited MDPS schools in measuring their goals, programs, and student academic achievement.

Based on interviews and focus group responses, each site and department within the sites were using different data to measure student academic achievement or progress. One of the focus group participants shared that they used quizzes in their PLC teams while another participant used items included in their mastery connect application. Data were not available to compare a third-grade class at Barnes Elementary with a third-grade class at Mid-Del Elementary. In addition, the focus groups stated concerns of students moving from one school to another because of the lack of consistency, expectations, and lack of curriculum alignment between sites.

Program evaluation is designed to assess the implementation and the effects of a program. The purposes for program evaluation include how and where to improve a program, assess the overall value of a program and the individual components, align cost with effectiveness and impact on student performance. Results of program evaluations are used for making decisions about whether to continue, improve, expand, or eliminate a program, allocate resources among competing programs, or accept or reject a program approach or theory. Sound policy drives

thorough program evaluations and is viewed as a deliberate means for managing and directing decision-making.¹¹ Other sources for best practices in evaluation note that:

- “Knowledge is power, and there’s nothing more powerful than data to help district and school leaders develop a solid blueprint with measurable results of continuous improvement.”¹²
- Purposeful data leads not only to first-order, direct changes in classroom practice and individual student achievement, but also to second-order, system level changes in school culture that ultimately benefit all students.¹³

RECOMMENDATION

Adopt common metrics, policies, and procedures related to annual program evaluation.

The superintendent and board should adopt policies, metrics, and timelines for annual evaluations of all programs – educational, social, and others. The policies should include directives for identifying needs, creating goals, and designing action plans with evidence-based practices. Implementation and reflection are substantial components of the planning and evaluation process.^{14,15}

A key to successful program evaluation is leaders who understand the impact of data analysis and are committed to the process. Data-driven decision-making takes time, effort, and understanding. The district should begin by creating a data inventory that identifies available data sources collected by the district and its appropriate use for evaluating a program. The data inventory will build capacity for providing timely and accurate information by focusing on the most appropriate data necessary for analysis. **Exhibit 1-22** provides an example of a data inventory sheet designed for teachers or administrators. It includes the following information about the data collected in the district:

- description: describes the type of data;
- purpose: identifies the core purpose for collecting the data elements;
- source: where does the data originate and what entity “owns” or maintains the data;
- timeframe & frequency: when and how often is the data collected;
- limitations: all data have limitations. Identifying limitations supports the appropriate use of the data; and

¹¹ https://education.nova.edu/Resources/uploads/app/35/files/arc_doc/progeval.pdf

¹² Data Driven Decision Making: A Powerful Tool for School Improvement, John Messelt, 2004.

¹³ Ahead of the Curve, Larry Ainsworth, Stephen White and others, Solution Tree Press, 2007.

¹⁴ <https://sde.ok.gov/search/node/low%20performing%20schools>

¹⁵ <https://sde.ok.gov/sites/default/files/9EE%20Booklet.pdf>

- data interpretations: identifies the questions that can be answered from analyzing the data.

Exhibit 1-22
Data Inventory Example

Defining the Types of Data- Example	
Description	Oklahoma School Testing Program Results: Performance Level of student, Percent Correct by standard, Scale Score of student
Purpose	Provide information on what students know and <u>are able to do</u> in relation to the grade-level content standards
Source	Oklahoma School Testing Program
Timeframe & Frequency	Two months after the assessment at the end of the school year. Data is collected once a year.
Limitations	Data reflects the effectiveness of past instruction and curriculum.
Data Interpretation	What patterns of learning does the data reflect? What are the trends of student performance? Did we meet goals that were set as a school, team or teacher? What goals should I set for students based on their performance of the previous year?

Source: Created by Prismatic consultant, 2020

Data Wise by Boudett, City, & Murane (2010), provides another template for developing a data inventory.¹⁶ In addition, the superintendent, administrators, and select faculty should review the following resources that provide basic information for initiating program evaluations:

- Poorvu Center for Teaching and Learning Program Evaluation Overview;¹⁷
- Using Program Evaluation to Enhance Student Success;¹⁸
- Jump Start Your School's Program Evaluation;¹⁹ and
- Getting the Information You Need from Your Evaluation.²⁰

¹⁶ School Data Inventory from Data Wise by Boudett, City, & Murane (2010).

¹⁷ <https://poorvucenter.yale.edu/Evaluating-Programs#:~:text=Program%20evaluation%20looks%20at%20the,various%20models%20of%20program%20review>

¹⁸ <https://www.aacu.org/publications-research/periodicals/using-program-evaluation-enhance-student-success>

¹⁹ https://www.educationworld.com/a_curr/school-program-evaluation-basics.shtml

²⁰ <https://www2.ed.gov/about/offices/list/oesc/sst/evaluationmatters.pdf>

Program evaluation can start by asking what the district is doing right. The district should continue to build excellence and capacity with their professional learning communities, improve on data analysis, and leverage resources provided by the SDE through its Office of School Support and Improvement. The School Support office assists schools with support, assistance, and/or resources needed to build capacity and sustain change that positively impacts students and their achievement.

FISCAL IMPACT

The superintendent should investigate the resources available to MDPS for conducting appropriate evaluations. The consulting team anticipates minimal additional time needed to develop a data inventory and possibly develop assessments or metrics that are common across schools for each of the domains. The selected overall evaluation approach will determine the final costs.

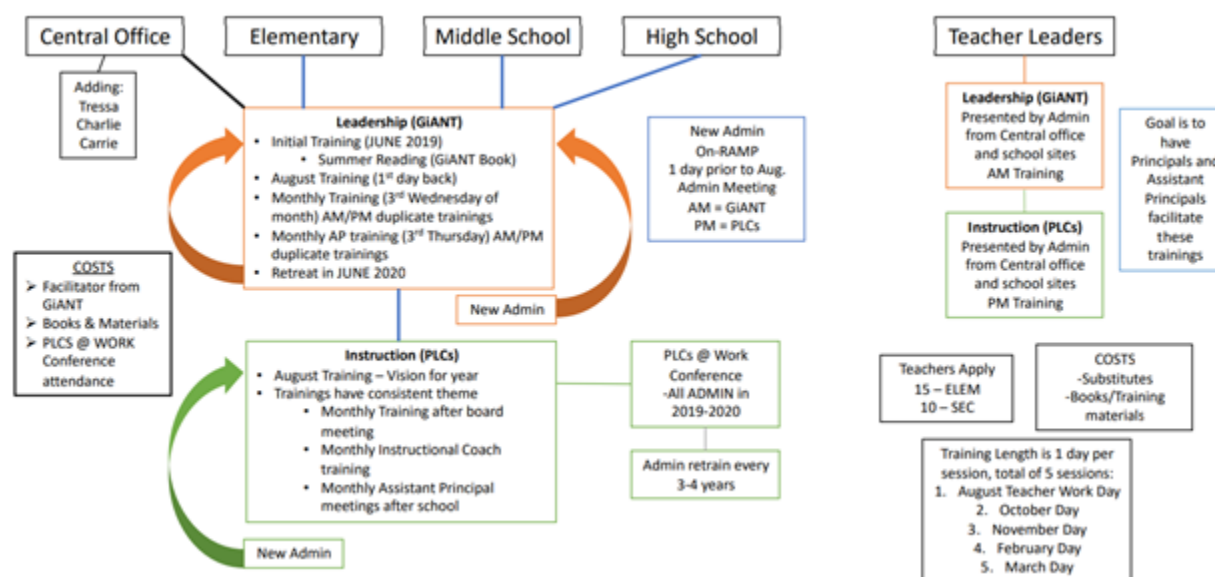
Given that the district does not yet have in-house expertise to conduct a robust schedule of program evaluation, the consulting team recommends that MDPS contract out for two or three programmatic evaluations for each of the next three years. Once the district builds some in-house expertise, it can choose to conduct more evaluations in-house. An external programmatic evaluation can cost between \$10,000 and \$25,000, depending on the size of the program evaluated and the extent of the evaluation sought.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Contract for some programmatic evaluations.	(\$75,000)	(\$75,000)	(\$75,000)	\$0	\$0

FINDING 1-8

MDPS understands the importance of leadership to support continued growth, build exceptional schools, and achieve academic success of their students. The district has launched the GiANT leadership framework as the foundation for growing leaders. **Exhibit 1-23** outlines the overall leadership development plan implemented by the district beginning in 2020-21.

Exhibit 1-23 Mid-Del Leadership Development



Source: MDPS, February 2021

Leadership opportunities for teachers are provided and encouraged at the sites and district. Focus groups provided many examples of leadership opportunities at their site. These examples included a variety of opportunities for staff to build leadership skills such as site leadership teams, small group presentations, student club leadership roles, and leadership roles within their PLC team. In addition, the district offers a leadership internship/cohort of approximately ten teachers per year. Teachers interested in the leadership internship/cohort must apply to and be accepted to participate.

Results from the staff survey indicated that a majority of staff feel they are an integral part of the team (**Exhibit 1-24**). This perception supports a foundation for a positive culture.

Exhibit 1-24 Staff Survey Result Regarding Team Perceptions

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I feel that I am an integral part of the team here.	22%	52%	10%	12%	5%

Source: Prismatic Survey Results, February 2021

According to the Southern Cross University's, "What is Good Leadership in Schools?", good leadership in schools helps to foster both a positive and motivating culture for staff and a high-quality experience for learners. Leaders at all levels in schools can contribute to this by developing the top skills needed by school leaders. The same study found that not one school (out of 180 surveyed) was able to improve student achievement records without effective school leadership. This research shows a clear connection between skilled school leadership and

positive student learning outcomes. It is proof that good leadership in schools directly impacts students' experience and performance.²¹

Good leadership in schools encourages and enables school-wide teaching expertise to achieve a strong rate of progress for all learners. This leadership can be driven by principals and executive staff in traditional leadership roles, as well as by school leaders and teachers without defined leadership roles.

COMMENDATION

MDPS has made good efforts to develop leaders from within the teacher ranks.

D. PERSONNEL MANAGEMENT

Personnel costs typically represent the largest expense in school districts. As a result, efficient and effective management of human resource functions is critical to the overall effectiveness of a district. In small districts, human resource functions are usually managed by the superintendent with clerical assistance. Typical tasks of a school district's human resources department include the following:

- recruiting employees;
- overseeing the interviewing, selection, and processing of new employees;
- retaining employees;
- processing promotions, transfers, and resignations;
- determining and maintaining compensation schedules;
- managing insurance programs;
- managing employee benefits programs;
- planning and forecasting personnel needs;
- maintaining complete employee records, including records on training and certification;
- developing and maintaining job descriptions, which would include establishing required job credentials;
- managing the employee evaluation process;
- handling employee complaints and grievances, including grievance procedures;

²¹ Content provided by Southern Cross University. "What Is Good Leadership in Schools?" ESchool News, 20 Aug. 2019, www.eschoolnews.com/2019/06/25/what-is-good-leadership-in-schools/.

- developing personnel policies; and
- ensuring that the employer follows all laws and regulations.

To support the mission of a school district, it is important that these human resource functions be efficient, effective, and aligned to federal and state law. Like most employers, public school districts must comply with federal laws governing human resource management. These laws include:

- *Fair Labor Standards Act*, which governs wages and hourly payments;
- *Americans with Disabilities Act*, which requires employers to provide reasonable accommodation to any employee or job applicant who has a disability; and
- *Equal Employment Opportunity Act*, which prevents employers from making hiring and firing decisions based upon age, race, religion, gender, or other factors not related to performance.

In addition, state laws govern school district human resource administration in areas such as grievances, due process, termination, and contract renewal. Personnel selection and retention are part of a continuous process necessary to ensure an experienced, quality teaching staff.

FINDING 1-9

Even though no state or federal law requires job descriptions, executive leaders in Mid-Del recognize the practical reasons for having them and, most importantly, ensure that they currently capture the work and expectations of the 90 jobs or positions in the district. In the summer of 2020, the HR Department worked with principals, supervisors, and departmental managers on a project to update and to rewrite the job descriptions to ensure that they accurately reflect the work and requirements associated with each job or position. About 85 percent of the job descriptions had been updated at the time of the onsite work.

The MDPS chief human resources officer and the HR staff began the project in early June of 2020. A prior examination of job descriptions on file showed that virtually none of the extant descriptions had been updated for several years. The staff identified current jobs that had no description at all. The issue was further complicated by formatting and contextual inconsistencies. The HR staff held meetings with principals and departmental managers to introduce the new standard format and share instructions and directions for conducting informal job analyses prior to either writing a new description or updating an old one.

Since the launch of online job searches and electronic applications systems in the mid-1990's, job applicants have been able to see vacancy postings online that identify or spell out the responsibilities of a job as well as information about working conditions, tools, equipment used, and knowledge and skills needed. Whenever MDPS posts a vacancy on its TalentEd online applicant tracking system, applicants can also view and download the job's description. From an

employer's perspective, establishing a practice of writing and maintaining up-to-date and relevant job descriptions will ensure:

- the recruitment of the best candidates;
- a solid set of expectations that are easily communicated from management to employee;
- greater employee accountability;
- greater productivity; and
- reduce risk and limit liability if an employee sues the employer.

COMMENDATION

The efforts of the MDPS HR department to guide and direct the creation and update of job descriptions is commendable.

FINDING 1-10

Lack of direct focus on the racial, ethnic, and socio-economic diversity of MDPS students is denying these students what they need to be successful and to meet their fullest potential. Equity is attained when the achievements of these historically underserved students match the outcomes of students in the dominant culture; when underserved groups increase in capacity and power; and when barriers to student success have been mitigated or eliminated.

During interviews and focus groups, staff acknowledged the diverse student enrollment and the subsequent need for diversity, equity, and inclusion training and processes for the faculties and staff. The MDPS HR department shared evidence of its efforts to recruit teachers who graduate from predominately black and Latino colleges and universities. Nevertheless, the MDPS teacher corps remains more than 80 percent Caucasian, compared to a student body that is now less than half Caucasian.

On the surveys conducted as part of this review, a majority of high school students, parents, and staff recognized district efforts to be inclusive (**Exhibit 1-25**). However, at least some portion of each stakeholder group indicated that work remains to be done in accepting the differences in students, treating students equitably, and treating diversity as an asset rather than a deficit.

Exhibit 1-25
Survey Results Regarding the Diversity, Equity, and Inclusion

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
High School Student	Students in this school accept each other's differences.	35%		30%	35%	
	Most staff in our school have high expectations for all students regardless of their race, ethnicity, or language.	65%		19%	16%	
	Most adults in my school treat student diversity as a good thing, not a bad thing.	57%		31%	12%	
Parent	Students are treated equitably in this district.	12%	45%	22%	14%	6%
	Students in this district are accepting of other students who are different.	12%	44%	27%	12%	5%
Staff	Students in this district are accepting of other students who are different.	13%	57%	16%	10%	3%
	Most staff in our school/department treat student diversity as an asset and not a deficit.	19%	56%	15%	9%	2%

Source: Prismatic Survey Results, February 2021

Moreover, five percent of the written responses on the survey from faculty and staff spoke to the need for justice, equity, diversity, and inclusion resources and training while admitting that current developments are mainly focused on the curricula and pedagogical approaches. Four percent of the written responses from parents expressed concern that, not only is diversity among MDPS teachers lacking, but there is also a lack of reasonable efforts to address the deficit.

Important first steps are being aware of the reality of the times and the need to address these issues more intensely. However, a more systemic approach and advocacy are necessary to reach major milestones. "Lip service" alone will not be sufficient. In June 2020, MDPS released a statement committing to addressing racial discrimination and supporting diversity and an inclusive educational environment (**Exhibit 1-26**).

Exhibit 1-26**MDPS Resolution on Developing an Intersectional Inclusive Educational Environment****Resolution**

WHEREAS, members of the Midwest City – Del City Board of Education, as well as the district staff acknowledge, are saddened, and outraged by historic, recent, and ongoing events that demonstrate the prejudice and injustice that persists in our community and country;

WHEREAS, racism and hate deserve no place in our schools or our society, and we will protect the Constitutional rights of every person who lives, works and learns in our community;

WHEREAS, we will not be silent. We will urgently act to stop the racial injustice that harms and anguishes Black people, who are our family, friends, neighbors, students, staff members and fellow Americans;

WHEREAS, we will listen. Those who have endured discrimination and intolerance as they deserve to be heard as they share the stories and truth about their experiences and feelings, and we must seek with great empathy to understand their challenges and their pain;

WHEREAS, we will learn. It is time to engage our community in meaningful and honest conversation about racial inequality, to build alliances with those committed to justice for all, and to work together to support our shared conviction that racism must end;

WHEREAS, we will lead. Each of us, individually and collectively, is responsible for creating and nurturing an anti-racist learning environment where every individual is respected and valued for who they are, celebrating their diversity. We must actively acknowledge, address and prevent racial bias that occurs as a result of district policies, practices and actions; and

WHEREAS, we will do better. Our district can be and will be a sanctuary of safety in our community and a beacon of light for the world, as we build and strengthen trust with those we serve, and we model the acceptance of all people.

THEREFORE, BE IT RESOLVED that we, members of the Midwest City – Del City Board of Education, stand steadfast in our commitment to foster an intersectional inclusive educational environment where every student, teacher, support professional, parent and community member is treated with dignity and respect, as well as our commitment to continue fighting for racial justice and human and civil rights for ALL.

Approved by the Midwest City – Del City Board of Education this 13th day of July, 2020.

Source: MDPS, February 2021

In the past decade, U.S. educational leaders have begun to take a deeper look at inequities to better understand the complex systems that affect student performance. To ensure that these concerns will be systemically targeted, school districts are establishing in-district departments to develop frameworks that use research-based tools and processes to study and translate data into

transformational actions and activities that will promote educational equity systemwide. This framework provides the district staff the ability to:

- consider the perspectives of multiple stakeholders;
- develop a common understanding about equity;
- create safe spaces for dialogue about data;
- build capacity and ownership internally to perform ongoing and practical equity reviews; and
- encourage transparent communication.

RECOMMENDATION

Establish an executive position at the superintendent's cabinet level to lead equity, social justice, and diversity efforts.

In order to fully realize positive change in this area, the district should develop a new, cabinet level position. The position should be responsible for planning, directing, coordinating, assisting, and being the internal consultant to the superintendent, executive leadership team, directors, and principals regarding equity, social justice, and diversity matters concerning staff, students, and families. Relevant job duties could include:

- researches, develops, recommends, and executes creative strategies to foster MDPS diversity goals;
- reviews current practices and policies, assessing and analyzing the extent to which they support or hinder the MDPS diversity goals;
- collects and analyzes statistical data to evaluate MDPS staffing in accordance with diversity standards and goals;
- drafts and implements recruiting and hiring strategies to attract employees from diverse backgrounds;
- develops and/or acquires training and development to aid diversity and retention initiatives;
- provides guidance to supervisory and human resources staff in developing objective performance and other employee evaluations and policies;
- acts as MDPS liaison with government agencies concerning affirmative action and equal employment opportunities;
- maintains knowledge of diversity-related issues, legislation, and best practices; and

- provides training and policy updates to colleagues, ensuring legal compliance of management and human resources staff.²²

FISCAL IMPACT

Based on existing salaries, the consulting team estimates that the new executive position will require approximately \$143,000 per year in salary and benefits.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Create executive position for equity, social justice, and diversity.	(\$143,000)	(\$143,000)	(\$143,000)	(\$143,000)	(\$143,000)

FINDING 1-11

Even though student enrollment in 2020-21 generally was down about 3,000, due to COVID-19, a review of MDPS' staffing in both 2019-20 and 2020-21 revealed overstaffing at all school levels. The problem at elementary levels was not as skewed as secondary, which was somewhat lessened with the merging of middle schools at the beginning of 2020-21. Moving forward, it will not be sufficient to depend upon attrition alone to reduce overstaffing in middle and high schools, even if student enrollment in 2021-22 closely approximates the numbers prior to the pandemic.

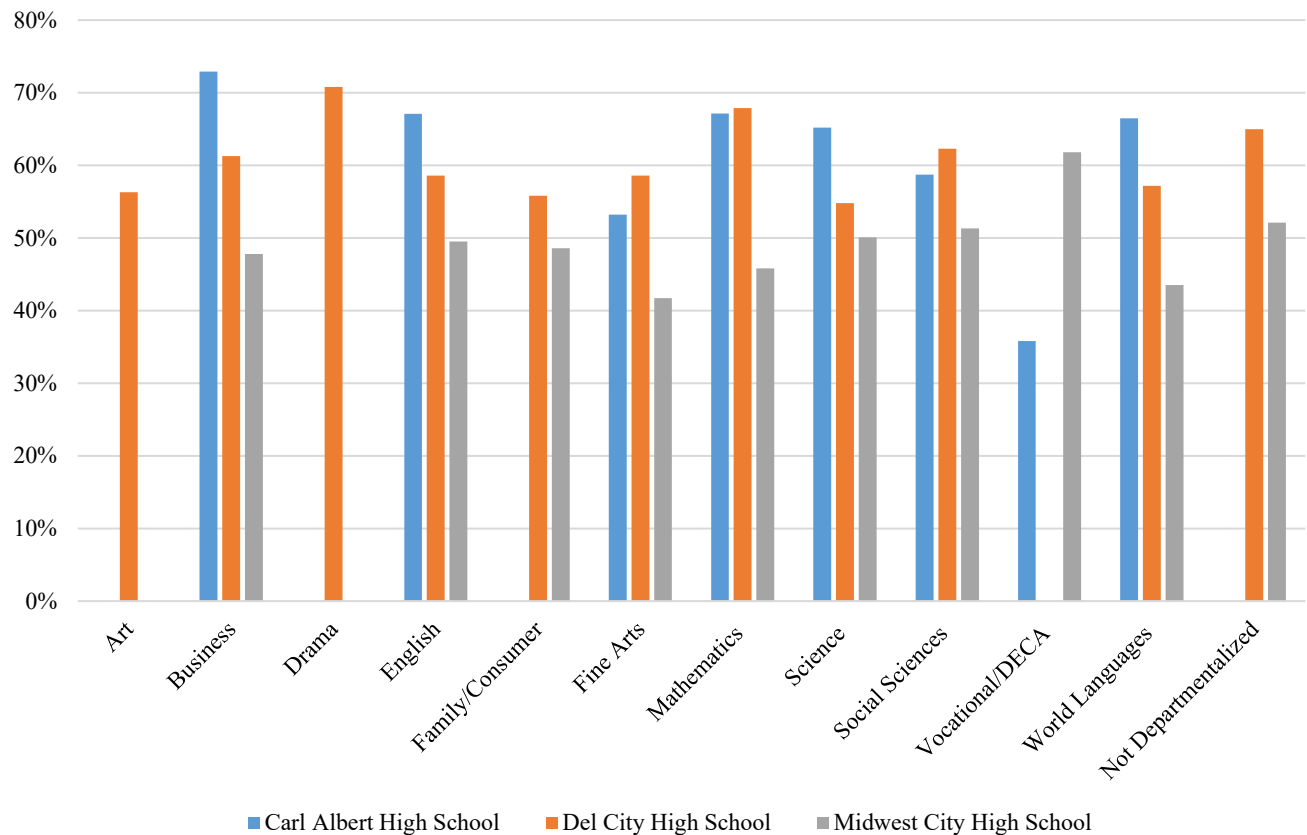
During interviews and focus groups, MDPS executive leaders and principals said that the scheduling of students and assignment of teachers for 2020-21 was based on the expectation that a similar number of students from the 2019-20 school year would be enrolled. When that did not happen, fewer seats were filled in individual classes, since the master scheduling had been set and teachers assigned. However, a review of class schedules and teacher assignments for 2019-20, especially of middle and high schools, revealed that overstaffing already existed in that year. The consulting team reviewed all school schedules and found that teaching loads (when actual student enrollment is compared with designated class caps) in elementary schools in both years were only moderately out of balance while the class loads of most teachers in Mid-Del middle and high schools were greatly imbalanced.

The consulting team performed an analysis of teacher staffing in secondary schools for 2020-21, when compared to 2019-20 by analyzing each teacher's regular schedule for both semesters and comparing the number of students enrolled with the maximum number of seats that could be filled. The analysis considered enrollment in both required and elective courses. Certain data were removed from the comparison, including teachers and courses of special education, physical education, sports, virtual learning, technology center, and those designated as online. **Exhibits 1-27 and 1-28** show the percentage of seats filled by department at each of the secondary schools. In the middle school analysis, literacy courses were grouped with Language

²² <https://www.shrm.org/ResourcesAndTools/tools-and-samples/job-descriptions/Pages/Diversity-Manager.aspx>

Arts, with the exception of art, music, and drama courses, which were departmentalized accordingly for more accurate comparison among the three schools.

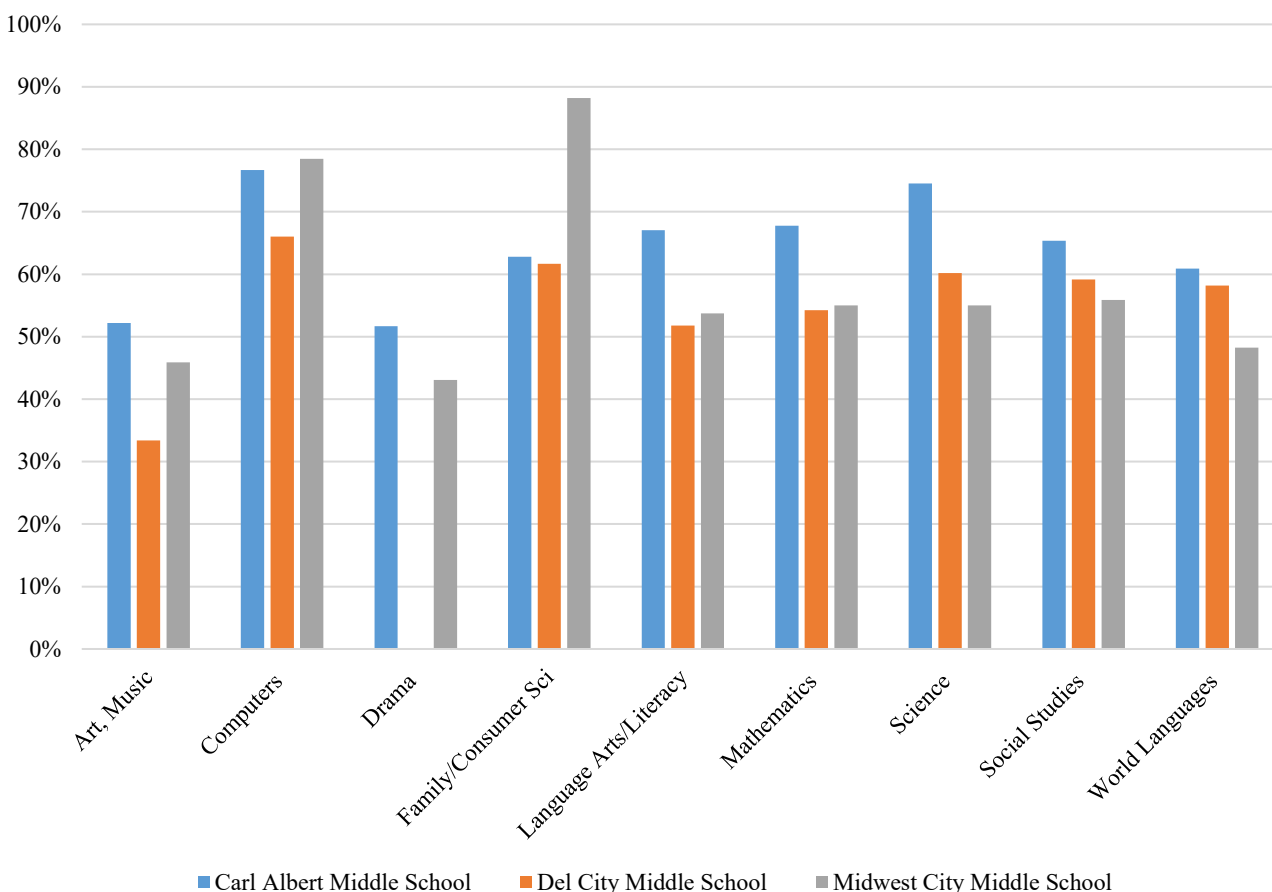
Exhibit 1-27²³
Percentage of Maximum Capacity Seats MDPS High Schools, 2020-21



Source: Prismatic calculations, March 2021

²³ Del City High School reported art and drama classes separately from fine arts while the other two high schools included art and drama in their fine arts listings.

Exhibit 1-28
Percentage of Maximum Capacity Seats MDPS Middle Schools, 2020-21



Source: Prismatic calculations, March 2021

The courses that have the greatest percentage of unfilled seats in MDPS high schools were found in the Advanced Placement (AP) and Honors courses. For example, at Carl Albert High School:

- one AP U. S. History had nine students filling one-third of the seats available ;
- an AP Chemistry had five of 30 seats filled;
- a French III class had three of 30 seats filled.

At Del City High School:

- AP English III classes had eight seats of 60 filled; and
- AP Chemistry had only two of 24 seats filled.

At Midwest City High:

- an Honors German class had three seats of the 30 available filled; and
- an AP Statistics class had three seats of the 30 available filled.

It is not unusual in smaller school districts for advanced level courses to have somewhat lower enrollment than introductory courses. Moreover, it is important for districts to provide access to the kinds of varied and advanced coursework that many students want. However, providing an in-person teacher for a classroom of just a few students comes at the cost of seating more fully lower-level classes and one could argue that it is actually students in the more introductory classes who need greater teaching support.

Based on the consulting team's analysis, even if the number of students enrolled in 2020-21 had approximated the number in 2019-20 (which it did not), low class loads still would have continued. The loss, or attrition, of about 95 teachers at the end of 2019-20 could have provided some budget relief for 2021-22. However, the decision was made to replace these teachers; teacher overstaffing worsened as a result. In fact, hire data provided by the district for new teachers for 2020-21 shows that almost 200 additional teachers (or 197 total new teacher hires) were contracted.

In any school district, business, or industry, overstaffing has obvious budget considerations. This employment situation in school districts is especially critical if, as is true in MDPS, student enrollment numbers are off and state support is determined annually by enrollment. Measuring the degree or extent of too many employees whose continued employment is dependent upon both decreased and restricted revenue requires serious considerations.

Some district leaders in U.S. schools attempt to justify low class loads as a form of compensation whenever teacher salaries are generally lower than competing districts. However, the practice of providing low class loads instead of providing competitive salaries does little to promote recruiting efforts or to build teacher morale, commitment, and retention.

A 2014 national study found that fully one-third of college students will take at least one of their courses online, even if they are enrolled in a brick-and-mortar institution.²⁴ MDPS has recent substantive experience in offering education via online means, due to COVID-19.

RECOMMENDATION

Reduce the number of teachers at secondary schools by 60+ teachers.

Based on the consulting team's analysis, MDPS could have as many as 125 too many secondary teachers. Even if a commitment to not replace any teacher who is leaving the district at the end of 2020-21 is made and that no additional teachers are hired, some non-renewals should be made to ensure that the district is fully using the teaching corps it already has. A more accurate indication of overall teacher staffing needs at the secondary schools can be determined if the district ensures that consistent scheduling courses and teacher loads are closer to the maximum seating levels. The consulting team recognizes that in some cases, it will be unavoidable and

²⁴ <https://www.bayviewanalytics.com/reports/gradechange.pdf>

desirable to retain teachers in specialty areas where course enrollments are typically low. Thus, a full reduction of 125 positions is likely not desirable. But, by closely monitoring course enrollments to see what students actually want to learn, offering a full breadth of online advanced courses, sharing an online classroom across the three high schools (or middle schools), and supporting the best teachers in earning multiple certifications, MDPS should be able to reduce its current overage of secondary teachers.

The superintendent should work with the cabinet, administrative council, and a representative group of teachers to develop a process for making staffing decisions. As part of designing a staffing decision process, consideration should be given to:

- engaging all instructional staff in identifying needs and generating options for reductions if needed;
- taking a critical look at course offerings, scheduling, class size, and staff skills and credentials;
- exploring possible redistribution or reduction of staff at the secondary level if necessary to increase the number of teachers at elementary as class size warrants;
- addressing ways to maintain or adapt the most effective student programs and services within the existing financial constraints;
- developing a communication model that involves staff discussions at all levels to create an open, transparent process for making staffing decision; and
- using student performance results and program evaluation data to adjust course offerings and staff assignments as needed.

FISCAL IMPACT

The average teacher salary plus district-provided fringe benefits in 2020-21 was calculated at \$52,664. The annual reduction of 60 secondary teachers would save the district approximately \$3,159,840 (60 x \$52,664). The consulting team recognizes that MDPS is unlikely to achieve a full reduction of 60 positions in the first year.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Reduce the number of secondary teachers.	\$1,579,920	\$3,159,840	\$3,159,840	\$3,159,840	\$3,159,840

FINDING 1-12

The beginning salary that MDPS pays in 2020-21 to its certified teachers makes recruiting certified teachers, as well as retaining those currently employed, challenging. This Step 0 salary is the lowest when compared with the five districts selected as peers for this review. When compared to 15 other neighboring districts in Oklahoma County, MDPS pays the third lowest. The bottom two of the 15 pay only the minimum salary that Oklahoma requires.

MDPS' challenges in attracting and retaining teachers is exacerbated by its inability to offer competitive salaries when compared with most other Oklahoma school districts. **Exhibit 1-29** and **Exhibit 1-30** shows how MDPS' teacher salaries schedule compare with its peer districts. In every case, MDPS pays less – not only to teachers with zero experience in all pay categories but also for its teachers who are compensated on the top step of the salary schedules.

Exhibit 1-29
0-Year MDPS and Peer Teacher Salaries, 2020-21

Entity	Bachelor's	NBCT & Bachelor	Master's	Master's & 30	NBCT & Master's	Doctorate
Mid-Del	\$38,300	\$39,300	\$40,000	\$40,200	\$41,300	\$41,500
Lawton	\$39,662	\$40,820	\$41,014		\$42,172	\$43,550
Moore	\$43,451	\$43,451	\$44,848	\$46,042		\$46,843
Norman	\$42,151	\$42,151	\$43,555			\$44,960
Putnam City	\$45,161	\$45,161	\$46,774			\$50,538
Union	\$40,220	\$41,220	\$42,220	\$44,220	\$43,220	\$47,720
Peer Average	\$42,129	\$42,561	\$43,682	\$45,131	\$42,696	\$46,722

Source: Oklahoma Salary Schedule Book, SDE

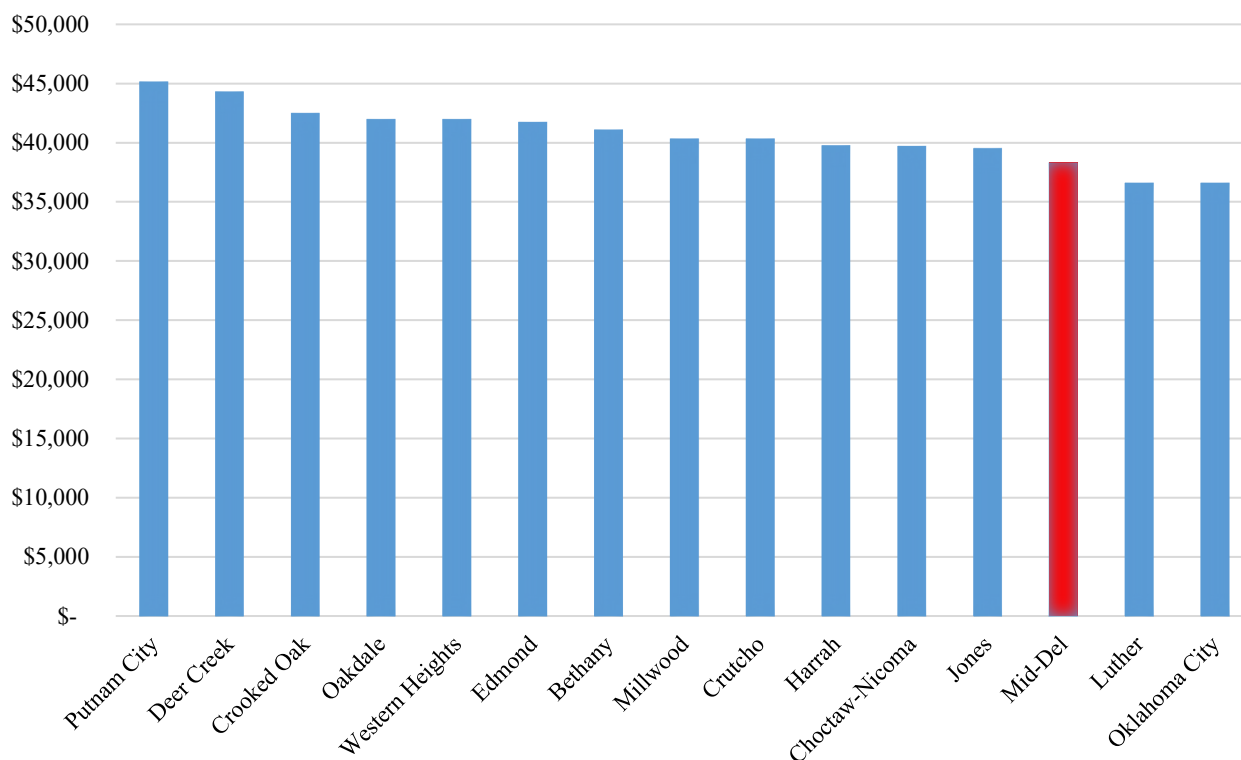
Exhibit 1-30
29- to 35-Year Top Step on MDPS and Peer Teacher Salaries, 2020-21

Entity	Bachelor's	NBCT & Bachelor	Master's	Master's & 30	NBCT & Master's	Doctorate
Mid-Del	\$57,200	\$58,500	\$61,150	\$63,625	\$63,650	\$65,700
Lawton	\$57,569	\$58,752	\$60,469		\$61,651	\$64,768
Moore	\$67,978	\$67,978	\$69,489	\$70,684	\$69,489	\$71,681
Norman	\$61,529	\$61,529	\$66,611			\$72,814
Putnam City	\$66,801	\$66,801	\$68,414			\$72,177
Union	\$61,070	\$62,070	\$63,670	\$66,770	\$64,670	\$70,070
Peer Average	\$62,025	\$62,605	\$64,967	\$67,026	\$64,865	\$69,535

Source: Oklahoma Salary Schedule Book, SDE

Exhibit 1-31 shows a comparison of Mid-Del's salary schedule with neighboring school districts. As shown, beginning teachers have little financial incentive to prefer MDPS over other neighboring districts.

Exhibit 1-31
Beginning Salaries in Oklahoma City Area Districts, 2020-21



Source: Oklahoma Salary Schedule Book, SDE

Exhibit 1-32 compares the survey results for all MDPS staff and then just for teachers. As shown, a majority of non-teaching staff did not feel that salary levels were competitive; a slightly higher percentage of classroom teachers (58%) felt the same. The same pattern was found when staff was asked whether they felt their salary level was adequate for their experience – a majority of non-teaching staff did not think so, and classroom teachers more so. Finally, only nine percent of non-teaching staff indicated they were actively looking for a job outside the district, but 22 percent of classroom teachers indicated they were looking.

Exhibit 1-32
MDPS Staff Survey Results Regarding Salary Levels

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Not Classroom Teacher	Salary levels in this district are competitive.	2%	20%	24%	33%	22%
	My salary level is adequate for my level of work and experience.	4%	22%	12%	40%	22%
	I am actively looking for a job outside of this district.	3%	6%	24%	33%	32%
Classroom Teacher	Salary levels in this district are competitive.	2%	21%	18%	35%	23%
	My salary level is adequate for my level of work and experience.	2%	17%	10%	44%	27%
	I am actively looking for a job outside of this district.	9%	13%	23%	32%	23%

Source: Prismatic Survey Results, February 2021

The majority of HR-related comments made by staff in response to open-ended questions on the survey pertained to low salaries for teachers. Some suggested that the main causes of teacher turnover are both beginning salaries and the draw surrounding districts have because they pay more. Key administrative leaders in interviews and focus groups acknowledged the need for teacher salary increases, but they also questioned sufficient and sustainable sources of funding to improve these salary schedules and to make them more competitive.

Salary increases may not only improve employee performance but also boost employee morale. School, business, and industry leaders know that they must keep on top of pay issues to make sure they are paying in line with the market for their areas, professions, and jobs. They also know that the economic effects of COVID-19 have forced re-evaluations of any salary increase plans for 2021, and possibly subsequent years. Despite budget restraints, these leaders generally will find some means to show positive growth in their compensation plans.

RECOMMENDATION

Increase the beginning salary for certified teachers from \$38,300 to \$40,000.

Ultimately, because of decreased student enrollment, MDPS will be challenged to find sufficient and permanent sources in its budget to make any salary adjustments. Nevertheless, the school board and superintendent should make the commitment to increasing teacher pay as a way to attract and retain top talent in the classroom.

FISCAL IMPACT

Increasing the beginning salary for teachers also requires salaries for all other teachers to be increased as well. If, for example, MDPS increases the beginning salary step from \$38,300 to \$40,000 (4.4 percent) in 2021-22, the cost (salary plus district-provided fringes) of increasing all teachers' salaries would be approximately \$2.146 million.

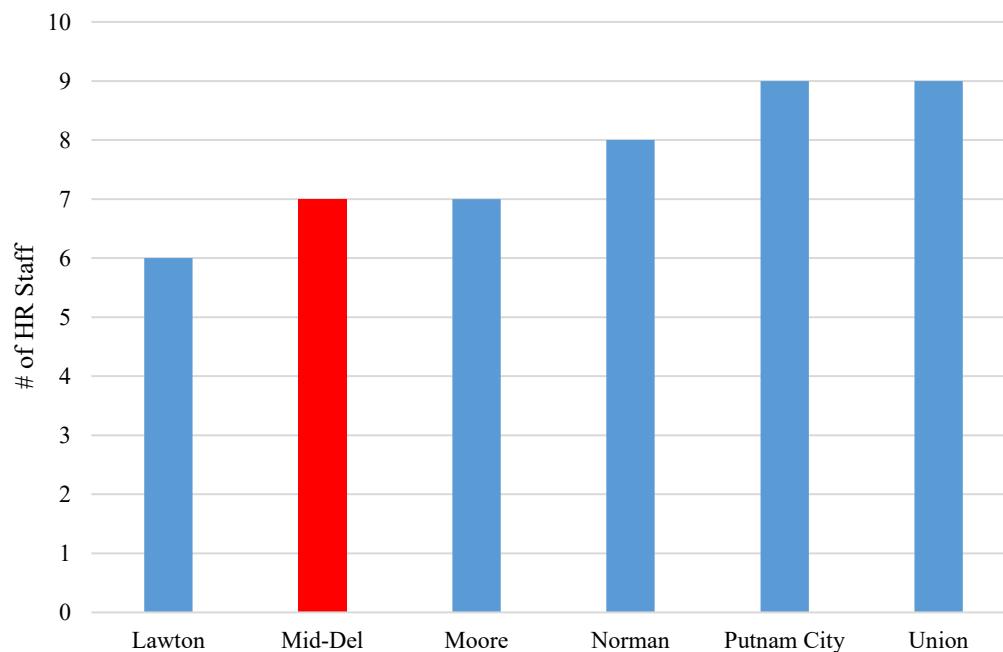
Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Increase beginning teacher schedule from \$38,300 to \$40,000.	(\$2.146M)	(\$2.146M)	(\$2.146M)	(\$2.146M)	(\$2.146M)

FINDING 1-13

Considering the total number of employees in the district, the MDPS HR department is leanly staffed. Nevertheless, it has demonstrated its ability to manage its operations and handle extraordinary workloads when the need arises.

The HR-to-employee ratio assesses HR staffing levels by comparing the number of HR FTEs supporting each 100 FTEs in the district. The national average of this ratio for organizations with 10,000 employees is 1.03. The ratio in MDPS, with seven HR staff and ~1,781 FTEs is 0.39. Furthermore, MDPS has fewer HR staff than many of its peers (**Exhibit 1-33**).

Exhibit 1-33
MDPS and Peer Size of HR Staff, 2020-21



Source: Compiled by Prismatic from district contacts, February 2021

Even though there were several HR-related concerns or issues expressed by staff in the survey conducted as part of this review, none were expressly negative about HR's functions, customer service, or operations. Those few issues that were collected in the comments section of the survey, such as salary and compensation, staff assignments, and teacher turn-over, though important, were not reflective of the day-to-day work that HR does. When asked directly during focus groups to comment on the overall performance of HR, employees were positive, especially regarding how they were helped and treated by HR staff during activities connected with requests for leave caused by the pandemic.

Generally, in any HR office, the functions and operations requiring considerable work and customer service are employee benefits and retirement programs. Fortunately, for the HR Department in MDPS, as well as other Oklahoma public school districts, employees are able to access information about statewide provisions of health benefits via the Internet. The accessibility of this information greatly reduces the workload of the local HR offices. Furthermore, the use of online applicant tracking systems means fewer hands-on efforts are needed for personnel processing and onboarding of new hires. In most cases, the online onboarding experiences are now totally virtual. Face-to-face "new employee orientations" are now rare, allowing HR staff to focus on other critical activities.

COMMENDATION

The quality of work, commitment, and services provided by the staff of the MDPS HR Department is commendable.

E. COMMUNITY AND PARENT INVOLVEMENT

School districts are a vital part of communities, often associated with a community's identity, sense of pride, and quality of life. This is especially true in smaller communities. To strengthen this role, school districts should develop effective communications and community involvement programs that lead to a more informed and engaged staff and community. Research demonstrates that community outreach benefits both the community and the schools.

Effective community involvement programs should highlight the unique characteristics of the school district and the community. These programs can substantially affect citizen perceptions and engage the community with the school system. Effective programs will rally public support and involvement. They can result in parent and community volunteers, public participation in the decision-making processes that affect the schools (i.e., bond and board elections), and productive business and community alliances.

FINDING 1-14

The consulting team found that the MDPS community strongly supports the school district. The district benefits from a high level of community involvement as evidenced by its ongoing support from banks, businesses, and private donations. School staff cited several community organizations and families that regularly support MDPS. Tinker Air Force Base, Rotary,

Chamber, and the Mid-Del Education Foundation are all examples of community partners that contribute regularly to the district.

The director of the Mid-Del Education Foundation shares office space at the Mid-Del administrative building and works closely with the director of community relations and the director of student activities for the district. This partnership has been beneficial to the district as shared by school staff in both the interviews and focus groups. Over the years, the foundation has been able to provide over a million dollars in scholarships, teacher grants, and other resources for the district.

Tinker Air Force Base has been another strong supporter of the district. The Tinker Air Force Base has designated an employee to do outreach with the schools and support students of military parents. In addition, the district partners with the Air Force base to provide internships and positions for Airmen exiting the military program. The partnership provides an additional pool of teacher and support staff applicants to serve the district.

Exhibit 1-34 shows the results of staff efforts to engage with families and the community. A majority of staff perceive that the district works with the businesses and community to improve education, (53 percent *agreed* or *strongly agreed*). A large number of staff also felt parents and families participate in school activities and organizations, (49 percent *agreed* or *strongly agreed*).

Exhibit 1-34
Staff Survey Results Related to Parent Communications

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Our district works with local businesses and groups in the community to help improve education.	8%	45%	35%	9%	3%
Parents/families participate in school activities and organizations.	4%	45%	19%	27%	5%

Source: Prismatic Survey Results, February 2021

According to a policy brief from the National Education Association (NEA), “when schools, parents, families, and communities work together to support learning, students tend to earn higher grades, attend school more regularly, stay in school longer, and enroll in higher level programs.”²⁵ Therefore, schools and school districts should consistently set goals to maintain and increase community involvement programs/opportunities.²⁶

²⁵ http://www.nea.org/assets/docs/PB11_ParentInvolvement08.pdf

²⁶ Henderson, A. T., Mapp, K. L. (2002). *A new wave of evidence: The impact of school, family, and the community connections on student achievement*. SEDL. Retrieved from: <https://www.sedl.org/connections/resources/evidence.pdf>

COMMENDATION

MDPS has made good efforts to build community support for the school district.

F. COMMUNICATIONS/PUBLIC RELATIONS

The primary role of communications in a school district is to convey messages and images consistent with the board of education policies and implemented through procedures established by the superintendent and district staff. Strategies for externally communicating with the community and internally communicating within the school district are critical components of communications.

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MDPS departments and functional areas. **Exhibit 1-35** provides the results for communications and community relations.

Exhibit 1-35
Staff Survey Results Regarding Communications

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Community relations and communication.	16%	32%	26%	10%	4%	13%

Source: Prismatic Survey Results, February 2021

FINDING 1-15

MDPS utilizes their website, social media, YouTube, and automated calls to reach out to their parents and community. The website includes an app to send push notifications to parents. The director of community relations supports the communication process and cultivates many partnerships through various means of communication.

Statistics are maintained and reviewed for each of the communication platforms. These statistics inform the district on how to best disseminate and receive communication. For example, the district collects the following information on their YouTube channel:

- publish date;
- video title;
- watch time (hours);
- subscribers gained;
- impressions; and
- impression click-through rate.

From November 2020 to January 2021 the district gained a total of 714 subscribers to their YouTube channel. As shown in **Exhibit 1-36**, most staff felt that families receive regular communications from the district.

Exhibit 1-36
Staff Survey Results Related to Parent Communications

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Parents/families receive regular communications from the district.	19%	59%	12%	8%	2%

Source: Prismatic Survey Results, February 2021

MDPS uses parent conferencing as a formal method of communicating with parents. **Exhibit 1-37** shows a five-year comparison of parent conference attendance rates for MDPS, its peers, and the state. The district had the highest participation rates compared to its peers and the state after 2016-17. MDPS tends to have average conference attendance rates of 80 percent, which is the highest among its peers and the state.

Exhibit 1-37
Trend in Parent Conference Attendance

Entity	2014-15	2015-16	2016-17	2017-18	2018-19
Mid-Del	78.0%	78.0%	82.0%	82.0%	80.0%
Lawton	74.0%	72.0%	71.0%	72.0%	77.0%
Moore	71.0%	72.0%	72.0%	67.0%	70.0%
Norman	76.0%	84.0%	83.0%	75.0%	72.0%
Putnam City	73.0%	79.0%	76.0%	68.0%	71.0%
Union	83.0%	77.0%	73.0%	74.0%	75.0%
State	74.0%	74.0%	73.0%	72.0%	73.0%

Source: Office of Educational Quality and Accountability, Profiles Database

The MDPS teachers and administrators practice many of the communication efforts detailed in NSPRA research and the cited best practices. As noted by NSPRA, “each school district must complete its own research to see what its parents and other constituents prefer when it comes to communication.”²⁷

Epstein (2001) at Johns Hopkins University²⁸ and others have documented research showing the positive effect that strong parental involvement has on schools and on student achievement. Their findings include:

²⁷ <https://www.edutopia.org/blog/parent-involvement-survey-anne-obrien>

²⁸ Epstein, J. L. (2001). *School, family and community partnerships: Preparing educators and improving schools*. Boulder, CO: Westview Press.

- 50 to 85 percent of the variance in achievement scores, IQ, or verbal ability can be attributed to parent, family, and home environment variables.
- Parent education programs, especially those that train low-income parents to work with their children, improve how well students use language skills, perform on tests, and behave in school.
- Many studies have found that when parents become involved in school activities, not only do their attitudes improve, but so do those of their children. Student achievement rises as well.

COMMENDATION

MDPS uses a variety of technologies to communicate with district stakeholders.

Chapter 2:
Instructional Delivery System

Chapter 2

Instructional Delivery System

This chapter addresses the instructional delivery of Mid-Del Public Schools (MDPS) in the following sections:

- A. Curriculum
- B. Management and Oversight of Instructional Programs
- C. Special Programs
- D. Student Services

The primary purpose of any school system is educating children. Effective schools deliver quality instruction based upon a district's capacity to manage and implement a rigorous, relevant curriculum. The education process requires robust policies and procedures that direct the instructional process, provide well-designed programs to meet the needs of all students, and provide resources to support program implementation. The monitoring and evaluation of program effectiveness based upon student performance data are also essential.

A. CURRICULUM

Oklahoma state education laws, as codified in the Oklahoma Administrative Code (210 OS § 15), manage the instructional process to ensure academic success for all students. It is the responsibility of the school district to meet the requirements of the law. A district's instructional program, along with its allocation of resources, is how a district attempts to meet the educational needs of all students. A well-designed and managed process for developing curriculum and directing instruction, collecting assessment data to evaluate and monitor programs, and providing the resources needed to support educational efforts is essential if a district is to meet the needs of its students.

Curriculum development and instructional delivery are critical components of student learning. The presentation of materials, concepts, skills, and new ideas greatly affect the acquisition of knowledge. Curriculum content and instructional strategies need proper alignment and regularly scheduled evaluations. This promotes improvement of student performance and ensures curricular relevance, rigor, and equity.

Oklahoma school boards and superintendents provide principals and teachers with necessary tools to deliver the state adopted standards. The Oklahoma Academic Standards (OAS) drive educational delivery. With OAS, educators are encouraged to shape their educational efforts by integrating the best practice of instructional shifts. The goal is that such efforts will provide the rigor and relevance students need to be college and career-ready.

The OAS provides a consistent, clear articulation of learning expectations, guides teacher instruction, and assists parents in knowing what they need to do to assist in the educational process. The academic standards are intended to mirror the robust, relevant, real world knowledge and skills that students need for success in college and careers. The OAS defines the content, knowledge, and skills students should gain during their K-12 educational careers. It

prepares high school graduates for success in college courses and in workforce environments.

Exhibit 2-1 further explains the OAS standards.

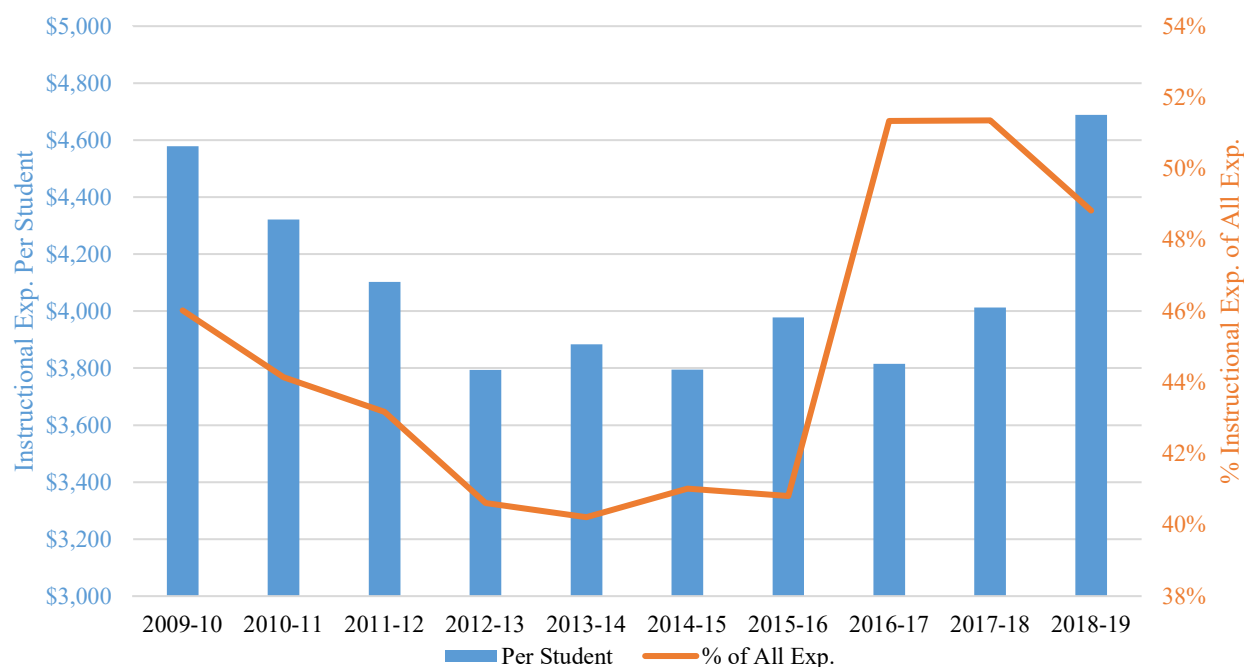
Exhibit 2-1
Oklahoma Academic Standards

What the OAS Does	What the OAS Does Not Do
<ul style="list-style-type: none">• Focus on deep thinking, conceptual understanding, and real-world problem-solving skills• Set expectations for students to be college, career, and citizenship ready• Incorporate literacy in science, social studies, and technical subjects• Emphasize the use of citations and examples from texts when creating opinions and arguments• Increase rigor and grade level expectations• Determine the full range of support for English language learners and students with special needs	<ul style="list-style-type: none">• Dictate how teachers should teach• Mandate a specific curriculum• Limit advanced work beyond the standards• Require the purchase or development of entirely new instructional materials• Prescribe all that can or should be taught• Limit efforts to prepare students for college, career, or citizenship readiness• Prescribe interventions for students below grade level

Source: The Oklahoma State Department of Education (SDE), 2018

Exhibit 2-2 provides a ten-year comparison of MDPS instructional expenditures as a percentage of total expenditures as well as the annual instructional expenditures per student. Over that period, instructional expenses have ranged from 40 percent to 54 percent of all expenditures. Instructional dollars per student have varied from \$3,795 in 2012-13 to \$4,688 in 2018-19.

Exhibit 2-2
MDPS Trend in Instructional Spending



Source: Office of Educational Quality and Accountability (OEQA), Profiles Database, and Prismatic calculations

A comparison of core units in the high school curriculum is displayed below in **Exhibit 2-3**. MDPS generally offers the second fewest core curriculum units among the peer districts. MDPS does offer more core curriculum units than the state across all subjects.

- The comparison shows MDPS second lowest in the number in fine arts, science, language arts and electives units and was also lower than the community group and higher than the state.
- MDPS had the third lowest number of math, computer education, and world languages units and lower than the community group and higher than the state.
- MDPS had the lowest social studies units among its peers and community group and higher than the state.

Exhibit 2-3
Comparison of Core Curriculum Units by Subject, 2018-19

Subjects	Mid-Del	Lawton	Moore	Norman	Putnam City	Union	Community Group	State
Fine Arts	17.7	18.3	23.7	16.3	26.0	27.0	21.3	8.2
Science	11.0	12.3	13.3	13.0	10.7	15.0	11.7	6.2
Math	8.7	9.0	8.0	8.7	9.3	11.0	9.2	5.4
Computer Education	3.7	3.3	6.0	2.7	4.3	7.0	4.1	2.1
Social Studies	11.7	13.3	12.7	12.3	13.3	16.0	13.1	6.9
Language Arts	7.7	6.7	8.0	8.0	9.0	8.0	7.8	5.2
World Languages	7.7	5.3	13.0	14.3	13.0	4.0	8.2	2.5
Electives	23.3	21.3	38.3	24.0	40.7	30.0	28.6	17.3
Total	91.5	89.5	123.0	99.3	126.3	118.0	104.0	53.8

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-4 shows that out of the past five years MDPS' number of high school graduates completing Regents' College-Bound Curriculum was continually at or above 70 percent. In 2014-15, MDPS had the highest rate among peer districts, higher than the community group and the state, but declined in the following years.

Exhibit 2-4
Percentage of MDPS and Peer District Graduates Completing
Regents' College-Bound Curriculum, 2014-15 to 2018-19

Entity	2014-15	2015-16	2016-17	2017-18	2018-19
Mid-Del	93%	71%	70%	78%	83%
Lawton	84%	89%	85%	59%	89%
Moore	77%	68%	89%	83%	86%
Norman	90%	91%	84%	41%	84%
Putnam City	88%	90%	65%	89%	86%
Union	92%	94%	100%	100%	100%
Community Group	89%	87%	81%	83%	90%
State	81%	81%	80%	80%	83%

Source: Office of Educational Quality and Accountability, Profiles Database

On the stakeholder survey conducted for this review, staff members were asked to assign a letter grade to various MDPS departments and functional areas. **Exhibit 2-5** provides the results for regular education programs and education generally in MDPS, from just district educators (administrators, classroom teachers, other certified, and instructional aides). Almost half of educators, 48 percent, gave overall quality of education at MDPS an A or B; 11 percent gave it a D or F. More than a third of educators, 37 percent and 39 percent respectively, gave the middle

and high school education an A or B; only 6 and 5 percent gave them a D or F. More than half, 52 percent, gave elementary education an A or B; only 5 percent gave it a D or F.

Exhibit 2-5
Educator Survey Results Regarding MDPS Education

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Elementary Education.	18%	34%	15%	4%	1%	28%
Middle School Education.	10%	27%	18%	5%	1%	39%
High School Education.	11%	28%	16%	4%	1%	39%
Overall quality of education in this district, compared to other districts in Oklahoma.	13%	35%	33%	9%	2%	7%

Source: Prismatic Survey Results, February 2021

FINDING 2-1

The district does not currently complete annual evaluations to determine the effectiveness of foundational and frequently used supplemental resources and programs. The district continues to move forward with digital learning management systems that house and drive curricula. Without a regular evaluation system, MDPS positions itself to fund instructional resources/programs that are misaligned and not meeting identified student need or the intent behind their implementation. Additionally, the MDPS community and stakeholders lacks assurance the district is not spending money and time on ineffective instructional resources/programs.

The district lacks processes and procedures to annually evaluate cost and review effectiveness of all curricula, supplemental resources, and instructional programs. The consulting team found no evidence that MDPS has determined the level of integration and compatibility these resources have with the designated learning management system (LMS). The district has not developed systems to determine if resources purchased and used in classrooms have appropriate rigor, relevance, and strong alignment with OAS, or whether they are developmentally appropriate. The district lacks annual evaluation and assessment data to determine if instructional resources used by teachers lead to standards mastery and improved student performance or just fill instructional time. The district does not comprehensively review curricula and supplemental resources to determine weighted importance based upon SDE Blueprints and alignment with OAS.

Most federal and state programs require resource/program evaluations. However, highly effective schools take the evaluation process to the next level and evaluate all locally implemented instructional resources/programs. This ensures all digital and hands-on instructional resources/programs interface, work in concert, and are effective for remediation or enrichment at each grade level, content area, and student sub-groups. An annual evaluation process ensures all instructional resources, programs, and software are not “busy work” but directly improve standards-driven student learning.

Without comprehensive instructional resource/program evaluations, schools risk getting into curricular and instructional traps. They continue purchasing and doing what they have always done, serving students instructional resources without focused intent and alignment to state standards or data that target current student learning needs. Systematically collecting and analyzing quantitative and qualitative information regarding instructional resources provides district administrators and teachers with valuable assessment information.

Evaluations should measure and answer questions, such as:

- Is there a need to improve, modify, or abandon the supplemental instructional resources?
- Does the resource yield the intended effect on improved student learning, including all subgroups?
- Are the resource goals still relevant to student need, performance data, and aligned to state standards?
- Do the resources render intended or unintended outcomes?
- Is there a need to change or refine the implementation strategies and procedures?
- Are all the individual resource components valuable and effective in improving student achievement?
- Does the instructional resource/program have a positive impact on students, teachers, school climate, and culture?¹

In high-performing districts, evaluation results are used to make informed and data-driven decisions. The evaluation guides the district to keep or abandon instructional resources/programs. Based upon data, modifications, additions, deletions, or revisions to instructional resources/programs are decided. The evaluations determine the instructional impact resources have on subgroups such as struggling readers, ELLs, and special education students.

Evaluation information is crucial for aligning district funds with new purchases. MDPS teachers have easy access to digital instructional supports and resources. However, in the area of technology-based resources, Hill and Hannafin (2001) observed that they often suffer from a lack of regulation of content validity, reliability, and credibility – using evaluation instruments helps teachers identify digital resources of high quality.²

¹ http://ies.ed.gov/ncee/edlabs/regions/pacific/pdf/REL_2014007.pdf

² https://www.researchgate.net/publication/260392089_How_to_evaluate_the_quality_of_digital_learning_resources

RECOMMENDATION

Evaluate all curricula and supplemental resources and programs to determine compatibility with implemented technology, cost effectiveness, and ensure rigor, relevancy, and alignment with Oklahoma Academic Standards (OAS).

High performing districts annually evaluate all instructional resources/programs, new initiatives, grants, and district processes. The combined data determines if there is need to eliminate components or discontinue the resource or instructional resource/program. The data should also provide evidence that the instructional resource/program positively:

- impacts improved student learning in all subgroups; and
- contributes to the alignment, relevance, and rigor of instruction and OAS curriculum.

All materials should undergo a formative and summative evaluation. A formative instructional resource/program evaluation can be used in purchasing new instructional resources/programs and during the implementation of the resource. Evaluation promotes close examination of instructional resource/program implementation, as to whether there were changes, adjustments, or improvements, and that it is adapted with fidelity. **Exhibit 2-6** provides examples of formative evaluation questions to explore.

Exhibit 2-6
Formative Instructional Resource/Program Evaluation

While the instructional resource/program is ongoing, these questions should be asked several times:

- Is the instructional resource/program being implemented as it was designed?
- Do the students understand the instructional resource/program's concepts?
- What are the misconceptions about the instructional resource/program?
- Are all MDPS instructional resource/program users implementing the instructional resource/program in the same way?
- Is the instructional resource/program being implemented on schedule?
- Is there enough time to implement all aspects of the instructional resource/program?
- What aspects of the instructional resource/program do not seem to be working as well as you intended?
- Do instructional resource/program implementers need additional training on the instructional resource/program?
- Are there any negative outcomes surfacing?

Source: http://www.janetwall.net/attachments/File/9_Step_Evaluation_Model_Paper.pdf

Summative instructional resource/program evaluation takes place after the instructional resource/program has been implemented and is conducted at the end of each school year, or another logical time, such as the end of instructional resource/programmatic intervention.

Exhibit 2-7 provides examples of summative evaluation questions to explore.

Exhibit 2-7
Summative Instructional Resource/Program Evaluation

After an instructional resource/program has been implemented, ask:

- What did the instructional resource/program accomplish?
- Did the instructional resource/program reach its goals and objectives?
- What impact did the instructional resource/program have on students?
- What were the outcomes?
- Who benefited from the instructional resource/program?
- How much was the benefit to improved student achievement?
- Was the benefit greater with this instructional resource/program when compared with another instructional resource/program?
- Did all types of students benefit from the instructional resource/program?
- What were the positive outcomes?
- What were the negative outcomes?
- What should be improved/changed in the instructional resource/program?
- Does the benefit of the instructional resource/program warrant the cost?

Source: http://www.janetwall.net/attachments/File/9_Step_Evaluation_Model_Paper.pdf

In addition to asking these evaluation questions, it is important to make certain the instructional resources/programs align tightly with the current OAS, depth of knowledge (DOK) expectations, and Oklahoma's expected student performance levels. MDPS student demographics, such as language, poverty, mobility, ethnicity, and lower quartile test scores, should also be taken into consideration for abandonment or retention purposes. Teachers cannot afford to implement instructional resources/programs and materials that do not have high impact on closing the achievement gap and improving student performance. There are many free resources available to gather additional information, including:

- resources on designing and planning instructional resource/program evaluation;³
- a basic guide to instructional resource/program evaluation;⁴ and

³ <https://www.cde.state.co.us/fedprograms/designing-and-planning-your-program-evaluation>

⁴ <https://managementhelp.org/evaluation/program-evaluation-guide.htm>

- an evaluation matrix and template.⁵

FISCAL IMPACT

This recommendation can be implemented with existing resources. Initially, MDPS staff could evaluate resources internally, with input from all administrators and teachers. However, federal guidance notes that districts should expect to spend between five and seven percent of the total funding of an instructional resource/program on evaluation. In time, it may be preferable to contract with an outside evaluation firm with credibility and expertise in statistical analysis. Using federal monies, the consulting team recommends that a minimum of \$15,000 per year be allocated to evaluation efforts.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Evaluate all curricula and instructional resources, digital programs, websites, and initiatives.	(\$15,000)	(\$15,000)	(\$15,000)	(\$15,000)	(\$15,000)

FINDING 2-2

Instructional delivery practices vary among the district's teachers. Teacher instructional delivery behaviors and classroom practices that promote student engagement and high achievement are inconsistent across the campuses. The district's move to one-to-one technology also modified teacher instructional delivery practices to varying degrees.

Textbooks, worksheets, and whole group lecture are no longer the primary tool needed for engaging students and presenting curriculum and delivering instruction. However, not all MDPS teachers are comfortable with the need for a paradigm shift to student-driven instruction. The journey of revising or turning loose of old instructional practices and understanding the "why" of new practices is difficult. Technology has changed today's students. Students are reluctant to engage in passive learning. The introduction of one-to-one devices, standards-based curriculum, data-driven instruction is compromised when teachers still use fill-in-the-blank work sheets and teacher-centered lecture as the preferred instructional delivery modality. Technology integration introduces lesson designs with multiple and varied learning options and the role of MDPS teachers is expanding to include facilitation skills and techniques.

Research is clear that student engagement makes learning take place. Clear and concise objectives are still delineated, standards are still taught and mastered, yet the pathway to learning is not the same for all students. As a facilitator, a teacher helps individual students build on their skills/interests and learn new ones. They offer support, advice, and provide necessary scaffolding knowledge and skills. "Extending the recognition and use of authentic purposes, materials, and

⁵ <https://www2.ed.gov/about/offices/list/oese/sst/evaluationmatters.pdf>

content into any subject area helps ensure that learning experiences are meaningful and satisfying for students.”⁶

The teacher as facilitator gives direction in finding necessary resources, information, and support in order for the learner to complete a task and master learning. Teachers as facilitators

...assist students in learning for themselves, picking apart ideas, forming their own thoughts about them and owning learning through self-exploration and dialog. As needed, a teacher facilitator corrects misinformation, provides clarification, and ensures students understand subject matter.⁷

Research tells us what can be expected from a teacher employing instructional strategies and practices that are proven to lead to increased mastery of lessons. Better learning happens in a dynamic setting in which teachers offer explicit active instruction than in situations in which teachers do not actively guide instruction and instead turn control over content and pace of instruction to students (Hattie, 2009).⁸

It is noted that schools and colleges are advising teachers to shift their roles from that of sole classroom leader/lecturer to one who aids students in leading themselves in the learning process. Research recognizes that the most powerful kind of learning does not come from being told what to think but in learning how to think about it for oneself. Now the role of teacher is as a facilitator in learning. Teaching means teacher is doing the act of teaching. Facilitation means students are doing the act of learning.⁹

Of course, students do not become independent learners overnight. Teachers as facilitators evolve to supportive classrooms in which student perspectives are valued, they have opportunities to share thoughts and feelings and are encouraged to make choices and exercise self-initiative in learning activities.¹⁰

RECOMMENDATION

Develop and implement with fidelity a district comprehensive plan for teacher instructional delivery and facilitation best practices.

As the district continues to integrate technology with curricula, it is imperative that teacher instructional delivery behaviors and practices evolve simultaneously to include instructional facilitation skills that engage all learners and improve achievement. The district’s instructional leadership team should articulate expectations and provide teachers with learning opportunities to grow and develop facilitation skills. Professional development opportunities, staff meeting

⁶ <http://www.ascd.org/publications/books/107003/chapters/Educating-Everybody's-Children@-We-Know-What-Works%E2%80%94And-What-Doesn't.aspx>

⁷ <https://study.com/academy/lesson/facilitator-of-learning-definition-lesson-quiz.html>

⁸ <https://www.winginstitute.org/system-dashboard-overview>

⁹ <http://oaji.net/articles/2016/1201-1476521024.pdf>

¹⁰ <https://stemminds.com/building-autonomy-in-the-classroom/>

discussion and dialog, and observing facilitatory teachers are possible options for supporting and increasing facilitation skills and expertise.¹¹

All Professional Learning Communities (PLC) agendas should include opportunities for teachers to share new learnings, strategies, and facilitation skills. Classrooms that have interactive learning opportunities, where teachers facilitate more than one pathway to mastery, and where teachers use differentiated instruction are classrooms where students want to be.¹²

Teachers from districts who are expected to incorporate facilitation skills into the teaching repertoire find it rewarding. The most impactful statement for teachers as facilitators comes from those who daily practice it. As noted by one professor on the subject: “The difference in the enthusiasm and learning that takes place isn’t even quantifiable. Not only do I adhere to the idea of being a facilitator and guide, I’m nearly an evangelist on the subject!”¹³

When assisting teachers in also becoming facilitators, it is important to provide teacher friendly checklists, common rubrics, and pragmatic strategies. A “drip system” of continuously feeding facilitation skills and ideas through instructional coaches and facilitators is also helpful.

FISCAL IMPACT

The consulting team estimates a one-time cost of \$7,000, based upon fees charged by firms that provide training in this and similar areas for a district the size of MDPS. This fee includes a full day of training for all district staff. However, the consulting team also recognizes that MDPS has teachers who are facilitators, so this recommendation could also be implemented with MDPS teachers helping teachers.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Provide training in teachers as learning facilitators.	(\$7,000)	\$0	\$0	\$0	\$0

FINDING 2-3

With only select staff trained in the foundational protocols and practices associated with PLC, the levels of implementation and function are inconsistent and varied. The effectiveness and quality also vary. Further, the district lacks standardized implementation expectations for PLC fundamental processes and functions.

The district’s intent is to provide training to all teachers and administrators in the protocols and practices of the Solution Tree PLC process. Currently, there are varied levels of implementation

¹¹ The following links provide background knowledge, pragmatic “how to” information, and examples for teacher facilitation skills:

<https://educationaldividends.com/teachers-as-facilitators/>

<https://journals.sagepub.com/doi/abs/10.1177/002248717502600319?journalCode=jtea>

<https://www.brown.edu/academics/education-alliance/teaching-diverse-learners/teacher-facilitator>

<https://www.teachermagazine.com.au/articles/the-teacher-as-a-facilitator-and-resource-person>

¹² <https://www.edutopia.org/article/two-step-process-reducing-chronic-absenteeism>

¹³ <http://jan.ucc.nau.edu/jde7/ese425/eco/optional/facilitator.html>

and effectiveness. Site-based PLCs have not evolved to uniform procedures and processes that accomplish the intent of continuous school improvement and establishing collaborative cultures. Differing implementation venues exist for release time to meet, team function, and expectations for productivity. Pragmatic, on-going dialog varies regarding curriculum alignment and adjustments, data analysis and use of results, instructional best practices, and assessment strategies. Accountability measures and monitoring operational effectiveness is minimal and teachers are not routinely canvassed to ensure the purpose and expectations for PLC implementation are maximized. As the district provides training for the remaining administrators and teachers, quality control measures of the current implementation need review.

PLCs can play a central role in implementing the curricular and instructional delivery changes launched by one-to-one technology. PLC agendas and discussions are vehicles for monitoring and adjusting the progression to standards-based curriculum and technology integration. Student assessment tools, the time and effort for administering the assessments, and the usefulness of the student data results need continuous teacher examination via PLC dialog.

However, interview dialog indicated principals and teachers have random understandings that intentional PLC collaboration is critical to school improvement, student success, and the shift from teacher-centered to a student-centered focus on learning. PLC collaboration is a vehicle for the implementation of curriculum frameworks, scope and sequence, pacing guides, and use of data. No clear evidence was presented to indicate consistent PLC time is used to comprehensively address these district-wide issues.

Research supports the importance of teachers meeting regularly as a group to share expertise, work collaboratively to improve teaching skills, and to improve student academic performance. Teaching in isolation is not a best practice. Effective teachers participate in collaboration and shared decision-making. This process renders:

- higher-quality decisions because more perspectives are considered;
- increased job satisfaction and morale;
- heightened sense of empowerment;
- greater ownership of school goals and priorities when teachers have a stake in the decision; and
- improved student achievement because of greater coordination of work among teachers.

Successful collaborative groups develop their own norms for how the group will function and how they will make a decision. In addition to a decision-making model, norms often include things like how to involve everyone in the discussion, how to avoid distractions, and how to record and share decisions that were made.¹⁴

¹⁴ <https://www.middleweb.com/39093/collaborating-through-shared-decision-making/>

Many in the public and in the profession believe that the only legitimate use of a teacher's time is standing in front of the class, lecturing and working directly with an entire class of students. In studies comparing how teachers around the globe spend their time, one finds this not to be the case everywhere. In some countries, such as Japan, teachers teach fewer classes, spending a greater portion of their time in planning, conferring with colleagues, working with students individually, visiting other classrooms, and engaging in other professional development activities (Darling-Hammond, 1994, 1996).

MDPS is a district seeking to improve. Continuously improving districts are mindful that capacity building is as important as accountability because the former is the route to the latter. Clearly, one needs both. Finding the right combination and integration of the two is the trick.¹⁵ Being the change agent in successful schools means that growing and learning are ongoing phenomena.¹⁶ **Exhibit 2-8** summarizes Fullan's insights regarding change.

Exhibit 2-8
Insights on Change for Continuous Improvement

Change Insights	<ul style="list-style-type: none"> • The implementation dip is normal • Behaviors change before beliefs • The size and prettiness of the planning document is inversely related to the quantity of action and student learning (Reeves, 2002) • Shared vision or ownership is more of an outcome of a quality process than it is a precondition • Feelings are more influential than thoughts (Kotter, 2008)
Change Savvy Leadership	<p>Change savvy leadership involves:</p> <ul style="list-style-type: none"> • careful entry into the new setting • listening to and learning from those who have been there longer • engaging in fact finding and joint problem solving • carefully (rather than rashly) diagnosing the situation • forthrightly addressing people's concerns • being enthusiastic, genuine, and sincere about the change circumstances • obtaining buy-in for what needs fixing • developing a credible plan for making that fix

Source: <http://michaelfullan.ca/wp-content/uploads/2016/06/2008SixSecretsofChangeKeynoteA4.pdf>

¹⁵ Fullan, M. (2008). *The six secrets of change*. San Francisco, CA: Jossey-Bass.

¹⁶ <http://www.sedl.org/change/issues/issues61.html>

Research reveals that when employees are allowed to freely collaborate and work in coordination with each other, there is a substantial uptick in productivity. In fact, flexibility and virtual work in today's workplace is a must-have for any organization.¹⁷

RECOMMENDATION

Continue the training and implementation of district-wide Professional Learning Communities (PLC) for teachers and administrators, with regularly scheduled release time, standardized norms, support structures, and a focus on best instructional practices, increased student achievement, and continuous school improvement.

The superintendent, teaching and learning administrators, instructional coaches, facilitators, and principals should all use PLC process to support changing cultures from isolation and autonomy to collaboration and shared learning. The PLC process should be used to examine the existing practices, agendas, and levels of teacher expertise and engagement being utilized during designated PLC times. As all staff receives PLC training, the instructional leadership staff and principals should uniformly communicate expectations, celebrate successes, listen to teachers, use their ideas to tweak or adjust systems, and solicit accountability.

Implementing PLC with fidelity includes clear and explicit guidelines for accountability; a focus on the learner; a culture of collaboration and results driven decision-making; and, delivering high impact instructional strategies. PLC agendas need to address technology implementation, curriculum alignment, use of data to adjust instruction, analysis of student work, and formative and summative assessment strategies. There is a great deal of expertise, as well as innovative strategies, and valuable resources among the staff. There is need for consistent structured PLC time or processes to share teacher work, knowledge, and experiences. Instructional rounds are venues for teachers to view best practice, collaborate and share curricular and instructional delivery changes and best practice.

The PLC time should be consistently used for continuous school improvement and teachers sharing their classroom innovative and engaging best practices. Schools and districts that use continuous improvement can achieve impressive results, including decreased failure rates, increased homework completion rates, increased Advanced Placement exam participation, increased kindergarten readiness, increased college enrollments, and more efficient use of funds.¹⁸ The benefits of continuous improvement allow for more engaged teachers and creates a proactive learning culture.¹⁹

PLC are opportunities for valuing all teachers, beginning where they are and providing opportunity for:

- offering input for how they actively engage students;

¹⁷ <https://www.hrtechnologist.com/articles/employee-engagement/how-technology-is-changing-engagement-at-work/#>

¹⁸ <https://files.eric.ed.gov/fulltext/ED557599.pdf>

¹⁹ https://www.google.com/search?q=rewards+of+continuous+improvement&rlz=1C1CHZL_enUS721US721&oq=-rew

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- transferring professional development from theory to pragmatic classroom implementation and best instructional practices;
 - intentionally soliciting and using best practice teacher ideas;
 - creating a work culture where teachers have a chance for communication and feedback flows in both directions;
 - giving positive feedback, helping teachers feel valued, communicating to teachers when they are exhibiting effective teaching and highlighting the benefits of their best practice efforts;
 - sharing successes for how curricular boundaries have moved to OAS standards driven platforms, not textbooks;
 - learning how to follow curriculum frameworks /scope and sequence for what is taught, tested, and assessed at all grade levels and subjects;
 - allowing teachers room and freedom to determine and implement best practices, resources, classroom activities, to bring about student mastery and learning;
 - trusting teachers to learn from each other and find the way to improved student achievement and mastery learning. If learning isn't progressing, make intentional effort to openly discuss all perspectives regarding how to address barriers; and
 - creating PLC expectations accompanied with relationships and standards that are simple, straightforward, brief, and easy to understand and follow.

PLC agendas focus participants to address specific problems and strategies:

- How do I teach *this* particular student better?
- How do I teach *this* specific standard more effectively?
- Teachers discuss and reflect on their instructional techniques, lesson designs, and assessment practices.
- District administrators may use the time to address leadership questions, strategies, and issues.²⁰

As the district navigates to one-to-one technology and standards-based curricula frameworks and pacing documents, all teachers must be focused on learning which “best practices” interface, support, and impact student achievement. Staff should reflect on trends and patterns emerging from technology and standards driven curriculum. Utilizing exemplary staff to model effective student engagement practices creates common practice among all staff members.

²⁰ <https://www.edglossary.org/professional-learning-community/>

Exhibit 2-9 cites examples of common activities of a district's leadership that may take place in PLC meetings.

Exhibit 2-9
Common Activities of District Leadership During PLC Meetings

Discussing teacher work: Participants collectively review lesson plans or assessments that have been used in a class, and then offer critical feedback and recommendations for improvement.

Discussing student work: Participants look at examples of student work in a class, and then offer recommendations on how lessons or teaching approaches may be modified to improve the quality of student work.

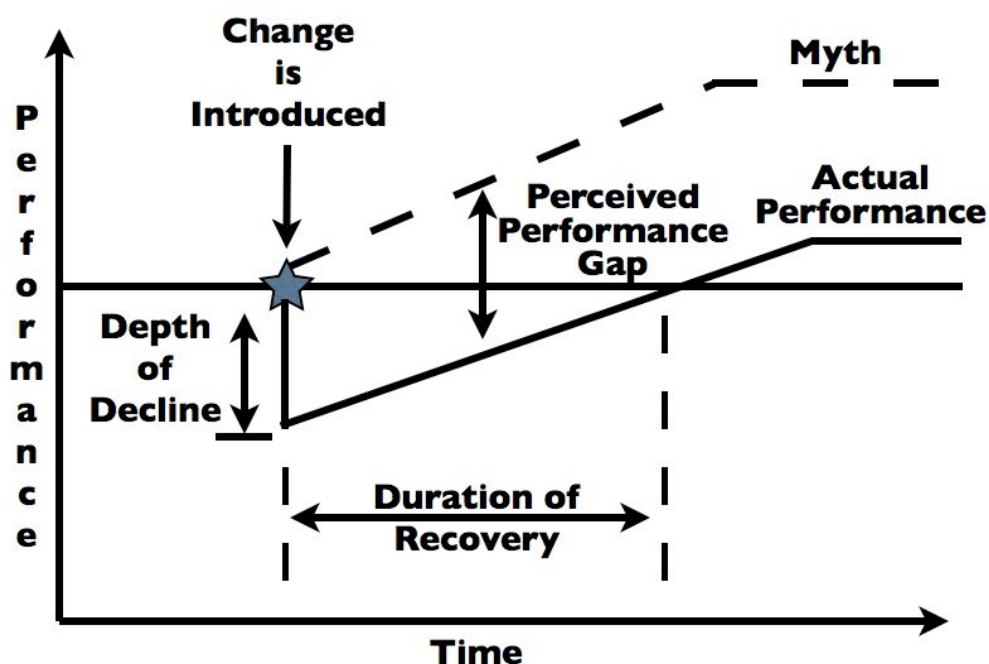
Discussing student data: Participants analyze student-performance data from a class to identify trends such as which students are consistently failing or underperforming and collaboratively develop proactive teaching and support strategies to help students who may be struggling academically.

Discussing professional literature: Participants select a text to read, such as a research study or an article about a specialized instructional technique, and then engage in a structured conversation about the text and how it can help inform or improve their teaching.

Source : <https://www.edglossary.org/professional-learning-community/>;
<https://files.eric.ed.gov/fulltext/ED410659.pdf>

MDPS is going through numerous district-wide changes. **Exhibit 2-10** describes the change process and gives insights from Fullan's *The Six Secrets of Change* (2008). The implementation dip is expected as change is introduced. However, after recovery, actual performance is better than before the change.

Exhibit 2-10
Change Implementation



Source: <http://michaelfullan.ca/wp-content/uploads/2016/06/2008SixSecretsofChangeKeynoteA4.pdf>

Maximizing PLC release time requires dedicated and intentional effort on the part of the MDPS instructional leaders and the professional staff. Moving to collaborative planning and learning creates organizational change.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 2-4

The district has no common form of formative assessment across its campuses. This makes it difficult to gauge progress across schools.

Across the district, common forms of student formative performance data are not in place. Teachers use an assortment of assessments such as MasteryConnect software, end of chapter textbook tests, and teacher created formative assessments. A variety of summative assessments are being administered, including Starr, the SDE Oklahoma School Testing Program (OSTP), and College and Career Ready Assessment (CCRA) tests.

There are random efforts among grade levels and subject areas to analyze summative data. There were minimal and isolated efforts reported of using data to plan, adjust, pace, and design instruction or to close skill gaps and inform instruction. There are varying site expectations and inconsistent practices to analyze summative OSTP student performance data and assist teachers in applying the results to instructional pacing and adjusting curriculum frameworks. There is no

repetitive process to routinely use student performance data to vertically align and pace curricula and make adjustments in re-teaching, remediation, and maintenance of specific concepts and skills.

On the staff survey conducted for this review, 69 percent of MDPS educators (administrators, classroom teachers, other certified, and instructional support staff) either did not know, *disagreed*, or *strongly disagreed* that formative and summative data are used to improve the district's curriculum (**Exhibit 2-11**). Conversely, 67 percent of educators indicated data were used to improve instructional practices. However, student test scores and curriculum alignment issues do not support this staff assessment.

Exhibit 2-11
Staff Survey Results Regarding the Use of Student Performance Data

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Test data from district-adopted benchmarks and mandated end-of-year tests are used to improve the district's curriculum.	3%	28%	43%	19%	7%
Teachers effectively use student data to improve instructional practices.	11%	56%	19%	12%	1%

Source: Prismatic Survey Results, February 2021

The consulting team learned of isolated efforts where teachers used item analysis to find trends and patterns in student learning. However, the input was unclear and with ambiguous knowledge and expectations for how the results were used to re-design instruction, change instructional practices, and determine if reteaching or remediation is what students need. No evidence indicated student performance data were collected at the end of a grading period and then routinely revisited over time to maintain mastery. There are no uniform processes and procedures to assist all teachers in using OSTP data to inform targeted instruction, form flex groups for targeted remedial instruction, and identify then close vertical and horizontal learning gaps. No evidence was presented that teachers use student data to identify district-wide, site-based, grade level, or subject area reoccurring curricula redundancies and pacing gaps.

Effective teachers use both formative and summative data to identify patterns of success and failure and then determine next steps instruction. One of the longest-standing bodies of research is the "effective schools" research. One of the original correlates of effective schools' research is the "frequent monitoring of student progress." As stated by the University of Oklahoma's research in effective schools: "The effective school frequently measures academic student progress through a variety of assessment procedures. Assessment results are used to improve individual student performance and improve instructional delivery. Assessment results will show that alignment must exist between the intended, taught, and tested curriculum."²¹

²¹ http://ces.ou.edu/7_correlates_effectiveness.html

More recently, effective schools research was conducted by the National Association of Elementary School Principals (NAESP). NAESP published best practices for schools and reported how the use of student achievement data must be included in instructional decision-making. NAESP provided five recommendations to help principals put student achievement data to the best possible use:

- make data part of the ongoing cycle of instructional improvement;
- teach students to examine their own data and set learning goals;
- establish a clear vision for school-wide data use;
- provide supports that foster a data-driven culture within the school; and
- develop and maintain a district-wide data system.²²

RECOMMENDATION

Adopt and implement common formative assessments and continue implementing summative assessments using data results to align core curricula.

The purpose of teachers analyzing classroom data are to determine what the students have learned, what they need help to learn, and how teachers revise instruction to ensure that they all do learn. The use of student performance data are essential to identify skill gaps in student learning. The learning and skill gaps must be addressed through re-teaching or remediation. The use of data also guides improvements in the rigor, pacing, and vertical articulation of curriculum and instruction. As teachers monitor performance data, patterns of teaching and individual student learning successes and challenges become evident. It is essential for teachers to have ongoing formative data to measure learning at the end of each instructional segment. This allows teachers to make informed, collaborative decisions to address potential problems.

Working with the teachers, the teaching and learning staff and principals should develop a timeline that details which student assessment data are required throughout the school year. Using this timeline, they should hold PLC meetings for analyzing data. Meetings should focus on determining the strengths and weaknesses of the students and how the results impact the district in pacing instruction. Reviewing formative benchmark test data throughout the school year allows timely feedback on student performance, the effectiveness of teaching strategies, and any needed adjustments and alignment to the curricula.

The district process should examine classroom data and ask key questions:

- Which content standards is the teacher assessing?
- What percent of students demonstrated proficiency?

²² http://www.naesp.org/sites/default/files/Student%20Achievement_blue.pdf

- What implications does that have for instruction?
- Which students have not demonstrated that they can master content standards?
- What diagnostic information did an examination of student work provide?
- Based upon individual student performance, what do teachers need to do next to move the student to proficiency?
- Based upon the class performance, what re-teaching needs to be done?
- After re-assessing, did students demonstrate proficiency?
- Is re-teaching or other interventions resulting in improved student performance?
- When comparing performance by subgroups, are any groups not performing as well as the whole group? If so, what is being done about that?
- Are there students who are not attaining proficiency across standards?
- What diagnostic information do we have about them to inform instruction?
- What interventions have we tried? What interventions do we plan to try next?²³

For data to be used effectively, teachers need to go beyond just tallying the data and diagnosing learning gaps. An important part of the data discussions involves sharing ideas about improving instructional practices based on student need. Conversations also need to center around, ‘What are you doing in your class that I’m not doing in my class?’ Teachers need quick, practical strategies for maximizing data analysis, including shared dialog for how to easily adjust instructional delivery practices.²⁴

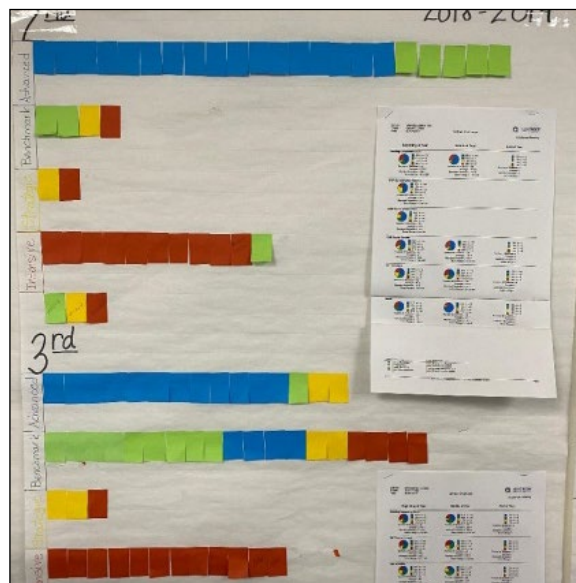
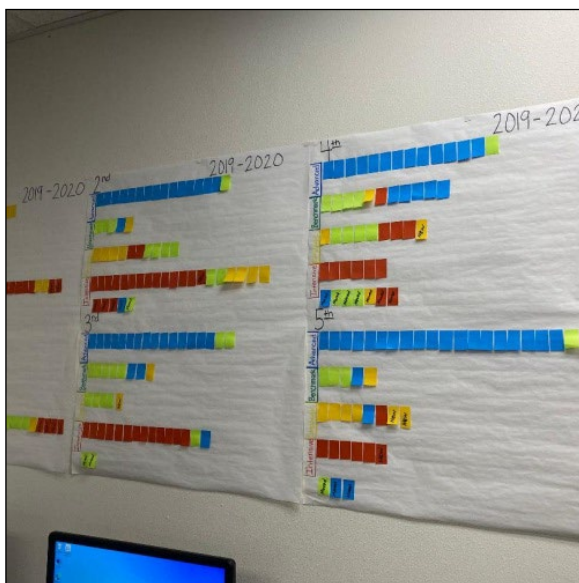
The teaching and learning staff, principals, and teachers should consider regularly graphing data. A visual depiction of the information often yields additional insights and has proven helpful to teachers. A way for teachers to get a quick visual picture of who needs additional support is to color code the data recorded in the grading process. For example, if three categories are used to define student performance in the grade book (i.e., basic - B, proficient P, and advanced - A), each could be assigned a different color. This would allow teachers to quickly determine who was progressing and who needed additional support.²⁵ **Exhibit 2-12** provides examples of dedicated data walls in other schools/districts. The data charts are color-coded and labeled for teachers to review as they work with students to make progress in reading skills.

²³ Nichols, B. W. & Singer K. P. (2000). Developing data mentors. *Educational Leadership*, 57(5).

²⁴ <https://files.eric.ed.gov/fulltext/ED536742.pdf>; <https://blog.advancementcourses.com/articles/data-driven-instruction/>; <https://www.edutopia.org/blog/new-teachers-how-use-data-inform-instruction-rebecca-alber>

²⁵ <http://mdk12.msde.maryland.gov/instruction/progress/using.html>

Exhibit 2-12 Example Dedicated Data Walls



Source: Prismatic, 2018-20

Parents, as well as students, need consistent and clear communication regarding ongoing student performance data. Through use of one-on-one conversation or electronic communication, they can monitor daily assignments, homework, and student test data.

Additionally, the SDE has developed the Oklahoma Family Guides for English Language Arts, Mathematics, Science, and Social Studies for Pre-K through 6th Grade.²⁶ The SDE Family Guides are resources aligned with the Oklahoma Academic Standards and developed specifically

²⁶ <https://sde.ok.gov/oklahoma-family-guides>

for Oklahoma families to complement classroom learning. They illustrate what is expected of students at each grade level in different content areas along with activities families can do at home to further support children's learning experiences.

FISCAL IMPACT

This recommendation can be implemented with existing resources. The teaching and learning staff has expertise to support this recommendation. However, if an external consultant is needed, there are consultants available to guide teachers through the data analysis process. A short-term consulting engagement would cost approximately \$6,000.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Hire a consultant to help design a process for analyzing student performance data, if needed.	(\$6,000)	\$0	\$0	\$0	\$0

FINDING 2-5

The superintendent and the teaching and learning leadership team share a common vision and passion for continuous improvement at MDPS. They are working with focused intent to set high performance expectations for teachers and students.

The district and its leadership team provide district-wide support systems, professional development, and direction designed to nurture exemplary learning environments for all students at all grade levels. District leaders share a passion for purposeful teaching founded on consistent best pedagogical practices. They understand the urgency and responsibility of ensuring all MDPS students are prepared for college and careers.

Research indicates that both district and school leadership provide a critical bridge between most educational-reform initiatives, and having those reforms make a genuine difference for all students. Such leadership comes from many sources, not just superintendents and principals. But those in formal positions of authority in school systems are likely still the most influential.²⁷

District leadership is connected to positive student achievement. The role of superintendent is critical. Marzano (2009) points to the following five research-based best practices for district level leadership responsibilities:

- ensuring collaborative goal setting;
- establishing nonnegotiable goals for achievement and instruction;
- creating board alignment with and support of district goals;

²⁷ <https://conservancy.umn.edu/bitstream/handle/11299/2035/CAREI?sequence=1>

- monitoring achievement and instruction goals; and
- allocating resources to support the goals for achievement and instruction.

The MDPS superintendent and the district's teaching and learning team, exhibit those research-based behaviors and practices.

COMMENDATION

The superintendent and teaching and learning leadership team are commended for their shared vision for growing MDPS into a high performing school district.

FINDING 2-6

The district has transitioned to a middle school concept at all three campuses. The recent closing of two middle schools provided a natural segue for transitioning from a traditional junior high to a middle school concept.

The implemented Middle School Model requires that a common group of students be instructed by the same team of teachers. Core content teachers, along with input from special education teachers, instructional coaches, and instructional facilitators plan curricula and instruction as a team. They work together to improve learning and meet the academic and social-emotional needs of the group of students they teach.

In 2000, Jackson and Davis summarized the findings of many middle school reform efforts. They concluded that these middle school concepts characteristics support both learning and positive youth development:

- a curriculum grounded in rigorous academic standards and current knowledge about how students learn best and is relevant to the concerns of adolescents;
- instructional methods designed to prepare all students to achieve at the highest standards;
- organizational structures that support a climate of intellectual development and a caring community with shared educational goals;
- staff who are trained experts at teaching young adolescents;
- ongoing professional development opportunities for the staff;
- democratic governance that involves both the adults and the adolescents;
- extensive involvement of parents and the community; and
- high levels of safety and practices that support good health.²⁸

²⁸ <https://cdrpsb.org/researchreport12.pdf>

COMMENDATION

The district is commended for implementing the Middle School Model for learning.

FINDING 2-7

The district has implemented a redesigned instructional coaching process, where instructional coaches serve teachers across all grade levels. This year, the elementary coaches are no longer site-based and instead travel in teams of three or four throughout the elementary sites. Secondary coaches remain site-based. This redesign has not yet been assessed.

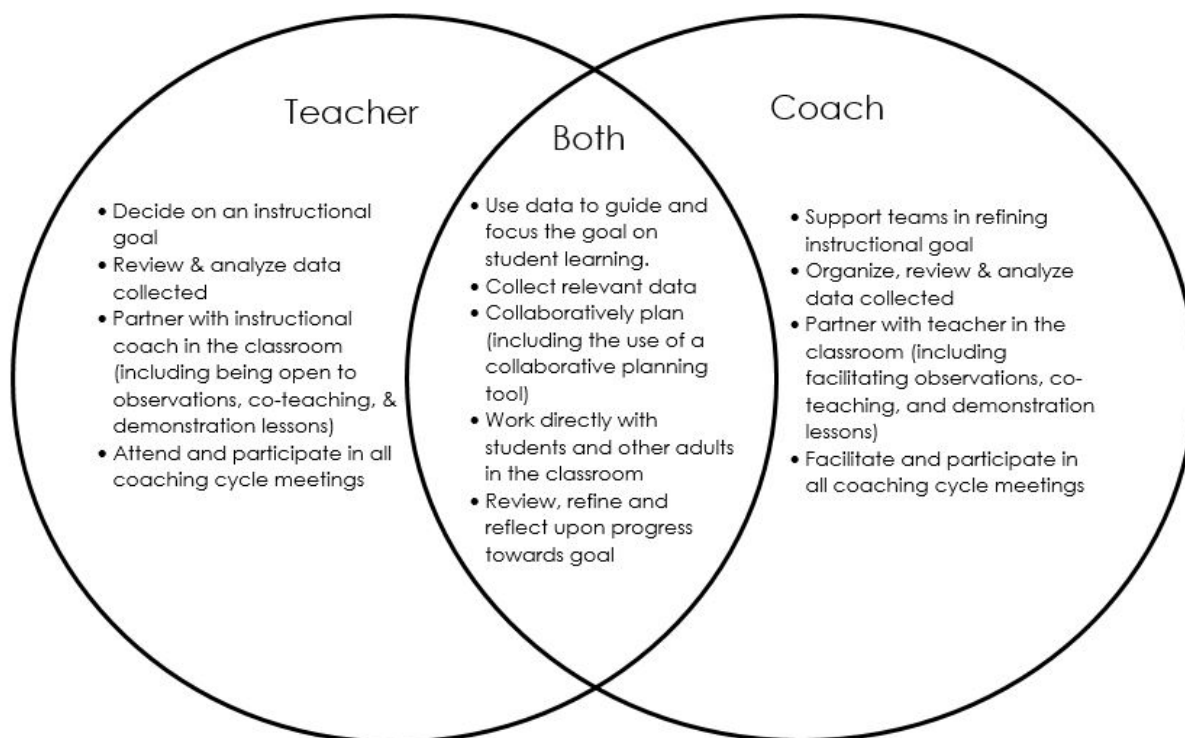
The consulting team learned that some instructional coaches were former reading specialists. The rationale for redesigning the coaching process was to keep coaches from being used for tasks that did not directly support coaching. Often their schedules were being filled and used as an additional administrator, duty person, or teaching assistant. The intent of the redesign was to enable coaches to focus on instructional coaching, and have more time to interact, share information, and communicate with teachers.

Focus group and interviews indicated that traveling coaches and teachers are encountering an implementation learning curve. Some teachers and coaches found it was more difficult to have coaching conversations and listen to what matters and to set goals and identify coaching needs. Building relationships, cultivating trust, and creating a safe space for risk-taking and learning was also reported as challenging for teachers. Teachers and coaches indicated the day-to-day visibility and informal contact provided in site-based assignments, added value and confidence to the coaching process.

The district has not reviewed the new design to determine its effectiveness. It has not assessed how the new process affects the trust relationships between teachers and coaches, feedback channels, and the processes for teachers and coaches to schedule the coaching sessions. Information from all persons involved would allow for tweaking and making minor adjustments in early implementation. Making adjustments in the early stages would contribute to the long-term success and systems of support for the coaching process.

Exhibit 2-13 illustrates how coaches and teachers play key roles in making the coach process a success.

Exhibit 2-13
Key Roles for Coaches and Teachers



Source: <https://esinstructionalcoaches.weebly.com/role-of-coach--teacher.html>

The art of creating and maintaining a coaching program includes evaluating coaches' effectiveness and evaluating the program's effectiveness. After districts have invested in coaching, they also need to invest in evaluating how effective the coaching program and the coaches are. Evaluations yield data that can be used to plan, monitor, assess, and evaluate coaching's costs, processes, and effects.

During early implementation, when processes are new and may not be clearly defined and understood, early reviews are important. Formatively monitoring, assessing, and communication during initial implementation will avoid unnecessary negative consequences. Early opportunities to adjust and improve the coaching programs enhances student achievement and overall effectiveness.

RECOMMENDATION

Review the ongoing effectiveness of the new coaching program design and the effectiveness of the coach to teacher process during the initial planning and implementation phase.

Review and evaluation are often overlooked until several years after a new program has begun or until someone needs solid evidence about the program's effects to weigh coaching against other improvement efforts vying for limited resources. The time to plan an ongoing review and evaluation of the coaching program and coaches is in the planning and implementation phase — many crucial decisions are made during the planning implementation phase that will affect long-

term program success.²⁹ Therefore, the district should move quickly to evaluate its current coaching design, then use the results to inform the improvement to the coaching process and teacher systems of support.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 2-8

Services and support provided to teachers by the Pre-K-12 instructional facilitators vary in function and process across the content areas. Facilitators give positive support through such things as scaffolding curriculum, providing content resources for specific state standards, training in best pedagogical practices, administering testing, and overall generalized support for implementing curricula based on Oklahoma Academic Standards (OAS). A nine-week scope and sequence and lesson plan template were delivered to teachers at the beginning of the year. However, rollout for subsequent documents has been intermittent and random.

The consulting team learned all instructional facilitation efforts and services are not clearly detailed and coordinated with ongoing direction and guidance repeatedly shared. It is important for teachers to see how all the facilitator's services, supplemental resources, and instructional tools interface and provide integrated and not "siloed" and separate instruction. Processes, procedures, services, and products within the facilitation staff themselves and distribution across the school sites need to work in concert. At all levels, next steps, resources and service roll-out, implementation expectations, and long-term guidance need clear direction and coordination.

After rolling out new initiatives, resources/products, and services the need exists for enabling two-way communication and systemized feedback channels. Communication and coordination of services and function among the facilitators, principals, and teachers need prioritizing and synchronization. Asking simple questions such as "Did it work? What can we do to make it better? Where is the success? Is there a miss match?" can lead to substantial improvements.

Timing and time frames for resource and product delivery and expectations for next steps or implementation needs on-going guidance. All instructional facilitation efforts and services need detailed communication with staff at all levels. Integrating and interfacing support efforts among the content areas needs review. Establishing consistent and timely two-way communication and feedback processes informs implementation issues and service adjustments needed.

²⁹ The following links will assist in providing resources for reviewing and evaluating the MDPS coaching process and how the new process supports the coaches:

<https://www.warrensville.k12.oh.us/Downloads/OTES%20Rubric%20Coaches2.pdf>;

<http://www.nysed.gov/common/nysed/files/Final%20Instructional%20Coaching%20Expanded%20Rubric.pdf>

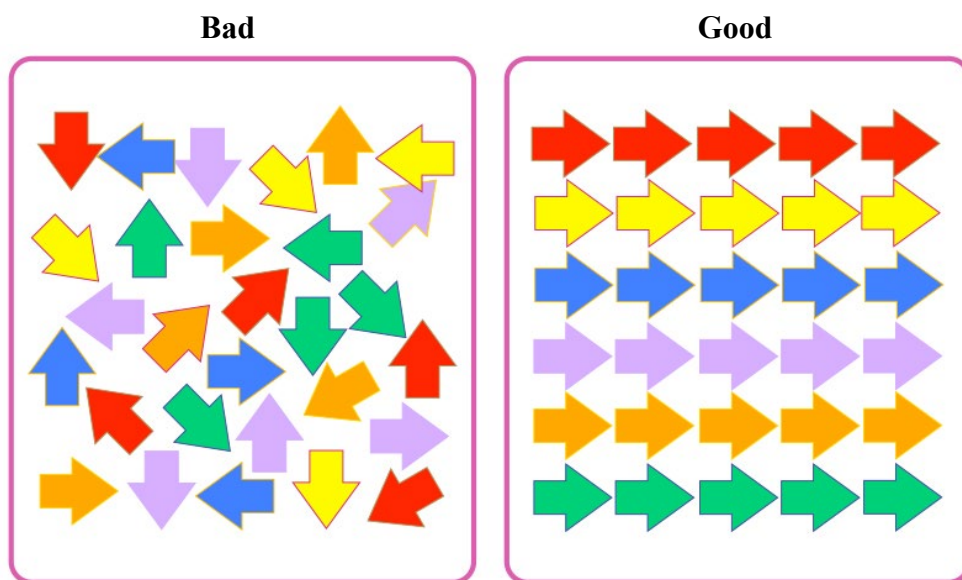
Research supports effective early communication will help to rapidly build trust that leads to increased productivity, output, and morale in general. It speaks to the benefit of integrated curricula and content that improves all learning.³⁰

RECOMMENDATION

Continue to synchronize and coordinate communication, time frames, processes for resource/product delivery, along with functions and services delivered through instructional facilitators.

Communication and connecting requires platforms and processes to facilitate idea sharing and conversations. This is about getting all the efforts going in the same direction. When aligned with the strategic plan, each effort is important, has purpose, meets a need(s), fits into the strategic plan and budget, and must all work in the same direction to support and help reach instructional goals. **Exhibit 2-14** is a simple illustration of implementation chaos when multiple entities are at work. Leaders need to make time for setting up communication platforms for engaging, listening, and learning. This avoids unnecessary confusion and keeps all entities headed toward a common goal.³¹

Exhibit 2-14
Workplace Communication



Source: <http://marktruelson.com/does-your-communication-still-look-like-matching-luggage/>

MDPS instructional facilitators should make intentional effort to synchronize and integrate services. The research reports that “we learn at a deeper level when connections are made, not

³⁰ <https://www.hrtechnologist.com/articles/employee-engagement/effective-communication-in-the-workplace-how-and-Workplace%20communication%20is%20important%20to,their%20ideas%20are%20being%20valued;>
<https://www.forbes.com/sites/forbescoachescouncil/2018/09/18/seven-ways-to-prevent-the-dangers-of-organizational-chaos/?sh=1a46bcd1a0f>; http://www.users.miamioh.edu/shermalw/edp603_group3-f00.html

³¹ <https://dynamicsignal.com/2020/09/29/workplace-communication/#02>

when we are in a fabricated, disconnected structure. When curriculum is integrated, material is connected in the way in which it exists around us and throughout the world.”³²

FISCAL IMPACT

This recommendation can be implemented with existing resources.

B. MANAGEMENT AND OVERSIGHT OF INSTRUCTIONAL PROGRAMS

High-achieving districts have written or digital curriculum maps that clearly define standards and learning objectives for each subject and grade level so that teachers know the content expectations and instructional timelines for student mastery of objectives. It takes strong instructional leadership to implement the curriculum. The principal and teachers, working collaboratively, are responsible for consistent implementation, quality instruction in the classroom, and student performance. The principal’s instructional leadership is the catalyst for effective instructional delivery and high student performance.

The College of Education at Washington University, Center for Educational Leadership, has developed a framework for instructional leadership. According to their website, the framework is not the sum total of the work of instructional leaders, rather it is a description of the most important aspects of instructional leadership. **Exhibit 2-15** describes the five core beliefs that drive the work in school leadership at the Center and **Exhibit 2-16** describes the four dimensions of instructional leadership.

Exhibit 2-15
Core Beliefs - Center for Educational Leadership

Beliefs	
1	Instructional leadership is learning-focused, learning for both students and adults, and learning which is measured by improvement in instruction and in the quality of student learning.
2	Instructional leadership must reside with a team of leaders of which the principal serves as the “leader of leaders.”
3	A culture of public practice and reflective practice is essential for effective instructional leadership and the improvement of instructional practice.
4	Instructional leadership addresses the cultural, linguistic, socioeconomic, and learning diversity in the school community.
5	Instructional leadership focuses upon the effective management of resources and of people – recruiting, hiring, developing, evaluating – particularly in changing environments.

Source: <http://info.k-12leadership.org/4-dimensions-of-instructional-leadership>

³² http://www.users.miamioh.edu/shermalw/edp603_group3-f00.html

Exhibit 2-16
Dimensions of Instructional Leadership

Dimensions	
Vision, Mission, and Culture Building	School leaders, committed to collective leadership, create a reflective, equity-driven, achievement-based culture of learning focused upon academic success for every student.
Improvement of Instructional Practice	Based upon a shared vision of effective teaching and learning, school leaders establish a focus on learning; nurture a culture of continuous improvement, innovation, and public practice; and monitor, evaluate, and develop teacher performance to improve instruction.
Allocation of Resources	School leaders allocate resources strategically so that instructional practice and student learning continue to improve.
Management of People and Processes	School leaders engage in strategic personnel management and develop working environments in which teachers have full access to supports that help improve instruction.

Source: <http://info.k-12leadership.org/4-dimensions-of-instructional-leadership>

Waters, Marzano, and McNulty (2003), from the Mid-Continent Regional Educational Laboratory (McREL), synthesized the body of research on the effects of leadership practices on student achievement. In their research, McREL identified 21 leadership responsibilities and 66 practices that are substantially associated with student achievement. These characteristics and responsibilities are now integrated into a Balanced Leadership Framework.³³ Much of the TLE evaluation process adopted for Oklahoma administrators uses this research.³⁴

School administrators must have pragmatic knowledge, skills, strategies, and tools to positively affect student achievement. They must move their instructional leadership skill set past abstract and theoretical thinking to concrete, day-to-day practices to be effective leaders. Instructional leaders understand the need for multi-faceted strategies that enable them to know when, how, and why leadership action must be taken.

Superintendents, central office staff, and principals form the core of educational leadership in school districts. The school leader is no longer simply that of a building manager who makes sure that schedules are met, the school is maintained, and that discipline is properly enforced. Today, the educational leader is responsible for consistency of implementation of an aligned curriculum, the quality of instruction in the classroom, and student performance. Recent research contends that school leaders influence classroom teaching, and consequently student learning, by staffing schools with highly effective teachers and supporting those teachers with effective teaching and learning environments.³⁵

³³ www.mcrel.org/~media/Files/McREL/Homepage/Products/01_99/prod54_BL_Framework.ashx page 15

³⁴ <http://ok.gov/sde/sites/ok.gov.sde/files/TLE-McRELBooklet.pdf> page 3

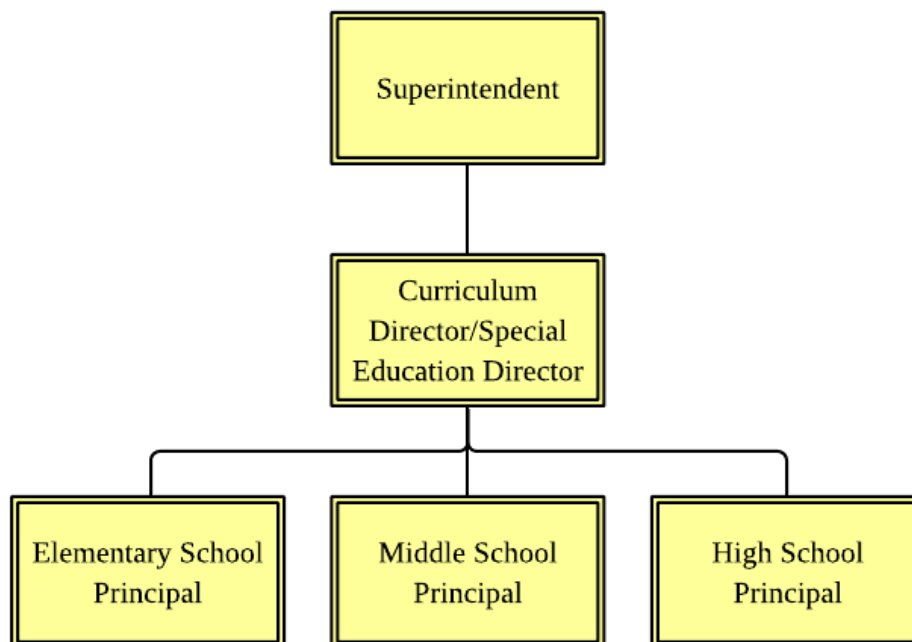
³⁵ <http://www.youblisher.com/p/110815-New-thinking-about-educational-leadership/>

Effective learning environments begin with strong educational and instructional leadership and include:

- Instructional Vision - instructional practices that are guided by a common, research-based instructional vision that articulates what students do to learn the subject effectively.
- Continuous Improvement of Instruction - resources (i.e., professional development, allocation of teacher time, budget decisions), policies, and procedures (i.e., school improvement plans, teacher evaluation) aligned toward continuous improvement of instructional practice guided by the instructional vision.
- High Expectations - for all students, academically, behaviorally, and in all aspects of student well-being.
- School Culture - a safe, collaborative, and supportive space that places high priority on ensuring that students are successful in school and life.

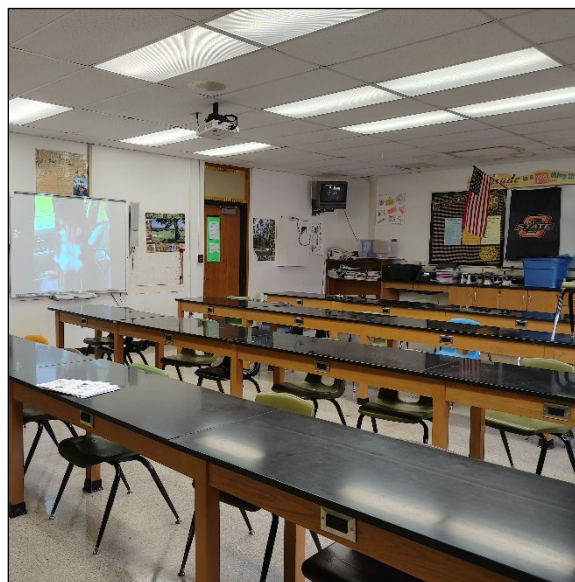
Exhibit 2-17 provides the current organizational structure for instructional delivery at MDPS.

Exhibit 2-17
MDPS Organization Chart



Source: Created by Prismatic, March 2021

Exhibit 2-18 provides illustrations of MDPS classrooms.

**Exhibit 2-18
MDPS Classrooms**

Source: Prismatic, February-March 2021

Oklahoma School Testing Program (OSTP)

Student assessment is an integral part of measuring student performance. The Oklahoma School Testing Program (OSTP) for students in grades 3rd through 8th and the College and Career Ready Assessment (CCRA) for students in 11th grade continue implementation of the current standards-based tests that students must take during the school year. The OSTP consists of Criterion-Referenced Tests (CRTs) designed to measure student attainment of skills established for core subjects and helps monitor student and school performance relative to the OAS. Currently, state assessments are administered for selected grades and courses in this manner:

- third grade: English Language Arts and Mathematics;
- fourth grade: English Language Arts and Mathematics;
- fifth grade: English Language Arts, Mathematics, and Science;
- sixth grade: English Language Arts and Mathematics;
- seventh grade English Language Arts and Mathematics;
- eighth grade: English Language Arts, Mathematics, and Science; and
- eleventh grade: CCRA consists of two parts. For part one, each district administers either the ACT or SAT, including the writing section. Part two consists of Science Content Assessment which is aligned to the OAS for Science, and U.S. History Assessment which is aligned to the OAS for U.S. History.

All students in the tested grades and subjects participate in the OSTP. The test results are for all students who attend a Full Academic Year (FAY). Current administrative rules define FAY as any student who has enrolled within the first 20 instructional days of the school year and who does not have a gap of ten or more consecutive instructional days prior to dates that vary by indicator type.

The SDE uses performance level descriptors (PLDs) advanced, proficient, basic, and below basic in reporting student test scores:

- Advanced – Student demonstrates superior performance on challenging subject matter;
- Proficient (called Satisfactory prior to 2009) – Student demonstrates mastery of appropriate grade level subject matter and is ready for the next grade, course, or level of education, as applicable;
- Basic – Student demonstrates partial mastery of the essential knowledge and skills appropriate to his or her grade level, course, or level of education, as applicable; and
- Below Basic – Student does not perform at least at the limited knowledge level.

To assist teachers and districts in teaching the OAS and preparing students for the OSTP, the SDE provides a variety of resources on its website. These resources include the following:

- the OAS by subject and grade level;
- test blueprints for each grade level and subject area test that show what percentage of the test each skill will represent;
- test/item specifications highlight important points about the items' emphasis, stimulus attributes, format, content limits, distracter domain, and sample test items;

- released test questions;
- writing samples;
- curriculum frameworks in ELA, Mathematics, and Science; and
- DOK levels and percentage weights for all OSTP test questions in test specifications.

The OAS along with the blueprints, PLDs, item specifications, DOK, writing samples, and released items define the testing requirements for 2014 through 2017.³⁶

Exhibit 2-19 provides the results of the math OCCTs in 2018-19. MDPS students scored the lowest among the peers, the community group, and state overall.

Exhibit 2-19
Percentage of MDPS and Peer District
Full Academic Year Students Scoring Proficient or Above in Math
2018-19

Entity	3 rd Grade	4 th Grade	5 th Grade	6 th Grade	7 th Grade	8 th Grade
Mid-Del	39%	29%	20%	27%	28%	14%
Lawton	46%	44%	42%	38%	42%	34%
Moore	56%	59%	49%	52%	54%	36%
Norman	57%	53%	45%	35%	41%	30%
Putnam City	50%	49%	38%	30%	43%	30%
Union	49%	51%	41%	31%	32%	38%
Community Group	46%	43%	35%	31%	36%	29%
State	53%	47%	39%	37%	40%	28%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-20 provides the results of the reading OCCTs in 2018-19. MDPS students scored the lowest among the peers, the community group, and state overall.

³⁶ <http://sde.ok.gov/sde/assessment-administrator-resources-administrators>

Exhibit 2-20
Percentage of MDPS and Peer District
Full Academic Year Students Scoring Proficient or Above in Reading
2018-19

Entity	3 rd Grade	4 th Grade	5 th Grade	6 th Grade	7 th Grade	8 th Grade
Mid-Del	39%	29%	31%	35%	28%	24%
Lawton	46%	42%	52%	46%	42%	42%
Moore	56%	45%	54%	59%	46%	45%
Norman	49%	45%	54%	49%	40%	44%
Putnam City	42%	37%	43%	47%	33%	37%
Union	47%	43%	46%	37%	32%	33%
Community Group	43%	37%	43%	41%	34%	34%
State	49%	39%	45%	45%	36%	37%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-21 shows the 2018-19 science scores. In 5th and 8th grades, MDPS students scored the lowest among the peer districts and lower than the community group and state.

Exhibit 2-21
Percentage of MDPS and Peer District
Full Academic Year Students Scoring Proficient or Above in Science
2018-19

Entity	5 th Grade	8 th Grade
Mid-Del	29%	37%
Lawton	46%	42%
Moore	53%	54%
Norman	50%	56%
Putnam City	49%	46%
Union	43%	49%
Community Group	42%	44%
State	47%	48%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-22 shows math scores over a five-year period. From 2014-15 to 2018-19, MDPS scores generally declined in math. Oklahoma adopted new higher performance standards in 2017. MDPS scores in 2017-18 and 2018-19 were lower than the state at every grade level.

Exhibit 2-22
Five-year Data Trend in Math

Grade	2014-15		2015-16		2016-17		2017-18		2018-19	
	Mid-Del	State	Mid-Del	State	Mid-Del	State	Mid-Del	State	Mid-Del	State
3 rd	69%	71%	74%	75%	47%	54%	37%	51%	39%	53%
4 th	76%	79%	72%	77%	43%	49%	29%	45%	29%	47%
5 th	77%	77%	75%	79%	32%	42%	29%	37%	31%	39%
6 th	72%	76%	71%	76%	27%	42%	25%	34%	35%	37%
7 th	71%	76%	67%	76%	30%	42%	27%	41%	28%	40%
8 th	54%	64%	57%	64%	23%	29%	15%	25%	24%	28%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-23 shows reading scores over a five-year period. From 2014-15 to 2018-19, MDPS scores generally declined in reading. MDPS scores in 2017-18 and 2018-19 were lower than the state at every grade level.

Exhibit 2-23
Five-year Data Trend in Reading

Grade	2014-15		2015-16		2016-17		2017-18		2018-19	
	Mid-Del	State	Mid-Del	State	Mid-Del	State	Mid-Del	State	Mid-Del	State
3 rd	79%	81%	82%	82%	42%	49%	38%	43%	39%	49%
4 th	79%	80%	75%	78%	42%	46%	37%	46%	29%	39%
5 th	78%	77%	82%	82%	44%	49%	43%	46%	20%	45%
6 th	71%	74%	68%	74%	34%	48%	37%	46%	27%	45%
7 th	80%	82%	78%	82%	37%	42%	24%	33%	28%	36%
8 th	83%	86%	81%	86%	36%	43%	33%	41%	14%	37%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-24 displays results for the 2018-19 11th grade test scores. MDPS had the lowest scores in English, math, and science across all comparison groups.

Exhibit 2-24
**Percentage MDPS and Peer District Grade 11 Regular Education,
 Full Academic Year Students Scoring Proficient or Above, 2018-19**

Entity	English	Math	Science
Mid-Del	28%	17%	24%
Lawton	32%	23%	29%
Moore	49%	39%	32%
Norman	60%	46%	35%
Putnam City	34%	21%	33%
Union	39%	31%	33%
Community Group	34%	23%	30%
State	40%	30%	29%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-25 compares the trends in the district's ACT composite scores over time. MDPS' composite score averaged 20.0 in 2014-15 but was 19.7 in 2018-19. This was the second smallest decrease among the comparison groups. MDPS outperformed the community group and state in 2018-19 but had the fourth highest scores among peer districts.

Exhibit 2-25
Trend in ACT Composite Scores

Entity	2014-15	2015-16	2016-17	2017-18	2018-19	Percentage Change
Mid-Del	20.0	19.7	19.3	18.5	19.7	(1.5%) ▼
Lawton	21.2	20.4	19.2	18.6	17.5	(17.5%) ▼
Moore	21.3	22	20.5	20.4	19.8	(7.0%) ▼
Norman	23.0	23.2	22.4	21.6	23.3	1.3% ▲
Putnam City	20.3	18.5	18.8	18.8	17.8	(12.3%) ▼
Union	21.3	21.3	19.8	19.5	21.2	(0.5%) ▼
Community Group	20.7	19.9	19.3	18.9	18.6	(10.1%) ▼
State	20.7	20.6	19.5	19.4	18.9	(8.7%) ▼

Source: Office of Educational Quality and Accountability, Profiles Database

In 2018-19, MDPS had the lowest four-year dropout rate among comparison groups. It also had the highest senior graduation rate among all comparison groups (**Exhibit 2-26**).

Exhibit 2-26
MDPS and Peer District Four-Year Dropout and Senior Graduation Rates, 2018-19

Entity	Four-Year Dropout Rate	Senior Graduation Rate
Mid-Del	3.3%	99.2%
Lawton	10.2%	96.4%
Moore	10.9%	97.1%
Norman	3.7%	98.5%
Putnam City	10.3%	95.2%
Union	7.5%	97.5%
Community Group	8.1%	96.9%
State	9.6%	97.2%

Source: Office of Educational Quality and Accountability, Profiles Database

FINDING 2-9

MDPS principals lack sufficient continuous support and training in the complex role of being instructional leaders. Principals are the primary agent for driving the changes that improve student achievement and guide teachers through the paradigm shift of no longer teaching in isolation.

The percentage of MDPS students scoring proficient and above by grade level and subject were in the lower quartiles. To raise the level of student engagement, principals must lead teachers to tap into the power and momentum of shared decision-making and working as a team. The district's principals are inextricably tied to improving student achievement and supporting teachers as they evolve to delivering best practice instruction founded in the structure of corporate thinking.

To raise the level of student engagement and student learning, MDPS principals must lead teachers to embrace the power and momentum of shared decision-making and working as a team. Principals are responsible supporting teachers as they evolve to delivering best practice instruction founded in the structure of corporate thinking. Low test scores, absenteeism, and teacher moral require principals to be the primary agent for driving the changes it takes to improve student achievement in their schools.

Research indicates that principals are inseparably linked to student achievement. Principals are called upon to be instructional leaders and impact classroom instruction that leads to improved student achievement. Principals keep their staff focused on learning goals and help them determine the effectiveness of their instructional strategies.³⁷

Successful instructional leaders establish an effective learning environment in their buildings, develop systems for supporting teachers and regularly monitor the progress of these school

³⁷ <https://www.readingrockets.org/article/role-principal-leadership-improving-student-achievement>

efforts. They promote a strong school climate by empowering and coordinating the work of teachers and school staff around shared goals.³⁸

A principal's instructional leadership skills and behaviors are needed to direct improved student achievement, curb absenteeism, and improve student performance. They lead and support teachers through the paradigm shift of learning how to engage students by no longer teaching in isolation and tapping into the power and reward of shared decision-making a corporate thinking.

RECOMMENDATION

Continue to provide targeted systems of support and set high expectations for principals in their role as instructional leaders.

MDPS principals are at differing skill levels of instructional leadership. Each principal must commit to improving and cultivating the professional expertise needed as instructional leader. One pathway to improvement is using the elements of their job to practice improving leadership in pragmatic and provides hands on learning. Below are ten day to day strategies principals can use. These daily practices need quality assurance criteria, not just "I did it". Nothing is more important than ensuring quality learning is taking place in our classrooms. **Exhibit 2-27** provides strategies to improve individual instructional leadership. **Exhibit 2-28** shows the rigor relevance framework.

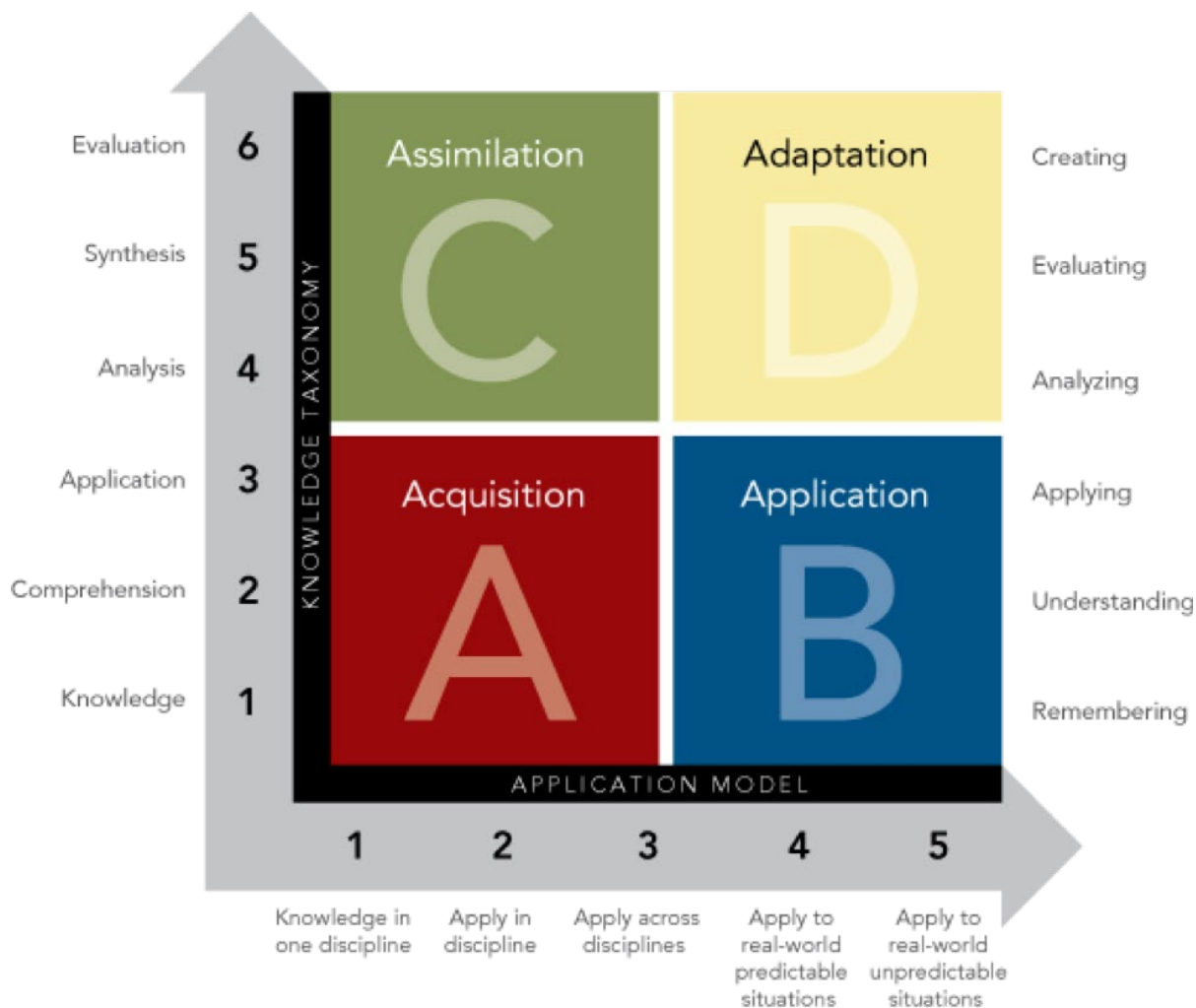
³⁸<file:///C:/Users/User/Downloads/MidDel%20ProjectNew%20folder/work%20papers/instructional%20leadership.pdf>

Exhibit 2-27
Strategies to Improve Instructional Leadership

1. **Get in Classrooms More** - Develop an informal walk-through schedule with your leadership team. Use a color-coded Google Doc to keep track of classrooms visited and the specific improvement comments provided to each teacher.
2. **Streamline Expectations and Eliminate Ineffective Practices** - Establish a common vision and expectations for all teachers. Get rid of the dog and pony show ritual of announced observations and focus upon daily instructional best practice.
3. **Improve Feedback** - Praise what is going well and give suggestions for improvement. Provide clear, practical examples and strategies that a teacher can begin to implement immediately. Timely feedback is essential.
4. **Be a Scholar** – Reading research positions principals to have better conversations with teachers about their own improvement. Use research that supports the types of effective pedagogical techniques that need to be seen in classrooms.
5. **Model** – Do not ask teachers to do anything that principals are not willing to do. Know how technology integration in the classroom and professional learning improve practice. If a teacher is struggling with assessments, do not just say they need to work on building better ones. Either provide an example or co-create an assessment together.
6. **Teach a Class** - Co-teach with both struggling and distinguished teachers. Lead by example, an instructional leader who “walks the walk” builds better relationships with staff and is positioned to engage staff in conversations to improve instruction.
7. **Grow Professionally** - Attend conferences, read books, get out of your education silo. Social media provides a 24/7 pathway to ideas, strategies, feedback, resources, and support that every educator should take advantage of.
8. **Write in Order to Reflect** - Journaling helps to reflect and process teaching, learning, and leadership. Asking teachers to journal prior to the post-observation conference is a great strategy to promote a conversation that is not one-sided.
9. **Integrate Portfolios** - Portfolios provide more clarity and detail on instruction over the entire school year. Portfolios can include learning activities, assessments, unit plans, examples of student work, and other forms of evidence to improve instructional effectiveness.
10. **Co-Observe** - Co-observe lessons with other principals then discuss.

Source: <https://www.nassp.org/2019/08/07/10-strategies-to-improve-instructional-leadership/>

Exhibit 2-28
Rigor Relevance Framework



Source: <https://www.nassp.org/2019/08/07/10-strategies-to-improve-instructional-leadership/>

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 2-10

The district's curricula lack horizontal and vertical alignment. A lack of alignment leads to learning gaps.

The first nine weeks of 2020-21, a K-12 core curriculum scope and sequence, organized by subject and grade, was provided to MDPS teachers. Detailed pacing and content standards to teach were articulated. Subsequent documents in all subjects and grades are not consistently available across all campuses. The district's Pre-K-12 written, taught, and tested curriculum is misaligned horizontally and vertically in grade levels and subjects. No updated comprehensive

Pre-K-12 frameworks or scope and sequence purposefully organize and give structure and design to core curricular content, rigor, and relevancy.

With no written district-wide core curriculum frameworks or scope and sequence that guide the written, taught, and tested curriculum, teachers implement and adhere to various pacing formats. Ongoing processes and procedures are not in place to horizontally and vertically align and calendar pace the core curriculum based on frameworks or a scope and sequence. Pacing procedures are needed to address curriculum gaps and redundancies based on student performance data. A system to monitor appropriate remediation, review, and maintenance based upon student data are needed.

At grade levels and subjects, there is no consistent monitoring and adjustment process to ensure mastery and maintenance of key concepts and skills that prepares students for the next level of instruction and avoids learning gaps. Focus group and interview dialog indicated some MDPS teachers individually follow pacing guides provided by the textbook publishers, some teachers map the curricula in horizontal grade level or subject teams, and some teachers follow personal pacing platforms for teaching OAS. Since moving to the middle school concept, middle school teachers work as a team across subject areas to design and pace curricula. These varied practices leave both vertical and horizontal alignment compromised.

The district's teaching and learning staff have expectations to comprehensively improve pacing instruction and advance to teachers collaborating, analyzing, and unpacking OAS. There is an understanding of the need to map out a common format for curriculum and for common assessments at each grade level and subject area with accompanying lessons and resources. Leadership speaks of expecting teachers to use formative and summative student performance data. However, district-wide student performance data are not maximized by interfacing and weaving the student data results into vertically and horizontally adjusting curriculum frameworks and calendar pacing the standards-based curriculum.

In order for student performance and test scores to improve, is imperative that all teachers know exactly what OAS concepts and skills they are responsible to teaching and assessing. Following a common pacing guide detailing the time frame for when these concepts and skills are taught is important. Within the framework and pacing guides, teachers have freedom and flexibility to choose, determine, and personalize which strategies, best instructional practices, teaching behaviors, and resources set their students up for mastery and success. Frameworks and pacing documents outline content, teachers decide how to deliver instruction using only best instructional practices.

Student performance data for 2018-19 (the latest available year at this time of this report) show MDPS as among the lowest of its peers, as well as generally in decline. Responses by educators to the staff survey indicate incongruity among student performance, perception, and practice regarding curriculum alignment (**Exhibit 2-29**). 62 percent *agreed* or *strongly agreed* the curriculum is aligned while 38 percent *did not know*, *disagreed* or *strongly disagreed* that the curriculum is aligned.

Exhibit 2-29
Educator Survey Results Regarding Curriculum

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The district's curriculum is aligned from grade to grade and from class to class.	8%	54%	19%	14%	5%
Teachers in our schools know the material they teach.	21%	60%	10%	8%	1%
Teachers have adequate supplies and equipment needed to perform their jobs effectively.	4%	26%	10%	41%	20%

Source: Prismatic Survey Results, February 2021

On the student survey, only 34 percent of high school students *agreed* or *strongly agreed* they “knew what to expect on state tests” (**Exhibit 2-30**). This is perhaps another indication of the lack of instructional alignment and pacing.

Exhibit 2-30
High School Student Survey Results Regarding Curriculum and Assessment

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I knew what to expect on the state tests.	6%	28%	31%	23%	13%

Source: Prismatic Survey Results, February 2021

Curriculum frameworks, scope and sequence and pacing guides provide the basic structure which organizes the standards and outlines the content and skills students are to learn, prepares students for the next level of learning, and guides teachers for review and maintenance of skills and concepts. Documents such as these define what the student should know and be able to do. Based on the frameworks, the curricula are horizontally and vertically aligned.

Vertical alignment organizes curriculum and builds skills and content from one grade level to the next and ensures students are prepared for the next level of content. Horizontal curriculum alignment is when all teachers at the same grade level or content area teach all students the needed content to be successful at the next level.³⁹

Alignment details “what content and skills are required and taught at each grade level. Calendar pacing tells “when” the content is taught and revisited. The curriculum frameworks provide a year-long overview, rather than a daily classroom perspective, of what content and skills are required over the course of the school year (Jacobs, 1997). Curriculum frameworks create a

³⁹ https://www.google.com/search?q=what+is+horizontal+curriculum+alignment&rlz=1C1CHZL_enUS721US721-&oq=what+is+horizontal+curri&aqs=chrome.0.0j69i57j0j0i22i30l4j0i390.11341j1j9&sourceid=chrome&ie=UTF-8

document for teachers to follow and gives guidelines to monitor accountability and ensure the required curriculum is being followed (O'Malley, 1982).⁴⁰

Curriculum pacing guides or calendars help teachers stay on track and ensure skills are revisited for review, reteach, and/or maintenance. These pacing guides serve a similar purpose to that of traditional scope-and-sequence documents, which lay out expectations of the material to be covered in each subject at each grade level. Pacing guides are different because they detail when the skills and content that are expected to be on the annual state test are presented to students. Teachers schedule these ongoing topics before the spring testing dates. Pacing guides are tied to benchmark assessments that take place quarterly or even more frequently, further delineating what teachers must teach and when they teach it. Some pacing guides specify the number of days, class periods, or even minutes that teachers should devote to each topic.⁴¹

Research and best practice recommend the identification and specific sequencing and scaffolding of content skills and learning objectives horizontally and vertically. Also recommended is identifying learning gaps based upon student performance. Teachers must know which skills and objectives have not been mastered and require remediation and re-teaching. Curriculum alignment or mapping involves a second-order change state which:

...involves dramatic departures from the expected, both in defining a given problem and in finding a solution. Curriculum Mapping may be considered a second-order change for our district because it challenges the status quo of historical practices and therein may result in resistance. However, it has the potential of resulting in transformative learning.⁴²

Jacobs (1997) states:

To make sense of our students' experiences over time, we need two lenses: a zoom lens into this year's curriculum for a particular grade and a wide-angle lens to see the K-12 perspective. The classroom (or micro) level is dependent on the site and district level (a macro view).

Though the micro and macro levels are connected throughout a district, there is a conspicuous lack of macro-level data for decision-making. Yet we need that big picture for each student's journey through his or her years of learning. With data from curriculum mapping, a school and its feeding and receiving sites can review and revise the curriculum within a larger, much-needed context. Data on the curriculum map can be examined both horizontally through the course of any one academic year and vertically over the student's K-12 experience.⁴³

Research indicates that the quality of pacing guides and how teachers respond to them vary greatly. For example, new teachers need curricular guidance. Studies find that new teachers can

⁴⁰ <http://www.ascd.org/publications/curriculum-handbook/421/chapters/Overview.aspx>

⁴¹ <http://www.ascd.org/publications/educational-leadership/oct08/vol66/num02/Pacing-Guides.aspx>

⁴² Marzano, R. J., Waters, T., & McNulty, B. A. (2005). *School leadership that works: From research to results*. Alexandria, VA: The Association for Supervision and Curriculum Development. p. 66.

⁴³ Jacobs, H. H. (1997). Chapter 1: The need for calendar-based curriculum mapping. *Mapping the big picture: Integrating curriculum & assessment K-12*. Alexandria, VA: The Association for Supervision and Curriculum Development.

benefit from resources such as pacing guides designed to help them figure out what to teach and how to teach it. It is also important for instructional leaders to understand that pacing guides, if poorly developed, intensify pressure on teachers to cover all the material specified and that teachers attempt to meet this demand in several ways. One is to devote more time to subjects that are tested, giving less attention to science, music, art, and social studies.⁴⁴ As noted in one resource:

The best pacing guides emphasize curriculum guidance instead of prescriptive pacing; these guides focus on central ideas and provide links to exemplary curriculum materials, lessons, and instructional strategies. Guides like these embody what many experienced teachers do when they plan their curriculum for the year: They chunk it, put topics in a sensible order, determine what resources to draw on, and develop a good sense of how long different elements will take. They also allow for some unpredictability depending on their particular mix of students. Constructive pacing guides assume differences in teachers, students, and school contexts. They adjust expectations through frequent revisions based upon input from teachers. Most important, they encourage instruction that challenges students beyond the content of the test.⁴⁵

Pacing is about the student, not the teacher. Pacing guides need built-in flexibility to address what to do if a student falls behind the pace or does poorly on an assessment. Pacing guides should allow for teacher autonomy to find instructional approaches and effective ways to reinforce and adjust the curriculum, as needed, based upon student data, that leads to standards mastery. **Exhibit 2-31** provides an example of a pacing guide that is mindful of outcomes on formative assessments and year-end goals. While it does not give teachers advice on how to monitor and adjust the pacing of the curriculum, this example does identify the priority lessons and the suggested alternatives for non-mastery.

⁴⁴ Kauffman, D., Johnson, S. M., Kardos, S. M., Liu, E., & Peske, H. G. (2002). "Lost at sea": New teachers' experiences with curriculum and assessment. *Teachers College Record*, 104(2), 273–300. doi: 10.1111/1467-9620.00163.

⁴⁵ <http://www.ascd.org/publications/educational-leadership/oct08/vol66/num02/Pacing-Guides.aspx>

Exhibit 2-31 Denver Public Schools Pacing Guide

Region	Pacing	Unit	Standards	Big Ideas	Essential Questions	Materials
	1 week	Population Density in Japan: Life in a Crowded Country	4.4, 5.2	<ul style="list-style-type: none"> Place Interaction 	<ul style="list-style-type: none"> How does population density affect the way people live? 	<ul style="list-style-type: none"> Geography Alive! Chapter 31, "Population Density in Japan: Life in a Crowded Country"
	2 weeks	The Global Sneaker: From Asia to Everywhere	4.3, 4.5	<ul style="list-style-type: none"> Interaction 	<ul style="list-style-type: none"> What is globalization, and how does it affect people and places? 	<ul style="list-style-type: none"> * Geography Alive! Chapter 32, "The Global Sneaker: From Asia to Everywhere"
Oceania and Antarctica	3 days	Mapping Lab: Oceania and Antarctica	1.3, 2.2	<ul style="list-style-type: none"> Geographic Tools Region 	<ul style="list-style-type: none"> How do I use and maps and other geographic tools to learn about the world around me? How does defining the world by regions help me understand the world around me? 	<ul style="list-style-type: none"> * Geography Alive! "Oceania and Antarctica Mapping Lab," Challenges 1-5 OR The Nystrom World Atlas, "Antarctica and the Arctic" lesson and "Australia and its Neighbors," Lessons 1-2
	2 weeks	The Pacific Islands: Adapting to Life Surrounded by Ocean	3.1, 5.2	<ul style="list-style-type: none"> Place 	<ul style="list-style-type: none"> How do people adapt to life in an island region? 	<ul style="list-style-type: none"> Geography Alive! Chapter 34, "The Pacific Islands: Adapting to Life Surrounded by Ocean"
	2 weeks	Antarctica: Researching Global Warming at the Coldest Place on Earth	3.1, 5.1, 6.2	<ul style="list-style-type: none"> Interaction Planning for the Future 	<ul style="list-style-type: none"> How might global warming affect the environment in the world's coldest places? 	<ul style="list-style-type: none"> * Geography Alive! Chapter 35, "Antarctica: Researching Global Warming at the Coldest Place on Earth"

* Indicates priority lesson. If you fall behind, go to next priority lesson.

Source: <https://grantwiggins.wordpress.com/2012/01/04/on-pacing-guides/>

RECOMMENDATION

Continue to develop and implement updated Pre-K-12 standards-based core curriculum frameworks/scope-and-sequence, that horizontally and vertically align curricula, based on student data results, along with teacher accountability measures.

MDPS should develop a district-wide framework and pacing document with a common vocabulary for addressing alignment issues. The district can build and expand on the 9-week scope and sequence provided at the beginning of the school year. As MDPS instructional leadership adopts and implements comprehensive standards-based horizontal and vertical curriculum alignment documents, processes and procedures, curriculum frameworks and pacing guides also need consideration. Pacing guidelines should be incorporated into the curriculum framework. Implementing pacing guides requires caution so they are not too prescriptive, mandated tight timelines for coverage of content only. Strengthen the alignment through integrating the curricula should be strongly considered.

Ultimately, the curriculum scope and sequence, framework, and pacing guide become one working document. There is a plethora of formats and options to peruse for designing and implementing standards-based frameworks and pacing guides. MDPS framework and pacing conversations must consider teacher friendly formats, processes, and procedures for implementation and maintenance that integrate one-to-one digital technology. Phasing out or balanced use of textbooks should accompany the transition to adopting a framework for alignment and pacing the curriculum. Supporting the learning needs of the districts' at-risk,

Special Education, and English Language Learner (ELL) students is also of primary importance.⁴⁶

The Curriculum Decisions Website examines mapping research and provides pragmatic rationale. The site addresses the importance of the horizontal and vertical curriculum alignment and serves as a valuable foundational resource. It also provides descriptions of the alignment, pacing, and curriculum mapping process and how the process is completed.⁴⁷

FISCAL IMPACT

This recommendation can be implemented with existing resources.

C. SPECIAL PROGRAMS

School districts offer educational services to students through a variety of programs, including regular education programs and special programs. Special programs are designed to provide quality services for student populations such as those in special education and Gifted and Talented education programs. It also includes educational supports, such as library programming.

Special Education

The *Individuals with Disabilities Education Act (IDEA)*, Part B is the federal law that supports special education and related service programming for children and youth with disabilities, ages three through 21. The major purposes of *IDEA* are:

- to ensure that all children with disabilities have available to them a free, appropriate, public education that emphasizes special education and related services designed to meet their unique needs and prepare them for employment and independent living;
- to ensure that the rights of children and youth with disabilities and their parents are protected; and
- to assess and ensure the effectiveness of efforts to educate children with disabilities.

Oklahoma statutes require that each school district provide special education and related services for all children with disabilities who reside in that district in accordance with *IDEA*. This duty may be satisfied by:

⁴⁶ Suggested resources that provide planning and background knowledge, formatting ideas, and information to include in pragmatic student-centered frameworks and pacing guides include: <https://sde.ok.gov/oklahoma-curriculum-frameworks>; <https://sde.ok.gov/oklahoma-family-guides>; <https://www.baschools.org/vnews/display.v/SEC/Curriculum%20and%20Instruction>; <https://www.currituck.k12.nc.us/domain/22>; and <https://www.cantonschools.net/site/handlers/filedownload.ashx?moduleinstanceid=7777&dataid=1661&FileName=11th%20Grade%20ELA%20Pacing%20Guide%202017-18.pdf>

⁴⁷ <https://www.curriculumdecisions.com/>; <http://www.curriculummapping101.com/curriculum-mapping-general>

-
- directly providing special education for such children;
 - joining in a cooperative program with another district or districts to provide special education for such children;
 - joining in a written agreement with a private or public institution, licensed residential child care and treatment facility, or day treatment facility within such district to provide special education for children who are deaf or hard-of-hearing, children who are blind or partially blind, or other eligible children with disabilities; or
 - transferring eligible children and youth with disabilities to other school districts pursuant to the provisions of the *Education Open Transfer Act*.

Districts must develop an Individualized Education Plan (IEP) for each child receiving special education services under *IDEA*. The IEP must include input from the parent and regular education teachers and be aligned with education plans for children in regular education classrooms. *IDEA* requires districts to provide educational services in the “least restrictive environment” and to include students with disabilities in state and district assessment programs. Instructional arrangements for students may include:

- all instruction and related services in a regular classroom in a mainstreamed setting;
- a resource room where the student is removed from the regular classroom less than 50 percent of the day;
- a self-contained classroom where the student is removed from the regular classroom more than 50 percent of the day; or
- a separate “self-contained” classroom for those whose disability is so severe that a satisfactory education cannot take place for any part of the day in a regular classroom.

Under *IDEA*, a school district can only place a student in a more restrictive setting such as a day treatment program or residential treatment placement if the student’s needs and educational program cannot be satisfactorily provided in the regular classroom with supplementary aids and services.

The reauthorization of *IDEA* in 2004, which went into effect in 2005, includes provisions substantially changing the way learning-disabled students are identified. One change in the law addresses early intervention services and creating opportunities to determine a student’s Response to Intervention (RtI). This approach was adopted in 2010 by SDE. With RtI, schools identify students at-risk for poor learning outcomes; monitor student progress; provide evidence-based interventions; and adjust the intensity and nature of those interventions depending on a student’s responsiveness. Based upon the results of these interventions, the district may need a referral for additional testing to determine if there is a specific learning disability.

IDEA now allows a school district to use up to 15 percent of its *IDEA* allocation to support services to students who have not been identified as needing special education services, but who

need additional academic and behavioral support to succeed in a general education environment. Funds may be used for professional development in scientific research-based interventions, literacy instruction, and the use of adaptive or instructional technology. It also permits use of funds for educational and behavioral assessments.

An effective special education program is defined by *IDEA* as having the following elements:

- pre-referral or tiered intervention in regular education;
- referral to special education for evaluation;
- comprehensive nondiscriminatory evaluation;
- initial placement through an IEP meeting;
- provision of educational services and supports according to a written IEP;
- annual program review;
- three-year re-evaluation; and
- dismissal from the special education program.

Exhibit 2-32 shows comparison data on the percentage of special education students and the number of full-time equivalent (FTE) teachers in special education for 2018-19. MDPS's identification rate, at 15.1 percent, was the second lowest peer district rate, higher than Union. MDPS had the third lowest special education student-to-teacher ratio of all comparison groups.

Exhibit 2-32
Students and Teachers in Special Education Programs, 2018-19

Entity	ADM	Special Education Percentage of All Students	Special Education Teachers FTEs	# of Special Education Students per FTE
Mid-Del	13,958	15.1%	113.9	18.5
Lawton	13,596	19.2%	189.2	13.8
Moore	24,546	16.8%	187.2	22.0
Norman	16,032	17.4%	143.3	19.5
Putnam City	19,241	15.6%	157.8	19.0
Union	15,656	12.2%	83.0	23.0
Community Group	15,612	15.4%	136.0	17.7
State	1,289	16.1%	8.3	25.0

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-33 compares district special education revenues and expenditures for 2018-19. At 70.1 percent, MDPS was tied with the fourth highest revenue-expenditure ratio among its peers.

Exhibit 2-33
Comparison of Special Education Revenues and Expenditures, 2018-19

Entity	Total Revenues for Special Education	Total Expenditures for Special Education	Revenues as Percent of Expenditures
Mid-Del	\$10,842,716	\$15,456,609	70.1%
Lawton	\$13,978,516	\$23,180,299	60.3%
Moore	\$21,959,460	\$30,068,199	73.0%
Norman	\$15,536,817	\$22,161,959	70.1%
Putnam City	\$17,025,300	\$20,848,489	81.7%
Union	\$9,408,931	\$12,332,635	76.3%
Peer Average	\$15,581,805	\$21,718,316	71.7%

Source: Oklahoma Cost Accounting System (OCAS) Impact Aid Letters and Prismatic calculations, 2020

Exhibit 2-34 shows the trend in special education revenues and expenditures over time. As shown, MDPS' special education revenues lagged behind expenditures every year.

Exhibit 2-34
Trend in MDPS Special Education Revenues and Expenditures

Year	Total Revenues for Special Education	Total Expenditures for Special Education	Revenues as Percent of Expenditures
2014-15	\$9,120,692	\$12,124,751	59.0%
2015-16	\$9,124,975	\$12,660,603	72.1%
2016-17	\$9,092,705	\$12,897,288	70.5%
2017-18	\$9,641,032	\$13,713,836	70.3%
2018-19	\$10,842,716	\$15,456,609	70.1%

Source: Office of Educational Quality and Accountability, Profiles Database

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MDPS departments and functional areas. **Exhibit 2-35** provides the results for special and alternative education programs in MDPS, from just district educators (administrators, classroom teachers, other certified, and instructional aides). Less than half, 47 percent, gave special education an A or B; 14 percent gave it a D or F. Less than a quarter, 22 percent, gave alternative education an A or B; 8 percent gave it a D or F.

Exhibit 2-35
Educator Survey Results Regarding MDPS Special and Alternative Education

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Special Education	18%	29%	19%	10%	4%	21%
Alternative Education	7%	15%	10%	4%	4%	61%

Source: Prismatic Survey Results, February 2021

FINDING 2-11

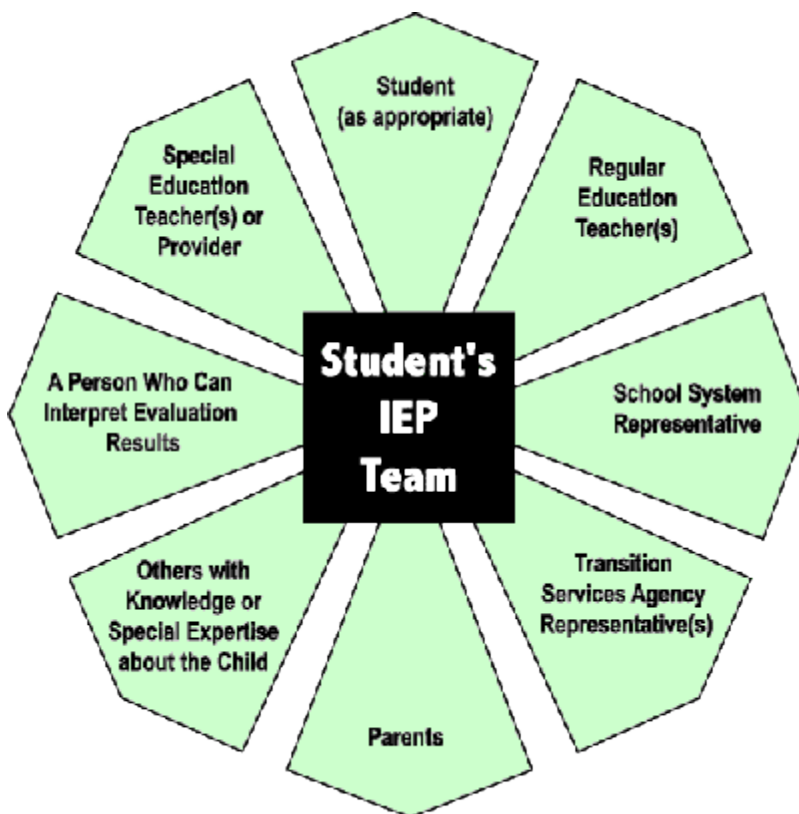
There have been some past concerns in MDPS as to whether all components of the special education program, and particularly student IEPs, were in compliance, updated, and maintained in accordance *IDEA* federal and state laws and regulations. More recently, there have been intensive efforts and guidance placed on assessments, identification protocols, and on annual updates to IEPs being complete and updated.

The district has placed intentional focus on providing appropriate service based on student need, ensuring student's experience their best learning environment, are provided with needed aids and services, and have appropriate interventions and assessments.⁴⁸

Exhibit 2-36 illustrates individuals represented on a typical IEP Team. High performing IEP teams function cooperatively and make sure student IEP goals are annually reviewed and revised. All team members assume responsibility for helping the student succeed both in academics and everyday school life. Continued effort focuses on clear communication and effective and supportive leadership as IEP teams seek to meet all legal and academic requirements. IEP teams function in concert and work together to ensure all services and support systems are in continuously in place to help students reach the identified goals. Ongoing monitoring must be present to assess if goals are or are not met, ensure progress is taking place, and if the IEP is being followed as written.

⁴⁸ <https://www.understandingspecialeducation.com/IEP-law.html>

Exhibit 2-36
IEP Team Members



Source: <https://www.speechbuddy.com/blog/legal-issues/navigating-the-individualized-education-program-iep/>

RECOMMENDATION

Continue the intentional focus to ensure the special education program is in compliance with all state and federal guidelines, IEP teams are high functioning, and all students are served in accordance with the written IEP.

The district's teaching and learning team, principals, special education teachers, and general education teachers must remain vigilant and work as a collaborative team to not only follow legal requirements but also meet the needs of struggling and identified learners. The law requires team effort in serving students. MDPS should focus on improving and cultivating effective teams. It is important for all team members to understand the competencies needed to build and lead a high performing team, defined as "a small number of people with complimentary skills who are committed to a common purpose, performance goals, and approach for which they hold themselves mutually accountable."⁴⁹

Exhibit 2-37 describes characteristics of effective PLC teams. These would also hold true for MDPS IEP teams. The IEP team should focus on identifiable student goals, member roles in

⁴⁹ *The Wisdom of Teams* Harvard Business School Press, 1993.

meeting the goals, positive social support, federal, state, and district goals, and effective communication.

Exhibit 2-37

Effective Team Characteristics

Some of the foundational work of creating a professional learning community is to ensure each team is functioning at an exemplary level. So, what does that mean? How do we define exemplary-level teams? Once you've established the time for teams to meet, and teams have established their norms and identified their roles – then what? How do teams move to high-functioning teams that are producing results?

1. **Collective Responsibility** – Each member of the team takes on collective responsibility of all students (DuFour et al., 2016). Every teacher and member in a team feels responsible for the success of special education students, they are willing to contribute their skills to ensure high levels of learning for the student.
2. **Focus** – IDEA requirements, deliver or change instruction based on identified need, follow data to help diagnose the problem, and all team members support the process. Discuss and share strategies based on teacher and staff member strengths. High-functioning teams spend time on self-reflecting and acknowledging that the issues are student driven, and how to adapt instruction. The team focuses on how we can teach differently so the student succeeds.
3. **Jobs** – Establishing roles and responsibilities. Identify and own the roles needed, know and understand what is expected. Ensure consistency in the roles to ensure all members are functioning at high levels.
4. **Assessment** – Self-assessing is an important piece to ensure teams are working towards that exemplary level and producing positive student results.

Source: <https://www.solutiontree.com/blog/creating-high-functioning-teams/>, <https://mikeschultz.medium.com/10-team-characteristics-for-effective-teamwork-e0429b362ddd>

IEP teams should function with the same characteristics as high performing PLC teams. The same skill set applies to IEP teams. The special education director can also use information from the corporate and industry world to improve team function. A major component of maintaining special education compliance is effective, high functioning teamwork.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 2-12

The MDPS special education program is in the process of transitioning from a Discrepancy Model to the Response to Intervention (RtI) Model for initial screening of at-risk students with learning needs. A Multi-Tiered Systems of Support (MTSS) process guide was developed to help special education services transition to the RtI Model. The guide provides processes and procedures for

early identification and intervention services for at-risk students. It is a first step to seamlessly interface with the current RtI services. Elementary principals have been trained in the MTSS process. All instructional staff have access to the guide.

MTSS helps schools and districts to organize resources through alignment of academic standards and behavioral expectations. Implemented with fidelity and sustained over time, MTSS accelerates the performance of every student to achieve and/or exceed proficiency. To meet the needs of all students in a school, including those with the most substantial cognitive disabilities, the MTSS framework needs to align general education and special education systems that provide supplemental special education supports. A focus on standards-based instruction and specific student learning needs leads to successful outcomes.^{50,51}

COMMENDATION

The district is commended for the development and implementation of the Multi-Tiered Systems of Support (MTSS) process.

FINDING 2-13

Across the district, campuses vary in the quality, effectiveness, and consistencies in implementing strategies, practices, and procedures for RtI tiered interventions. The district has not yet engaged in evaluations of RtI implementation among its schools.

Identification processes and procedures for placing students in tiers, interventions, and remediation timing and protocols vary. RtI Tiers 2 and 3 are over-populated in MDPS. High impact instruction and interventions in all tiers are lacking. There are inconsistencies detailing support structures and small group assignment, rotation, and assigned interventions. Instructional expectations, pedagogy, and remediation results lack rigor. These variances have led to an inverted RtI instructional balance. The glass ceiling mindset that MDPS students are high poverty and cannot function at a higher level have also led to an instructional imbalance.

The consulting team noted in focus groups and interviews no clear, consistent, understanding of structured tiered interventions. Test scores for struggling students indicate the need for targeted interventions. Teaching and learning team administrators, principals, and teachers expressed awareness of the need to address targeted interventions and clearly define procedures to more effectively meet the needs of at-risk students. The district has multiple systems of support teachers can tap into, including instructional coaches, facilitators, and tutors. However, implementation of comprehensive, consistent continuum of RtI prevention/intervention services is not yet pervasive.

Interviews and focus group discussions indicated a need for consistent data-driven interventions, routine and timely use of formative data to select strategies, and support structure that improves learning. It was also unclear how interventions are evaluated to ensure they are actually closing

⁵⁰Browder, D. M., & Mims, P. J. (in press). Using instruction that works: Evidence-based practices. In D. M. Browder, F. Spooner, G. R. Courtade, & contributors, Teaching students with moderate and severe disabilities (2nd ed.). Guilford Publications.

⁵¹ <https://nceo.umn.edu/docs/OnlinePubs/NCEOBriefMTSS.pdf>

learning gaps. Teachers provide interventions, but the RtI strategic and common process for determining appropriate placement and rotation in tiered groups, how to tailor differentiate instruction, and assessing the effectiveness of interventions remains inconsistent.

RtI is a continuum of service. At the lowest end of the RtI framework, many students in the general classroom are given small interventions. Most students respond favorably to them and no other interventions are needed; however, if they do not demonstrate progress, more intensive interventions are tried (a move upward on the continuum). At the highest end of the framework, a small number of students are given intense interventions, with special education support.⁵²

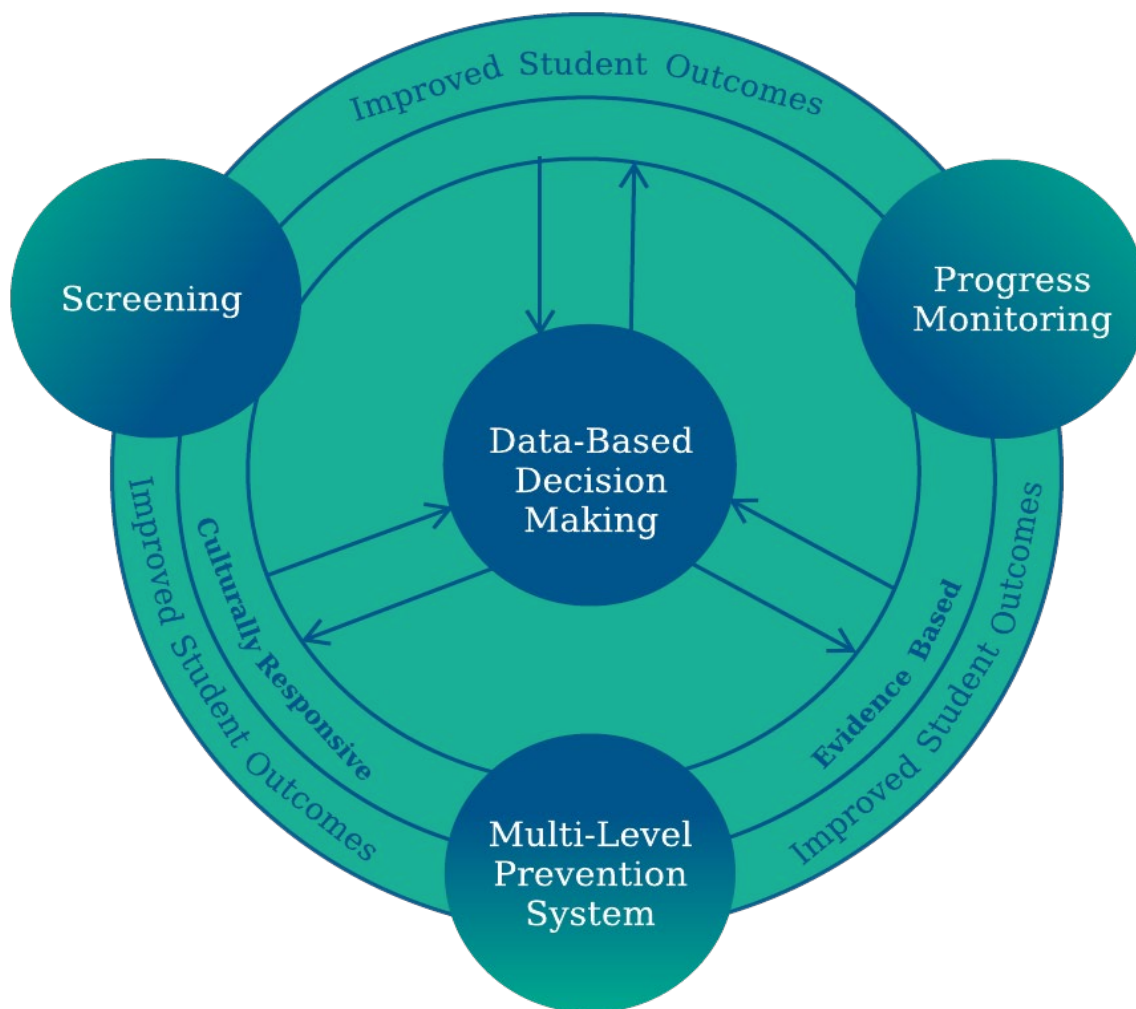
When implemented appropriately, the RtI process is the first step in assisting a student with their learning. RtI early interventions are utilized in conjunction with regular classroom instruction. However, targeted, specific interventions can also be assigned to identified special education students such as braille books, wheelchairs, one-on-one teaching, or an aide.⁵³

The RtI model has both an academic and behavioral component. Oklahoma's RtI model is Oklahoma Tiered Intervention Support System (OTISS) model. **Exhibit 2-38** illustrates the RtI process.

⁵² <https://www.specialeducationguide.com/pre-k-12/response-to-intervention/>

⁵³ <https://www.specialeducationguide.com/pre-k-12/response-to-intervention/how-is-rti-different-from-special-education/>

Exhibit 2-38
Essential RtI Components



Source: <http://www.rti4success.org/essential-components-rti/data-based-decision-making>, re-created by Prismatic, March 2016

The research behind RtI implemented with school-wide fidelity indicates that staff will see⁵⁴:

- a valid and reliable assessment system is in place;
- curriculum that is evidence-based and includes grade level components across tiers; and
- instructional practices are evidence-based and follow set parameters.

RtI provides structure for lesson planning and instructional delivery. **Exhibit 2-39** summarizes the essential questions teacher teams address in lesson planning and planning for delivering instruction using RtI.

⁵⁴ http://www.rti4success.org/sites/default/files/FidelityImplementation_10-20-09_FINAL.pdf

Exhibit 2-39
RtI Lesson Planning and Instruction

Adherence	<ul style="list-style-type: none"> • How well do you “stick to the plan?” • How well do you stay true to the intervention and not drift from the core elements? • Did you make sure all pieces of the intervention have been implemented as intended?
Duration/Exposure	<ul style="list-style-type: none"> • How often does a student receive an intervention? • How long does an intervention last? • In elementary schools: Providing 90 minutes of reading instruction five days a week? Progress monitoring a minimum of every two weeks?
Quality of Delivery	<ul style="list-style-type: none"> • How well was the intervention or instruction delivered? • How well do you differentiate one intervention from another? • How well do you avoid inserting pieces from other interventions?
Program Differentiation	<ul style="list-style-type: none"> • How well do you differentiate one intervention from another? • How well do you avoid inserting pieces from other interventions?
Student Responsiveness	<ul style="list-style-type: none"> • How engaged and involved are the students in this intervention or activity? • Amount of time students spend on task? • Levels of enthusiasm for activity? • Extent students feel they learned what was expected? • Number of students meditating with their eyes closed and heads on their desks?

Source: http://www.rti4success.org/sites/default/files/FidelityImplementation_10-20-09_FINAL.pdf.

A district implementing RtI successfully has clearly defined procedures, techniques, feedback loops, and decision-making processes within each component. The district’s plan will:

- detail responsibilities of specific persons (coaches, teachers, administration);
- create a data system for measuring operations, techniques, and components;
- link fidelity data to improved outcomes data;
- approach instructor observation in a positive manner, emphasizing problem-solving; and

- create accountability measures for noncompliance.⁵⁵

RECOMMENDATION

Evaluate all aspects of current RtI services for efficacy and impact.

This district needs to involve all principals, teachers, and teaching and learning team staff who work directly with curriculum and instruction. The evaluation should scrutinize the overall RtI framework being implemented and the efficacy and impact of all components. The evaluation should examine the assessment and diagnosis processes, analysis and use of data and processes for tiered placement, interventions, and measuring progress. The review should give explicit focus on depopulating Tiers 2 and 3 and improving practices, procedures, and processes to effective interventions at Tier 1.

The RtI evaluation should ask:^{56,57}

- Who is being served?
- How are they identified?
- What are they getting?
- How are we monitoring progress?
- What progress are students making?
- What is working well?
- What are challenges?
- What can we do better?

The results of district's comprehensive review and evaluation should include improvement measures to ensure:

- staff follow clear data-based decision-making rules;
- predetermined fidelity checks are applied routinely;
- integration and sustainability practices are followed; and

⁵⁵ Johnson, E., Mellard, D. F., Fuchs, D., & McKnight, M. A. (2006). *Responsiveness to intervention (RTI): How to do it*. Lawrence, KS: National Research Center on Learning Disabilities.

⁵⁶ https://www.slideshare.net/ChristopherKolar1/cera-17-district-program-evaluation-to-improve-rtimtss?from_action=save

⁵⁷ <https://work.chron.com/difference-between-facilitators-teachers-11510.html>

- staff regularly communicate using the same vocabulary.⁵⁸

Based on the results, the district should make adjustments to strengthen RtI early intervention services. The RtI process must interface and work seamlessly with the MTSS process.

The guide *Considering Tier 3 Within a Response-to-Intervention Model* can serve as a resource to understand the RtI process.⁵⁹ The *RtI Essential Components Integrity Rubric* and the *RtI Essential Components Integrity Worksheet* are useful appraisal tools.⁶⁰

The district may also consider guidelines for planning remediation for all at-risk students. All students, and particularly ones at-risk, learn best if the following components are included in lesson planning.

- Content objectives – what exactly is to be taught;
- Language objectives – ELL students are not likely to be as familiar with the vocabulary associated with content specific vocabulary, this must be explicitly taught, clearly defined, using some sort of visual, revisited and reviewed multiple times, taught and used contextually;
- Utilizing Visuals – photographs, pictures, authentic video materials, graphs, maps, and graphic organizers;
- Activating Prior Knowledge – each student has a different set of experiences that influences how a student interprets and organizes new information. Once the topic becomes personal, it is more interesting and applicable to the student;
- Expanding Upon Prior Knowledge – using their experiences to help make connections to new information;
- Scaffolding – introduce skills and tasks in a slow, manageable manner, in the beginning stages of learning, students need more support, as the skill is strengthened the supports are methodically eliminated; and
- Working Together – working with peers creates a low-pressure, confidence-building environment optimal for progress, small groups provide safe settings for practicing language, students learn language nuances, native speakers, or more fluent peers are excellent mentors.⁶¹

FISCAL IMPACT

This recommendation can be implemented with existing resources.

⁵⁸ Ibid.

⁵⁹ <http://www.rtinetwork.org/essential/tieredinstruction/tier3/consideringtier3>

⁶⁰ <https://www.rti4success.org/resource/essential-components-rti-integrity-rubric-and-worksheet>

⁶¹ <https://www.fluentu.com/blog/educator-english/instruction-strategies-for-ell-students/>

Gifted and Talented Education

Chapter 8 *Article VII, Section 904* of the School Law Book defines Gifted and Talented children as “those children identified at the preschool, elementary, or secondary level as having demonstrated potential abilities of high-performance capabilities and needing differentiated or accelerated educational services.” The definition includes students who scored in the top three percent on any national standardized test of intellectual ability or who excel in the areas of creative thinking ability, leadership ability, visual performing arts ability, and specific academic ability.

School Law Book *Section 910* requires each school district to provide Gifted and Talented educational programs and to serve those identified students who reside within the school district boundaries. The local board of education is required to submit a plan for Gifted and Talented to the State Board of Education and to provide annual program reports to the SDE.

The required components for Gifted and Talented education programs includes:

- a written policy statement which specifies a consistent process for assessment and selection of children for placement in Gifted and Talented programs in grades one through 12;
- a description of curriculum for the Gifted and Talented educational program, demonstrating that the curriculum is differentiated from the normal curriculum in pace and/or depth, and that it has scope and sequence;
- criteria for evaluation of the gifted child educational program;
- evidence of participation by the local advisory committee on education for Gifted and Talented children in planning, child identification, and program evaluation;
- required competencies and duties of Gifted and Talented educational program staff; and
- a budget for the district’s Gifted and Talented educational programs.

Exhibit 2-40 shows the trend in the gifted and talented identification rate over time. From 2014-15 to 2018-19, MDPS’ identification rate increased and was higher than the community group and state, apart from 2014-15. However, MDPS’ identification rate was generally lower than those of the peer districts.

Exhibit 2-40
Trend in Percentage of Gifted and Talented Education Students

Entity	2014-15	2015-16	2016-17	2017-18	2018-19
Mid-Del	14.3%	14.8%	16.1%	16.4%	14.9%
Lawton	8.4%	8.2%	8.6%	8.1%	7.8%
Moore	17.9%	15.3%	18.0%	17.0%	16.1%
Norman	23.6%	24.3%	26.0%	26.1%	27.5%
Putnam City	15.7%	16.1%	16.5%	16.3%	15.4%
Union	19.3%	19.2%	20.1%	19.1%	18.7%
Community Group	14.5%	14.7%	15.5%	15.2%	14.4%
State	14.2%	14.2%	14.5%	13.9%	13.6%

Source: Office of Educational Quality and Accountability, Profiles Database

According to the National Association for Gifted Children,⁶² between six and ten percent of students are gifted.⁶³ Contrary to some common misconceptions, gifted students often need a different educational approach in order to be engaged and succeed in the classroom.⁶⁴ In 2018-19, Oklahoma allocated \$54.4 million to support gifted education.⁶⁵

FINDING 2-14

The MDPS Gifted and Talented program lacks strength in the areas of identification, rigor, and program evaluation. This reduces the quality of educational opportunities for gifted MDPS students.

The district serves elementary students through a pull-out program. In the regular classroom, teachers need continued direction to deliver differentiated curriculum, creative enrichment, and opportunities for leadership, and advanced thinking. Middle school students are served through elective courses and accelerated courses in math and English language arts. High school students are primarily served in honors courses, Advanced Placement courses, electives, and extracurricular activities.

The MDPS Gifted Education Plan is posted on the school website. The district's belief statements, along with parent resources, are also posted. The MDPS Gifted Education Plan meets all SDE program requirements. Interview and focus group conversation indicated the need to set expectations for intentionally enriching classroom instruction and heighten the interaction between gifted students and the opportunities provided by teachers. It was learned that AP teachers will now be required to attend the designated training in order to teach an AP class.

Gifted and talented students and those with high abilities need gifted education programs that will challenge them in regular classroom settings and enrichment and accelerated programs to

⁶² www.nagc.org

⁶³ <https://www.k12dive.com/news/identifying-gifted-and-talented-students-with-equity-proves-difficult/413434/#:~:text=According%20to%20the%20National%20Association,organization%20collects%20these%20student%20statistics.>

⁶⁴ <https://www.nagc.org/myths-about-gifted-students>

⁶⁵ <https://nagc.org/state-of-states>

enable them to make continuous progress in school. A study looking at gifted students who participated in talent development through competitions, the researchers reported a long-term impact on these students' postsecondary achievements, with 52 percent of the 345 students who participated having earned doctoral degrees.⁶⁶

RECOMMENDATION

Continue to strengthen the Gifted and Talented Program through annual program review including clear procedures for identifying students and providing enriched learning environments for all students.

Further benefits of gifted programs have been shown to include that students who had participated in gifted programs maintained their interests over time and stayed involved in creative productive work after they finished college and graduate school.⁶⁷

FISCAL IMPACT

This recommendation can be implemented with existing resources.

D. STUDENT SERVICES

Student services are comprised of counseling, health services, and social services in most Oklahoma districts. Services provided include:

- college and career counseling;
- health education and services;
- substance abuse and psychological counseling;
- social services; and
- graduate follow-up.

Student services are evolving into a more powerful tool to assist students. They are becoming increasingly more valuable in providing needed support and guidance for students' college questions, career options, and individual needs.

Guidance and Counseling

Oklahoma State Board of Education Accreditation Standards for guidance and counseling are:

⁶⁶ Campbell, J. R., & Walberg, H. J. (2011). Olympiad studies: Competitions provide alternatives to developing talents that serve national interests. *Roeper Review*, 33, 8–17.

⁶⁷ Westberg, K. L. (1999, Summer). What happens to young, creative producers? NAGC: *Creativity and Curriculum Division Newsletter*, 3, 13–16.

- The counseling staff, parents, administrators, and others shall provide guidance and counseling program direction through involvement in assessment and identification of student needs.
- The school shall develop a written description of a guidance and counseling program with special provisions for at-risk students. The program shall address assessed needs of all students, including those who are identified as at-risk and shall establish program goals, objectives, and evaluation.
- Each school shall provide an organized program of guidance and counseling services that include: counseling services available to students; a planned sequential program of guidance activities that enhance students' development; appropriate referrals to other specialized persons, clinics, or agencies in the community; and coordinated services.
- Each counselor shall follow a planned calendar of activities based upon established program goals and provide direct and indirect services to students, teachers, and/or parents.

The SDE publishes *The School Counselor's Guide: Developing a Comprehensive School Counseling Program Using Accreditation Standard VI*. This publication is designed to assist school districts in strengthening existing programs or developing new ones. The major components of the defined guidance curriculum include Guidance Curriculum Domains (Academic Development, Career Development, and Personal/Social Development); Student Competencies; and Guidance Curriculum Delivery.

The American School Counselor Association (ASCA) states, "School counseling programs are collaborative efforts benefiting students, parents, teachers, administrators, and the overall community. School counseling programs should be an integral part of students' daily educational environment and school counselors should be partners in student achievement."⁶⁸

ASCA recommends that school counselors divide time between four components:

- Guidance Curriculum – The guidance curriculum is structured with developmental lessons designed to assist students. The guidance curriculum is infused throughout the school's overall curriculum and presented systematically through K-12 classrooms.
- Individual Student Planning – School counselors coordinate ongoing activities designed to assist students individually in planning.
- Responsive Services – Responsive services are activities meeting individual students' immediate needs that may require counseling.
- Systems Support – School counseling programs require administration and management.

⁶⁸ <http://www.ascanationalmodel.org/>

Time allocated for each program component should depend on the developmental and special needs of the students served. While each district determines time allotments, ASCA recommends that school counselors spend 80 percent of their time in direct contact with students. Oklahoma high schools and middle schools are required to have one full-time counselor for every 450 students. At the elementary level a counseling and guidance program is required but does not have to be delivered by a certified counselor.

Exhibit 2-41 provides the trend in counselor staffing over time. MDPS has increased its counselor staffing over the last five years, though less than most of its peers.

Exhibit 2-41
Trend in Counselor Staffing Over Time

Entity	2014-15	2015-16	2016-17	2017-18	2018-19	Percent Change
Mid-Del	39.9	41.0	38.0	37.4	42.0	5.3% ▲
Lawton	48.5	46.8	46.3	48.6	49.5	2.1% ▲
Moore	55.8	56.9	58.0	57.4	60.1	7.7% ▲
Norman	39.7	40.0	39.5	42.2	43.0	8.3% ▲
Putnam City	45.5	46.5	46.5	46.5	50.8	11.6% ▲
Union	29.4	29.3	31.4	35.1	35.9	22.1% ▲
Community Group	40.8	40.9	40.5	41.9	44.5	9.1% ▲
State	3.1	3.1	2.9	2.9	3.0	(3.2%) ▼

Source: Office of Educational Quality and Accountability, Profiles Database

FINDING 2-15

The district's students have many counseling needs. Currently, the district lacks multi-faceted counseling support efforts to meet these needs.

High poverty, social trauma, and emotional trauma are common characteristics of many MDPS students. The district's counseling department has initiated trauma-informed professional development to help teachers better understand how social and emotional trauma impacts academic performance. Teachers need further support and guidance from counselors in understanding how trauma and poverty directly impact a student's ability to learn. In addition, chronic absenteeism has been insufficiently addressed thus far.

All MDPS students are entered into the Individual Career Academic Plan (ICAP). The secondary counselors assist students with college and career guidance, including the necessary steps to apply for Oklahoma Promise.

Effective school counseling programs are a collaborative effort between the school counselor, teaching staff, families, and community stakeholders. Counselors work with other educators to create an environment resulting in a positive impact on student achievement. School counselors' value and respond to the diversity and individual differences in their student population and community. They are culturally sensitive and responsive to student needs. Comprehensive school counseling programs become an integral part of the school setting. Counselors ensure equitable

access to opportunities and rigorous curriculum for all students to participate fully in the educational process.⁶⁹

The ASCA National Model guides school counselors in the development of school counseling programs that:

- are based on data-informed decision-making;
- are delivered to all students systematically;
- include a developmentally appropriate curriculum focused on the mindsets and behaviors all students need for postsecondary readiness and success;
- close achievement and opportunity gaps; and
- result in improved student achievement, attendance, and discipline.⁷⁰

RECOMMENDATION

Continue to expand and strengthen the counseling program by offering expanded teacher training and services targeted to support and meet the academic, social, and emotional needs of students.

The teaching and learning team administrators and staff, along with building administrators and teachers, understand the need for continuing to build the outreach and usefulness of counseling services. The ASCA National Model guides school districts in continuing to improve counseling services. The district's leadership can explore the suggested options that help improve student outcomes. A good first step in this area would be completing an internal study of how each counselor is currently spending their time. Is each counselor reaching the ASCA recommendation of spending 80 percent or more of their time in direct contact with students? If not, what challenges are in the way of reaching that level of direct contact and how can they be overcome?

In addition to the ASCA National Model, a second resource the MDPS staff may use is the Framework for School Counseling Programs outlined by the ASCA. The framework guides counselors in developing and expanding programs that have substantial impact on student achievement, attendance, and discipline.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

⁷⁰ <https://schoolcounselor.org/About-School-Counseling/ASCA-National-Model-for-School-Counseling-Programs>

FINDING 2-16

The district offers Career Tech courses as electives that must then compete for enrollment with other electives, such as sports and fine arts. The high school and middle school programs provide hands-on learning to explore potential careers while learning leadership and workplace skills for life.

MDPS has a Mid-Del Career Tech Center (MDTC). It is the only tech center in the state that shares a board with a public school district. The Tech Center shares facilities with Tinker Air Force Base and Rose State College. Secondary students enrolled in Career Tech courses are taught in classrooms in the Mid-Del district. However, they may attend morning or afternoon courses and the Career Tech Campus. Through career classes, students can learn about and explore future careers, uncover interests, and build an educational plan. They can participate in Career Tech student organizations and compete in state and national contests.

Career tech courses play a substantial role in growing and preparing students for careers in the Oklahoma workforce. Career Tech coursework is work-based and promotes workplace skills. Students gain skills to compete and accept responsibility for success in a wide variety of workplace settings.⁷¹

Proponents of Career Tech Education (CTE) argue that such programming improves career opportunities by providing students with hands-on training and the soft skills necessary to succeed in the labor market. Similarly, advocates stress that CTE may improve core academic skills by fostering student engagement and motivating students to attend school more regularly. Cullen et al. (2013).⁷²

RECOMMENDATION

Continue to market Career Tech courses while working with counselors to enroll students who benefit most from the relevancy, hands-on strengths, and life skills of the career tech coursework.

The directors, principals, counselors and CTE staff should continue to explore all options to heighten awareness and increase the focus and benefits of CTE coursework. These courses broaden student options to succeed in both academic skills, technical skills, and employability skills. They provide students with one more opportunity to understand how what they are learning applies to real life.

There is increasing evidence that high-quality CTE programs in high school are actually complements – they can improve high school completion, employment, and earnings, all without sacrificing general learning outcomes. CTE students say their program helped them earn better grades academically.

⁷¹ <https://www.okcareertech.org/educators>; <https://educationnorthwest.org/resources/what-research-says-career-technical-education-cte-updated>

⁷² <https://www.brookings.edu/blog/brown-center-chalkboard/2019/09/20/the-promise-of-career-and-technical-education/>

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 3:
Business Operations

Chapter 3

Business Operations

This chapter addresses business operations of Mid-Del Public Schools (MDPS) and is divided into the following sections:

- A. Organization, Management, and Staffing
- B. Planning and Budgeting
- C. Accounting/Internal Control and Payroll
- D. External and Internal Auditing
- E. Cash Management
- F. Risk Management
- G. Fixed Asset Management
- H. Purchasing
- I. Warehousing

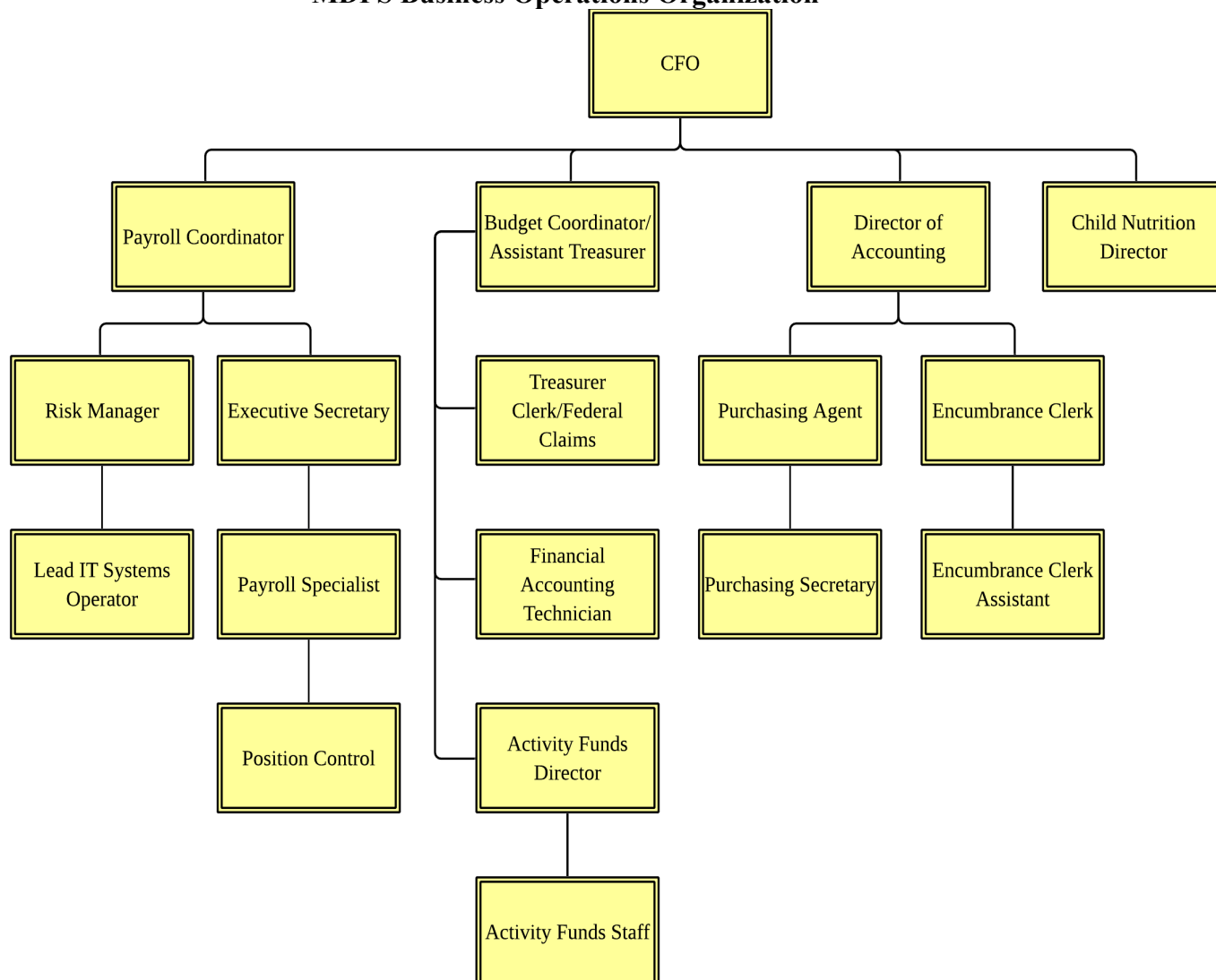
Financial, asset, and risk management in school districts require thoughtful planning and decision-making. Public school districts must meet or exceed increasingly rigorous academic standards without exceeding their budgetary resources. The superintendent and board of education must ensure that the district receives all available revenue from local, state, and federal sources and expends those funds in accordance with all applicable laws, rules, regulations, and policies so that the district can best meet or exceed the established academic standards.

Background

Oklahoma law entrusts a school district's board of education with specific responsibilities, including the oversight of investments and funds. The board can contract with the county treasurer for the management of its accounts, or it may choose to appoint a treasurer.

The organizational chart for MDPS is shown in **Exhibit 3-1**. The chief financial officer (CFO) oversees the four main functions of the department, which are payroll, budget/treasury, accounting, and child nutrition. Because the child nutrition department is addressed explicitly in Chapter 5, the organizational structure for that function has been omitted from the exhibit here for clarity.

Exhibit 3-1
MDPS Business Operations Organization



Source: Created by Prismatic, February 2021

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MDPS departments and functional areas. **Exhibit 3-2** provides the results for functional areas within the finance department.

Exhibit 3-2
Staff Survey Results Regarding Finance Functions

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Budgeting	7%	22%	24%	13%	7%	26%
Financial management	8%	23%	21%	12%	7%	28%

Source: Prismatic Survey Results, February 2021

Financial Statements

Financial statements for MDPS are prepared based upon Generally Accepted Accounting Principles (GAAP) that require funds to be combined by fund type, and for the financial statements to be prepared based on these combined funds. The accounts of the district are organized based on funds, each of which is a separate entity. The operations of each fund are accounted for by providing a separate set of self-balancing accounts that comprise its assets, liabilities, fund balances, revenues, and expenditures.

The district's financial statements are prepared on a prescribed procedure of accounting that demonstrates compliance with the cash basis and budget laws of the State of Oklahoma. Revenues are recorded as received in cash, except for revenues susceptible to accrual and material revenues that are not received at the standard time of receipt. Expenditures are recorded in the accounting period in which the fund liability is incurred and encumbered. MDPS prepares financial statements that include the fund types illustrated in **Exhibit 3-3**.

Exhibit 3-3
Funds Contained in the MDPS Annual Financial Report

Type	Purpose
General Fund	To account for all revenue and expenditures applicable to the general operations of the district.
Special Revenue Funds	To account for the financial activity of the building and child nutrition funds.
Debt Service Fund	To account for the revenue received from ad valorem taxes dedicated to the repayment of bonds and the subsequent payment of debt service.
Bond or Capital Projects Fund	To account for monies received from the sale of bonds for specific capital projects that span several years.
Agency Fund	To account for the activities of various student groups.

Source: MDPS Annual Financial Report, 2020

Oklahoma Cost Accounting System

Oklahoma Statutes, *Title 70, Section 5-135.2*, require school districts to report financial transactions for all funds using the Oklahoma Cost Accounting System (OCAS). Policies and procedures set forth in OCAS describe the basis of funding of Oklahoma public schools, the duties and procedures for the financial operations of the district, and the role of the Oklahoma

State Department of Education (SDE) and the district in receiving, dispensing, reporting, and accounting for school funds.

School boards, superintendents, business managers, encumbrance clerks, treasurers, independent auditors, and other parties with responsibilities for school budgets and the administration of school district funds must be familiar with OCAS policies and procedures. A district's annual audited financial statements must include all necessary financial information and related disclosures as prescribed by OCAS.

Revenue Sources

General fund revenues from state sources for current operations are governed primarily by the State Aid Formula under the provisions of *Title 70, Article XVIII. B. Section 200* of the School Law Book. The Oklahoma State Board of Education administers the allocation of state funding to school districts based upon state aid factors, the weighted average district membership, and several categories of prior year revenues.

Intermediate revenue sources primarily represent a four-mill levy assessed on a countywide basis and distributed to the county school districts based upon average daily membership for the preceding school year. Local sources of funding are derived from ad valorem (property) taxes assessed each year by the district pursuant to *Article X, Section 9* of the Oklahoma Constitution. These taxes consist of the following components:

- no less than five mills of a total of 15 mills levied for county, municipal, and school district purposes;
- 15 mills levied specifically for school district purposes;
- an emergency levy of five mills; and
- ten mills levied for local support.

A mill is the equivalent of \$1 per \$1,000 or (1/10 of a penny) of net asset valuation.

Assessment ratios for real and personal property are determined locally by each individual county assessor within guidelines established by the State Board of Equalization and the Oklahoma Tax Commission. Property within MDPS district boundary had a net valuation of \$569,202,294 in Fiscal Year 2019-20 and \$547,551,769 in 2018-19. The millage rate levied in Oklahoma County (where most of MDPS is located) has trended slightly higher over the past three years, due to bond issues (**Exhibit 3-4**).

Exhibit 3-4
Recent Millage Rate Components

Entity	2018-19	2019-20	2020-21
General Fund	36.14	36.14	36.14
Building Fund	5.16	5.16	5.16
Sinking Fund	25.42	26.08	29.93
State	66.72	67.38	71.23

Source: www.oklahomacounty.org

State funds and ad valorem taxes are accounted for in the general fund of the district, which is authorized pursuant to *Title 70, Section 1-117*, Oklahoma Statutes 2001, as amended pursuant to *Article X, Section 9*, of the Oklahoma Constitution. The purpose of the general fund is to pay for operations. School districts are not authorized to use these revenues for capital expenditures as defined in the statutes.

Ad valorem taxes for bond issues are required by statute to be collected by the county treasurer and remitted to the school district for deposit into the sinking fund. The total debt service requirements may be reduced by any surplus from the prior fiscal year or any direct contributions made into the sinking fund.

Ad valorem tax rates for sinking fund purposes are determined by ascertaining the actual dollars of revenues required for payment of principal and interest on indebtedness, fees, and judicial judgments. A reserve for delinquent taxes, in an amount of not less than five percent and not more than 20 percent of the net required tax collections, is added to the required debt service collections.

The revenue requirements for both debt service and general fund are then divided by the total assessed valuation of all taxable property within the district. Multiplying the resulting quotient by 100 results in the tax rate expressed as a percent; multiplying the resulting quotient by 1,000 results in the tax rate expressed in mills.

Between 2014-15 and 2018-19, the average assessed property value per student in MDPS increased by 13.6 percent (**Exhibit 3-5**). This was the largest increase among all the comparison groups, but slightly lower than the overall state increase.

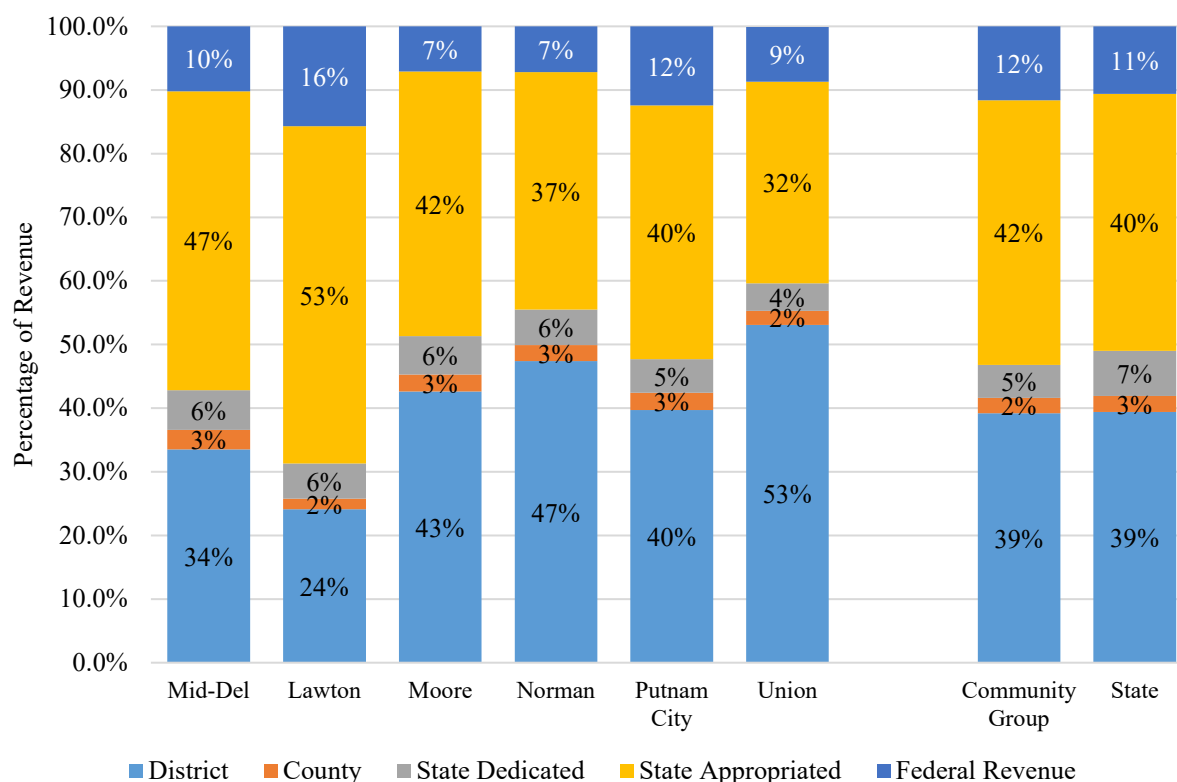
Exhibit 3-5
Trend in Assessed Property Value per Student

Entity	2014-15	2015-16	2016-17	2017-18	2018-19	Percent Change
Mid-Del	\$34,534	\$35,590	\$35,460	\$37,397	\$39,230	13.6% ▲
Lawton	\$29,846	\$30,828	\$29,505	\$31,143	\$31,649	6.0% ▲
Moore	\$43,668	\$45,731	\$44,373	\$46,096	\$48,033	10.0% ▲
Norman	\$56,851	\$60,164	\$59,842	\$60,203	\$61,804	8.7% ▲
Putnam City	\$50,215	\$52,050	\$51,531	\$53,637	\$55,073	9.7% ▲
Union	\$48,712	\$50,044	\$50,422	\$51,947	\$54,225	11.3% ▲
State	\$47,329	\$49,623	\$49,471	\$52,219	\$55,097	16.4% ▲

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3-6 shows the percentages of district, county, state, and federal revenues for MDPS and its peers. The majority of revenues for MDPS came from State Appropriated sources, and the second most from district sources.

Exhibit 3-6
Breakdown of Revenues by Source, All Funds, 2018-19



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3-7 shows the trend in revenue sources for MDPS, the community group, and state. The district's district and county revenue percentages were consistently lower than both the

community group and the state each year. The percentage of revenue from state sources was higher than the community group and the state each year. The percentage of federal funding was lower than the community group and the state most years.

Exhibit 3-7
Sources of Revenue as a Percentage of Total Revenue, All Funds

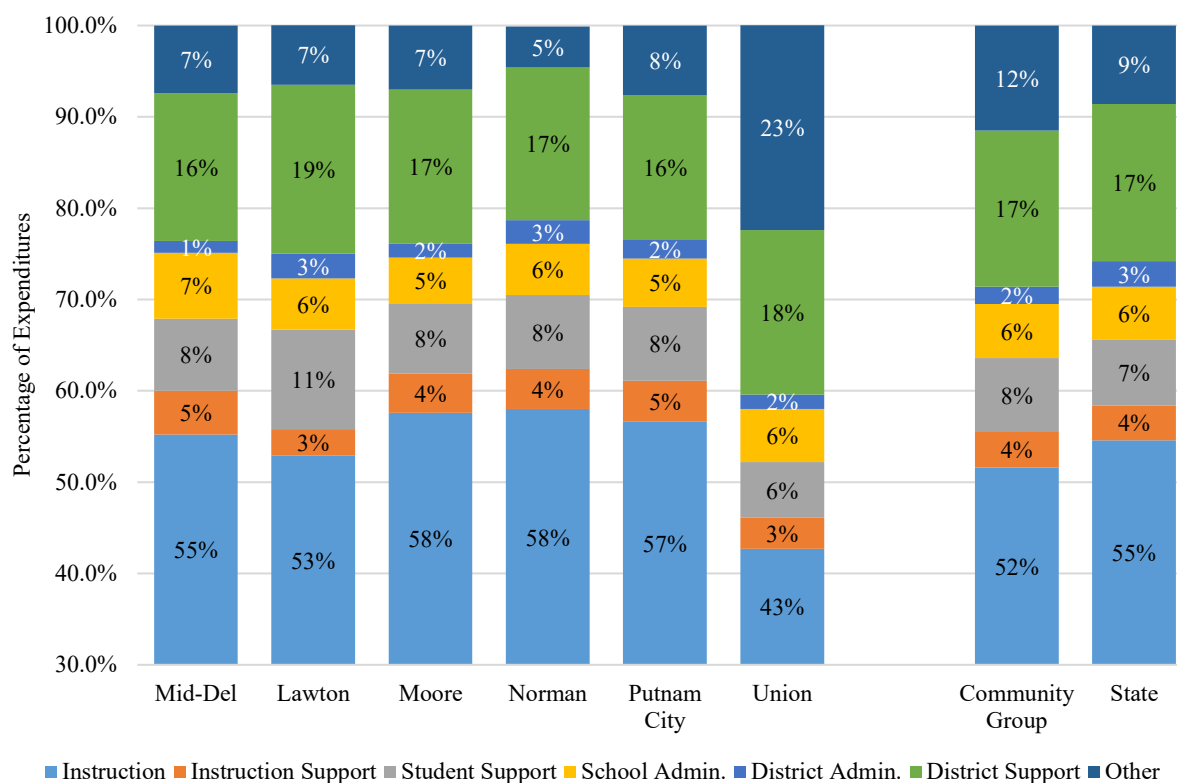
Source of Revenue	Entity	2014-15	2015-16	2016-17	2017-18	2018-19
District & County	Mid-Del	37.2%	38.2%	38.9%	39.4%	36.6%
	Community Group	38.1%	39.8%	42.4%	43.9%	41.6%
	State	40.8%	42.1%	43.2%	44.2%	41.9%
State Dedicated & Appropriated	Mid-Del	52.1%	50.7%	49.8%	50.5%	53.2%
	Community Group	48.4%	47.6%	45.3%	45.4%	46.8%
	State	47.7%	46.3%	45.5%	45.1%	47.5%
Federal	Mid-Del	10.7%	11.1%	11.4%	10.1%	10.3%
	Community Group	13.5%	12.6%	12.2%	10.8%	11.6%
	State	11.6%	11.6%	11.3%	10.7%	10.6%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3-8 compares 2018-19 expenditures as a percentage of total expenditures. As shown:

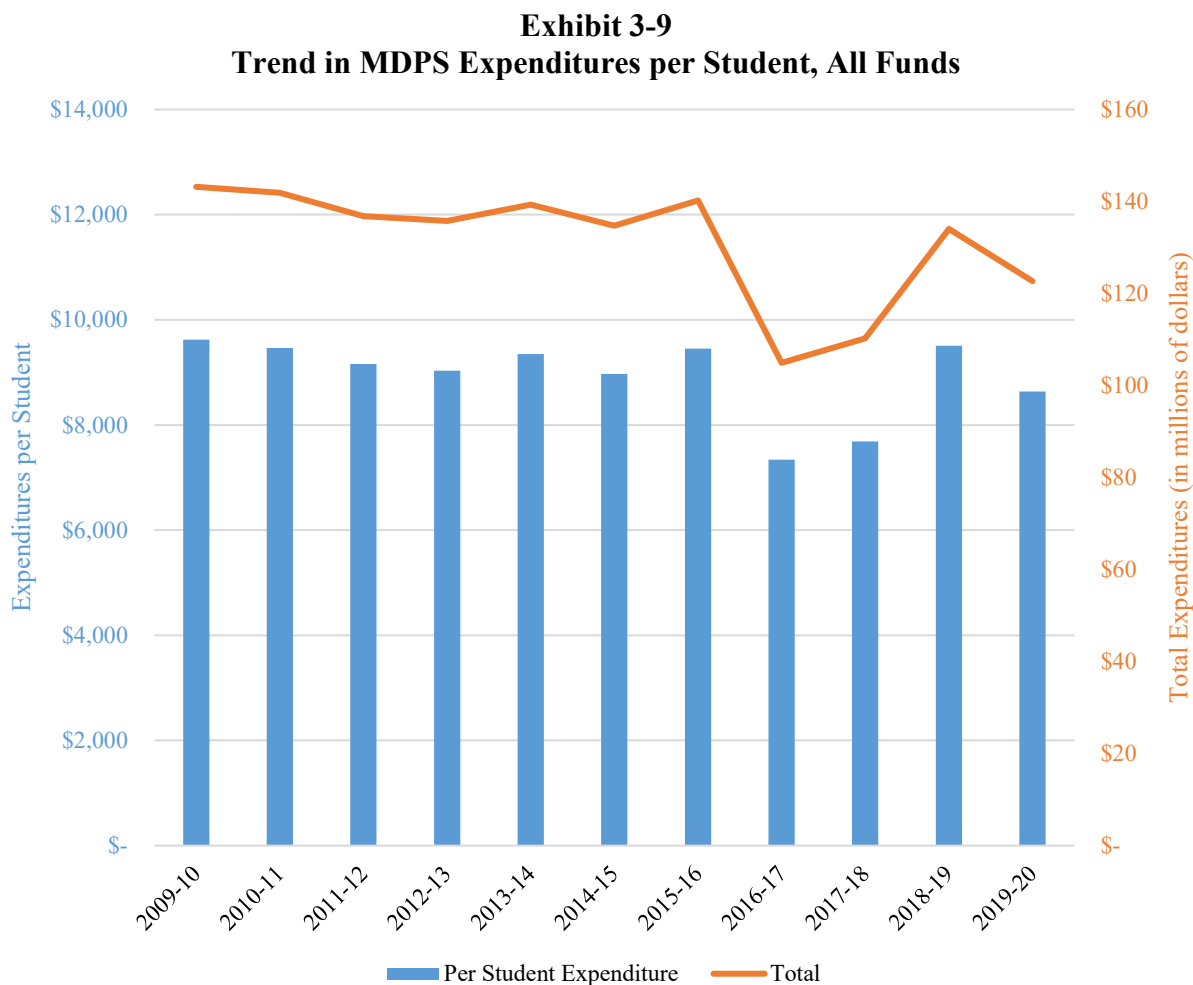
- MDPS was the fourth highest of its peers, surpassed the community group, and tied with state for instructional spending.
- The percentage that MDPS spent for instructional support, student support, and district support was in line with those of the peer districts.
- The percentage that MDPS spent on school administration was the highest of all comparison groups. However, the percentage that MDPS spent on district administration was the lowest.

Exhibit 3-8
Percentage Breakdown of 2018-19 Expenditures by Type, All Funds



Source: Office of Educational Quality and Accountability, Profiles Database

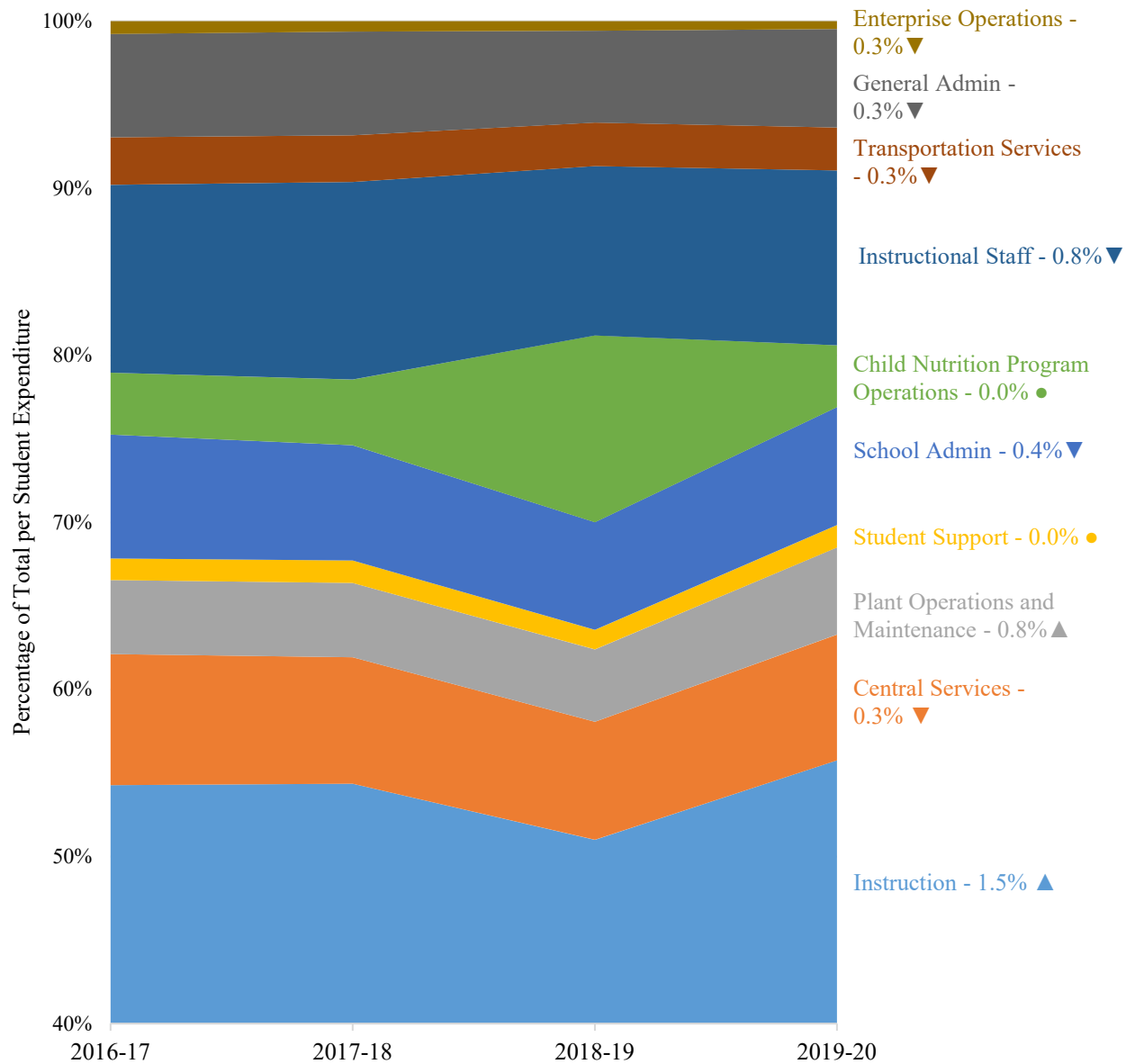
Exhibit 3-9 shows the trend in MDPS expenditures per student and overall, for the past ten years. Total expenditures have fluctuated between \$104 million and \$143 million. Per student expenditures were \$8,635 in 2019-20.



Source: Oklahoma Cost Accounting System and Prismatic calculations

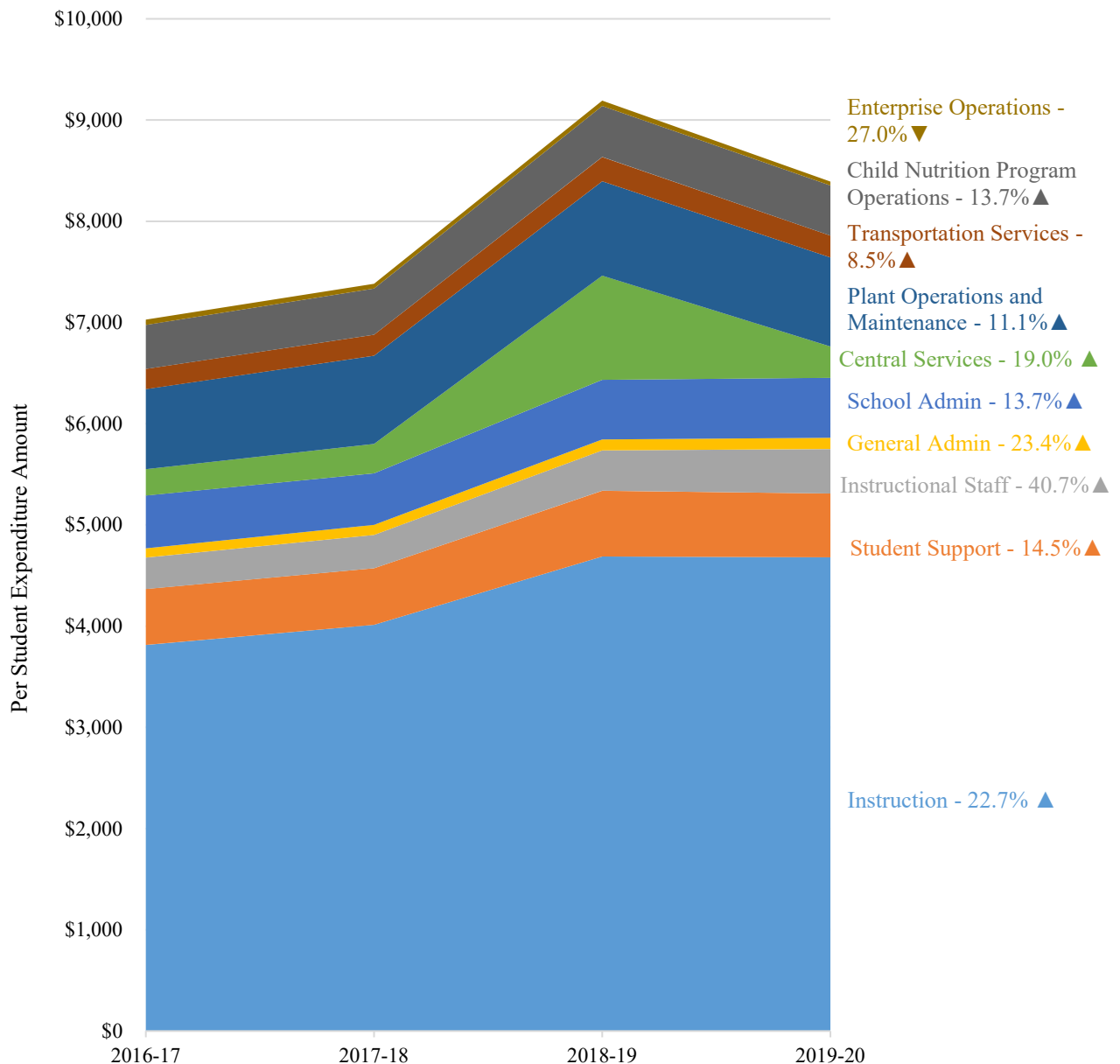
Exhibit 3-10 shows MDPS expenditures per student for the past four years, disaggregated by function code as a proportion of the total expenditures per student. **Exhibit 3-11** shows the same expenditures in dollars, also per student by function code. The function code is a dimension used to describe the service or commodity obtained as a result of the expenditure. As shown, total expenditures increased by 19.4 percent. As a proportion of total per student expenditure, spending for instruction and plant operations and maintenance increased, while all other categories decreased. Across the time period shown, spending in 2018-19 was unusual in comparison to the other three years.

Exhibit 3-10
Proportional Trend in MDPS Expenditures per Student, All Funds



Source: Oklahoma Cost Accounting System and Prismatic calculations

Exhibit 3-11
Trend in MDPS Expenditures per Student, All Funds



Source: Oklahoma Cost Accounting System and Prismatic calculations

Fund Balance

The fund balance, often referred to as “carryover,” is defined as the excess of assets over liabilities and is used in future years to offset any revenue shortfalls or negative midyear adjustments that may occur. Fund balance is the amount of cash that is not obligated by purchase orders, contracts, outstanding warrants, or other commitments. A healthy fund balance can be beneficial to a school district by permitting longer investment terms and bridging periods of low cash flow during the year. Perhaps more importantly, it helps the district maintain cash flow to

get through the first part of the new school year until state aid distribution can catch up with the district's obligations.

A school district's fund balance policy can provide guidance for the development and implementation of an annual budget. Oklahoma public school laws provide guidance regarding the allowable year-end balances. *Title 70, Section 18* of Oklahoma Statutes provides the maximum amount, as a percentage of total general fund collections, that a school district can maintain as a fund balance. **Exhibit 3-12** shows the table of maximum allowable balances expressed as a percentage of their general fund collections.

Exhibit 3-12
Maximum Allowable Balances at Year End

General Fund Collections	Maximum Allowable Balances
less than \$1,000,000	40%
\$1,000,000 - \$2,999,999	35%
\$3,000,000 - \$3,999,999	30%
\$4,000,000 - \$4,999,999	25%
\$5,000,000 - \$5,999,999	20%
\$6,000,000 - \$7,999,999	18%
\$8,000,000 - \$9,999,999	16%
\$10,000,000 or more	14%

Source: SDE Technical Assistance Document, July 2009

Based upon general fund collections of \$104M for 2019-20, MDPS would be able to reserve up to 14 percent as a fund balance. **Exhibit 3-13** provides the MDPS fund balances for the last four years. The fund balance has grown since 2016-17 as general fund collections have increased. For the past two fiscal periods, the fund balance has remained at 8.1 percent of the general fund collections.

Exhibit 3-13
Trend in MDPS General Fund Balances

	2016-17 Actual	2017-18 Actual	2018-19 Actual	2019-20 Actual
General Fund Collections	\$87,816,017	\$87,474,834	\$99,003,681	\$104,323,944
Fund Balance	\$8,014,260	\$8,983,942	\$8,051,220	\$8,475,000
Percentage of General Fund Collections	9.1%	10.3%	8.1%	8.1%
Fund Balance Year-Over-Year Change		12.1% ▲	(10.3%) ▼	5.2% ▲
Fund Balance Three-Year Change			0.5% ▲	(5.7%) ▼

Source: MDPS Annual Audit Reports, 2016-17 through 2019-20, and Prismatic calculations

Bond issuance and indebtedness

Article X, Section 26 of the Oklahoma Constitution prohibits school districts from issuing debt without approval of “60 percent plus one” of the district’s voters. A district’s outstanding debt is limited to ten percent of its assessed valuation. The issued debt may be used for acquiring or improving school sites, constructing, repairing, remodeling, equipping buildings, or acquiring school furniture, fixtures, or equipment. **Exhibit 3-14** compares the district’s average daily membership (ADM), assessed property value, and bonding capacity for the last five years. As shown, ADM has decreased since 2014-15 while property value and bonding capacity have increased.

Exhibit 3-14
MDPS Trends in ADM, Assessed Values, and Bonding Capacity

School Year	ADM	Assessed Property Valuation per Student	Bonding Capacity per Student
2014-15	14,567	\$34,534	\$3,453
2015-16	14,385	\$35,590	\$3,559
2016-17	14,123	\$35,460	\$3,546
2017-18	14,105	\$37,397	\$3,740
2018-19	13,958	\$39,230	\$3,923
Percent Change	(4.2%) ▼	13.6% ▲	

Source: Office of Educational Quality and Accountability, Profiles Database, and Prismatic calculations

The debt service expenditures per student are based upon the amount of outstanding debt and number of students a district has during a given school year. Districts must balance facility and equipment needs with the amount of tax money requested of district taxpayers. In 2018-19, MDPS had the second-lowest debt service expenditure per student of its peer districts and was lower than the community group (**Exhibit 3-15**).

Exhibit 3-15
Debt Service Expenditures per Student, 2018-19

Entity	Debt Service per Student
Mid-Del	\$1,084
Union	\$1,731
Lawton	\$305
Moore	\$1,355
Norman	\$1,510
Putnam City	\$1,268
Community Group	\$1,133
State	\$1,084

Source: Office of Educational Quality and Accountability, Profiles Database

A. ORGANIZATION, MANAGEMENT, AND STAFFING

School districts must practice sound financial management in order to maximize the effectiveness of limited resources and to plan for future needs. Effective financial management ensures that internal controls are in place and operating as intended, technology is maximized to increase productivity and that reports are generated that help management reach its goals.

Financial management includes the broad areas of organization, management and staffing of the financial management function, planning and budgeting, accounting/ internal control and payroll, internal and external auditing, and cash management. The district is required to manage its financial operations in conformity with the regulations and requirements of the Oklahoma State Department of Education's (SDE) Oklahoma Cost Accounting System (OCAS) and to report their data to the SDE.

Financial management is most effective when a district properly aligns its business services functions, establishes strong systems of internal control, and properly allocates staff resources to achieve the best results. A department that is well defined in those areas is well positioned to succeed at its core functions.

FINDING 3-1

The district has focused upon cross-training employees within the finance department to ensure there is a backup if someone is out on leave for an extended period or terminates employment with the district. Staff has worked together to learn other job duties within their area.

The MDPS finance department has employees working together to learn the daily processes within such areas as payroll, accounts payable, and cash management. Each employee within a specified area has worked to understand the role of other staff assigned to a particular job function. This effort began in the Spring 2020 with a long-term employee leaving the district. When the employee left the district, much institutional knowledge left with the person. As a result, leadership within the department has made a concerted effort for employees within a specific function of the department to understand the roles of other staff members in their area. The investment each employee has made during the past year has helped overcome challenges with the current pandemic. As employees have been required to be out of the office for extended periods of time, the functions of the department did not stop with those absences. Based on interviews, the employees now understand the importance of other roles and see this as a positive change for the department. The employees have greater respect for the fellow staff members within their area.

Cross-training of staff is mutually beneficial to the employer and employees. The Government Finance Officers Association (GFOA) names several benefits from having a cross-trained workforce:

- employees from other areas can pitch in when unexpected situations occur;
- employer risk is reduced from employee turnover;

- employees learn where their role fits in the organization;
- employees have a better understanding of workflows;
- employees can better spot opportunities for process improvements;
- employees tend to have higher rates of job satisfaction;
- employees have better relationships with co-workers;
- employee absenteeism decreases; and
- employers save money spent on recruiting and hiring new talent, because employee turnover is lower.

COMMENDATION

The MDPS finance department has cross-trained staff to perform different functions.

FINDING 3-2

Procedures for the payroll process are documented as shown in **Exhibit 3-16**, but there are no other written desk procedure guides for other positions in the business services area. The absence of written desk procedures for each job function within the department reduces the ability of the department to respond to prolonged employee absences and weakens the succession plan if employees leave the district.

Exhibit 3-16

MDPS Current Payroll Documentation Desk Procedure

Created on 2/22/2007 7:52 AM, REVISED 01/12/2021

Payroll Processing

Time sheets will be received per the cut-off schedule provided each year.

1. Auditing – Follow auditing check list, ~~substitute processing list~~ and fund 12 payroll processing. (Copies attached)
2. Confirm that time sheets and necessary action has been taken and/or received based on the monthly payroll action spreadsheet.
3. Update all salary changes received from personnel actions from the HR department.
4. Update all voluntary deduction changes received from the employee.
5. Enter any payroll docks received from the leave clerk verifying the correct daily rate of pay or hourly rate to be charged.
6. ~~Run Substitute proforma (print screens attached) to verify substitutes have been posted correctly. Print forms PAI-685T to check project pay pay. Print forms PAI-687S to check project totals. Reconcile substitute vouchers to printouts.~~
7. Run 1st ~~proforma~~ Earnings and Deductions proof for ~~fund 11~~ the payroll month to reconcile all time sheets and all contract salaries.

A. ~~Print PAI-625~~ Site Salary Reconciliation Spreadsheets - EMPLOYEE CHECKS DETAIL LISTING - To use to verify salaries as shown below.

- Verify contract salaries. Confirm that monthly amounts on salary calculation Deduction Register Summary sheets agree with ~~proforma~~ pull down.
- Check for errors when generating a PDF in the Earnings and Deductions screen.
- Check for zero gross, net, and zero deductions.
- Check for high gross, net, and deductions.
- Verify the coding for salary reserves & no dummy accounts are in the payroll.
- Verify that all contract salaries have appropriate employer paid benefits attached (TRS, TRS tax, matching FICA/Medicare, District Paid Life)
- Verify that the monthly retirement credit for all certified staff is appropriately reflected. Verify that the In-Lieu Benefit is not being paid on any employee receiving health insurance.
- Verify that the Flexible Benefit Allowance is not being paid on any employee not receiving health insurance.
- Verify health insurance deductions match billing from Jacque.
- Enter all garnishments based on garnishment spreadsheet and associated paperwork.

B. ~~Print PAI-631~~ PAYROLL WAGES SUMMARY BY EMPLOYEE ~~To use to record any changes~~

Print the summary only proof in Earnings and Deductions to verify totals.

C. ~~Print PAI-684S~~ DEDUCTION REGISTER SUMMARY –

- Verify totals on payroll deductions
- Verify that that totals match on the number of people who have FICA/ MEDICARE tax withheld and salaries are the same (except when FICA Maximum is met).
- Verify that TAX US and TAX OK have the same number of people.

D. After making sure Totals match vendor deductions and wages are verified everyone needs to get out of the Payroll Start and Status screen.

E. Update Employees – takes 15-20 minutes

F. Let Tresa or Kellie know there is payroll out there ready to be printed, need to give them warrant information

- Create ACH File and print registers
- Print actual checks and check registers
- Verify direct deposit totals and #of records to send to Kay/Preston for direct deposit upload 2 days prior to payroll date.

G. Run the payroll detail distribution report for Donna and Kay to look through to verify coding looks good. Save out in the Munis shared drive.

- Print by employee name
- Print full account #

THERE IS NO GOING BACK FROM THIS POINT!

H. Update GL

- Define – No split on coding
- Reference – warrant #
- Short Description – payroll
- If no errors, then output post and save all PDFs generated
- Generate Invoices and give the AP file path to Tresa so she can print the vendor checks & ET

I. Tresa will bring you the totals from vendor checks and ETs, verify against deduction register to make sure the totals match.

J. Update Remaining Amounts – once this process is complete let Kay know so she can start her encumbering processes.

Source: MDPS Business Office, February 2021

The department is relying on many long-term employees who possess years of institutional knowledge. Although they are sharing this knowledge verbally with others in their area, there are still no written procedures other than the payroll process.

The absence of written procedures can lead to employees not understanding job functions completely and creating their own processes that may not align with the department's mission. This weakens internal controls. When asked about the lack of written procedures in one of the interviews, the comment was made "these people have been here for so long, they understand their jobs".

Without written procedures, employees complete their duties based upon verbal directions that may vary or become stale. Once time has passed after verbal directions are provided, employees often begin to perform their duties differently than instructed, and employees also improvise and develop their own ways to do certain procedures. Processing transactions in an unapproved manner often leads to errors. A desk procedures manual covers each activity's steps in sufficient detail that an individual using it for the first time can perform the steps with little, if any, additional instruction. It also lists specific forms to be used, computer screens accessed, fields on the screen in which to enter information, as well as identifying other positions that supply information for the procedure, or to which it sends information.

For internal controls to operate effectively, all employees need a documented reference source detailing how they perform their assigned duties. An employee desk manual has much more detail than a procedures manual and is basically a step-by-step written document approved by management that describes how employees are expected to complete their individual assignments. Detailed desk procedures facilitate cross-training of employees and training of new employees since they provide the step-by-step instruction needed to perform tasks. This increases internal control by helping to ensure processes are performed correctly.

Some business offices have developed excellent detailed desk procedures to use when employees are completing their assigned duties. The payroll department in Chesterfield Public Schools in Virginia developed detailed desk procedures that are placed on the office's server with individual folders containing instructions for each staff member, but all employees of the office have access to them. Detailed explanations on a step-by-step basis for how to fulfill the numerous duties that must be completed accurately and timely are included. An example of a desk procedure that is for a payroll process called "COBRA changes" has detailed steps that include:

1. Receive from benefits, yellow form with the box next to COBRA marked and the change reflected.
2. Pull file. (It will either be in the file cabinet or COBRA basket.)
3. Ask XXX if individual on COBRA has paid anything.
4. Make a copy of the payment sheet or check.
5. Run calculator tape of what individual has paid.

6. Go to Excel, Payroll Server, open health insurance folder, health calculation 2003, COBRA, and COBRA-newchgehealthcal03. (Enable macros.)
7. Complete spreadsheet. (Referring to yellow form and individual's file.)
8. Next to number of payments, enter number of months going to have coverage. (Will be based on effective date until the end of the year.)
9. Note: If individual is an employee, next to employee, enter yes. If not, enter no and next to employee, in the next cell, enter employee's name.
10. Note: Next to coverage for, the start date would be based on the effective date. The end date remains the end of the year.
11. Enter the amount the individual paid next to less amount paid.
12. New monthly payment date will always be the first of the month. (The individual pays monthly.) Also, adjust the number of pays.
13. Next to total payment due by, give the individual 5 to 10 days.
14. The bottom of the spreadsheet may not need to be hid depending on if they owe us any money.
15. Print two copies of the calculation sheet. One copy will go to XXX, one copy is put in individual's COBRA file, and the original is mailed.
16. If the individual owes us money, a letter needs to be sent.
17. Go to Word, Payroll Server, health insurance, and health letters.
18. Use the information from the calculation sheet to complete the letter.
19. Make two copies of letter. One copy goes to XXX, one copy goes in individual's file, and the original is mailed.

RECOMMENDATION

Develop a desk procedures document for each position within the finance department.

The CFO should develop a list of critical duties performed by the employees of each department for which desk manuals should be developed. Employees in the departments should be asked to collaborate on the development of the list. A standard format for creating desk procedures manuals should be developed and each employee trained on the use of the format. The CFO should develop a timetable for when the manuals are to be completed and then monitor their completion.

Each staff member should develop procedures for each of their duties. Once they have developed a draft of their desk procedures manual, the assistant superintendent and/or the CFO should review and approve the draft and determine which staff members should be cross trained on what duties. Staff being cross-trained should review the procedures to help ensure they are easily understandable and can provide sufficient guidance toward performing the duties.

A matrix should be created that lists the critical procedures for which a cross-trained backup is needed. For each critical procedure the employee to be cross-trained should be instructed in the proper desk procedure and then be kept up to date with regard to changes in the procedure.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

B. PLANNING AND BUDGETING

An organization's budget development and management establish the foundation for all other financial operations. The budget process should be strategic in nature and consist of activities that encompass the development, implementation, and evaluation of a comprehensive plan for student success.

The National Advisory Council on State and Local Budgeting (NACSLB) has identified four essential principles of effective budgeting. The specific principles include the following tasks:

1. Set broad goals to guide decisions.
2. Develop strategies and financial policies.
3. Design a budget supportive of strategies and goals.
4. Focus on the necessity of continually evaluating goal achievement.

FINDING 3-3

There is no public and limited, if any, staff involvement in the budget development process. The budget is prepared primarily by the CFO in coordination with the superintendent and is based upon the revenue estimates prepared by the CFO.

Interviews with staff indicate little or no input into the budget from MDPS employees or community members. The public is not provided any means to be involved in the budget development process and meetings are not held to obtain principal and department head involvement. A budget calendar is not produced for the budget development process.

Exhibit 3-17 shows survey results from MDPS district staff and parents regarding the budgetary process. More parents indicated MDPS does not ask for community input when developing the budget than indicated that the district does. Moreover, a majority of parents had no opinion on the subject, which likely indicates a low level of awareness of the budgetary process. The results

were similar for MDPS staff, with more indicating that staff is not involved in the budgeting process than indicating staff is involved.

Exhibit 3-17
Survey Results Regarding the Budgetary Process

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Parent	The districts ask the community for input when developing its budget.	5%	15%	51%	21%	8%
Staff	The budgeting process effectively involves administrators and staff.	3%	17%	44%	25%	12%

Source: Prismatic Survey Results, February 2021

The MDPS budget development process begins with the superintendent and CFO analyzing revenue and agreeing to the estimated revenue that is anticipated for the next year. Staffing needs are developed by the deputy superintendent and the executive directors for elementary and secondary education. The CFO prepares a list of items that are titled “considerations.” The list includes both increases and decreases to the budget from the previous year’s budget. The superintendent and CFO review and discuss the items listed on the considerations sheet and make the determination as to which ones they will include in the budget and which ones they will not. The considerations sheet for the 2020-21 budget included 34 items representing net reductions of just over \$1.7 million that were discussed for possible budget impact. Some of the items were:

- retirement incentive savings;
- two additional staff for Central Enrollment;
- hourly staff for learning center;
- projected property insurance increase;
- contingency for three teachers;
- extra duty pay savings due to merged middle schools;
- athletic stipends savings from A. Collier; and
- saving from reduced positions.

By developing the budget in such an isolated manner, the district fails to receive critical input from parents, community leaders, and district staff. Without input from the public and staff, the district fails to foster support and commitment for the budget. The lack of a comprehensive

calendar that details what steps are to be followed and when involvement of all parties is to occur does not allow for input from the parties and does not encourage support for district initiatives. A budget developed in isolation normally has little support from these stakeholders. Involving the public and district staff in budget development helps to ensure an understanding of and support for the adopted budget.

The Government Finance Officers Association recommends that a school district budget be developed using a results and outcomes approach. Using this approach, the budget should be developed to address the highest priorities of the district that could be achieved with the available resources. For example, if the district identified a need for additional staff members, the budget would be developed to incorporate this need, and, subsequently, be communicated clearly to all stakeholders.

Many districts have a budget committee comprised of community members, business leaders, and district employees who provide input to the board of education and superintendent on the priorities that should be addressed. Some Oklahoma public school districts use a budget committee that provides regular input to the superintendent and treasurer during the budget process. Other districts publish their budget materials and related information on their websites to ensure that all stakeholders are informed of budget processes and decisions that are being made.

In addition to establishing specific tasks, responsibilities, and deadlines for completing the budget process, a budget calendar provides the community with notice of their opportunity for input so they can plan accordingly. The calendar also shows all the steps necessary to develop and adopt the budget within the time established by law. The calendar guides the superintendent and the board from year to year to ensure the continuity of the budget process. Without a budget calendar, districts subject themselves to missing important dates or tasks. There are many formats for budget calendars and steps that have to be performed. A district's calendar should be customized to meet the needs of the district.

At the time it was reviewed under the Oklahoma School Performance Review process, Clinton Public Schools had a transparent budget development process with a commendable level of public input. The process for budget development in Clinton involved these steps:

1. **Preliminary Budget:** Prior to the end of the current fiscal year, the superintendent and other key administrators prioritized items for the following fiscal year. Many contributions for this process came from school employees and the public.
2. **Preparation of Proposed Budget:** After the school board approved the estimate of needs, proposed budgets were devised within the approved revenues and expenditures for the budget year.
3. **Receipt of Public Comments:** The school board conducted a public hearing to take all comments on financial matters, both past and future, in the district.
4. **Adoption of a Final Budget:** This included any revisions due to public comments and potential program allocations received prior to this date.

5. Amending of Final Budget: Changes were made throughout the year to ensure that all expenditures had an appropriate amount of budgeted funds available and to adapt the current budget to reflect midterm allocation changes.

RECOMMENDATION

Establish a budget development process that provides for input from the public and school and department staffs.

The district should include a variety of stakeholders in the budgetary process. These stakeholders should include the members of the superintendent's leadership group, principals, and directors. A teacher and parent representative could also be included in the process. The goal should have more transparency, communication, and input regarding the process.

In order to help ensure all parties are informed of when their involvement is to be provided, a budget calendar detailing all steps and dates should be developed. The board should adopt and publish the annual budget calendar. The budgetary process and timeline should be communicated throughout the district in order to foster transparency. Budget discussions should include opportunities for input from district and community stakeholders. The budgetary process, timeline, and documents should be posted in public places and online to facilitate communication, understanding, and support of the adopted budget. A sample budget calendar that the district should consider using as a template when developing a similar one to meet its needs is shown in **Figure 3-18**.

Exhibit 3-18 Sample Budget Calendar

Date	Budget Activity
October 3	Introduction of budget process to principals and administrative staff
October 16	Submission of budget calendar to school board (regular meeting)
	Establishment of December date for public hearing on budget
October 20	Preliminary administrative staff budget committee meeting #1
	Review of budget process assignments and calendar
October 30	Administrative budget committee meeting #2
	Establish preliminary overall budget priorities
October 31	Submission of budget requests by principals and administrative staff
November 20	Public reminder concerning December date for public hearing on budget
November 27	Administrative budget committee meeting #3
	Analysis of budget requests and review of preliminary priorities
	Preliminary report on market analysis of cohort school districts
November 29	Advertise for December public hearing
December 4	Advertise for December public hearing
December 4	Annual school board legislative work session
December 8	Administrative budget committee meeting #4
	Refinement and alignment of projected expenditures
December 11	Public hearing on proposed budget (regular meeting)
	Report to school board on preliminary budget priorities (regular meeting)
	Invitation for school board member input on preliminary budget priorities
December 18	Administrative budget committee meeting #5
January 8	Analysis of preliminary budget priorities
	Review of projected state revenues based on the state proposed budget
January 11	Administrative budget committee meeting #6
	Refinement of budget priorities based on school board work session
January 22	Presentation of projected state revenues based on state proposed budget
	Invitation for further school board member input on budget
January 25	Administrative budget committee meeting #7
	Refinement of budget priorities based on public hearing and board member input
February 5	Presentation of first formal draft of budget
February 7	Administrative budget committee meeting #8
	Refinement of budget priorities
February 19	Presentation of second formal draft of budget (regular meeting)
	Update on projected state revenues
March 8	Administrative budget committee meeting #9
March 19	Target date for school board approval of budget (regular meeting)
May TBD	Called meeting for school board certification of final budget April 25-May 4
May 7	Target date for issuance of professional personnel contracts
May 21	Target date for issuance of classified personnel contracts

Source: Created by Prismatic, based on records from an Oklahoma school district, February 2021

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-4

The district does not produce a comprehensive budget document for informing the public and all interested individuals about the revenues, expenditures and other pertinent data pertaining to the district. The district's budget, as presented to the board for approval, is a number of schedules with just numerical amounts for revenues by source and expenditures by project, but do not include any explanatory narrative.

Schedules included in the budget document show the revenues and expenditures for the General Fund, Tech Center, Building Fund, Child Nutrition Fund, Tech Center Building Fund, and Sinking Fund. Expenditures for the General Fund has a project titled General Operations Program that has over 70 percent of expenditures budgeted to the program. The pages do not include any narrative to explain the numbers.

The budget document also does not include any discussion of budget goals, priorities, or objectives. There are no explanatory narratives, charts, or graphs to highlight important information and numerical relationships. In its current form, the budget does not provide insight into the district's operations and future initiatives.

A school district's budget is most effective when it is useful to both district staff and the community-at large in understanding the district's inner workings. A budget document has three major purposes. It serves as a communications device, a policy document, and a financial plan. School districts have an opportunity to 'tell their story' when their budgets communicate what is behind and beyond the numbers.

There is no standard for the specific data that districts should include in their budget document. The actual data that districts include in budget documents can cover many topics, not necessarily financial data. These topics can include:

- the district's mission and vision;
- a table of contents;
- an executive summary;
- a comprehensive budget calendar;
- average daily attendance for the last several years and growth projections for the next several years;
- projected student enrollment by school and grade;
- itemized requested increases from previous year;

- revenue projections;
- number of positions and salary cost by type and location for several years;
- per pupil cost and comparison to peer and neighboring districts; and
- charts and graphs in color when appropriate.

Many school district budgets include comparative data in easy-to-understand formats to provide additional information to readers. Schedules are included for each department that present budgeted amounts by summarized categories such as salaries, benefits, operating, and capital, with comparisons shown for the budget year to the previous two to three years. Also, budget documents contain schedules showing positions by department for the current year compared to the previous four or five years and comparative schedules for revenues by source.

Presenting detailed budget data provides district decision-making with information that helps them to make informed decisions. It further provides the public with information that helps them understand where funds for district education are expended. Presenting the budget on the district's website provides all individuals interested in obtaining information on the district's budget with an easily accessible location to obtain the data.

A budget document that includes only a limited amount of revenue and expenditure data without any narrative that explains the numbers makes it impossible for the public to have a reasonable understanding of where the district is spending tax dollars. A budget document that does not include summary comparative information by departments and schools, summary comparative information for positions, and other useful information does not enable the school board and community to understand how taxpayer dollars are being used in educating students of the district.

Improving the district's budget document to include summary comparative information by departments and schools, summary comparative information for positions, and other useful information will enable the school board and community to better understand how taxpayer dollars are being used in educating students of the district.

The Association of School Business Officials International (ASBO, www.asbointl.org) is an organization that promotes excellence in school business operations. ASBO offers guidance on best practices in school district budget development. Per ASBO, the best budget documents include these five areas:

- Cover Letter
- Table of Contents
- Executive Summary
- Organizational Section

- Financial Section
- Informational Section

Each year, ASBO bestows a Meritorious Budget Award upon district budgets that meet their criteria (provided in **Appendix F**). In 2018-19 and 2019-20, no district in Oklahoma earned a Meritorious Budget Award. A district with a slightly smaller level of student enrollment that did earn the award in 2019-20 is Greenwich Public Schools in Connecticut.¹ An example of some of the data provided in Greenwich's 160-page budget document is shown in **Exhibit 3-19**.

¹ Their budget book can be accessed at https://www.greenwichschools.org/uploaded/district/departments/business_services/budget_19-20/FY20_Superintendent's_Budget_Book_wA_POST_11-8-18_R1.pdf

Exhibit 3-19

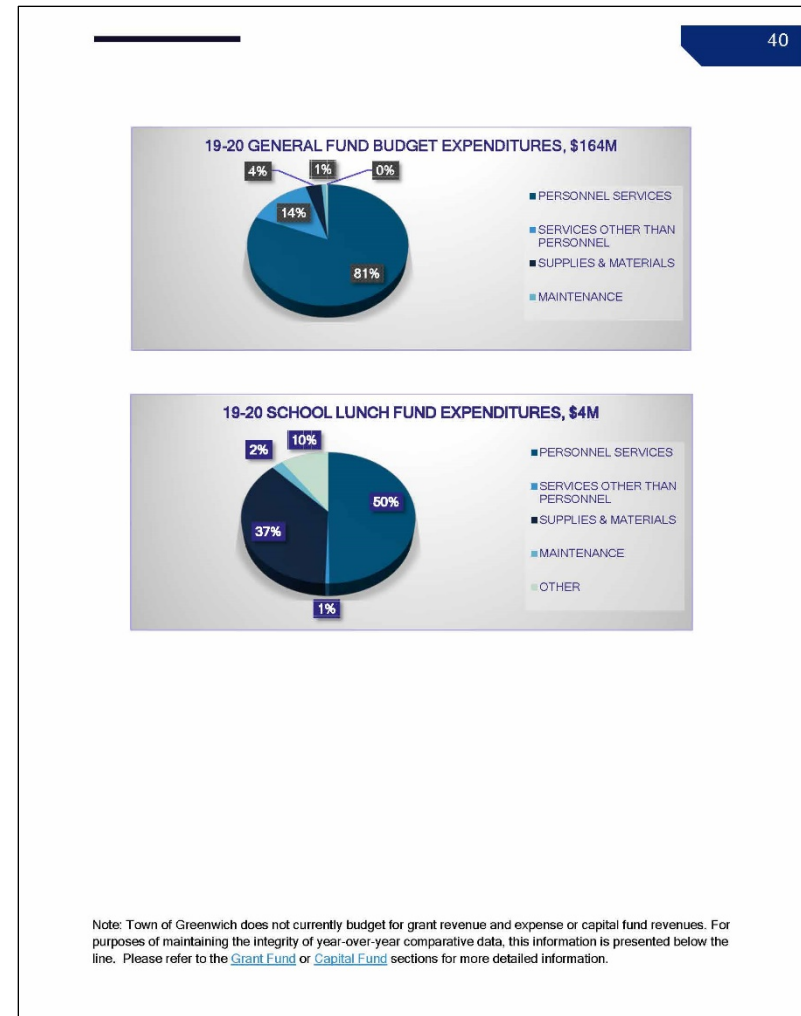
Sample Pages from Budget Document That Earned ASBO Award

42

General Fund – Expense Detail, by Functional Area

MAJOR OBJECT CODE	FY15-16 ACTUALS	FY16-17 ACTUALS	FY17-18 ACTUALS	FY18-19 BUDGET	FY19-20 BUDGET	B TO B TTL FUNDS \$ VARIANCE	B TO B TTL FUNDS % VARIANCE
ADMINISTRATION							
100 PERSONNEL SERVICES	4,707,932	4,848,601	4,655,286	5,052,962	4,887,382	(165,490)	-3.3%
200 SERVICES OTHER THAN PERSONNEL	395,430	398,298	555,340	523,689	840,747	317,058	60.5%
300 SUPPLIES & MATERIALS	69,801	159,054	34,559	43,373	45,600	2,227	5.1%
400 MAINTENANCE	30,776	29,350	137,710	41,400	37,360	(4,040)	-9.8%
700 OTHER	90,052	3,761	20,089	70,000	70,000	-	0.0%
TOTAL ADMINISTRATION	5,293,990	5,439,063	5,402,984	5,731,324	5,881,089	149,765	2.6%
INSTRUCTION							
100 PERSONNEL SERVICES	110,862,054	112,652,021	115,576,120	117,293,668	121,573,302	4,279,634	3.6%
200 SERVICES OTHER THAN PERSONNEL	6,805,527	7,553,297	8,216,979	8,901,838	8,600,123	(301,715)	-3.4%
300 SUPPLIES & MATERIALS	3,035,012	2,998,074	2,709,953	3,197,002	3,365,608	168,546	5.3%
400 MAINTENANCE	318,907	328,133	337,763	596,444	563,322	(26,878)	-4.5%
700 OTHER	115,000	132,406	126,254	175,000	175,000	-	0.0%
TOTAL INSTRUCTION	121,137,490	123,663,932	126,967,068	130,104,012	134,277,355	4,173,343	3.2%
MAINTENANCE OF PLANTS							
100 PERSONNEL SERVICES	713,008	694,309	575,497	679,818	592,412	(87,406)	-12.9%
200 SERVICES OTHER THAN PERSONNEL	3,898,480	3,945,644	3,497,760	3,856,835	3,691,200	(165,635)	-4.3%
300 SUPPLIES & MATERIALS	252,816	271,843	247,094	310,000	298,500	(11,500)	-3.7%
400 MAINTENANCE	747,007	669,230	889,982	958,000	938,000	(20,000)	-2.1%
TOTAL MAINTENANCE OF PLANTS	5,611,312	5,581,026	5,210,333	5,804,653	5,520,112	(284,541)	-4.9%
OPERATION OF PLANTS							
100 PERSONNEL SERVICES	6,075,592	6,232,762	6,224,651	6,344,702	6,586,266	241,564	3.8%
200 SERVICES OTHER THAN PERSONNEL	186,508	176,884	178,630	218,200	216,650	(1,550)	-0.7%
300 SUPPLIES & MATERIALS	389,163	424,161	405,110	415,000	418,600	3,600	0.9%
400 MAINTENANCE	(14,009)	(99)	12,144	22,000	22,000	-	0.0%
TOTAL OPERATION OF PLANTS	6,636,654	6,833,708	6,820,535	6,999,902	7,243,516	243,614	3.5%
STUDENT ACTIVITY							
100 PERSONNEL SERVICES	1,298,410	1,327,151	1,372,549	1,453,474	1,487,042	33,568	2.3%
200 SERVICES OTHER THAN PERSONNEL	474,119	463,575	512,921	568,080	572,464	3,784	0.7%
300 SUPPLIES & MATERIALS	175,923	180,446	184,126	189,670	191,763	1,893	1.0%
400 MAINTENANCE	5,956	6,803	3,938	8,750	8,250	(500)	-5.7%
600 OTHER	-	-	-	2,200	-	(2,200)	-100.0%
TOTAL STUDENT ACTIVITY	1,954,409	1,977,975	2,073,533	2,222,974	2,259,519	36,545	1.6%
TRANSPORTATION							
100 PERSONNEL SERVICES	43,251	(3,041)	178,359	93,837	137,750	43,913	46.8%
200 SERVICES OTHER THAN PERSONNEL	4,795,087	4,947,024	5,983,400	9,276,231	9,454,255	178,024	1.9%
300 SUPPLIES & MATERIALS	412	191	827	600	600	-	0.0%
400 MAINTENANCE	-	-	-	300	-	(300)	-100.0%
TOTAL TRANSPORTATION	4,838,751	4,944,174	6,162,647	9,370,968	9,592,605	221,637	2.4%
TOTAL EXPENDITURES	143,518,196	146,461,903	150,563,566	160,233,833	164,774,196	4,540,363	2.8%

Notes: See next page.



Source: https://www.greenwichschools.org/uploaded/district/departments/business_services/budget_19-20/FY20_Superintendent's_Budget_Book_wA_POST_11-8-18_R1.pdf

RECOMMENDATION

Develop a budget document that meets ASBO requirements and place it on the district website to provide stakeholders with information on how the district's financial resources are used.

The CFO should research the ASBO requirements and direct her staff in the development of a budget document that meets those requirements. The financial data included in the document should be clarified using charts, tables, larger fonts, written analyses, and executive level summaries. The district should submit the resulting budget document for an ASBO award.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-5

Although the district does have a general fund balance policy that provides some guidance for the fund, routine status reports are not provided to the board. The state allows districts that have general fund revenues of over \$10 million to maintain a fund balance that does not exceed 14 percent. At the end of 2019-20, the district's general fund balance as shown in the audited financial report for June 30, 2020 was \$8,475,000 or 8.1 percent.

The CFO prepares a report referred to as the Control Sheet each month. The Control Sheet compares revenue, expenditure, and fund balance amounts for the current year to five previous years. The 2020-21 budget as of the first amendment on September 14, 2020 anticipated using over \$5 million of the general fund balance to fund the 2020-21 budget.

The Control Sheet is provided to the superintendent but not to the school board. The superintendent does use information from the report in periodic discussions with the school board. As funding decreases it becomes extremely important that all board members are provided with current financial data pertaining to the impact on the district's general fund balance.

The district's policy D-7 *Fund Balance and Salary Guidelines* states, in part, "It is the intent of the Board of Education to establish in the initial management budget a minimum of six percent fund balance with the objective of establishing and maintaining a six percent to eight percent fund balance". The current policy provides only limited guidance.

A district's general fund balance policy should outline what the board considers to be an adequate balance to maintain efficient cash flow, cover emergency expenditures, adjust for revenue shortfalls, and avoid excess balance penalties or paying interest on non-payable warrants. The fund balance is a measure of the financial stability of a district and is an integral part of the budgeting process. Fund balance policies are also needed to provide guidance as to how to achieve and maintain a minimum fund balance. Districts that are fortunate enough to achieve a substantial fund balance should also include policy guidance as to what priority needs should be funded.

Keeping all board members informed on the status of the general fund is extremely important in order to manage the finances of a district. Reports that not only show the financial activity that has occurred but also includes projections to the end of the year based upon actual year-to-date data prepared by an informed district official are effective in providing board members with an understanding of the status of the general fund balance.

The Government Finance Officers Association (GFOA) has developed standards for fund balance and recommends that:

- Governmental agencies establish a fund balance policy setting forth unreserved balances.
- The level of these recommended unreserved balances are based on unique characteristics and needs.
- Unreserved balances are no less than five percent of general operating revenues or no less than one or two months of regular general fund operating expenditures.
- Accountability measures consider long-term forecasting.

For example, Guthrie Public Schools has a general fund balance policy that states:

An adequate level of general fund balance is required in order to maintain efficient cash flow, cover emergency expenditures, adjust for revenue shortfalls and avoid paying interest on non-payable warrants. In order to maximize the efficient use of this fund, the board of education establishes the fiscal management priority objective of achieving and maintaining a general fund balance of twelve percent (12 percent). Should the general fund balance drop below a minimum level of eight percent (8 percent), the administration shall give first priority to restoring this minimum level with any additional funding received and with the development and implementation of an appropriate expenditure strategy.

Each year beginning in January or February, the assistant superintendent in Guthrie Public Schools prepares an informative monthly document titled Fund Balance Projection. **Exhibit 3-20** shows a sample of the data included in that report. This report is shared with the superintendent and the school board.

Exhibit 3-20
Example Fund Balance Projection Report

Expenditure Classification	2014-15 Activity	2015-16 Activity YTD Activity	2015-16 Projected Activity	2015-16 Total Activity	Increase/ (Decrease)
BEGINNING FUND BALANCE					
Current year	\$2,745,439	\$2,776,000	\$0	\$2,776,000	\$30,561
Lapsed From Prior Year	\$0	\$23,560	\$0	\$23,560	\$23,560
REVENUES					
Local Sources	\$4,758,920	\$3,894,754	\$938,950	\$4,833,704	\$74,784
Intermediate Sources	\$849,719	\$617,776	\$227,224	\$845,000	(\$4,719)
State Sources	\$15,047,772	\$7,707,310	\$5,737,251	\$13,444,562	(\$1,603,210)
Federal Sources	\$1,541,225	\$1,023,399	\$516,958	\$1,540,357	(\$868)
Non-Revenue Receipts	\$223,533	\$48,579	\$161,421	\$210,000	(\$13,533)
Total Revenues	\$22,421,169	\$13,291,818	\$7,581,805	\$20,873,623	(\$1,547,546)
EXPENDITURES					
Total Expenditures	\$22,390,608	\$21,329,397	\$540,382	\$21,869,778	(\$520,830)
ENDING FUND BALANCE	\$2,776,000	(\$5,238,018)	\$7,041,424	\$1,803,405	(\$972,595)

Source: Guthrie Public Schools, February 2016

RECOMMENDATION

Revise the MDPS general fund balance policy to provide guidance how on to achieve the minimum required balance, provide a desired fund balance range, and require fund balance status reports to the school board.

The board should provide guidance through a revised fund balance policy that establishes how to achieve the minimum required fund balance, the use of the district's fund balance that exceeds the minimum target amount to help ensure that the funds are only used for critical priority items, and requires regular status reports to the school board and public.

Reports to the board will help the members to monitor the fund balance and have an understanding of the impact of actions that impact the balance. Similar reports can also be prepared for each of the district's funds. The CFO and budget staff should develop a process to produce a monthly report similar to **Exhibit 3-21** for the superintendent and board. Year-to-Date amounts should be taken from the district's financial accounting system (Munis), analyzed to make a projection for the amounts for the remainder of the year. The report should also include a narrative for items not included in the report that are expected to impact the fund balance, such as needed transfers to the Child Nutrition Program for anticipated operating losses and use of the district's \$12.6 million in relief funding.

Exhibit 3-21
Example Fund Balance Projection Report

Expenditure Classification	2019-20 Actual	2020-21 YTD	2020-21 Projected To End of Year	2020-21 Projected Total	Increase/ (Decrease) From Previous Year
BEGINNING FUND BALANCE	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
REVENUES					
Local Sources	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
Intermediate Sources	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
State Sources	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
Federal Sources	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
Non-Revenue Receipts	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
Total Revenues	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
EXPENDITURES					
Total Expenditures	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
Instruction	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
Instructional Support	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
Student Support	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
School Administration	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
District Administration	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
District Support	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
Other	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
Total Expenditures	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
ENDING FUND BALANCE	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx

Source: Prismatic, February 2021

FISCAL IMPACT

This recommendation can be implemented with existing resources,

FINDING 3-6

A number of financial reports are provided to the board; however, the reports provide limited information of the sort that would enable board members to adequately monitor MDPS spending. It is difficult for most individuals, including school board members, to understand financial

reports unless the reports are formatted and presented in an easily understood manner. Without routine reports that present comparative financial data, school board members and the public have limited information to assess current year operations and compare it to previous months and years.

Included in current MDPS monthly board reports are reports that provide detailed information on the cash activity within the various district funds. The reports include:

- analysis of deposits and disbursements;
- summary of operating and investment funds;
- distribution of operating and investment funds;
- securities pledged by depository institutions;
- detailed investment activity;
- designation of “operating” and “investment funds”;
- summary of collections by fund;
- purchase order listing;
- warrant register;
- lease revenue bond payments; and
- school activity fund transfers.

However, these reports do not contain data for the amounts expended on expenditure classifications such as salaries, materials and services, or purchased services by function. There are not any comparisons of revenues and expenditures to prior periods and do not include any definitions to explain the numbers or narrative that describe what the reports are intended to show. For example, the November 2020 board packet includes 63 pages in the Monthly Financial Report section. **Exhibit 3-22** provides a breakdown of the 63 pages. As shown, there is almost no trend or prior period context provided. There is no breakdown of expenditures year-to-date compared the initially planned budget.

Exhibit 3-22
Analysis of the November 2020 Monthly Financial Report

Title	# of Pages	Contains Prior Period/Year Comparisons?
Analysis of Deposits and Disbursements	1	No
Summary of Operating and Investment Funds	1	No
Distribution of Operating and Investment Funds	1	No
Securities Pledged by Depository Institutions	2	No
Detailed Investment Activity for 20-21	1	No
Designation of “Operating” and “Investment” Funds	1	No
Summary of Collections by Fund	1	Yes, prior period data for current year
Purchase Order Listing	8	No
Warrant Register by Fund	40	No
School Activity Fund Addenda and Transfers	7	No

Source: MDPS Board Packet and Prismatic analysis, February 2021

As an example of monthly financial reporting, Broken Bow Public Schools prepares monthly financial reports for the school board that list revenue by source and expenditures by function for the period. Comparative totals are presented for the previous two years along with the budget for the current year. The monthly financial report also provides information on the district’s cash and investment positions. This presentation allows board members and administration to monitor the district’s financial status and trends in relation to prior year activity. It also assists the school board as they look toward budget adoption for the upcoming fiscal year.

RECOMMENDATION

Develop reports to the school board that show actual revenues and expenditures compared to budgeted amounts.

Financial reports are especially critical in keeping school board members and the public informed regarding situations that impact the district’s general fund. Requiring monthly budget status reports will provide the board and executive administration better oversight to the district’s budgets. Should funding for the district become more restricted, closer oversight could prove to help identify problem areas timelier or where savings could be obtained.

The CFO should obtain copies of routine financial reports prepared by peer districts and other comparable districts and develop additional reports for the school board. Monthly financial reports should include types of revenues and expenditures and a comparison with the previous year’s financial information. Proposed reports should be presented to the board for their review and recommendations to make the reports easier to understand and more useful.

Exhibit 3-23 illustrates a sample format that could be used for the general fund. Revenues and expenditures shown use the OCAS coding structure and can be expanded with more detail as

needed. Reports could also include ones by department and school. Similar reports using the sample format could be prepared for the building and other funds.

Exhibit 3-23
Example Monthly Budget Status Document

Mid-Del-Public Schools General Fund Budget Status Report Month Ended xx,xx,xx						
Description	Current Year				Previous Year	
	Estimated/ Budgeted	Current Month Received/ Expended	Year to Date Received/ Expended	Remaining Balance	Current Month Received/ Expended	Year to Date Received/ Expended
Revenues:						
Local	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx
Intermediate	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx
State	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx
Federal	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx
Total Revenues:	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx
Expenditures:						
Salaries	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx
Benefits	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx
Purchased Professional and Technical Services	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx
Purchased Property Services	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx
Other Purchased Services	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx
Supplies and Materials	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx
Property	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx
Other	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx
Total Expenditures:	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx

Source: Created by Prismatic, February 2021

Exhibit 3-24 provides a sample of another report that could be prepared monthly. A report of this nature that uses the function categories in OCAS, along with charts and graphs, and a written analysis would provide the school board and other stakeholders with the necessary financial information to understand the district's financial position on an ongoing basis. Such an understanding of the district's financial position will help establish and maintain confidence in the MDPS system of accountability.

Exhibit 3-24
Sample Monthly Financial Report

Category	Previous Year Actual	Previous Year to Date	% YTD to Actual	Current Year Budget	Current Year to Date	% YTD to Budget
Beginning Balances:	\$x,xxx,xxx	\$x,xxx,xxx		\$x,xxx,xxx	\$x,xxx,xxx	
Revenues:						
Local	x,xxx,xxx	\$x,xxx,xxx	xx%	\$x,xxx,xxx	\$x,xxx,xxx	xx%
Intermediate	x,xxx,xxx	x,xxx,xxx	xx%	x,xxx,xxx	x,xxx,xxx	xx%
State	x,xxx,xxx	x,xxx,xxx	xx%	x,xxx,xxx	x,xxx,xxx	xx%
Federal	x,xxx,xxx	x,xxx,xxx	xx%	x,xxx,xxx	x,xxx,xxx	xx%
Non-Revenue Receipts	x,xxx,xxx	x,xxx,xxx	xx%	x,xxx,xxx	x,xxx,xxx	xx%
Total Revenues:	\$x,xxx,xxx	\$x,xxx,xxx	xx%	\$x,xxx,xxx	\$x,xxx,xxx	xx%
Expenditures:						
Instructional Programs:						
Salaries and Employee Benefits	\$x,xxx,xxx	\$x,xxx,xxx	xx%	\$x,xxx,xxx	\$x,xxx,xxx	xx%
Professional Services	x,xxx,xxx	x,xxx,xxx	xx%	x,xxx,xxx	x,xxx,xxx	xx%
Supplies and Materials	x,xxx,xxx	x,xxx,xxx	xx%	x,xxx,xxx	x,xxx,xxx	xx%
Other Expenses	x,xxx,xxx	x,xxx,xxx	xx%	x,xxx,xxx	x,xxx,xxx	xx%
Total Instructional:	\$x,xxx,xxx	\$x,xxx,xxx	xx%	\$x,xxx,xxx	\$x,xxx,xxx	xx%
Student Support Services:						
Salaries and Employee Benefits	\$xxx,xxx	\$xxx,xxx	xx%	\$xxx,xxx	\$xxx,xxx	xx%
Supplies and Materials	xxx,xxx	xxx,xxx	xx%	xxx,xxx	xxx,xxx	xx%
Other Expenses	xxx,xxx	xxx,xxx	xx%	xxx,xxx	xxx,xxx	xx%
Total Student Support Services:	\$xxx,xxx	\$xxx,xxx	xx%	\$xxx,xxx	\$xxx,xxx	xx%
Staff Support Services:						
Salaries and Employee Benefits	\$xxx,xxx	\$xxx,xxx	xx%	\$xxx,xxx	\$xxx,xxx	xx%
Professional Services	xxx,xxx	xxx,xxx	xx%	xxx,xxx	xxx,xxx	xx%
Travel, Postage, Std. Transp.	xxx,xxx	xxx,xxx	xx%	xxx,xxx	xxx,xxx	xx%
Supplies and Materials	xxx,xxx	xxx,xxx	xx%	xxx,xxx	xxx,xxx	xx%
Other Expenses	xxx,xxx	xxx,xxx	xx%	xxx,xxx	xxx,xxx	xx%
Total Staff Support Services:	\$xxx,xxx	\$xxx,xxx	xx%	\$xxx,xxx	\$xxx,xxx	xx%
Total Expenditures:	\$x,xxx,xxx	\$x,xxx,xxx	xx%	\$x,xxx,xxx	\$x,xxx,xxx	xx%
Ending Balances:	\$x,xxx,xxx	\$x,xxx,xxx	xx%	\$x,xxx,xxx	\$x,xxx,xxx	xx%

Source: Created by Prismatic, February 2021

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-7

Monthly financial reports presented to the board for the child nutrition fund do not provide adequate information to effectively monitor and manage the funds. The reports include data for total cash collections and disbursements and listings for encumbrances and warrants. However, the reports lack detail information for what type of revenues were collected and what disbursements were for or if the program made or lost money.

The child nutrition program has lost money the last three years:

- (\$185,428) in 2017-18;
- (\$371,324) in 2018-19; and
- (\$1,005,172) in 2019-20.

District staff told the consulting team that they were expecting to have to transfer approximately \$1.0 million from the general fund to the child nutrition fund in 2020-21 to cover anticipated losses.

In addition to listings of encumbrances and warrants provided to the board, two reports showing child nutrition fund data are also provided: *Summary of Collections* and *Analysis of Deposits and Disbursements* (**Exhibits 3-25** and **3-26**). These reports show totals for cash collected and disbursed but do not provide any information on budgets and types of revenues and expenditures or results of operations. In these February 2021 reports, the district reports that 17.6 percent of estimated collections have, in fact, been collected into the child nutrition fund. What is not answered is whether that is a good or bad percentage. Is the district likely to reach the 2020-21 estimated collections figure, given where the district currently is? Is the district likely to the estimated collections figure, given where the district was in the previous year? The reports given to the school board do not provide answers to those kinds of questions.

Exhibit 3-25 Child Nutrition Fund - Summary of Collections

Balances and Transactions	Amounts
20-21 Estimated Collections	\$7,213,177
Prior Cumulative Collections	\$1,228,680
Current Period Collections	\$42,095
Current Cumulative Collection	\$1,270,775
Percent of Collections	17.6%
Balance to be collected	\$5,942,401

Source: MDPS school board packet, February 2021

Exhibit 3-26
Child Nutrition Fund - Analysis of Deposits and Disbursements

Balances and Transactions	Amounts
Balance forward	\$245,298
Plus: Deposits	\$42,095
Less: Disbursements	\$454,071
Ending Balance	(\$166,678)
Less: Outstanding warrants	\$6,431
Balance Subject to Outstanding Warrants	\$173,109

Source: MDPS school board packet, February 2021

Without informative reports, the superintendent and board members do not have financial data available that show if the cafeteria is operating in a financially prudent manner. The district's annual audited financial statements do include information for the child nutrition fund but are only available after the end of the year when the audit report is finalized by the outside audit firm. **Exhibit 3-27** shows the information for the child nutrition fund for 2017-18 through 2019-20 as shown in the audited financial statements.

Exhibit 3-27
Child Nutrition Fund, 2017-18 to 2019-20

	2017-18	2018-19	2019-20
Balance Sheet			
Assets			
Cash and cash equivalents	\$2,740,401	\$2,300,627	\$1,170,138
Receivables	\$1,725	\$2,014	\$2,160
Inventories	\$104,198	\$113,614	\$216,015
Total Assets	\$2,846,324	\$2,416,255	\$1,388,313
Liabilities			
Accounts payable	\$108,198	\$19,103	\$8,137
Accrued wages	\$280,992	\$311,342	\$299,538
Total Liabilities	\$389,190	\$330,445	\$307,675
Fund Balance			
Nonspendable inventory	\$104,198	\$113,614	\$216,015
Restricted fund balance	\$2,352,936	\$1,972,196	\$864,623
Total fund balances	\$2,457,134	\$2,085,810	\$1,080,638
Total liabilities and fund balance	\$2,846,324	\$2,416,255	\$1,388,313
Statement of Revenues, Expenditures, and Changes in Fund Balances			
Revenues			
Interest	\$3,105	\$3,319	\$9,899
State	\$489,242	\$462,071	\$514,991
Federal	\$4,664,941	\$4,907,262	\$4,103,689
Local	\$1,341,083	\$1,356,237	\$995,595
Other	\$3,287	\$2,972	\$4,765
Total revenues	\$6,501,658	\$6,731,861	\$5,629,059
Expenditures			
Non-instructional services	\$6,674,393	\$7,100,110	\$6,629,466
Other outlays	\$12,693	\$3,075	\$4,765
Total expenditures	\$6,687,086	\$7,103,185	\$6,634,231
Excess (deficiency) of revenues over expenditures	(\$185,428)	(\$371,324)	(\$1,005,172)
Net change in fund balance	(\$185,428)	(\$371,324)	(\$1,005,172)
Fund balance, beginning of year	\$2,642,562	\$2,457,134	\$2,085,810
Fund balance, end of year	\$2,457,134	\$2,085,810	\$1,080,638

Source: MDPS Annual Audit Reports, 2017-2020

Districts that provide effective management oversight of specific programs such as a child nutrition program provide management and the board with reports that allows them to monitor the program's financial activity. The reports contain information on both the balances for the fund and the revenues and expenditures that allow management and boards to determine if the program is making or losing money.

RECOMMENDATION

Develop and present to the board reports for the child nutrition fund that show fund balances, revenues, expenditures and whether the program is making or losing money.

The finance department should prepare summary reports either monthly or quarterly. The reports should show a limited number of revenue and expense categories that will provide staff, management, and board members with easily understood financial information for the child nutrition program. **Exhibit 3-28** provides an example of a format that the CFO could use for developing monthly reports.

Exhibit 3-28
Child Nutrition Program Financial Status for Period XX

	Current Period	Year-To-Date	Previous Year Totals
Beginning Balance	\$x,xxx	\$x,xxx	\$x,xxx
Current Revenue			
Federal	\$x,xxx	\$xx,xxx	\$xx,xxx
State	\$xx	\$xx	\$xx
Local	\$xx	\$xx	\$xx
Total Current Revenue	\$x,xxx	\$xx,xxx	\$xx,xxx
Current Expenses			
Salaries	\$xx	\$xx	\$xx
Benefits	\$xx	\$xx	\$xx
Food Products	\$xx	\$xx	\$xx
Supplies	\$xx	\$xx	\$xx
Other	\$xx	\$xx	\$xx
Total Current Expenses	\$x,xxx	\$xx,xxx	\$xx,xxx
Revenue Over/(Under) Expenses	\$x,xxx	\$xx,xxx	\$xx,xxx
Ending Balance	\$x,xxx	\$xx,xxx	\$xx,xxx

Source: Prepared by Prismatic, February 2021

Including financial data for the child nutrition fund will provide the superintendent and board with information to enable them to provide oversight to the program's financial position and operations. Providing routine financial data to decision makers helps ensure all are kept informed and should problems occur can be corrected in a timely manner.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

C. ACCOUNTING/INTERNAL CONTROL AND PAYROLL

Day-to-day financial processes should be efficient and effective. They should also be documented, transparent, and rational. Accounting and payroll are among the most important business functions performed by a school district. Although regulations such as the OCAS and other accounting standards exist, actual practices can vary widely among Oklahoma school districts.

A sound accounting and payroll system can provide numerous benefits including:

- providing internal controls and safeguards;
- providing timely reporting on the status of funds; and
- allowing systematic disbursements to maximize available funds.

FINDING 3-8

The finance department hosts an annual mandatory in-service training for all district secretaries and activity fund sponsors. Financial training is critical to successful implementation of procedures across the district.

The district has a long history of providing an annual training of the critical business functions to district secretaries and activity fund sponsors. The district financial staff prepares a large presentation with speakers from each critical function within the department so that sites and departments are up-to-date on current processes and new requirements. This is a mandatory meeting for all sponsors. In interviews and focus groups, it was shared that department and site staff appreciates this annual opportunity. It also creates the opportunity for staff from other sites and departments across the district to collaborate with each other.

Training is essential for school and department staff. These sessions provide guidance and direction on completing financial and operations duties. Administrative staff better understand the processes and requirements for various finance-related topics that impact their responsibilities.

COMMENDATION

The MDPS finance department provides annual training that is appreciated by financial staff and activity fund sponsors across the district.

FINDING 3-9

Department-level financial reports are not created on a consistent recurring basis. While some department secretaries may have the ability to run the reports from Munis, the district's financial software package, many areas do not run the reports on a monthly basis and share with department leadership.

Financial reports are created upon request by either the department secretary or the district finance department. In more than one interview, department leadership shared that their secretaries could run the reports but did not create them on a monthly basis. They also stated they would call the finance department to get an up-to-date report from the CFO. It is difficult for department leadership to make spending decisions without current budget information and relying upon another department to run needed reports is an outdated practice.

School sites have smaller allocations than the operational departments, but still do not create reports on a monthly basis. While these school site budgets have less funds to manage, it is imperative that leaders have a good understanding of their individual budget. The reliance of leadership upon secretaries or the finance department for budget updates creates risk in decision-making.

The lack of readily and widely available financial reports likely contributes to a perception that funds are not managed to best of the district's/department's abilities. **Exhibit 3-29** provides staff and parent survey responses regarding financial management. As shown, staff were split in opinion as to whether the district manages funds wisely and whether their school/department allocates resources equitably and fairly. Parents were similarly split as to whether the district spends its money wisely. One-third of parents felt that MDPS needed to spend more on facilities; two-thirds wanted more spent on classroom supplies.

Exhibit 3-29
Survey Results Regarding Financial Management

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	Funds are managed wisely to support education in this district.	3%	22%	39%	25%	11%
Staff	My school/department allocates financial resources equitably and fairly.	5%	29%	43%	16%	7%
Parent	The district spends its money wisely.	7%	21%	49%	15%	8%
Parent	The district needs to spend more of its budget on its facilities.	10%	26%	49%	13%	2%
Parent	The district needs to spend more of its budget on classroom supplies.	23%	44%	29%	4%	0%

Source: Prismatic Survey Results, February 2021

Leadership has to have a current awareness of their financial status in order to manage their department budget. According to GFOA, budget monitoring is crucial for an organization to be able to enforce accountability related to spending. In addition, regular, comprehensive monitoring of the budget allows a governmental entity to evaluate service level provision, ensure

any new initiatives are making expected progress towards goals/expectations, learn more about trends and other deviations that may impact future operations, and finally demonstrate transparency by sharing findings from the regular monitoring.

RECOMMENDATION

Provide additional training for Munis to staff and establish a process where monthly budget reports are processed at the department and site level.

The CFO should provide training opportunities for site and departments. During these trainings, the CFO should distribute detailed instructions on how to create useful budget reports in Munis. The CFO should establish a date of the month that reports will be created for sites and departments. The reports can be created at the departmental level and do not have to originate from the finance office. The finance department should follow up with the secretaries on a regular basis to ensure these reports are being created as scheduled.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-10

The district still completes a large portion of its monthly payroll work via manual data entry, despite having a technology-based system for time-keeping. This is inefficient and outdated.

VeriTime is the district's time-keeping system for non-exempt employees. After each payroll period, time sheets are printed out from VeriTime for hourly-paid employees and then manually input into Munis, the district's financial software.

Two payroll staff manually enter the information on the printed timesheets into Munis for up to 150 employees monthly. Manual entry of this time into the payroll system can lead to errors. Moreover, it is an inefficient practice. Staff estimates that each of the two payroll staff spend an average of two days per month entering data and verifying data entry.

While the current process may work to get the process completed, the advantage to having an electronic timekeeping system is to have the ability to integrate the system with the district's payroll system. The current manual procedure is labor intensive, and time could be saved by importing the information from VeriTime. The district currently imports leave from another system into the payroll system.

The best time and attendance tracking solutions include the ability to share and integrate data, as needed or required. Most districts the size of MDPS have an integrated process where time is exported from the time-keeping system and imported into the payroll software. Having an integrated process saves time and money each month.

RECOMMENDATION

Develop a process to import hours worked from VeriTime into Munis after each payroll period.

The CFO and payroll coordinator should work with VeriTime to develop a seamless process of exporting data from the timekeeping system by the creation of an electronic file format compatible with Munis. After a file format is determined and the process is created, the integration should be tested to make sure it is working correctly. After that, the payroll coordinator should ensure that payroll staff are trained in how to export and import the data.

FISCAL IMPACT

This recommendation can be implemented with existing resources and should free as much as four staff days per month.

FINDING 3-11

The district lacks an activity fund procedures manual. While the district hosts an annual in-service training, the absence of written procedures for activity funds creates risks that are unnecessary. Relying strictly on in-person training once per year is insufficient for a district as large as MDPS.

The finance department has several forms for activity funds posted on their section of the district's website, but there are no written procedures for activity fund sponsors to refer to when they need guidance. When asked if there was such a document in paper or electronic form, it was stated that the PowerPoint presentation given at the in-service is stored on the district's server.

School district activity funds usually have the most potential for risk due to the amount of cash transactions and the number of different people handling money for each activity fund. Without written procedures, the potential increases for sponsors to violate board policies and state statutes.

Written procedures are essential to maintaining proper internal controls for an organization. Ideally, written procedures are provided to all activity fund sponsors in the form of a handbook. A typical handbook would include these sections:

- general information;
- responsibilities of the principal;
- responsibilities of sponsors;
- responsibilities of the activity fund custodian;
- procedures for fund raisers;
- procedures for purchasing;

- sponsor procedures for receipting money;
- activity fund custodian procedures for receipting money;
- important points to remember, sponsor;
- important points to remember, activity fund custodian; and
- activity fund project codes.

For example, Guthrie Public Schools publishes a comprehensive manual that provides guidance for managing school activity funds. The manual provides instructions and guidelines that cover over 30 topics along with forms, board policies, and examples. Topics in the manual include:

- procedures for purchasing;
- receiving and depositing cash;
- accounts payable;
- administrator responsibilities;
- receipts and deposits; and
- expenditures.

The Guthrie handbook also includes Oklahoma state laws and SDE regulations pertaining to activity funds. The manual is reviewed annually and updated as needed. It provides a valuable resource to principals and sponsors, as they manage activity funds and prepare various documents related to activity funds.

RECOMMENDATION

Develop a standardized procedures handbook for all district activity funds to help ensure that funds are administered properly.

The procedures should clearly state how all activity funds are to be administered, and thus will assist principals, teachers, and sponsors in fulfilling their responsibilities. The handbook also will provide a good reference for new principals, teachers, and sponsors. An electronic copy of the handbook should be published on the finance page of the district website.

The activity fund clerk should require every sponsor to read the handbook and sign an “activity account sponsor’s affidavit of responsibility” stating that they have read the handbook and understand it. This form should also be signed by the principal and the activity account name or number for which the sponsor is responsible. The sponsor could be issued a receipt book only upon approval of this affidavit.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

D. EXTERNAL/INTERNAL AUDITING

Internal and external audits provide a review of the district's compliance with established standards and practices. External audits are required of all Oklahoma school districts and are performed by state-approved public accounting firms. The external audit provides:

- an annual financial and compliance report;
- an examination of the expenditure of federal funds (as applicable); and
- a report to management on internal accounting controls (as applicable).

The internal audit function supplements the work of the external auditor. The internal audit function examines specific areas to determine:

- the adequacy of internal controls;
- compliance with adopted policies and procedures and adherence to applicable law and regulation; and
- efficiency and effectiveness of operations.

FINDING 3-12

The MDPS finance department performs random internal audits throughout the year on activity sub-accounts along with a thorough end-of-year examination. The district finance team performs these tasks on a consistent basis.

The finance department at MDPS regularly performs internal audits on activity fund sub-accounts, sanctioned booster clubs, and departmental and site budgets. These audits help the district discover any procedural errors or other irregularities before the item becomes a larger issue. The audits are performed randomly, so sub-account managers do not know when an internal audit might occur. The investment of time to perform this function on a regular basis deters fraud and protects taxpayer funds. This process has also helped the district maintain clean annual audits from its external independent auditor. This process can also lead to process improvements if similar violations are found in multiple areas of a district.

An internal audit can determine the efficiency and effectiveness of the school district, while ensuring compliance, evaluating the internal operations of the district, and investigates issues related to theft, fraud, and other indiscretions. In addition to investigating fraud, internal auditors may discover whistleblower complains and address issues of ethics within the district.

COMMENDATION

MDPS has developed a successful internal audit process.

E. CASH MANAGEMENT

Effective management of cash and investments requires seeking investments with maximum interest-earning potential while simultaneously safeguarding the district's cash and ensuring the district's liquidity to meet fluctuating cash flow demands. Developing an effective cash management program can provide a district with additional revenues to fund programs and operations.

FINDING 3-13

The district is not currently maximizing the potential for earning interest on its idle cash. This results in a lower rate of return on investments and lower interest earnings by the district.

Base on a review of district financial statements, it appears a majority of the idle cash is held in the district's checking account. There is a certificate of deposit at the local bank that holds a small portion of the surplus funds. While this ensures the district has cash that is readily available when it is needed, the district is potentially losing out on additional earnings that could be used to help the district's mission.

The district has an investment policy that allows for the district to place funds in other institutions. When asked about the idle cash, the statement was made that the local bank preferred all funds stay with their institution. Without seeking bids for investment options from other institutions, the local bank does not have to compete for these funds and results in the district earning a lower rate of return on their money.

By not investing idle cash regularly, MDPS has lost on interest-earning opportunities. **Exhibit 3-30** provides a comparison of the interest earnings over time for MDPS and a similarly-sized Oklahoma district.

Exhibit 3-30
Recent Interest Earnings, All Funds

Year	Mid-Del	Jenks	Difference
2015-16	\$84,068	\$392,152	(\$308,084)
2016-17	\$96,950	\$407,821	(\$310,871)
2017-18	\$109,265	\$682,489	(\$573,224)
2018-19	\$327,534	\$1,052,962	(\$725,428)
2019-20	\$305,124	\$1,121,643	(\$816,519)

Source: MDPS and Jenks Public Schools, March 2021

Today's investment opportunities with public funds are limited due to current market conditions, but it is still a good practice to request rate quotes from multiple financial institutions. Current treasury yield curve rates are historically low with rates ranging from two basis points for a two-

month treasury to six basis points for a 12-month investment. Insured cash sweeps are one to three basis points unless one finds an institution that will pay a premium rate for the district's business. Certificates of deposits have limited availability due to the collateral requirements of public funds. Higher rates are available for multi-year governmental agencies callable bonds, but those options offer little liquidity and expose the district to market risk if the bond is not called.

RECOMMENDATION

Invest idle cash more aggressively.

While the current economic environment justifies keeping the district's surplus funds in the local bank, it benefits the district long-term to work to maximize its earnings on all idle cash, especially as market conditions improve. This means moving idle cash into more lucrative positions in order to earn higher interest rates. The CFO should contact other Oklahoma districts to develop a list of likely banks and institutions that would offer better returns on idle cash and then invest accordingly.

FISCAL IMPACT

Based on the earning of Jenks Public Schools, the consulting team estimates that MDPS can double its typical interest earnings. Assuming the 2019-20 interest earnings as a base, this would result in an additional \$305,124 in earnings each year.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Invest idle case in higher yield areas.	\$305,124	\$305,124	\$305,124	\$305,124	\$305,124

FINDING 3-14

The district still issues pay warrants (checks) as the primary method for accounts payable vendors. As technology has evolved, vendors are willing to accept other forms of payment in order to get paid more timely.

For the accounts payable process, checks are the only method of payment for accounts payable used by MDPS, other than p-cards used by select employees of the district. Paper checks are expensive due to the cost involved in printing, stuffing envelopes, and mailing the checks to vendors. Checks will occasionally get lost in the mail, are stolen, or be sent to an incorrect mailing address. When one of these issues happen, it starts the process of voiding the check, issuing a stop pay with the bank, and reissuing a replacement check.

There are alternative methods of payment in use in other school districts:

- Banks offer an Accounts Payable card solution to replace paying certain vendors by check. Banks that offer this option will work with a district's local bank and financial software. Typically, the bank will complete the vendor setup at no cost to the district. The rebates generated from this type of process is discretionary and can be used as supplemental revenue to the district.

- Virtual card payments automate payments, streamline the accounts payable process, reduce costs, and earn cash rebates. They also improve security, internal controls, and help manage cash flow. Virtual cards cost the district nothing.
- Automated Clearing House (ACH) credit process allows a district to directly move funds from one of its bank accounts to the bank account of a vendor. It requires a small amount of set-up time (similar to that required to set up direct deposit for an employee). ACH transactions typically cost the district nothing but do not earn rebates.

Broken Arrow and Edmond Public Schools both use virtual card systems as an alternative payment solution for their accounts payable process. While both districts still issue the majority of payments by check, this additional payment method has generated significant rebates for each district.

RECOMMENDATION

Implement an alternative accounts payable solution that will generate rebates back to the district.

The CFO should research alternative solutions for accounts payable payments. Once a product is identified that works best for MDPS, staff should be trained, and written procedures established to document the new process. The district can send a current vendor file to the bank managing the program for the bank so the bank can enroll vendors.

FISCAL IMPACT

Based on the spend of a similarly sized district, the consulting team estimates rebates generated from a successful virtual card payment solution will be approximately \$60,000 a year. The consulting team estimated half of that for the initial year, to allow time for full implementation.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Earn rebates from an alternative accounts payable solution.	\$35,000	\$60,000	\$60,000	\$60,000	\$60,000

F. RISK MANAGEMENT

Effective risk management involves the safeguarding of property from loss, damage, theft, and obsolescence. Proper safeguarding of district assets requires an effective system of accountability and a culture of adherence to established policies and procedures.

FINDING 3-15

MDPS financial data are not backed up to a location outside the district. The district is not utilizing any cloud solution as an alternative backup method.

The district backs up their critical data to a server in another building within MDPS boundaries. This building was built as a storm shelter, so the servers are protected in the event of a severe storm. But all buildings can experience unexpected situations, such as water damage, electrical issues, or HVAC failure. These types of issues can be catastrophic for servers.

In the event that a local backup server was damaged, the finance department would lose valuable information. This information would have to be recreated in the financial system which could include a labor-intensive process and could delay important functions such as processing payroll and accounts payable. Tyler Technologies can establish a backup for the financial system, but those services are not being utilized.

School districts that use best practices for backing up critical data have a disaster recovery plan in place which includes a comprehensive backup plan. Those districts backup data frequently in higher data entry functions such as payroll, human resources, and accounts payable. Data are also backed up from both internal and external locations. The most common best practices include:

- use remote storage;
- take backups frequently and regularly;
- consider retention span;
- keep backups encrypted and protected;
- store backups on RAID arrays; and
- stack backup solutions (have more than one).

RECOMMENDATION**Expand disaster recovery plans to include backing up financial data to a cloud solution.**

The CFO and technology director should establish a comprehensive backup plan for financial data as part of an overall district technology plan and disaster recovery plan. They should determine what data needs to be included in the backup, the frequency of the backups, and where the data will be stored. The district finance software providers should play a key role in this process. The plans should be written and shared with key leadership as a guide and a reference in the event of an unexpected technology breach or other event that could impact the financial systems.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

G. FIXED ASSET MANAGEMENT

Asset management involves managing the district's cash resources and physical assets in a cost effective and efficient manner. Effective cash and investment management involves forecasting cash requirements timely and accurately so that funds are made available when needed.

FINDING 3-16

Physical fixed asset inventories are not performed on an annual basis. The last physical inventory for the entire district was performed in 2017.

The district has a fixed asset policy that requires capital assets, along with high theft items, to be tracked and inventoried so that the district can be a good steward of the assets it owns as well as comply with GASB standards. The MDPS policy calls for a physical inventory of the entire district to be performed annually. While the district issues asset tags on all new purchases that are considered fixed assets or high theft items such as technology devices, the district has not performed a physical inventory since 2017.

There are forms and processes in place for the transfer and disposal of assets. The fixed assets are tracked in the district's financial software Munis. The district did provide fixed asset listings in the submission, but it was stated in both interviews and the focus groups that an actual inventory has not been performed in some time. To perform an annual inventory for the entire district would likely be expensive, given the district's size.

To protect their investment in fixed assets, school districts track their assets and have policies that provide direction on how the assets are to be managed. As items are acquired, they are immediately added to the listing. When the district disposes of an item through normal processes it is taken off the listing. When an item cannot be found, the situation is reviewed, and appropriate action is taken. Normally, the school board is required to approve all deletions. Physical inventories are typically scheduled on a consistent basis.

RECOMMENDATION**Modify MDPS policy and require a physical fixed asset inventory for a specific portion of the district each year.**

The CFO should present an amendment to current board policy to change the frequency of the annual physical inventory from the entire district to a realistic portion such as one-third of the district each year. The department can identify internal staff to perform the function and the portion of the district to be inventoried annually. This will provide a more accurate fixed asset listing and help in the event an insurance claim needs to be made, such as after a natural disaster.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

H. PURCHASING

An effective purchasing system allows a school district to receive quality materials, supplies, and equipment in the right quantity in a timely, cost-effective manner. Purchasing includes those activities involved in the identification and purchase of supplies, equipment and services needed by the district, as well as the storage and distribution of goods. Goods and services must be obtained according to the specifications, at the lowest responsible cost, and within state laws and regulations, including the state's purchasing and bid requirements and the School Laws of Oklahoma.

A sound purchasing system begins with researched policies implemented through well considered procedures. Careful planning, strong internal controls, and cost-efficient practices such as bulk purchasing and price/bid solicitation provide the framework for the efficient procurement of goods and services.

Purchasing policies and operating procedures help ensure a district complies with state and board purchasing requirements while performing purchasing functions in an efficient and timely manner. Policies should clearly establish purchasing authority, methods required for each type of purchase, provisions for conflicts of interest, and penalties for violating purchasing laws and policies. Purchasing procedures implement policies by documenting the steps that should be taken when goods or services are procured.

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MDPS departments and functional areas. **Exhibit 3-31** provides the results for purchasing. Slightly less than one-third (32 percent) of staff gave purchasing an A or B.

Exhibit 3-31
Staff Survey Results Regarding Purchasing Functions

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Purchasing	8%	24%	23%	9%	5%	32%

Source: Prismatic Survey Results, February 2021

FINDING 3-17

No purchasing procedures manual exists. While there is a board policy for purchasing and procurement, and procedures are presented at the annual in-service training for all secretaries and activity fund sponsors, a written procedures guide for purchasing does not exist.

When the question was asked in interviews about the existence of written purchasing procedures, staff indicated that no such document existed, that topics were covered in the annual meeting, and that “people can call us if they have questions”. Without a written document, people are less

likely to understand the district policies and procedures, which makes the process more cumbersome for the end user. For example, comments were made in focus groups that some staff members did not understand what items could be ordered from bond allocations. On the stakeholder survey, 26 percent of staff felt that the purchasing process takes too long, while 52 percent had no opinion (**Exhibit 3-32**). These sentiments likely reflect a lack of comfort with or understanding of the purchasing process.

Exhibit 3-32
Staff Survey Results Regarding Purchasing

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The purchasing process takes too long.	6%	20%	52%	19%	3%

Source: Prismatic Survey Results, February 2021

The finance department page on the district's website lacks any purchasing guidance other than a training manual on how to enter requisitions in Munis. The website is typically the most effective way to distribute written information regarding purchasing requirements, required vendor forms, along with a frequently asked questions section.

Districts that have efficient and effective purchasing programs have written guidance that includes instructions on how to use the automation process for requisitions, district policy requirements, an explanation of the steps in the purchasing process, and the types of items allowed for purchase within different funds. Effective procedures guides are written in an easy understandable format. A district website usually includes resources such as required forms and an electronic copy of the written procedures.

RECOMMENDATION

Create an MDPS purchasing procedures handbook and publish it on the district website.

The CFO, director of accounting, and the purchasing agent should create a written purchasing procedures handbook. The handbook should include all necessary items regarding the purchasing process including the step-by-step instructions on the requisition process, the purchasing process, currently policy requirements, required forms, vendor forms, and other resources that are useful in the process. This should also include information regarding the receipt of goods and the accounts payable process. Once the handbook is created, it should be available to staff on the district website.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

I. WAREHOUSING

An efficient warehouse operation should ensure that:

- all purchases and deliveries to schools and departments are complete and timely;
- inventory levels are sufficient to meet requests for supplies from individual schools and units;
- property and equipment are accounted for properly and controlled; and
- surplus or obsolete property is disposed of properly and removed from district records.

FINDING 3-18

The district maintains and operates a warehouse that stores child nutrition, custodial, light bulbs, and surplus property items. Although the warehouse is needed for child nutrition and surplus items it is expensive to maintain for custodial items and provides questionable benefit to the district.

There are three inventories maintained at the warehouse: child nutrition, custodial, and light bulb. Surplus property is also stored there. The warehouse has 24,050 square feet of space. The district's security staff and the inter-district mail operation is also located at the warehouse facility. The warehouse inventory breakdown is shown in **Exhibit 3-33**. The child nutrition items at the warehouse are provided to schools for use in the school meals program. School cafeterias also have an inventory of food and other items at the individual school sites – this had a cumulative value on June 30, 2020 of \$95,075. The custodial inventory contains primarily cleaning supplies used by custodians and copy paper. The light bulb inventory includes a stock of bulbs used by the district's building maintenance personnel.

Exhibit 3-33
Warehouse Inventories as of June 30, 2020

Inventory	Number of Types of Items	Inventory Value
Child Nutrition	185	\$120,986
Custodial	40	\$93,727
Light Bulbs	43	\$4,023
Total	268	\$218,736

Source: MDPS inventory sheets, June 2020

Seven district employees involved in maintaining the warehouse processes; a warehouse coordinator is assisted by six other employees:

- a child nutrition secretary;
- secretary/inventory clerk, and
- four warehouseman/delivery drivers.

The duties of most staff overlap duties between child nutrition, custodial, and other duties including surplus property. Based on an estimate made by management of time spent by each

employee, the custodial inventory (which includes copy paper) is supported by staff earning an estimated \$138,325 (**Exhibit 3-34**). The budget for 2020-21 and expended in previous years was approximately \$150,000 for the warehoused custodial items. Thus, when salaries for maintaining the items are added to the cost of the custodial items, their total cost to the district is nearly doubled. Use of space in the warehouse and equipment including trucks and forklift further adds to the actual cost of items in the custodial inventory.

Exhibit 3-34
MDPS Warehouse Staff Salary Allocation by Warehouse Area

Staff	Salary and District-Paid Retirement	Child Nutrition		Custodial		Other	
		Time Spent	Allocated Salary	Time Spent	Allocated Salary	Time Spent	Allocated Salary
Warehouse Coordinator	\$61,387			40%	\$24,555	60%	\$36,832
Clerical/Secretary/Inventory	\$37,562			75%	\$28,172	25%	\$9,390
Child Nutrition Clerk	\$29,856	100%	\$29,856				
Warehouseman	\$31,763			100%	\$31,763		
Warehouseman	\$31,139	50%	\$15,569	50%	\$15,570		
Warehouseman	\$33,887			60%	\$20,332	40%	\$13,555
Warehouseman	\$29,888			60%	\$17,933	40%	\$11,955
Total	\$255,482		\$45,425		\$138,325		\$71,732

Source: MDPS administrative staff and Prismatic calculations, February 2021

MDPS does not use an automated inventory for managing its inventory of custodial items and light bulbs. Without an automated inventory system there is limited internal controls over the items maintained in the inventories. The lack of an automated system with associated written procedures provides the opportunity for abuse and unauthorized distribution of inventory items. To determine the value of the inventories a manual physical inventory has to be taken and calculations made. Without an inventory system there is no way to track items received at the warehouse or items distributed to schools without a physical review of each receiving report and issue ticket making practically impossible without spending a tremendous amount of time. In contrast, the child nutrition inventory is maintained in and managed by the Mosaic software system used by the child nutrition program. As items are taken from the warehouse inventory, they are automatically added to the school's child nutrition inventory.

Schools request items from the custodial inventory including copy paper and are not billed for items, thus creating a process without cost containment incentives or penalties. Most schools assign the head custodian at the school the duty of ordering items from the custodial inventory. Warehouse personnel deliver the items to the schools. Interviews with school staff indicated that deliveries were considered to be timely, normally within 48 hours of ordering.

Purchasing processes enable schools to obtain most of the items directly from local vendors. Items acquired from the inventory by schools are usually at the same price as can be acquired from local vendors. The custodial inventory was likely cost effective and efficient when items could not be readily obtained locally, but this is no longer the case.

Many entities, including school districts, are eliminating central supply warehouses and relying on the just-in-time (JIT) delivery systems of vendors. Organizations order goods and supplies from vendors who agree to deliver the goods quickly, usually by the next business day. Although per unit cost of goods may be slightly higher in some instances, school districts actually save money because they can eliminate the warehouse space, equipment, and the staff needed to operate it.

RECOMMENDATION

Phase out the custodial inventory except for copy paper and implement a just-in-time ordering system for supplies that are delivered directly to the schools.

The CFO should develop a plan to phase out the custodial inventory. With the exception of paper, the district should stop ordering custodial supplies immediately and allow inventory to be reduced by normal requests for schools. The district should liquidate the remaining inventory items after six months. The district should begin purchasing supplies from vendors as needed and deliver all supplies directly to schools. The supply of light bulbs should be transferred to the building and maintenance department and that department should be assigned the responsibility for ordering and maintaining the needed supplies or provide the light bulbs using just-in-time purchases.

Since the district receives a substantial discount for volume purchasing of copier paper, the district should consider continuing to store copier paper in the warehouse for schools. The warehouse coordinator should assess new workloads and make job assignments as appropriate. The workloads of staff assigned to the warehouse including the warehouse coordinator and clerical/secretary/inventory will be reduced and their positions should be reviewed by district management staff and other duties assigned where possible.

FISCAL IMPACT

The estimated fiscal impact of this recommendation is based upon eliminating the workload associated with stocking and maintaining custodial supplies in the warehouse. Eliminating custodial items except copier paper would enable the district to eliminate the equivalent of three positions referred to as “warehouseman.” The actual savings to the district of \$95,007 represents the salaries for three positions based on the average of four of the warehouseman positions supporting the custodial inventory ($\$126,677 / 4 = \$31,339$) ($\$31,339 \times 3 = \$95,007$). It is anticipated that the positions would not be eliminated until June 2021, providing the district with sufficient time to use the stock of supplies in the warehouse and to potentially transfer the existing staff to other suitable positions in the district. Additional savings were not calculated pertaining to the use of the building space and equipment since it is anticipated that the space and equipment will be used for other functions.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Phase out the custodial inventory except for copy paper and implement a just-in-time ordering system for supplies that are delivered directly to the schools.	\$95,007	\$95,007	\$95,007	\$95,007	\$95,007

Chapter 4:

Facilities Use and Management

Chapter 4

Facilities Use and Management

This chapter addresses the facilities use and management of Mid-Del Public Schools (MDPS) in the following sections:

- A. Facilities Planning and Construction
- B. Maintenance and Custodial Operations
- C. Energy Management
- D. Safety and Security

Facilities use and management includes the planning, construction, and maintenance of buildings, the safety of students and staff using those buildings, and the security of facilities before, during, and after school hours. More specifically, this area includes the following:

- planning and designing facilities to meet educational standards and to provide a physical framework that enhances learning conditions;
- properly maintaining and cleaning facilities so that teaching and learning can take place in a healthy and clean environment;
- ensuring that the facilities are safe when students and teachers are present;
- creating proper safeguards to ensure the security of the facilities during and after school hours; and
- having safety plans in the event of a crisis or natural disaster so that students and staff members are protected.

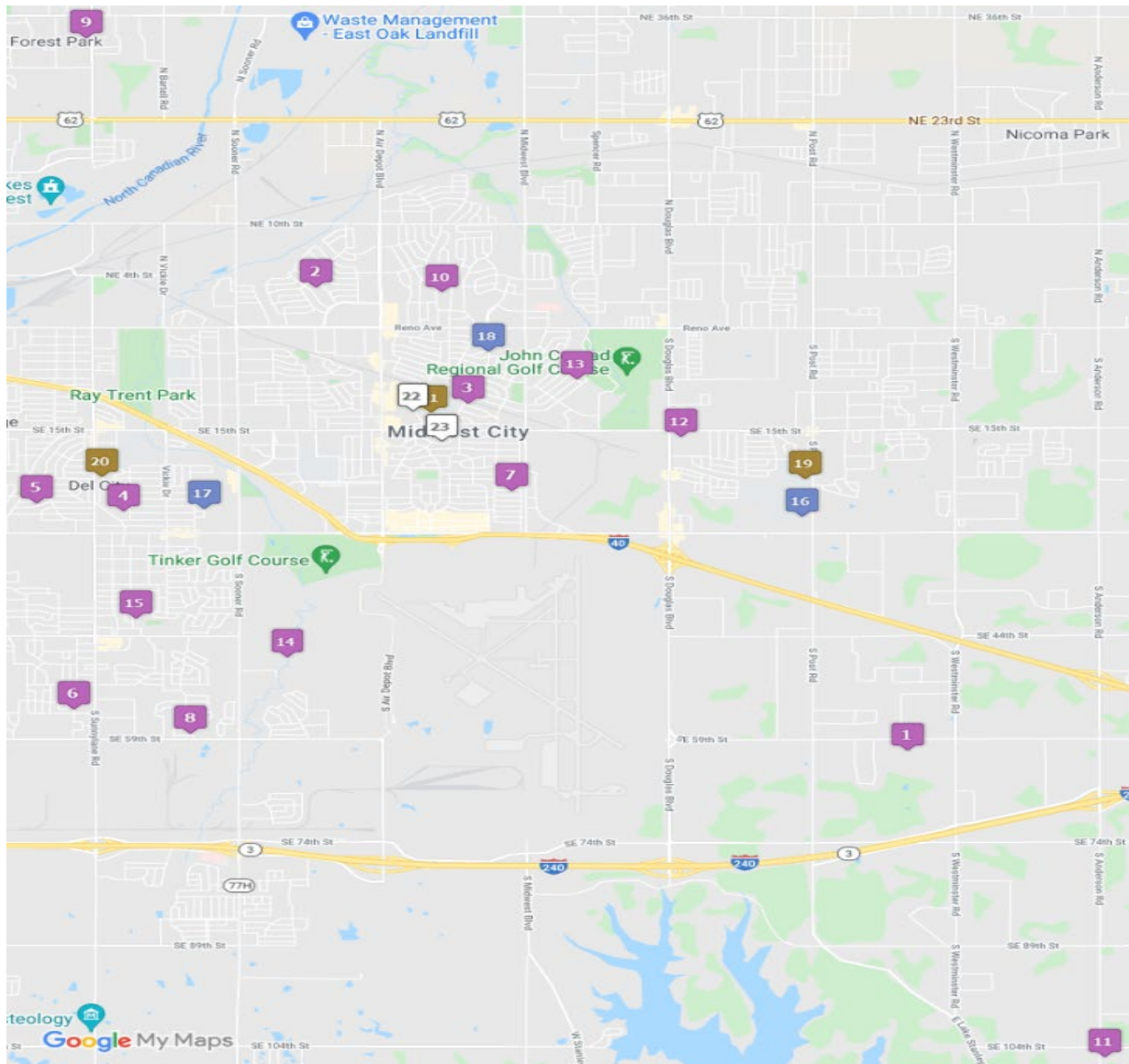
Background

Mid-Del Public Schools (MDPS) serves the two Oklahoma City suburbs of Midwest City and Del City, and a portion of Oklahoma City (**Exhibit 4-1**). MDPS had its origins in the waning years of the Second World War, when about 1,250 students in Midwest City were taught in five temporary structures. The first permanent building was dedicated in 1944.

After a past decade of outright school closures, several major additions, two replacements of old elementary schools with new facilities, and the wholesale renovations of the field houses and fine arts facilities at all high schools, MDPS now operates three high schools, three middle schools, and 15 elementary schools. Further facilities actions, including further school closures, remain under consideration or are in planning (**Exhibit 4-2**).

The Mid-Del Technical Center (MDTC) provides vocational-technical training at the high school level, including a satellite aeronautical maintenance and technology program at Tinker AFB. MDTC is the only facility of its kind in Oklahoma under the jurisdiction of a school district's board of education.

Exhibit 4-1 MDPS School Locations



- | | |
|------------------------|------------------------------|
| 1. Barnes ES | 12. Soldier Creek ES |
| 2. Cleveland Bailey ES | 13. Steed ES |
| 3. Country Estates ES | 14. Tinker ES |
| 4. Del City ES | 15. Townsend ES |
| 5. Epperly Heights ES | 16. Carl Albert MS |
| 6. Highland Park ES | 17. Del City MS |
| 7. Midwest City ES | 18. Midwest City MS |
| 8. Parkview ES | 19. Carl Albert HS |
| 9. Pleasant Hill ES | 20. Del City HS |
| 10. Ridgecrest ES | 21. Midwest City HS |
| 11. Schwartz ES | 22. MDTC |
| | 23. Rose Administration Bldg |

Source: Google Maps, February 2021

Exhibit 4-2
MDPS Facilities Inventory

Facility Name	Year Built	Floor Area (Sq. Ft.)	Current Replacement Value (\$)
Barnes ES	1955	56,164	\$7,740,000
Cleveland Bailey ES	1963	48,380	\$6,435,000
Country Estates ES	1951	56,315	\$7,490,000
Del City ES	1977	96,347	\$16,379,000
Epperly Heights ES	1951	79,779	\$10,684,000
Highland Park ES	1969	73,209	\$10,279,000
Midwest City ES	2014	110,000	\$28,270,000
Parkview ES	1973	73,960	\$10,502,000
Pleasant Hill ES		49,556	\$7,681,000
Ridgecrest ES	1958	44,630	\$5,936,000
Schwartz ES		42,718	\$6,621,000
Soldier Creek ES ¹	2014	110,000	\$28,270,000
Steed ES	1955	56,592	\$7,697,000
Tinker ES	1969	53,003	\$7,049,000
Townsend ES	1953	58,700	\$8,101,000
Carl Albert MS	1971	148,934	\$19,808,000
Del City MS	1955	134,646	\$18,176,000
Monroney/Midwest City MS	1956	157,456	\$20,942,000
Carl Albert HS	1962	252,535	\$46,719,000
Del City HS	1952	296,727	\$46,289,000
Midwest City HS	1951	274,853	\$49,475,000
Learning and Service Center ²	2020	112,017	\$1,490,000
Mid-Del Technical Center (MDTC)	1965	145,327	\$19,328,000
Central Administration	1990	37,712	\$5,016,000
CN, Transportation, Print Shop	1962	24,822	\$3,301,000
Maintenance Facility	1967	43,091	\$5,731,000
Central Warehouse	1981	24,050	\$3,192,000
Total		2,661,523	\$408,601,000

Source: Compiled by Prismatic from MDPS data, March 2021

Exhibit 4-3 provides a sample of MDPS school exteriors. As shown, the district has a fairly wide variety of school facilities.

¹Calculations of current replacement value for MWCES by the insurance underwriter are based on \$257/s.f., whereas calculations for Soldier Creek ES are based on \$139/s.f. These are identically designed schools constructed in 2014. The correct figure for Soldier Creek should also be \$257/s.f. Presumably, the lower number was used in error. It appears to be the figure used in prior years for the old school building of the same name that was replaced with a new building in 2014. Therefore, the consulting team is showing identical CRV values for both MWCES and Soldier Creek ES, reflecting the fact that these are newly constructed, identical seven-year-old schools.

² Housed in 2020 in the repurposed former Del Crest Middle School originally built in 1962.

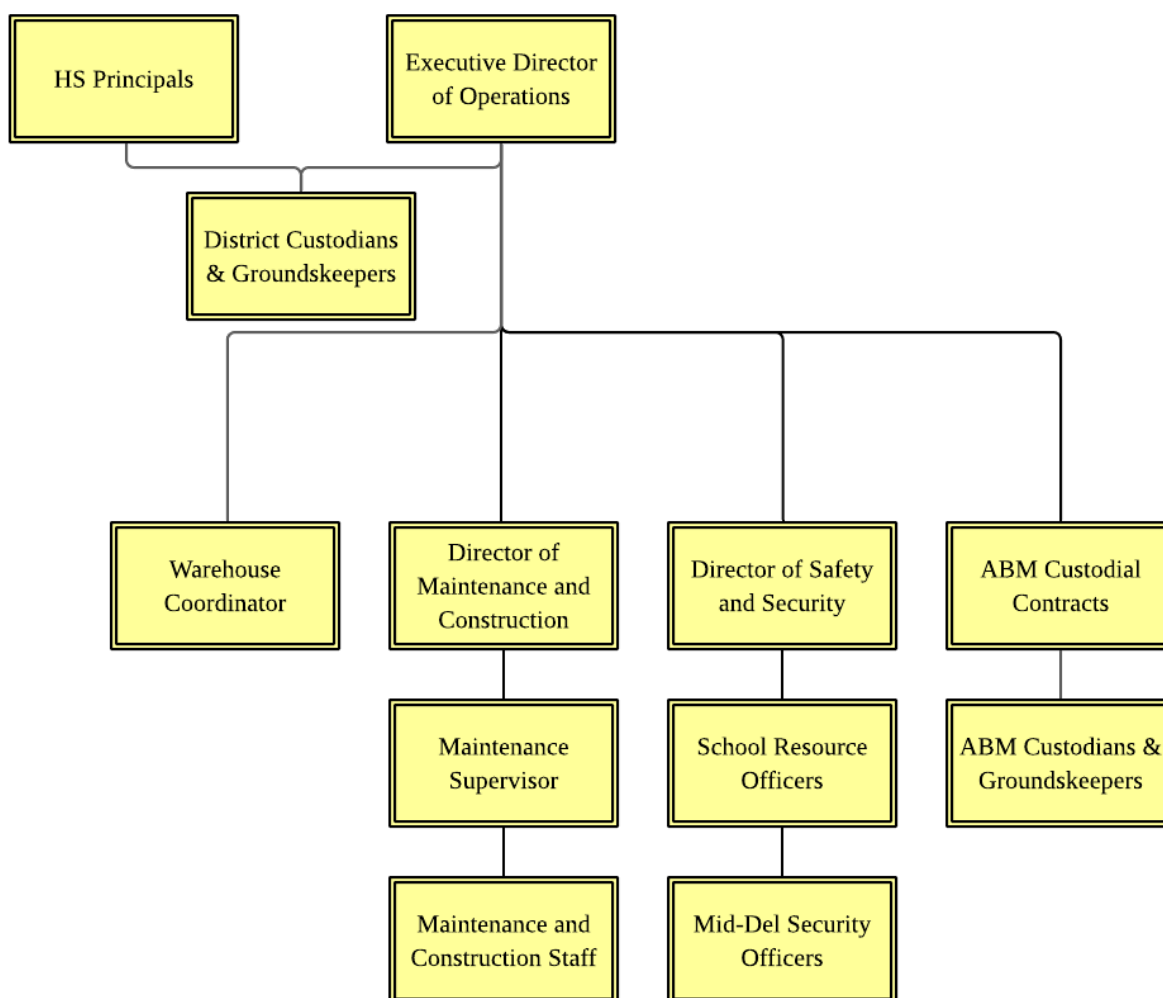
Exhibit 4-3
Sample of MDPS School Entrances



Source: Prismatic, February and March 2021

The MDPS operations department contains most functions related to facilities use and management, including custodial, maintenance, warehousing, and safety/security (**Exhibit 4-4**). A somewhat unusual circumstance is reflected in the current organization: Most of the district's custodial labor force is provided under contract with a private corporation, ABM Industries. ABM custodians staff 100 percent of the elementary and middle schools, while a cadre of 17 FTE custodians employed directly by the district works in the high schools, supplemented at night by ABM custodians. The district's own custodians are direct reports to the high school principals, and report secondarily to the executive director of operations. The ABM site representative also reports to the executive director of operations.

Exhibit 4-4
Organization Chart of MDPS Department of Operations



Source: Created by Prismatic, March 2021

A. FACILITIES PLANNING AND CONSTRUCTION

Well-planned facilities are based upon the educational program and accurate student enrollment projections. The design process should have input from stakeholders, including administrators, principals, teachers, security specialists, parents, students, and the maintenance and operations staff. The selection of building materials, interior finishes, hardware, mechanical, electrical, and plumbing systems, and other major building components should be made by applying life cycle cost analyses for an optimum total cost of construction, operations, and maintenance.

This, coupled with the functional need of providing the best physical learning space possible for students, should lead a district to recognize the absolute necessity of developing, presenting, and implementing a long-range facilities master plan. Failure to implement a long-range facilities master plan will eventually lead to user dissatisfaction and facility concerns.

Having a long-range facilities master plan will ensure that building projects are prioritized, begun, and completed following a studied, developed, and logical process. As district leaders retire or change, having a long-range facilities master plan will add stability and cohesiveness to the district's construction, use, and management of facilities.

A school district's long-range facilities master plan is a compilation of district policies and statistical data that provide a basis for providing educational facilities to meet the changing needs of a community. A valuable resource in developing a quality long-range facilities master plan can be obtained from the Association for Learning Environments (A4LE).³ Effective long-range school facilities master planning incorporates the following elements:

- **Facility Capacity:** Districts establish the capacity of each school facility by setting standards that govern student/teacher ratios and the amount of square feet required per student in a classroom. These standards deal with the minimum size of core facilities, such as classrooms, gyms, cafeterias, and libraries, so that schools do not overload these facilities or overuse portable classrooms.

In 2008, the Oklahoma State Department of Education (SDE) published the second edition of *Planning for Education: Space Guidelines for Planning Educational Facilities*.⁴ The guidelines were developed to assist local school boards, school administrators, architects, engineers, and planners in planning and designing educational facilities. The guidelines arrange space information by the major activities of instructional spaces, auxiliary spaces, and service and structure spaces for the various grade ranges. They also provide suggested methods of calculating preliminary net and gross square footage for school buildings by grade and major activity. Another excellent resource for facility construction is *An Administrator's Guide to School Construction Projects*, also published by SDE.⁵

- **Facility Inventory:** An accurate facility inventory is an essential tool in managing the use of school facilities. The inventory identifies the use and size of each room, which enables planners to accurately set the capacity of each school. Modifications to schools are noted in the inventory so it can be kept up to date.⁶
- **Enrollment Projections:** Effective planning requires accurate enrollment projections at least five years into the future.⁷ Accurate projections require planners to examine district demographics and track any new construction activity in the district. Many school planners work in coordination with county and city planners to track growth patterns.
- **Capital improvement program:** Effective planning requires the district to anticipate its future needs and balance these against expected resources. A capital improvement program charts future improvements to school facilities and identifies funding sources for them. An

³ Council of Educational Facility Planners International. (2004). *Creating connections: The CEFPI guide for educational facility planning*. Can be purchased at <http://creatingconnections.a4le.org/>

⁴ <http://digitalprairie.ok.gov/cdm/singleitem/collection/stgovpub/id/9456/rec/4>

⁵ <http://sde.ok.gov/sde/sites/ok.gov.sde/files/CI-AdministratorsGuide.pdf>

⁶ Floor area figures furnished by MDPS were used. These figures did not reflect disaggregation to the individual space level for size and use description.

⁷ No official enrollment projections are available from any sources from MDPS.

effective planning process involves the community at large, identifies district goals and objectives, and prioritizes projects based upon those goals and objectives.⁸

- **Facilities Maintenance Plan:** School facility planning necessitates identifying links between facilities maintenance and facilities construction and renovation. Capital outlay for school construction is generally a more palatable proposition for taxpayers and public officials when a school system demonstrates that existing facilities receive appropriate care and maintenance. Good plans include short- and long-term objectives, budgets, and timelines – all of which demonstrate organizational commitment to facilities maintenance.⁹

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MDPS departments and functional areas. **Exhibit 4-5** provides the results for facilities planning. Only 26 percent gave facilities planning an A or B; 15 percent gave it a D or F.

Exhibit 4-5
Staff Survey Results Regarding Facilities Planning

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Facilities planning	7%	19%	22%	9%	6%	37%

Source: Prismatic Survey Results, February 2021

FINDING 4-1

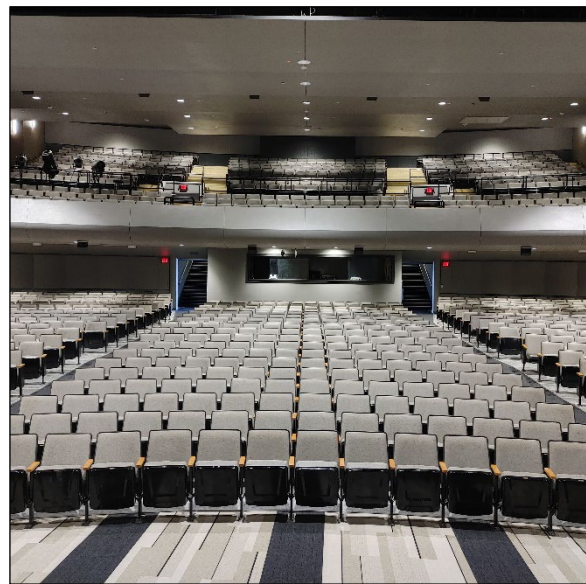
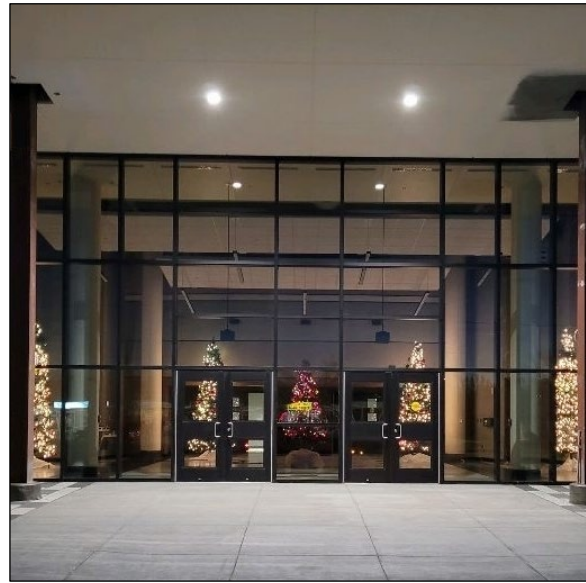
MDPS has operated its three high schools with each campus containing separate performing arts centers as well as field houses. At the time of the onsite review, bond issue-supported renovations of both have been completed, or were nearing completion, at all three high schools. The consulting team has seen few high schools with indoor athletic facilities designed, constructed, and equipped to such a high standard. And yet, the performing arts facilities are, in their renovated states, capable of hosting musical and theatrical performances at most conceivable levels and are therefore a step above even the field houses.

Exhibit 4-6 provides photos of the performing arts centers. Beyond the architectural aesthetics, the consulting team found the acoustics of the facilities to be outstanding.

⁸ MDPS boasts an impressive record of successful bond referenda.

⁹ No official facilities maintenance plan is available from MDPS.

Exhibit 4-6
MDPS Performing Arts Centers



Source: MDPS and Prismatic, March 2021

The performing arts centers are not only assets of MDPS to support all curricula in music and theater, but they enhance the available public and private venues in the community at-large. The district exhibited initiative, vision, and community support in developing these exemplary facilities.

COMMENDATION

The state-of-the-art and far-reaching renovations completed on the Performing Arts Centers at Carl Albert, Del City and Midwest City High Schools resulted in outstanding facilities that are capable of supporting most musical and theatrical curricula.

FINDING 4-2

MDPS has had a “Use of School Facilities” policy (Policy F-2) since its initial adoption in 1982. It was updated in 2013 and 2020. With the arrival of the newly renovated field houses and performing arts centers at the three high schools, the current policy is outdated.

Policy F-2 includes a number of items that are likely outdated now that MDPS has field houses and performing arts centers of high commercial quality. These items include:

- “Minimum insurance coverage of \$100,000 for property damage” – damage from large events, such as commercial musical concerts or college-level sporting events could easily exceed \$100,000 in property damage;
- “The building principal has sole responsibility on all first considerations for facility use” – if the venues become popular for high volume community events, the task of reviewing, booking, and managing venue use could become large and perhaps be better handled centrally;
- “No buildings and facilities will be available for use during the month of July” – retaining this clause for the new facilities would likely negatively impact potential revenue-generating events for MDPS; and
- Rates of \$1,200 per day for auditorium or field house use – these fees may be insufficient for the use of the new facilities.

RECOMMENDATION

Review and modify the current policy “Community Use of Facilities” policy to reflect the current facilities.

The district should review and revise Policy F-2 to make sure it provides for all of the current considerations, concerns, and features of these essentially new facilities. The review should focus on the identification of possible additions, modifications, or deletions to both protect and promote the community use of the new, commercial-class facilities.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 4-3

The district does not have or maintain a current and active facilities master plan document. The only facilities master plan-related document is a succinct facilities element contained in the district's strategic plan. This strategic plan element is neither of sufficient depth nor detail to be suitable for use as a master plan. Facilities master planning is an essential activity for any school district of any size but even increases in importance as district size increases and becomes ever more complex. Without a master plan, the district runs the risk of overbuilding, underbuilding, or otherwise spending on facilities that do not meet district needs sufficiently.

MDPS lacks processes and data for developing and maintaining a long-range, continuous facility plan that addresses building maintenance and students' educational needs. Neither the MDPS school board nor the district's leadership team are engaged in active facilities master planning. This leaves unclear if board members or district leaders are encouraged or expected to bring forward their own facilities planning proposals, or if their role is viewed more passively as one of approving or disapproving the proposals of others.

Facilities planning is not just about new construction or big projects. Rather it includes a broad spectrum of actions, including, but not limited to, the following:

- properly and realistically funded facility maintenance and operations activities, including preventive and reactive maintenance tasks, operational energy efficiency improvements, custodial services, and many other tasks aimed at keeping buildings safe, clean, healthy and conducive to teaching and learning;
- major and minor capital improvement projects, such as additions, renovations, replacements, facility adaptive reuse projects, or upgrading of building systems or elements;
- proper staffing of maintenance and custodial functions, supplemented by outsourcing as needs may arise;
- land and facilities sales or acquisitions; and
- new construction.

Districts that engage in facilities master planning systematically identify and collect the data needed to inform decision-making in the facilities master planning process. Major data collection activities include:

- periodic building condition assessments;
- demographic, economic and geographic development trends;
- building capacity and space use; and
- any other research or data collection efforts needed for decision-making, such as redistricting, building additions, building closures, and mobile classroom management.

There are additional best practices to consider as the plan's components. A school district' long-range facilities master plan is a compilation of district policies and statistical data that provide a basis for educational facilities to meet the changing needs of a community. As noted in resources developed by the Association for Learning Environments (A4LE),¹⁰ effective long-range school facilities master planning incorporates the elements previously described as lacking at MDPS.

RECOMMENDATION

Adopt, implement, and use a continuous facility master planning protocol.

MDPS should take the initiative to design and implement a protocol for a continuous, ongoing facilities master planning activity. As noted in one best practice resource for facilities master planning:

[Facility Master Plans (FMP)] should be developed with a wide range of community stakeholders to ensure that multiple perspectives are included. Many districts find community workshops to be beneficial in both understanding the facility needs of each school and in building support for the plan and any future financing efforts. Finally, approval by the [school board] demonstrates the significance of the FMP and that the plan has a high level of support.¹¹

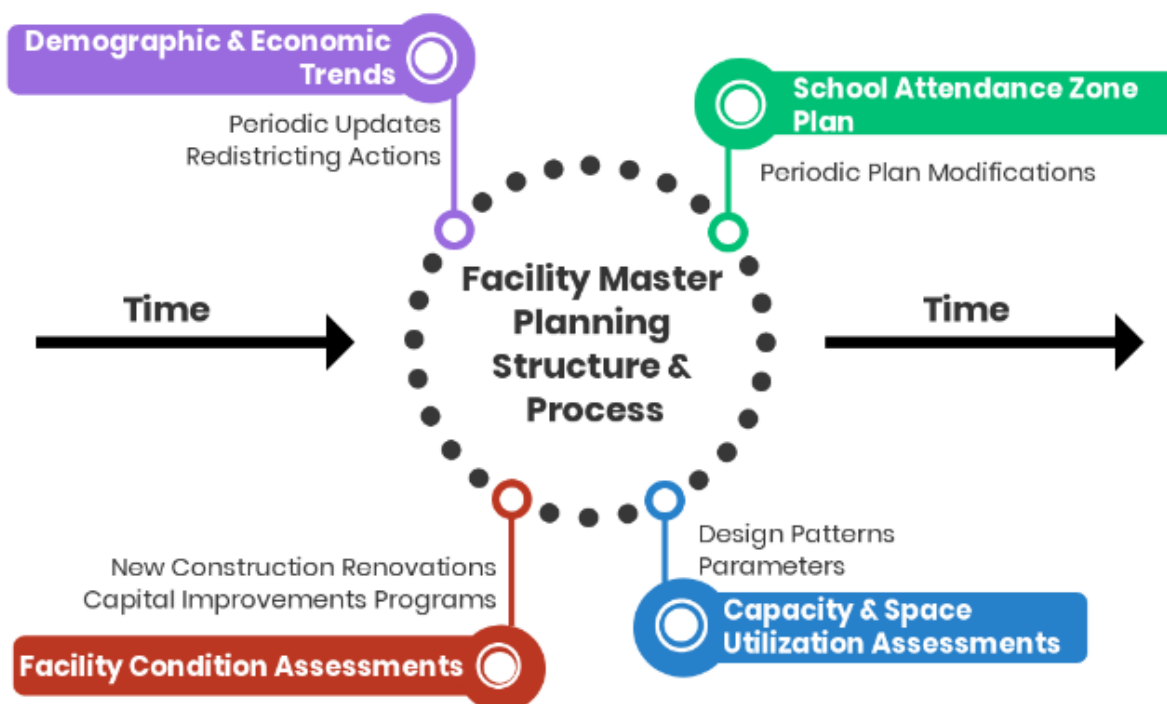
In this process, the district may find it necessary to keep specific details of the plan confidential until such time that they can be openly shared with the public, but it should use public workshops to discuss alternatives before deciding on the best course of action.

Exhibits 4-7 and **4-8** show in diagrammatic form how a continuous facility master planning process should function.

¹⁰ Council of Educational Facility Planners International. (2004). *Creating connections: The CEFPI Guide for Educational Facility Planning*. Can be purchased at <http://creatingconnections.a4le.org/>

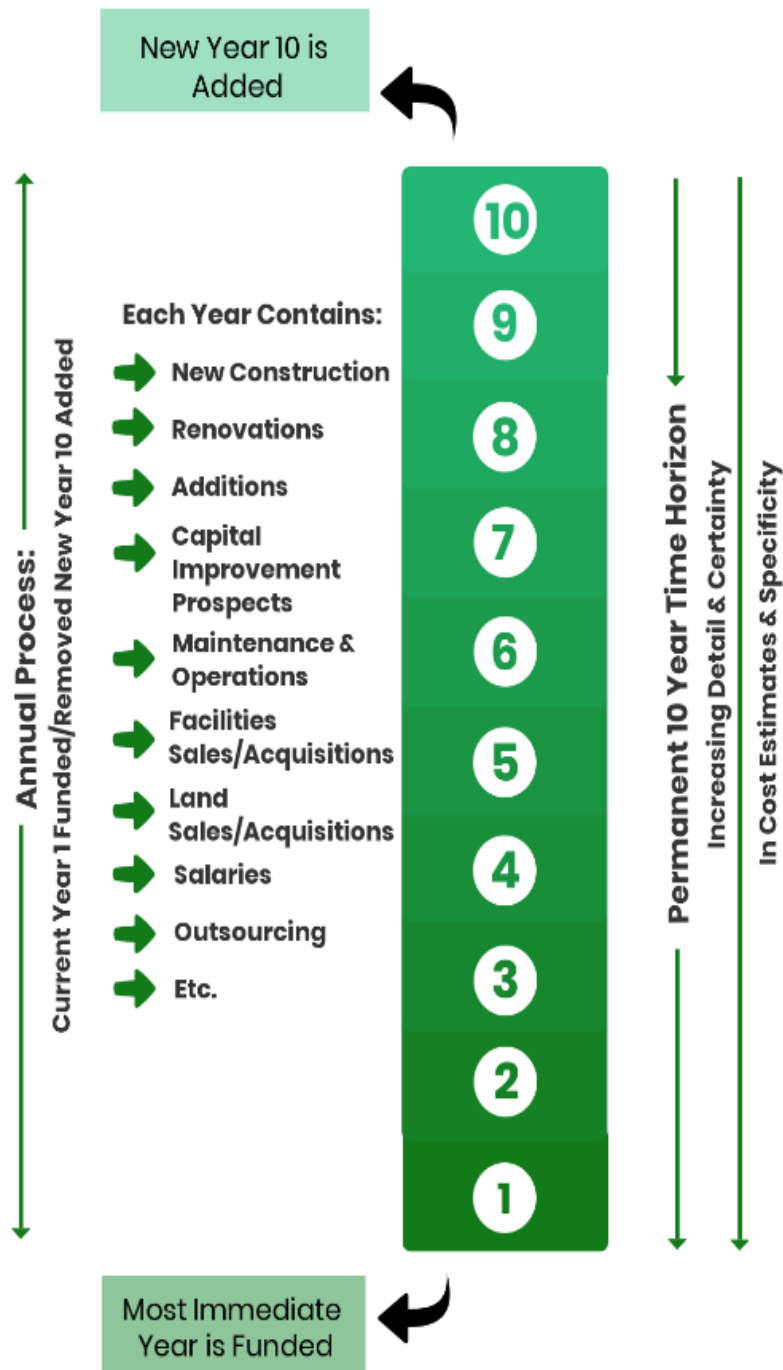
¹¹ Ibid.

Exhibit 4-7
Facility Master Planning Structure and Process



Source: Created by Prismatic, 2020

Exhibit 4-8
Procedure for Maintaining a Continuous 10 Year Time Horizon



Source: Created by Prismatic, 2020

Additional implementation steps should include:

1. MDPS should consider hiring a facilities master plan consulting team on a retainer basis. This will have a fiscal impact but may be desirable for the first few years of activity on

continuous facility master planning. The hired facilities master plan consulting team would serve as designated committee staff, and would be tasked with preparing all minutes, reports, or other committee records and correspondence.

2. The district should form a permanent MDPS Master Plan Committee, with committee membership determined by the BOE and district administrators. Broad community-wide stakeholder representation is desirable. The major purpose of this group would be to recommend the addition of new plan action items for approval by the BOE. The committee should meet quarterly on a standing basis, or more frequently should the need arise. Care should be taken not to overlook stakeholders from all walks of life.
3. The consulting team and the committee should operate under the purview of the superintendent.
4. A Facility Master Plan update should be scheduled at the same time each year. This activity would require one full day, consisting of the following:
 - a. Full detailing of the Master Plan's current year, Year Zero, for full funding of all included projects and other activities, and recommendation by the MDPS Master Plan Committee for approval of this year by the BOE.
 - b. Refinement of Years 1 to 9 and addition of Year 10 to complete the Master Plan's time horizon. Each year should be discussed individually, and the overall 10-year timespan also viewed as a continuum of increasingly likely plan actions. The completed time horizon should be recommended to the BOE for approval.

FISCAL IMPACT

The consulting team estimates that hiring an outside qualified facility planning firm on retainer would require an annual cost of approximately \$40,000, possibly more in the initial two years. This firm should be excluded from being awarded for design services or any projects it created in the facilities master plan. Its philosophy should reflect the attitudes and orientation expressed in this recommendation.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Engage a consulting firm to assist with facilities master planning.	(\$45,000)	(\$45,000)	(\$40,000)	(\$40,000)	(\$40,000)

FINDING 4-4

In 2015, the district hired a construction management firm to conduct building condition assessments (BCAs) of nearly all buildings in its inventory. These BCAs were completed in 2016. No documentary evidence exists that the findings of these BCAs were used to prepare capital improvements projects to eliminate some, or all, of the backlogged maintenance and repair work identified.

The conduct, and periodic updating, of building condition assessments is a recognized best practice of facilities management among owners and managers of buildings because it provides important information about the extent and location of maintenance needs, particularly deferred maintenance needs. The facilities condition index (FCI) offers a guideline comparing the resulting ratio of deferred maintenance to current replacement costs of a facility. FCI is calculated on a scale that ranges from 0 to 30+ percent:

- “Good” (0 to 5 percent);
- “Fair” (5 to 10 percent);
- “Poor” (10 to 30 percent); or
- “Critical” (30 percent or greater).

Based on available data, the district appears to be spending an appropriate amount annually on facilities maintenance and repair activities. However, the lack of updated BCAs or FCIs make a final determination impossible at this time.

The district has spent an annual average of \$10,883,525 over the past five fiscal years on its maintenance and repair activities (**Exhibit 4-9**). Maintenance and repair costs were determined from District Report Function 2600, which represents the total of all O&M expenditures. The cost of all utilities was subtracted from these costs because they are true operating expenses and contribute little, if anything, to maintenance and repair. All remaining operating costs are counted because they can be construed as contributing to maintenance and repair, even though they are also classified as operating expenses.

Exhibit 4-9
Trend in MDPS Annual Maintenance and Repair Expenditures at MDPS

District Report Function 2600	2015-16	2016-17	2017-18	2018-19	2019-20
O&M Function Plant Services ¹²	\$11,767,381	\$11,403,636	\$12,801,524	\$13,498,715	\$12,758,835
Minus Utilities ¹³	(\$1,569,792)	(\$1,607,019)	(\$1,642,958)	(\$1,527,896)	(\$1,459,803)
Total Cost: Maintenance & Repair	\$10,197,589	\$9,796,617	\$11,158,566	\$11,970,819	\$11,294,032

Source: Prepared by Prismatic Services from data provided by MDPS, February 2021

The \$10.9 million annual average represents 2.66 percent of the approximately \$409 million current replacement value (CRV) of the district’s facilities inventory. This percentage is within the two to four percent range recommended as a best practice by the Building Research Board of the National Research Council.¹⁴

¹² From workpapers Table District_Report_Function Code_2600_02-23-2021.xlsx

¹³ Electricity, natural gas, diesel, water, all other utilities

¹⁴ <https://www.nap.edu/read/9807/chapter/1>

This level of maintenance and repair spending by MDPS is potentially commendable, for a few reasons:

- The level of maintenance and repair spending is within the best practice range of two to four percent of total CRV.
- The district's maintenance and repair spending has been consistent across the five years examined.

However, a commendation can only be given if the deferred maintenance in the total building inventory shows an FCI of ten percent of CRV and preferably five percent or below. If the FCI is higher, a best practice may be higher as well, above the upper limit of four percent. This FCI figure is currently unknown at MDPS. Regular BCAs can provide districts with the information necessary to calculate building-level FCIs, which can then be used to prioritize facilities maintenance, repair, renovation, and new construction. While it seems inconceivable, following years of maintenance neglect, some school districts complete BCAs only to determine that some buildings have an FCI of over 100 percent, meaning that it would cost more to fix all deferred maintenance than to build new.

RECOMMENDATION

Institute regular building condition assessments and maintenance backlog management.

At a minimum, a district's maintenance backlog should be managed by keeping it below ten percent, or preferably five percent or less. Building condition assessments should be updated approximately every five years to confirm that the FCI is at least "fair" and preferably "good."

The district should consider rehiring the previous firm to update the BCAs it completed in 2016. The consulting team reviewed that work and concluded it was done competently. An update should be less costly and more efficient than if a new firm were hired. The district should then use the updated results to schedule and fund capital improvement projects to reduce or eliminate backlogged maintenance and repair actions identified in these updated BCAs.

Using the BCA results, the maintenance team should create new preventive maintenance work orders if warranted to slow the build-up of future maintenance backlogs. Projects should be scheduled and incorporated into the overall continuous facility master planning process.

If the resulting maintenance/repairs needs are extensive, the district may find that its current level of 2.66 percent of CRV is insufficient. Consequently, MDPS may need to increase its annual maintenance budgeting.

FISCAL IMPACT

This recommendation can be implemented with existing resources, in that the expenses for the BCAs should be more than repaid through maintenance cost savings. Overall, this recommendation should result in a substantial savings to the district over the long-term. The costs of updating the building condition assessments every five years, and of completing the

projects and preventive maintenance work orders to reduce backlogged maintenance will soon result in FCI results of below ten and five percent on most buildings. This, in turn, will allow the district to reduce its overall maintenance spending to zero in future bond issues (a best practice), and further to the low end of the two to four percent range of the current replacement value of its building inventory.

FINDING 4-5

Members of the district's facilities maintenance department are well-represented in progressive design reviews with the architects and engineers for new buildings, major additions, and renovations. Each major discipline (e.g. mechanical, electrical, plumbing, locksmith and electronic access, interior finishes, energy management, etc.) offers its own updated educational specifications as the official client requirements of the district. The reviews take place at all stages of completion of the construction documents until final sign-off before construction begins. A key component of the participation of the maintenance technicians is that they are stakeholders: They want the buildings designed for efficient, effective, and yet lasting maintenance. Some examples given during a focus group discussion regarding changes made in response to maintenance department requests included:

- the specification of solid acrylic countertops instead of plastic laminates;
- the use of light emitting diode (LED) lamps; and
- inclusion of low-maintenance faucets with washer-free closures.

The inclusion of stakeholders in the design and construction process is a best practice. It is inclusive and responds to the needs and preferences of building users and other stakeholders.

COMMENDATION

The district is commended for its commitment to detailed reviews by the maintenance trades during the design process to assure the architect and engineers respond to, and incorporate, the district's educational specifications in their design development work.

FINDING 4-6

Unlike the institutionalized participation of members of the maintenance department in design reviews, the district does not appear to seek or engage in the regular involvement of administrators, faculty, custodians, and students or parents in reviews during design development. Complaints about a lack of design participation, especially in new school designs, reflect the frustration of principals and other building users about their exclusion from such consultations.

During focus groups that the consulting team conducted with various groupings of principals, principals were asked about the extent to which they were consulted during facility design phases. They were nearly unanimous in their responses that they were not consulted (**Exhibit 4-10**).

Exhibit 4-10
Input from Principals Regarding Facilities Planning

Focus Group Questions	Focus Group Answer Summary
How are you involved in the overall district facilities planning process?	<ul style="list-style-type: none"> • In a bond election, once there is money, the high schools get involved to talk about their specific needs at their site. • None. Zero. The architects designed them. • One middle school principal requested two rooms for autistic students – the resulting rooms do not meet needs. • If principals went to planning meetings, it was more of information flowing to them, not requesting their input. There was a field trip to a school in Shawnee, but that was mostly to look at furnishings.
Do you participate in preparation of educational specifications, design, equipping and construction of new or renovated facilities?	<ul style="list-style-type: none"> • The architects “showed us things” but we did not have input to design. • High school principals were asked to provide some limited input regarding the fine arts and stadium renovations but someone else made the “overarching decisions”.

Source: Prismatic, February 2021

When asked whether the new and renovated facilities meet their needs, principals also provided a litany of concerns:

- Middle School Cafeteria – it does not fit an entire grade level – doing six “mini-lunches” instead. This problem was the result of not renovating core spaces when two old middle schools were combined.
- There are “undefined” spaces in some of the newly renovated areas. It could have been another place for teachers to meet or something, but right now it is nothing. Staff/principals are not sure what the intent of this space was.
- There is no teacher restroom or workroom in one of the new buildings.
- There are several little storage closets in some of the new areas but they are without defined function – they are not big enough to house a copier.
- Some principals believe the district should have done some renovations of the older facility at the same time as the new construction. It is hard to tell one teacher you get something brand new while telling the others that you continue to get the same old space. One principal noted an increase in the number of teachers who wanted to teach 6th grade this year, potentially as a result of the new construction.
- Older buildings are designed to require students to go outside to get to the next segment of the building (described as three L shapes that connect). Principals asked for this to be addressed specifically but was told it was too expensive. They have concerns about the security of this arrangement – it is too accessible from the outside.

The sentiments expressed by the MDPS principals were echoed by staff in the survey conducted as part of this review (**Exhibit 4-11**). Only 24 percent of staff *agreed* or *strongly agreed* that various stakeholder have opportunities to provide input into facility planning; 38 percent *disagreed* or *strongly disagreed*.

Exhibit 4-11
Staff Survey Regarding Opportunities to Participate in Facility Planning

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Parents, citizens, students, faculty, and staff have opportunities to provide input into facility planning.	3%	21%	39%	27%	11%

Source: Prismatic Survey Results, February 2021

Stakeholder engagement is a best practice in many areas of public and private operations.¹⁵ It is especially important in the planning, programming, design, and construction of buildings.^{16,17}

RECOMMENDATION

Make participation in design reviews by other building users and stakeholders mandatory.

The MDPS Facility Master Plan Committee should be used as the vehicle for formal review meetings with architects and engineers and other design professionals in the design of new buildings, additions, and major renovations. The committee should incorporate these principles in its future way of work:

1. Avoid hiring architects and other design professionals who are known to be “input-resistant.” This design review process should be conducted in earnest, and never be viewed as perfunctory, token, or dismissive.
2. Develop detailed educational specifications (“edspecs”) and update these periodically, especially before design begins on new schools, and major additions and renovations. Do not rely passively on the design professionals to prepare edspeccs. Write the edspeccs and discuss them with the architect’s design team and make adjustments if warranted. The MDPS maintenance department has already prepared thoughtful edspeccs in their areas of expertise because they have been consulted regularly in the past.
3. While the inputs from maintenance must continue to be sought, specific consideration should now be given to school administrators, faculty, staff, counselors, custodians, students, and parents. Not all these stakeholders should be expected to create edspeccs in finished form but

¹⁵ Stakeholder engagement - best practice guide (simplystakeholders.com)

¹⁶User Participation in Building Design and Management: KERNOHAN, DAVID, Joiner, Duncan, Daish, John, Gray, John: 9780750628884: Amazon.com: Books

¹⁷ (PDF) User involvement in building design – a state-of-the-art review (researchgate.net)

should be given the opportunity to submit written thoughts, ideas and recommendations to the committee.

A current task for the committee should be to lead the district in post-occupancy evaluations (POE). According to the U.S. Department of Education, the practice of “institutionalizing the POE in the school district facility operations and management” has as its purpose the creation of “databases from which to make capital improvement decisions.” Thus, the end process of a renovation/construction project is to determine what needs to be corrected and what unmet needs will have to be met in a future construction/renovation effort.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 4-7

The district has many older elementary schools and has not yet tackled the question of whether those facilities continue to meet district enrollment levels and modern educational needs. Continuing to maintain a school in a particular area of a district, simply because it is there, is often inefficient and ineffective.

School district leadership has in recent years decided to recommend, and the school board approved, the permanent closure of two of the district’s five middle schools, Del Crest and Jarman. These decisions were reached chiefly because of declining enrollments, even though the district lacked relevant demographic and economic projections. Both middle schools were selected for repurposing to house other district functions.

The district has not yet engaged in substantive discussions regarding what its needs for elementary schools is likely to be over the next five to 20 years. As shown in **Exhibit 4-12**, MDPS currently has a high amount of excess capacity among its elementary schools, as measured by the difference between the planned and current occupancy.

Exhibit 4-12
Excess Capacity at MDPS Elementary Schools

Elementary School	Year Built	Floor Area (Sq. Ft.)	# of Classrooms	Student Capacity	2018-19 Enrollment	Excess Capacity (Students)
Barnes ES	1955	56,164	27	812	384	428
Cleveland Bailey ES	1963	48,380	23	700	349	351
Country Estates ES	1951	56,315	30	814	439	375
Del City ES	1977	96,347	40	1,394	627	767
Epperly Heights ES	1951	79,779	36	1,154	650	504
Highland Park ES	1969	73,209	33	1,059	517	542
Midwest City ES	2014	110,000	56	1,591	831	760
Parkview ES	1973	73,960	50	1,070	668	402
Pleasant Hill ES		49,556	18	717	212	505
Ridgecrest ES	1958	44,630	24	645	313	332
Schwartz ES		42,718	17		343	
Soldier Creek ES	2014	110,000	56	1,591	710	881
Steed ES	1955	56,592	32	818	413	405
Tinker ES	1969	53,003	32	767	479	288
Townsend ES	1953	58,700	33	849	403	446
Total			507	13,981	7,338	6,643

Source: Compiled by Prismatic from MDPS data, March 2021

The district does not have updated demographic projections, but recent enrollment trends do not seem to indicate a large enrollment increase in the near future. Overall enrollment from 2014-15 through 2018-19 has declined by 4.2 percent. The impact from COVID-19 and whether some students choose to remain in a remote learning environment is as yet unquantifiable, but it is possible that some percentage of former MDPS in-person learners choose to continue in remote only. On top of these trends, MDPS has roughly twice as many elementary seats as it needs.

In its onsite review, the consulting team observed a number of spaces within existing elementary schools that were previously classrooms but that had been repurposed as enrollments declined. The consulting team also observed that underutilized schools did not have sections of them closed off. This means that the district is still covering cleaning, maintenance, and utilities costs on the entire building, while receiving the benefits of operating the school building for a smaller than planned number of students.

School closure candidates may have a variety of attributes. Typically, they are older facilities that operate below capacity and are substantially deficient in meeting state and federal standards for educational facilities or have other noteworthy shortcomings. Based on the available data, the consulting team identified six elementary schools for potential closure. All are 50+ years old. All are currently under-utilized based on student enrollment. All but one of the closure candidates have less than poor facilities condition indexes (FCI, >40%), plus other conditions favoring closure:

- Cleveland Bailey Elementary – Students at this school could be accommodated in other nearby schools. Ridgecrest Elementary School is also a closure candidate and is the nearest other elementary school. Closure of both is probably neither feasible nor advisable. The building was constructed in 1963. The dates of additions could not be determined by the firm that completed the 2015 BCA. The BCA noted deferred maintenance in the amount of \$3,135,285. Based on a building replacement value of \$6,435,000, the FCI at that time was just below 50 percent, a catastrophic rating. The 2015 BCA noted that the existing heating equipment was beyond its planned lifespan and that indoor air quality was not up to current standards. The building would require a significant reinvestment for reuse by the district, or a buyer. Demolition and sale or reuse of the land would also be justifiable.
- Country Estates Elementary – This is the oldest elementary school, built in 1951. The BCA noted a need for a new fire suppression system and an update to the plumbing/HVAC system. These two items alone totaled \$0.8M in estimated costs. The total deferred maintenance was estimated at \$2,990,000. This yields an FCI of 40 percent at the time of the BCA, an extremely poor result. In 2021, the consulting team found an un-cleanable, unsanitary kitchen floor with missing and broken vinyl composition tiles in need of immediate replacement. The school is in the vicinity of Midwest City High School, Mid-Del Technical Center, and the Rose Administration Building. It could therefore be repurposed as an auxiliary facility to any one of these buildings or be placed on the market for possible sale. Demolition is a justifiable alternative. The land might be of use to the district, or it could be sold for residential development. Students at this school would most likely be redistricted to the nearby Midwest City Elementary School, which has ample room for additional enrollment.
- Highland Park Elementary – Built in 1969, this is among the youngest of the closure candidates. Located in the southwestern part of the district, it is near Parkview, Tinker, and Townsend Elementary Schools. Of these, Townsend is also a closure candidate, and closure of both may neither be feasible nor justifiable. However, Highland Park students could readily be reassigned to any or all these other elementary schools. The 2015 BCA lists a total deferred maintenance estimate of \$4,477,785. With a replacement cost of 10,279,000, the FCI computes to an extremely poor 44 percent. The school could be repurposed as a community center via gift to the local government, or sold on the market. Demolition can also be justified if the FCI remains above 30 percent at this time.
- Ridgecrest Elementary – This is the smallest elementary school, with a floor area of 44,630 square feet. This was probably the original floor area when the school opened in 1958. It is in the northwestern part of the district. The nearest other elementary school is Cleveland Bailey, which is also a closure candidate. Closure of both schools may not be justifiable or feasible. The 2015 BCA estimated total deferred maintenance estimate of \$2,573,350. Of this total, the replacement estimate of the HVAC system was listed as \$1,110,00. Based on a replacement value of \$5,936,000, the FCI computes to an extremely poor 43 percent. This compact school with ample grounds could be repurposed as a community center for the northwestern part of the district, or possibly sold for on the market. If the current FCI has not declined below 30 percent, demolition is also justifiable.

- Steed Elementary – This school is perhaps the most ideally suited as a gift to Midwest City for use as a community center. The adjacent land already belongs to the city and has been used as a recreational park for many years. It also doubles as the playground area for the school. Steed opened in 1955 and has undergone several expansions to its current size of 56,592 square feet. The 2021 consulting team observed recent work on roof improvements. The 2015 BCA estimated a total deferred maintenance value as \$3,397,680, including \$2,310,000 for replacement of the HVAC system. Based on a total replacement value of \$7,697,000, the FCI computes to an extremely poor 44 percent. Replacing the HVAC system would reduce the FCI percentage to approximately 14 percent, which is slightly above a fair rating. The majority, perhaps all, Steed students could be zoned for and accommodated in Midwest City Elementary School.
- Townsend Elementary – Built in 1953, Townsend is the best maintained of the closure candidates. The 2015 BCA estimated deferred maintenance at \$2,320,000 in a building with a replacement value of \$8,101,000. This computes to an FCI of 28 percent, the only closure candidate with an FCI less than 30 percent. Since Townsend is in the geographic vicinity of closure candidate Highland Park, it might appear that the closure and repurposing of Townsend is less justifiable than the Highland Park alternative. With 58,700 square feet of floor area, Townsend is among the largest of the older elementary schools. This ample floor area may also present an argument in favor of closing Highland Park.

RECOMMENDATION

Select four elementary schools for closure.

The decision to close an existing school is never easy. However, continuing to occupy so many under-utilized elementary schools is not in the best interest of the district. Every excess elementary school results in additional spending on school-level administrators, having more teachers than would be needed if fuller classrooms could be created, and spending on building maintenance and utilities that could be avoided. Indirect additional costs also crop up in areas like transportation, where students have to be bused to a greater number of destinations, and food services, where a certain minimum number of staffing is required for even minimal operations.

The facilities master planning team should review all the data it currently has for the six candidate schools and determine which four should be closed. As part of the decision-making process, the team may determine that some additional data be collected, including updated BCAs and community-level demographic projections. Once the team selects the specific elementary schools for closure along with their specific disposition, they should recommend these actions to the school board for approval.

Many – perhaps all – of the identified schools might serve ideally as community/neighborhood centers after closure by MDPS. This alternative reuse could be accomplished via donation of the closed facility to the local government where it is located. Most elementary schools have gymnasiums and outdoor play facilities for recreation, cafeterias with stages and kitchens for meetings and other social functions, along with offices and classrooms for seminars, courses, and local government agency functions, and many other activities to bring extensions of programs to

the neighborhood level. Perhaps the most obvious choice as a community center reuse is Steed Elementary, where a city park is directly adjacent, providing ample outdoor space.

FISCAL IMPACT

Selecting schools for closure and making attendance boundary adjustments can be accomplished with existing resources. However, the savings from closing schools to remove unneeded capacity will be substantial. A 2003 resource on closing schools estimated the annual savings in mostly non-classroom personnel expenses to be \$0.5 million per elementary school, \$1 million per middle school, and \$2 million per high school. In 2012, the consulting team completed the analysis on non-classroom personnel for two elementary schools in Virginia and found annual savings of \$0.7 million per school.¹⁸ The consulting team estimates that the average reduction in salaries and operating costs for each closed elementary school will be approximately \$0.7 million per year. This figure does not include estimates for maintenance costs the district will avoid by not repairing the closed schools.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Close four elementary schools.	\$0	\$2.8M	\$2.8M	\$2.8M	\$2.8M

B. MAINTENANCE AND CUSTODIAL OPERATIONS

The objective in maintaining and cleaning school facilities is to provide safe and cost-effective buildings, a sound educational environment, increased longevity of buildings and equipment, and the protection of school property. The maintenance and cleaning of the facilities must be accomplished in an efficient and effective manner in order to provide a safe and secure environment that supports the educational program and reflects proper stewardship for district resources.

Efficiencies and economies of maintenance and cleaning are critical to ensure that resources for direct instruction are maximized. However, extreme actions to reduce the cost of maintenance and cleaning can result in higher than acceptable costs of repair and replacement in the years to come. Consequently, a balance must be achieved between reasonable economies and unreasonable cost-cutting.

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MDPS departments and functional areas. **Exhibit 4-13** provides the results for facilities maintenance and custodial functional areas. As shown, somewhat higher percentages of staff gave the areas an A or B than gave it a D or F.

¹⁸ http://www.doe.virginia.gov/school_finance/efficiency_reviews/bedford_co.pdf, p. 109.

Exhibit 4-13
Staff Survey Results Regarding Facilities Planning

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Facilities maintenance	11%	26%	26%	14%	9%	14%
Custodial services	14%	28%	25%	14%	13%	6%

Source: Prismatic Survey Results, February 2021

Maintenance

The proper maintenance of facilities is critical to ensuring support for an effective instructional program. Research has shown that appropriate heating and cooling levels, building and room appearances, the condition of restrooms and other facilities, as well as occupant safety, all impact how students and staff members can carry out their respective responsibilities.

Ineffective or inadequate maintenance provisions have proven to lead to increased costs of facility operations by shortening the useful life span of equipment and buildings. Many school districts have adopted rigorous preventive maintenance programs. They maintain a record of the performance of equipment and the costs of regular maintenance to measure the effectiveness of these programs.

On a per-student basis, MDPS' expenditures for maintenance and operations at MDPS increased by 15.4 percent over the past six years, the second largest increase among the peer districts (**Exhibit 4-14**).

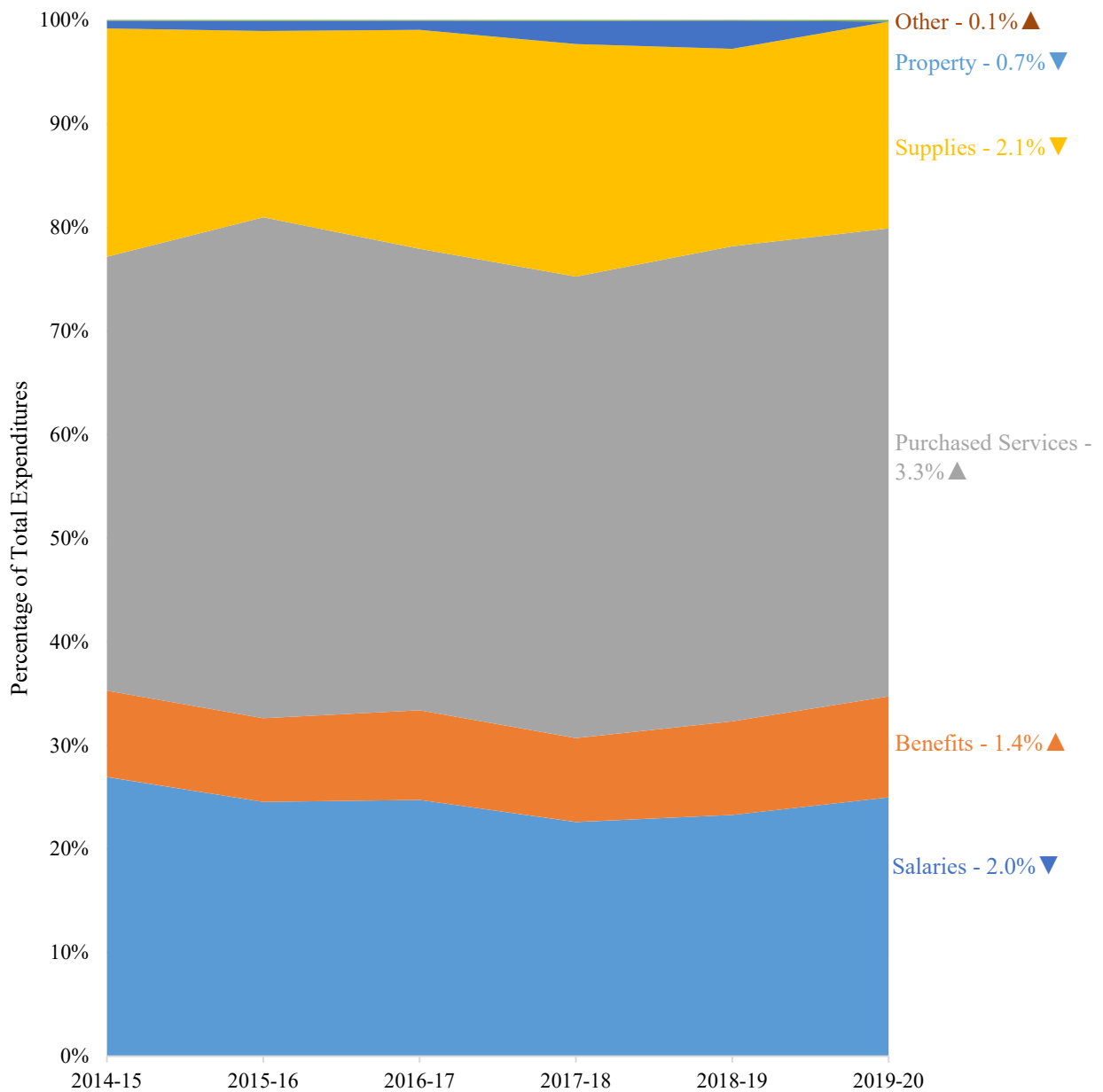
Exhibit 4-14
Trend in Maintenance and Operations Expenditures per Student

Entity	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	Percent Change
Mid-Del	\$761	\$818	\$807	\$908	\$967	\$878	15.4%▲
Lawton	\$768	\$1,028	\$831	\$1,178	\$1,207	\$1,025	33.5%▲
Moore	\$902	\$900	\$821	\$870	\$933	\$1,039	15.3%▲
Norman	\$680	\$665	\$682	\$709	\$726	\$741	9.1%▲
Putnam City	\$783	\$784	\$742	\$757	\$837	\$869	11.0%▲
Union	\$1,019	\$1,032	\$962	\$1,009	\$1,049	\$1,055	3.6%▲
Peer Average	\$830	\$882	\$808	\$905	\$950	\$946	14.0%▲

Source: SDE, School District Expenditure Reports 2014-2020, and Prismatic calculations

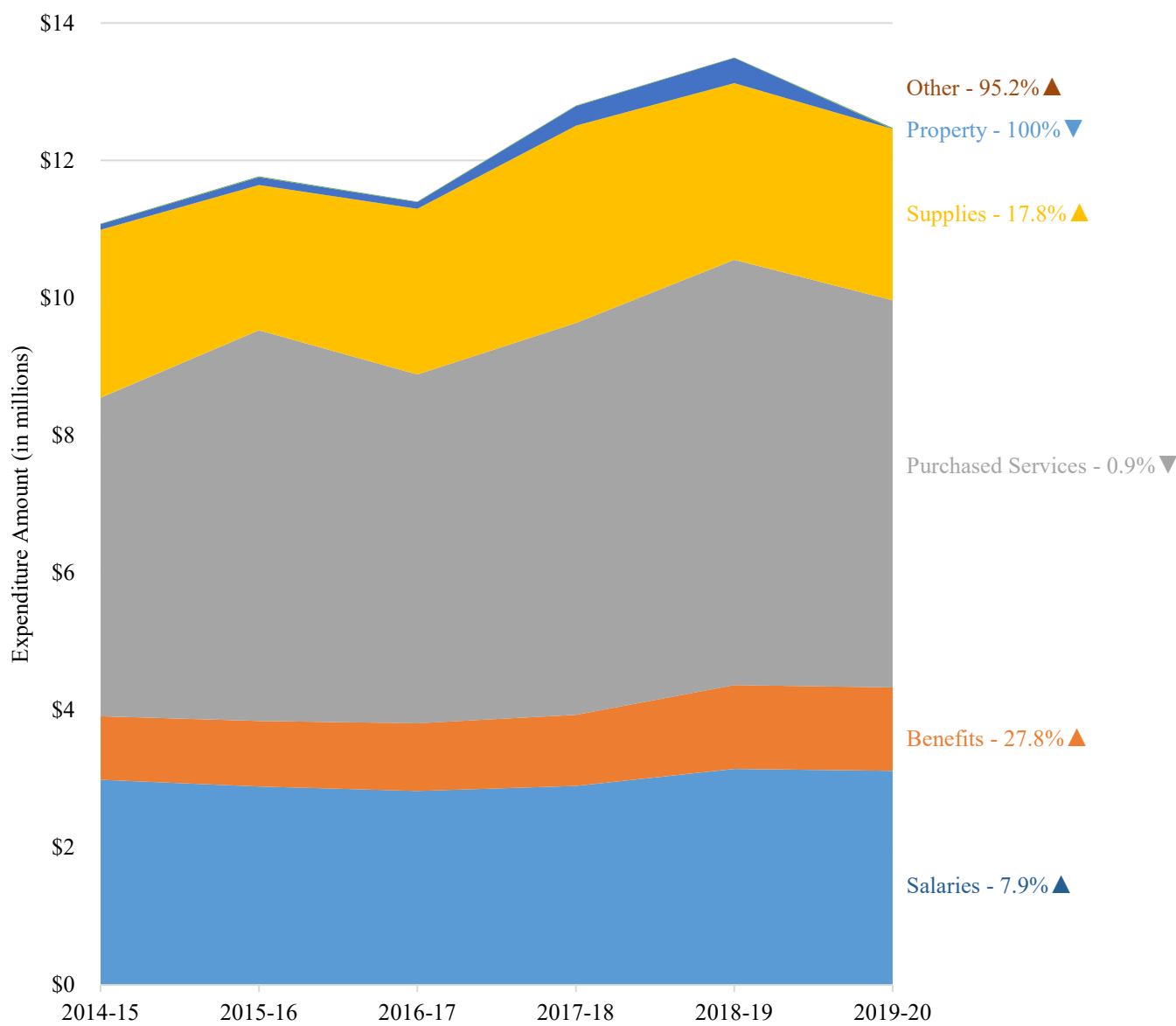
MDPS' maintenance and operations expenditures by category are shown over time as a proportion of total expenditure amount in **Exhibit 4-15**. **Exhibit 4-16** shows the actual change in maintenance and operations expenditures over time. From 2015-16 to 2019-20, MDPS reported an overall increase of six percent in maintenance and operations expenditures.

Exhibit 4-15
Proportional Trend in MDPS Maintenance and Operations Expenditures, All Funds



Source: SDE, School District Expenditure Reports 2015-2020, and Prismatic calculations

Exhibit 4-16
Trend in MDPS Maintenance and Operations Expenditures, All Funds



Source: SDE, School District Expenditure Reports 2015-2020, and Prismatic calculations

Exhibit 4-17 shows MDPS' maintenance and operations expenditures by fund over time. The LEA Assigned Bond Fund increased by 427 percent, and the building fund increased by 33.7 percent.

Exhibit 4-17
MDPS Trend in Maintenance and Operations Expenditures by Fund

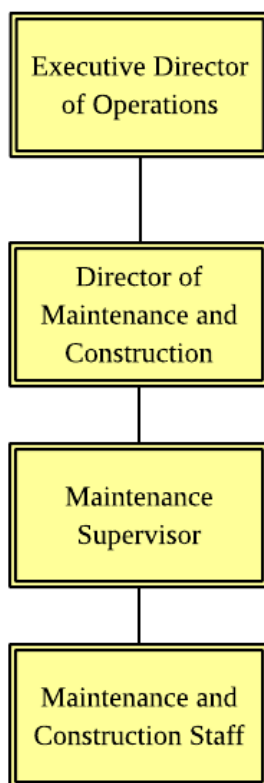
Fund	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	Percent Change
General Fund	\$7,712,318	\$6,331,289	\$6,256,170	\$5,921,505	\$6,502,200	\$7,443,295	(3.5%) ▼
Building Fund	\$2,798,004	\$3,973,454	\$4,489,928	\$4,836,848	\$4,527,612	\$3,741,853	33.7% ▲
Oklahoma City Maps Trust	\$18,291	\$30,985	\$0	\$0	\$0	\$0	(100.0%) ▼
LEA Assigned Bond Fund	\$233,827	\$188,996	\$568,096	\$1,972,562	\$2,394,944	\$1,231,567	426.7% ▲
School Activity Fund	\$68,202	\$108,528	\$78,792	\$66,485	\$73,959	\$57,192	(16.1%) ▼
Trust and Agency Funds	\$248,428	\$1,134,129	\$10,650	\$4,125	\$0	\$0	(100.0%) ▼
Total	\$11,079,070	\$11,767,382	\$11,403,636	\$12,801,524	\$13,498,715	\$12,473,906	12.6% ▲

Source: SDE, School District Expenditure Reports 2014-2020, and Prismatic calculations

Note: Column sums may not match the total shown due to rounding.

The MDPS maintenance organization chart is shown in **Exhibit 4-18**.

Exhibit 4-18
MDPS Maintenance Organizational Structure



Source: Created by Prismatic, March 2021

FINDING 4-8

The district has a substantial amount of maintenance and repair needs among its facilities. The current staffing is likely insufficient to be able to timely address all the needs.

Appendix G contains a sample of areas of need observed by the consulting team during building walk-throughs February 15-19 and March 29 – April 1, 2021. These photos show problems with unaddressed maintenance issues, custodial negligence, and general building mismanagement. Collectively, these illustrations give rise to the following general observations:

- Ceiling tiles are frequently stained and/or damaged due to leaks from plumbing, HVAC condensation, roof failures, or work done in the interstitial spaces without proper ceiling repairs.
- There are egregious roof leaks on some buildings, especially Del City HS library and many parts of Mid-Del Tech Center.
- Stair railings at Midwest City High School have separated and need to be repaired or replaced.
- Vinyl floor tile is cracked or partially or completely missing in many schools. In places, floors have been unevenly patched.
- Vinyl composition tile is inappropriately used on some kitchen floors, where quarry or ceramic tile should have been used.
- Some stair treads are worn to the substrate.
- Some walls are damaged from impacts, showing holes or deep indentations.
- Formica is chipped on some bathroom vanities; some mirrors are missing. Some ceramic tile is broken.
- Occasional graffiti were found, along with some painted over but still visible.
- Some walls have not received paint in many years.
- Inspections of school kitchens by the Oklahoma Department of Health Consumer Protection Division representatives have identified deficiencies that have yet to be addressed by maintenance. This agency has authority to close kitchens if these deficiencies remain unaddressed more than ninety days after the inspection report.

Including the leadership team and clerical support, MDPS maintenance staff consists of 57 FTE. That includes a team of 54 FTE maintenance technicians, divided among various trades. Some of the technicians are nearing retirement, and certain trade categories (e.g., roofers) have too few FTEs in their ranks. The maintenance techs are, by and large, respected and regarded as competent and responsive. They are also perceived as unable to keep up with the demand for

services, and as “being behind.” To meet best practice standards, the operative attitude among district staff is that several more FTE mechanics will be needed in specific trade categories, and retirees will need to be replaced swiftly with persons of equal competence.

However, putting this assertion to the test reveals less understaffing than is commonly perceived within the district. The highest APPA standard for maintenance staffing is one maintenance FTE per 47,220 square feet of facilities to achieve a “showpiece” level of maintenance:

Level 1: Showpiece Facility Maintenance activities appear highly focused. Typically, equipment and building components are fully functional and in excellent condition. Service and maintenance calls are responded to immediately. Buildings and equipment are regularly upgraded, keeping them current with modern standards and use.¹⁹

With 2,661,523 square feet of facilities to maintain, the district would have 56 FTE maintenance staff at APPA Level 1. This is only two more than currently on the maintenance team. With potential understaffing of just two, it is surprising that MDPS schools show little “showpiece” levels of maintenance.

While it may be true that the MDPS maintenance staff is typically highly responsive, it is equally correct that many maintenance service requests are deferred if they are not deemed to be of critical importance. As shown in **Exhibit 4-19**, a sizable portion of staff and student survey respondents did not think that their schools were well maintained. A large portion of students also noted that their school needed a lot of repairs (38 percent). Staff responses to the open-ended question of “where could the district improve?” include a number of comments related to unmet facilities maintenance/repair needs.

Exhibit 4-19
Staff, Parent, and Student Survey Responses Regarding Facilities Maintenance

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	Our facilities are well maintained.	9%	42%	11%	28%	10%
Parent	My child’s school is well maintained.	18%	51%	23%	6%	2%
Student	My school building is well maintained.	14%	42%	23%	13%	8%
Student	My school building needs a lot of repairs.	17%	22%	32%	22%	7%

Source: Prismatic Survey Results, February 2021

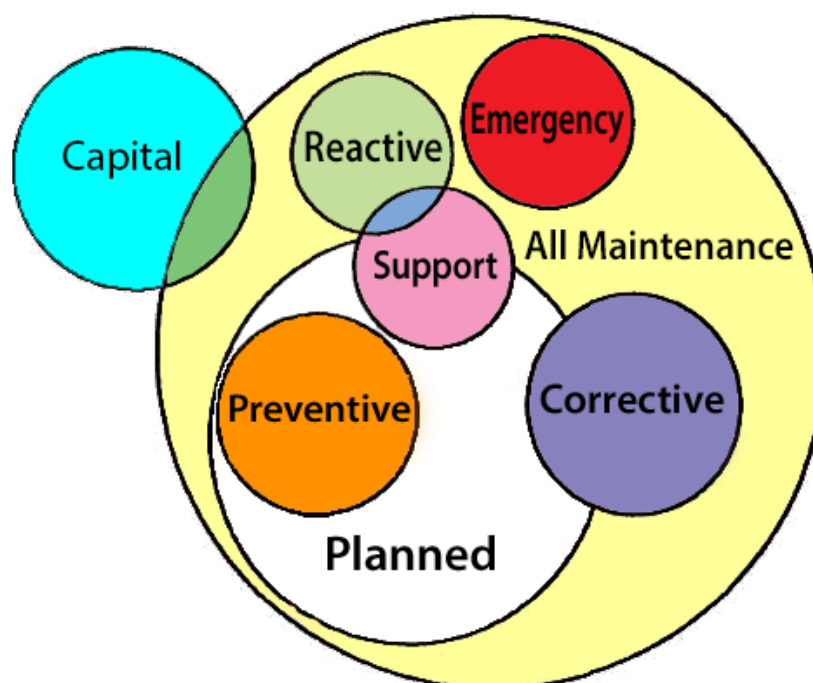
¹⁹ [https://www.usg.edu/assets/facilities/documents/APPA_Standards_\(Maintenance,_Custodial_Grounds\).pdf](https://www.usg.edu/assets/facilities/documents/APPA_Standards_(Maintenance,_Custodial_Grounds).pdf)

In focus groups, principals provided a number of comments that underscored challenges in MDPS maintenance operations. Comments included:

- *Painting is put on the back burner – some requests have been there for 3-4 years.*
- *Understaffed and overworked.*
- *We have been here long enough that we know what we can ask for and what we can't.*
- *Only the urgent gets handled.*
- *There is no point in replacing the floors when they are going to be ruined every time it floods – new wing that was built in a low area. They think it is some kind of laminate.*
- *They work hard. They are just overwhelmed. There are so many things that need to be done.*
- *They may not be hiring the best – sometimes things have to be repaired multiple times.*
- *When you work with kids you need to know what kids do. You can come fix the door, but you should know that kids are going to continue to kick the door.*
- *Some principals have had work order requests exceed 90 days and had to appeal to higher ups to get stuff done.*
- *Maintenance staff this year may have been jammed up dealing with punch ticket items from new construction in other schools.*
- *Intercom system went out at the beginning of the year at one school and it was not fixed until November – this was a safety concern. Another school principal echoed a similar concern with intercom problems.*

Maintenance in a school is not merely replacing equipment when it quits working. There are various types of maintenance that should be performed to ensure the continued safe and efficient operation of equipment and systems, as well as reducing replacement costs. Becker (2011) wrote that maintenance can be depicted using a Venn diagram (**Exhibit 4-20**).

Exhibit 4-20
Overlap and Interrelationships in Types of Maintenance



Source: APPA Operational Guidelines for Educational Facilities: Maintenance, February 2011

As Becker stated:

The large circle represents all maintenance activities that the operations and maintenance staff may perform in a year. The next smaller circle, entirely within maintenance, is planned work. These include preventive or predictive maintenance and some corrective work – those tasks that customers request that have some time requirements associated with them and are not fully within the facilities operation’s control to schedule. Finally, hanging off to the side and trying to be part of maintenance, is capital work.²⁰

The older a building, the more corrective maintenance it will require and all buildings, regardless of age, require regular preventive maintenance.

RECOMMENDATION

Outsource a higher percentage of maintenance work in order to reduce deferred maintenance in its building inventory to an FCI of ten percent initially, and eventually to five percent or below.

²⁰ Becker, T. J., (2011) What constitutes maintenance? *Operational Guidelines for Educational Facilities: Maintenance*, second edition (July/August), pp.14-15.

It may sound paradoxical, but MDPS may need to increase the effective size of its maintenance staff beyond the “showpiece” level for potentially a few years. This could be the case for two reasons:

1. It is possible that the amount of deferred maintenance in many of the district’s older buildings is larger than an FCI of ten percent – perhaps in the 20 to 30 percent range or even higher. This condition could be triggering a higher-than-normal occurrence of reactive maintenance calls, causing an overload on what would otherwise be a more-than-adequate staff.
2. Because MDPS engages in little to no preventive maintenance, it is further likely that an even greater amount of reactive maintenance calls has resulted. A lack of preventive maintenance can also bring about a higher rate of deferred maintenance accumulation.

Eventually, this action should result in a marked decrease in reactive maintenance work orders. Once an acceptable FCI has been achieved, MDPS should be able to reduce its use of maintenance contractors and rely primarily upon in-house staffing.

The leadership team should further examine work orders from the past four or five years to identify repeated types of breakdowns that could have been reduced or prevented outright via concerted preventive maintenance actions. From this information, the maintenance managers should prepare preventive maintenance work orders and schedule them throughout the year as single or repeated preventive maintenance actions. Once implemented, these batteries of repeated work orders should reduce remaining reactive calls even further.

In addition, the maintenance managers should implement a vertical maintenance approach.²¹ In vertical maintenance, a multidisciplinary team is deployed to a facility for a period of several days. In that time, all previously identified maintenance needs are addressed, as well as any needs the team observes while onsite. This approach has been highly successfully deployed by Charleston County School District (SC). The consulting team recommends that MDPS deploy three vertical maintenance teams of three technicians each, deploy a rotating schedule of school visits, and work to address maintenance needs. Any projects that the team cannot complete in the three days allotted should be schedule for completion by either in-house or contracted staff.

FISCAL IMPACT

With the rather limited data available, the consulting team estimates the cost of hiring outside contractors to reduce the FCI to ten percent or below at approximately \$5 million. This figure could be adjusted higher or lower once BCAs are updated.

²¹ Further details on vertical maintenance approaches can be found at:
http://www.geaslin.com/vertical_maintenance.htm

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Reduce deferred maintenance and implement preventive maintenance.	\$0	(\$5 million)	\$0	\$0	\$0

FINDING 4-9

MDPS has an inventory of mobile classrooms that are old and barely serviceable. These structures offer no equity with any classrooms located in the district's permanent buildings, are less secure than other school facilities. Moreover, they are almost impossible for custodians to clean, lack energy efficiency, perform unsafely in high velocity winds, and present an extraordinary maintenance burden. At a time when enrollment at MDPS is down, the retention of these inferior classroom spaces is inappropriate.

MDPS provided the information on its mobile classroom inventory in shown **Exhibit 4-21**. As shown, not every MDPS school has mobile classrooms. A number of the mobile classrooms are either not in use at all or not in use as a classroom. Not counting the mobile units located in the maintenance complex and of Sodexo transfer and staging center, the district is currently maintaining 15 single units and 30 double units that are not truly needed. The maintenance complex and Sodexo units are used as permanent installations.

Exhibit 4-21
MDPS Elementary School Classroom Inventory

Building	Single	Double	Square Footage	In Use?	Middle Wall?	Use
Barnes ES		X	1,440	Yes	No	
		X	1,440	Yes	Yes	
Country Estates ES		X	1,440	Yes	Yes	
	X		720	No	N/A	
		X	1,440	No	Yes	
Epperly Heights ES		X	1,440	No	No	
		X	1,440	Yes	No	
Highland Park ES	X		720	No	N/A	
Ridgecrest ES	X		720	No	N/A	
		X	1,440	Yes	Yes	
		X	1,440	Yes	No	
	X		720	No	N/A	
	X		720	Yes	N/A	
Schwartz ES		X	1,440	No	Yes	
		X	1,440	No	Yes	
Steed ES	X		720	Yes	N/A	
		X	1,440	Yes	No	
	X		720	No	N/A	
		X	1,440	Yes	No	
Tinker ES	X		720	No	N/A	
	X		720	Yes	N/A	
		X	1,440	Yes	Yes	
Townsend ES	X		720	No	N/A	

Source: MDPS, February 2021

Exhibit 4-21 (continued)
MDPS Middle School Classroom Inventory

Building	Single	Double	Square Footage	In Use?	Middle Wall?	Use
Carl Albert MS		X	1,440	Yes	Yes	
	X		720	Yes	N/A	
		X	1,440	Yes	Yes	
		X	1,440	Yes	Yes	
		X	1,440	Yes	Yes	Classroom & Storage
Del City MS						
North Courtyard		X	1,440	Yes	Yes	
North Courtyard		X	1,440	Yes	Yes	
North Courtyard		X	1,440	Yes	Yes	
South Courtyard		X	1,440	Yes	Yes	Classroom & Storage
South Courtyard		X	1,440	Yes	Yes	In School Restriction
Softball		X	1,440	Yes	Yes	Dressing Space
Midwest City MS						
Classroom	X		720	Yes	N/A	West side of campus
Classroom		X	1,440	Yes	Yes	West side of campus
Softball		X	1,440	Yes	Yes	Dressing Space

Source: MDPS, February 2021

Exhibit 4-21 (continued)
MDPS High School Classroom Inventory

Building	Single	Double	Square Footage	In Use?	Middle Wall?	Use
Carl Albert HS						
Softball		X	1,440	Yes	Yes	Dressing Space
Del City HS						
Baseball		X	1,440	Yes	Yes	Dressing Space
Midwest City HS						
Baseball		X	1,440	Yes	Yes	Dressing & Storage
Softball		X	1,440	Yes	Yes	Dressing & Storage
Softball		X	1,440	Yes	Yes	Storage
Vocational /Tech Center	X		720	Yes	N/A	Storage
Learning & Svc Center	X		720	Yes	N/A	Storage
Maintenance						
Office West		X	1,440	Yes	Yes	Office & Storage
Carpentry		X	1,440	Yes	Yes	Storage
1/2 Carpentry & 1/2 Paint			1,440	Yes	No	Storage
HVAC		X	1,440	Yes	No	Storage
Locks & Doors	X		720	Yes	N/A	Storage
Plumbing	X		720	Yes	N/A	Storage
Building & Grounds	X		720	Yes	N/A	Storage
Electrical	X		720	Yes	N/A	
1/2 Electrical & 1/2 Plumbing		X	1,440	Yes	N/A	Storage
Maintenance (North Lot)						
Building & Grounds	X		720	Yes	N/A	Storage
HVAC		X	1,440	Yes	Yes	Storage
CAHS Drama		X	1,440	Yes	Yes	Storage
Transfer & Staging Center						
ABM Custodial		X	1,440	Yes	Yes	Office
1/2 ABM and 1/2 Mid-Del		X	1,440	Yes	Yes	Storage
Special Services		X	1,440	Yes	Yes	Storage
Food Bank	X		720	Yes	N/A	Storage
Indian Affairs	X		720	Yes	N/A	Storage

Source: MDPS, February 2021

The district does not maintain data on the condition of its mobile units. However, the units visited by the consulting team were found to be entirely subpar to any of the classrooms in the brick-and-mortar school buildings observed.

RECOMMENDATION

Eliminate most mobile classrooms from school campuses.

The district should eliminate all mobile units on school campuses that are not currently in use as a classroom within the next year. Following that, the use of mobile classrooms as classrooms should be examined and likely reduced. As spaces that are below the standards of permanent classrooms, it is likely that none of the mobile classrooms on school campuses should be kept.

MDPS should not allow itself to be forced into a position of having to replace these units with newer models at any time in the future. Some school districts have policies to keep a stock of mobile classrooms at the ready when they need to house students temporarily while a new school is constructed, or an existing school is renovated. In these and any similar situations, mobile classrooms can be leased if necessary, preventing these temporaries from becoming permanent.

FISCAL IMPACT

The removal of mobile units will save the district money, including energy costs, maintenance and cleaning costs, as well as monitoring charges for fire and intrusion alarms. The removal of these structures' vulnerability to high velocity winds may reduce the district's insurance premiums. Each mobile unit may have sufficient salvage value to entice some enterprises to remove them free of charge, while better preserved units may have a nominal sale value of a few thousand dollars. The consulting team has estimated a small revenue generation from the sale of mobile classrooms, but has not estimated the ongoing savings from energy, custodial, maintenance, and insurance cost reductions.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Remove most or all mobile classrooms.	\$10,000	\$20,000	\$0	\$0	\$0

Custodial Operations

Safe, clean, and sanitary facilities are essential elements of the education environment. School systems across the United States use different means to address these elements. Typically, school boards either contract out (outsource) custodial services or organize a comprehensive in-house program with staff to provide custodial services. Personnel will be employed by either the outsourced company or the school board.

Management responsibility, if the program is in-house, may reside partially or wholly with the central office, the individual school, or maintenance department. Determining the desired structure usually involves several criteria, including minimizing costs to the school district, improving services to schools, and reducing (or increasing) the span of control of district or school-based administrators.

Studies conducted by APPA demonstrate that one custodian should be capable of cleaning between 20,000 and 30,000 square feet of school facilities to achieve a level 2 or level 3 standard of cleanliness, respectively. The levels of cleanliness in the APPA standard are shown in **Exhibit 4-22**.

Exhibit 4-22

Appearance Factors and the Five Levels of Clean

Level 1— Orderly Spotlessness

- Floors and base moldings shine and/or are bright and clean; colors are fresh. There is no buildup in corners or along walls.
- All vertical and horizontal surfaces have a freshly cleaned or polished appearance and have no accumulation of dust, dirt, marks, streaks, smudges, or fingerprints.
- Lights all work and fixtures are clean.
- Washroom and shower fixtures and tile gleam and are odor-free. Supplies are adequate.
- Trash containers and pencil sharpeners hold only daily waste, are clean, and odor-free.

Level 2 — Ordinary Tidiness

- Floors and base moldings shine and/or are bright and clean. There is no buildup in corners or along walls, but there can be up to two days' worth of dust, dirt, stains, or streaks.
- All vertical and horizontal surfaces are clean, but marks, dust, smudges, and fingerprints are noticeable upon close observation. Lights all work and fixtures are clean.
- Washroom and shower fixtures and tile gleam and are odor-free. Supplies are adequate.
- Trash containers and pencil sharpeners hold only daily waste, are clean, and odor-free.

Level 3 — Casual Inattention

- Floors are swept or vacuumed clean, but upon close observation there can be stains. A buildup of dirt and/or floor finish in corners and along walls can be seen.
- There are dull spots and/or matted carpet in walking lanes. There are streaks or splashes on base molding.
- All vertical and horizontal surfaces have obvious dust, dirt, marks, smudges, and fingerprints. Lamps all work and fixtures are clean.
- Trash containers and pencil sharpeners hold only daily waste, are clean, and odor-free.

Level 4 — Moderate Dinginess

- Floors are swept or vacuumed clean, but are dull, dingy, and stained. There is an obvious buildup of dirt and/or floor finish in corners and along walls.
- There is a dull path and/or obviously matted carpet in the walking lanes. Base molding is dull and dingy with streaks or splashes.
- All vertical and horizontal surfaces have conspicuous dust, dirt, smudges, fingerprints, and marks.
- Lamp fixtures are dirty and some (up to 5 percent) lamps are burned out.
- Trash containers and pencil sharpeners have old trash and shavings. They are stained and marked.
- Trash containers smell sour.

Level 5 — Unkempt Neglect

- Floors and carpets are dull, dirty, dingy, scuffed, and/or matted. There is a conspicuous buildup of old dirt and/or floor finish in corners and along walls. Base molding is dirty, stained, and streaked. Gum, stains, dirt, dust balls, and trash are broadcast.
- All vertical and horizontal surfaces have major accumulations of dust, dirt, smudges, and fingerprints, all of which will be difficult to remove. Lack of attention is obvious.
- Light fixtures are dirty with dust balls and flies. Many lamps (more than 5 percent) are burned out.
- Trash containers and pencil sharpeners overflow. They are stained and marked. Trash containers smell sour.

Source: Fichter, G., (2011). *Maintenance of buildings, operational guidelines for educational facilities: Custodial*. APPA, third edition, pp. 72-73.

FINDING 4-10

The district's outsourced custodial contract has not been successful. Numerous stakeholders have expressed discontent with the ongoing cleanliness of facilities. The consulting team observed less than satisfactory cleaning results as well.

The district has 17 FTE custodians on its own payroll. All these in-house custodians are assigned to the district's three high schools, concentrating on the day shift. The remaining custodians are furnished under a contract by a custodial services subsidiary of ABM Industries, a company with \$6 billion in annual revenues. Monthly ABM billing for cleaning services is approximately \$207,300 or about \$2,500,000 per year. The total custodial ABM workforce is listed as 101.5 FTE. Thus, all custodians at MDPS, full-time and-part-time, in-house and contracted, add up to 118.5 FTE. Occasionally, when workforce availability has been constrained, ABM has subcontracted, with MDPS permission, portions of its work to smaller firms.

ABM's performance on its contract with MDPS is viewed in negative terms by variety of stakeholders, including leaders, administrators, professional staff, faculty, non-teaching employees, students, and parents. The most frequently heard complaints centered on the perceived poor performance of the contracted evening custodians.

In multiple focus groups, principals offered variety of negative feedback regarding the outsourced custodial services:

- *The nighttime custodians are particularly poor in completing job duties.*
- *One principal began to get better service when they got personally involved in every complaint that came up, but this was not a good use of their time.*
- *The contractor has a lot of staff turnover.*
- *The contracted custodians do not take pride in their work.*
- *Contracted custodians are often told to hurry up to finish their assigned school so they can cover at another school.*
- *With the evening shifts, often rooms do not get cleaned, items go missing, and supplies get hoarded in various places in the schools. District staff is told to lock up their stuff before going home each night.*
- *Things have been stolen.*
- *One time a principal came into the teacher's lounge where the custodian had been sitting with his feet up on a table with his leftover Chinese food on the floor.*
- *Night crews are not well supervised.*

- *Some principals come in early to review the work of the evening custodial crews. They are doing simple things like flushing toilets that the evening crew missed.*
- *Some principals are cleaning bathrooms themselves before there is a basketball game.*
- *The contractor does not have an individual assigned to be “in charge.” When something happens, the contracted custodians all stand around and wait for direction.*
- *Communication is also a problem. If a contracted custodian is running late, it needs to be communicated.*

Staff, parents, and student respondents to the surveys conducted for this review indicated some dissatisfaction with school cleanliness as well (**Exhibit 4-23**). A sizable portion of staff (29%) did not think the facilities are clean. Parents were more positive, but they are also the least frequent occupants of the MDPS schools. Approximately one-third of in-person high school and non-high school students did not feel their school was clean.

Exhibit 4-23
Staff, Parent, and Student Survey Responses Regarding Facilities Maintenance

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	Our facilities are clean.	12%	49%	9%	20%	9%
Parent	My child’s school is clean.	20%	51%	24%	4%	1%
In-Person High School Student	My school is clean.	55%		13%	32%	
In-Person Non-High School Student	My school is clean.	60%		9%	31%	

Source: Prismatic Survey Results, February 2021

In its onsite reviews, the consulting team also found cleanliness to be lacking. The consulting team found that bathrooms were an average of Level 2; most other spaces were an average of Level 3. Moreover, there were several areas in various schools that the consulting team rated as Level 5. In conversations with contracted custodians, they complained of poor quality cleaning tools and stripping/polishing machines, as well as low hourly wages with little/no benefits.

In its work with over 200 school districts across the United States, the consulting team has encountered few outsourced custodial operations free of serious disappointments, persistent

confrontations, and complaints. Perhaps the most elaborate and detailed presentation of these issues is from an article in *American School and University Magazine* and from other sources.²² Often, the initial decision to outsource a district function is based primarily on the anticipated cost savings. However, there are myriad considerations when outsourcing and cost savings is only one (**Exhibit 4-24**).

²² <https://www.asumag.com/facilities-management/maintenance-operations/article/20843160/labor-savings>

Other articles: Would it be worth \$800,000 a year to keep custodians in-house?

<https://www.heraldsun.com/news/local/counties/durham-county/article199491119.html>;

Here is a sample contract with union-represented in-house custodians:

<https://www.auburn.k12.ma.us/staff/evaluations-certification/custodians-contract>

Exhibit 4-24
Considerations in Selecting In-House or Outsourcing Service Delivery

Determinable Service Delivery Measurement	If the service considered for outsourcing is insufficiently defined, it may be difficult to convey the terms of service delivery in a contract. Similarly, it may be difficult to hold the outside contractor accountable for errors or inefficiencies.
Contract Management	The ability to properly supervise the work of a provider must exist.
Existing Costs Determinable	If it is impossible to determine the existing costs of providing the service, it will also be impossible to determine if savings can be realized through outsourcing. Obtaining accurate, verifiable cost information is critical to the decision for competition.
Local Area Economic Impact	Conversion to an outsourced operation should not result in a significant increase in the unemployment rate of a local area or loss of an essential local market.
Existing Competitive Market	A large competitive base provides the best opportunity for savings. A large pool of competitors also ensures that pricing will not substantially increase in future years after the district no longer has the immediate ability to return to in-house operations.
Stability of the Market Place	A high level of stable vendors in the marketplace indicates that the outsourcing of a service has been successful and that the vendors can generally be relied upon to produce quality services at competitive rates.
Economy of Scale	High dollar amount services may generate the greatest savings through competition. Larger programs may have a greater chance for inefficiencies to develop due to larger spans of control and less frequent oversight by upper-level managers.
Information Sensitivity	Activities for which information security needs are low are most conducive to outsourcing. If security needs are high, adequate controls must exist to protect data.
Lack of In-House Competition	Large portions of programs may already be subject to market pressures and are therefore less likely to benefit from further competition. Programs which are entirely in-house, perhaps in a monopoly-like environment, are good candidates for competition.
Alternative Delivery Methods	If alternative methods of production exist to provide the desired final product, increased competition can lead to innovative methods to save costs or improve services. Programs which require product or service delivery in a specific fashion to accomplish specific goals may be better handled by the district
Satisfaction with Current Services	In-house services with significant concerns about quality, timeliness, or costs are good candidates for outsourcing. Evidence of concern includes complaints by customers, customers trying to provide service with their own resources, or customers reducing their use of the service.
Comparative Cost of Services	If current costs per unit are above the per unit costs of similar services being provided by outside vendors, then the service is a good candidate for outsourcing.
Ease & Cost of Conversion to Outside Vendor	Some services are relatively easy and cost little to convert to an outside vendor. Those are good candidates for outsourcing.
Ease & Cost of Conversion Back to In-house	Outsourcing may not work as hoped. When this happens, it may be necessary to bring the operation back in-house. When major difficulties exist or costs are high for conversion back to in-house operations, outsourcing is less attractive.
Impact on Employee Morale	If outsourcing will cause employee morale problems throughout the organization, outsourcing is less attractive unless the organization finds ways to mitigate the problem.

Source: Developed by Prismatic, 2012

RECOMMENDATION

Return custodial services back to in-house operations.

After more than three decades of contracted custodial services, the district should consider the return of custodial services to an exclusive in-house operation. As the district has found, outsourced custodial services is typically cheaper than in-house operations because contractors offer lower wages and fewer benefits. In MDPS, this has resulted in higher custodial turnover and lower quality results than many district stakeholders deem acceptable.

A completely in-house custodial services operation should include a total of 94 FTE:

1. APPA Standard Level 2 cleaning requirements at MDPS:

The consulting team estimates that approximately 12 percent of the total MDPS building inventory's floor area includes spaces requiring APPA Level 2 cleaning. This amounts to approximately 320,000 square feet. Thus, the FTE requirement at MDPS for Level 2 cleaning is:

$$320,000/20,000 = \mathbf{16 \text{ FTE custodians.}}$$

2. APPA Standard Level 3 cleaning requirements at MDPS:

The remaining 2,342,000 square feet of floor area require the following FTE custodians:

$$2,342,000/30,000 = \mathbf{78 \text{ FTE custodians.}}$$

Given that 17 FTE custodians are already on the MDPS payroll, an additional **77 FTE** will need to be hired. Many of these hires may come from the cadre of current contracted custodians, if they have already established an acceptable pattern of work performance.

3. A substitute custodian roster of initially **five FTE** will serve to provide reliable, responsible and competent custodians to serve on short notice for short periods or over longer times to cover for absences of permanent custodians. The number of substitute custodians may be adjusted as experience with the need to cover absences dictates.

Each principal or other designated site leader will be the primary report for the custodians assigned to that site. The principal or designee will hold custodians accountable via performance evaluations, give orders for set-ups for events during the day or after hours, order periodic housecleaning of closets and removal of objects constraining or blocking access circulation, ask head custodians to inspect custodial work, etc. The executive director of operations will serve as the overall manager of the custodial staff, carrying out training programs, requests from the site managers for reassignments, substitute custodian scheduling, job actions (with human resources) and participate in performance evaluations if requested. If the need arises, MDPS may hire a custodian at a high experience and responsibility level to serve as administrative assistant for custodial services to the executive director of operations.

FISCAL IMPACT

Based on current data, the consulting team estimated the net cost to the district to be approximately \$368,000 per year (**Exhibit 4-25**). This estimate includes the cost of a custodial manager, 77 additional FTE custodians, and five FTE substitute custodians.

Exhibit 4-25
Cost Analysis of Recommended In-House Custodian Operation

Cost Component	Annual Cost
77 FTE @ \$34,809 avg. salary/benefits	\$2,680,300
1 FTE custodial manager @ \$48,237	\$48,237
5 FTE substitutes @ \$27,969	\$139,845
TOTAL	\$2,858,375
Current ABM contract cost	-\$2,500,000
Added cost for in-house move	\$368,375

Source: Prepared by Prismatic Services, April 2021

The consulting team recommends a phased approach to implementing this recommendation, shifting a portion of outsourced positions to in-house each year, over a period of three years.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Return to in-house custodial operations.	(\$122,792)	(\$245,583)	(\$368,375)	(\$368,375)	(\$368,375)

C. ENERGY MANAGEMENT

General energy consumption can be one of the most expensive operational areas for a school district. Due to the large infrastructure required for education, schools use large quantities of electricity, water, oil, and natural gas. Implementing an energy management program can assist in reducing a school district's operational costs associated with otherwise excessive utility use.

Energy management programs can be implemented in a wide variety of ways, from hiring full-time energy managers to sending out simple shut-down reminders before school dismissal or before a break. One of the most beneficial practices of energy management is the recording of monthly utility bills and the communication of use and costs to the general staff. Tracking utility use can give a bird's eye view of how much each school is spending on its utilities compared to other schools. The energy manager can then target the most expensive utilities and work to reduce consumption. This communication helps foster awareness of the expenses of running a school and brings attention to energy conservation measures by both students and staff.

The American Society for Hospital Engineers (ASHE) has developed a list of ten components necessary for a successful energy management program. Although this list was originally intended for hospital organizations, they are applicable to all energy management programs. As recommended by ASHE, the items to consider are:

1. Measure/benchmark current energy consumption.
2. Develop an energy use profile.
3. Complete a greenhouse gas emissions inventory.
4. Build teams, get leadership support, and assign dedicated resources.
5. Set targets/goals.
6. Develop strategic action plans for improvement.
7. Consider adopting a strategic energy management plan.
8. Implement projects.
9. Track, measure, and report.
10. Train, educate, and celebrate.

The Association of School Business Officials (ASBO), in their publication *Planning Guide for Maintaining School Facilities*,²³ suggests that the following guidelines will help a school system accomplish more efficient energy management:

1. Establish an energy policy with specific goals and objectives.
2. Assign someone to be responsible for the district's energy management program and give this energy manager access to top-level administrators.
3. Monitor each building's energy use.
4. Conduct energy audits in all buildings to identify energy inefficient units.
5. Institute performance contracting (i.e., contracts requiring desired results rather than simply a list of needed products) when replacing older, energy inefficient equipment.
6. Reward employees of schools or buildings that decrease their energy use.
7. Install energy efficient equipment including power factor correction units, electronic ballasts, high-efficiency lamps, set-back thermostats, and variable-speed drives for large motors and pumps.
8. Install motion detectors that turn lights on when a room is occupied and off when the room is unoccupied.

²³<http://nces.ed.gov/pubs2003/2003347.pdf>

Additional considerations may include alternative energy sources such as solar, wind and geothermal energy.

More information about energy management can be found through the National Clearinghouse for Educational Facilities' Energy Page which provides a list of links, books, and journal articles on various methods of heating, cooling, and maintaining new and retrofitted K-12 school buildings and grounds.²⁴

FINDING 4-11

The district has low energy spending. This results in more dollars available for items and activities more directly related to academic outcomes.

In 2018-19, the district spent a total of \$1,776,281.00 on utilities. With a total floor area of 2,593,375 square feet, this translates into an annual cost of \$0.68 per square foot. The annual cost in 2017-18 was \$0.76 per square foot. During interviews with leadership in Mid-Del Operations, it was pointed out repeatedly that visiting Energy Systems Company (ESCO) representatives have consistently refused to offer the district any energy performance contracts because they could not find sufficient additional energy savings to make such an arrangement viable.

The Council of the Great City Schools annually collects a variety of data from its member districts that are suitable for use in benchmarking. The Council compiles these into its publication, *Managing for Results*.²⁵ **Exhibit 4-26** provides the upper, median and lower quartiles for utilities spending among Council districts. These cost figures include electricity, natural gas, fuel oil, water, and sewer.

Exhibit 4-26
Council of the Great City Schools
Cost per Square Foot of Utilities

Year	2015-16	2016-17	2017-18	2018-19
Upper Quartile	\$1.47	\$1.57	\$1.59	\$1.64
Median	\$1.25	\$1.23	\$1.34	\$1.45
Lower Quartile	\$1.10	\$1.10	\$1.13	\$1.17

Source: Council of the Great City Schools, <https://www.cgcs.org/Page/635>

At 90 cents per square foot for utilities in 2017-18, MDPS' costs were substantially below the lower quartile.

COMMENDATION

MDPS spends relatively little on utilities, freeing general funds for other uses.

²⁴ <http://www.ncef.org/search/node/energy%20management>

²⁵ <https://www.cgcs.org/Page/635>

FINDING 4-12

The district is proactively seeking to further reduce its utilities costs. It is engaged in replacing older lighting. Energy management staff has among its goals the constant pursuit and implementation of further energy conservation opportunities.

The district is currently engaged in a re-lamping program aimed at converting nearly all lamps to light emitting diode (LED) technology. LED lamps are brighter, longer-lived, and consume less energy than older lighting technologies. Over the next ten years, this action has the potential to deliver an 80 percent savings over conventional incandescent lighting.²⁶

Other potential energy saving opportunities will increasingly come from renewable resources.²⁷ Energy sources that could displace fossil fuels are potentially counter-culture choices in Oklahoma. Yet the consulting team has recently worked in two of this state's school districts who operated windmills or geothermal heating and cooling installations.

Finally, energy conservation behavior is an important contributor to low energy utility bills. It is easy for building users to fall back on lax behavior, such as forgetting to turn off power users overnight and on weekends. A periodic campaign to re-energize energy conservative attitudes and actions will have the desired effect.

The U.S. Department of Energy determined that at least 25 percent of all energy consumed in a school facility is due to energy inefficiency. This inefficiency can be caused by:

- dry transformers;
- poor location of light switches;
- continuously burning hallway lights;
- excessive plug loads and use of personal appliances; and
- phantom loads.²⁸

The search for more energy saving opportunities – and for more sources of energy – is never abandoned in high performing districts. One of the best sources of this attitude is Dr. Daniel Yergin's book *The Quest – Energy, Security, and the Remaking of the Modern World*.

RECOMMENDATION

Continue to pursue prudently and yet aggressively energy conservation opportunities.

²⁶ [How Much Do Energy Efficient Bulbs Save? \(sfgate.com\)](http://www.sfgate.com)

²⁷ <https://www.nationalgeographic.org/encyclopedia/renewable-resources/>

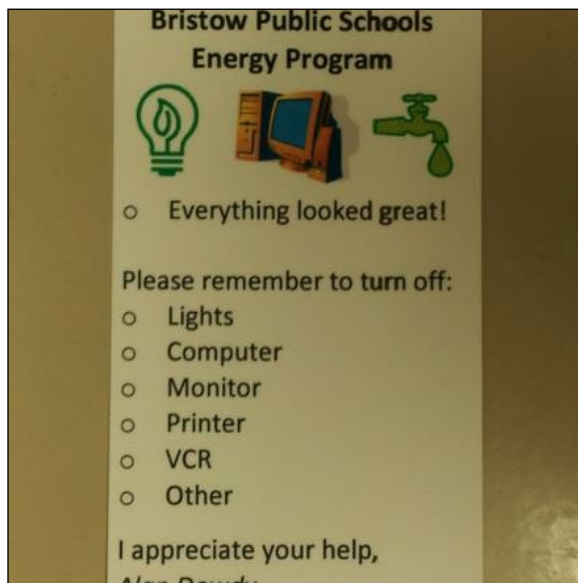
²⁸ See http://www.stratenergy.ca/phantom_loads.htm for a detailed explanation.

In addition to the LED re-lamping, the district should pursue enhanced energy-saving behavior among building users, investigate renewable energy sources, and seek other viable energy cost-savings as they arise.

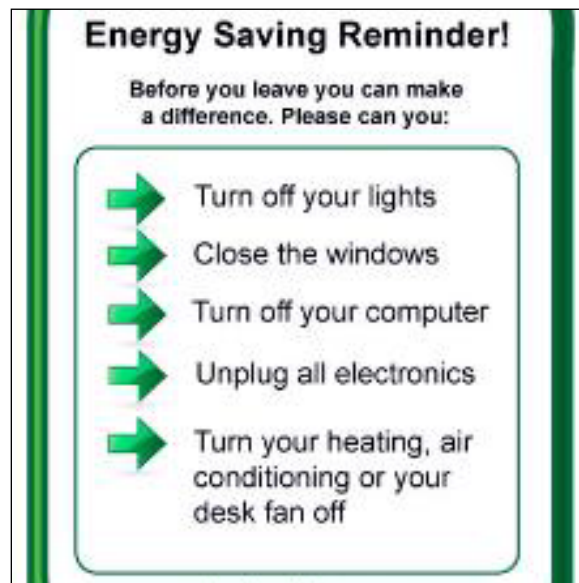
An active energy awareness program is a best practice for school districts and should be considered by MDPS. The following are some examples of these conservation efforts:

- creating low utilities usage competitions among the schools, with a portion of saved dollars being given to student organizations, or to staff and faculty for their proven contribution to energy savings;
- performing building checks to see if lights are turned off, doors are closed, water faucets are not dripping, etc.;
- leaving notes reminding teachers or staff of the proper procedure, such as those shown in **Exhibit 4-27**, if problems are found during building checks;

Exhibit 4-27
Examples of Energy Saving Reminder Stickers



Source: Prismatic Archives, April 2012



Source: BusinessHelpZone.com, December 2015

- enforcing set points for thermostats at 76 degrees in the summer and 69 degrees in the winter; and
- setting water heaters or boilers at a maximum temperature of 140 degrees, except in areas requiring higher temperatures for sanitation purposes, such as kitchens.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

D. SAFETY AND SECURITY

School districts are expected to provide a safe and secure environment for their students and staff. While districts are largely insulated from violent crime, incidents of violence at schools draw national attention. School districts must take proactive measures in safety and security even in incident-free schools. Students, teachers, and other district employees deserve a safe school environment in which to work and learn.

In 2003, Homeland Security Presidential Directive-5 (HSPD-5) initiated the development of a National Incident Management System (NIMS) and requires its use by public sector agencies, including school districts. The intent of this system is to provide a common template and language for responding organizations to work together in preventing, preparing for, responding to, and recovering from incidents. As noted by FEMA, NIMS represents “a core set of doctrine, concepts, principles, terminology, and organizational processes that enables effective, efficient, and collaborative incident management.”

NIMS emphasizes that true preparedness requires a commitment to continuous review and improvement. Most districts understand the continuous nature of emergency management and the need for an all-hazard approach. As such, the mission of school districts in an emergency/disaster is to:

- **Prevent** a threatened or actual incident from occurring.
- **Protect** students, teachers, staff, visitors, networks, and property from a threat or hazard
- **Mitigate** to eliminate or reduce the loss of life and property damage by lessening the impact of an event or emergency.
- **Respond** to stabilize an emergency once it has already happened or is certain to happen in an unpreventable way; establish a safe and secure environment; save lives and property; and facilitate the transition to recovery.
- **Recover** to assist schools affected by an event or emergency in restoring the learning environment (**Exhibit 4-28**).

Exhibit 4-28
Continuous Process of Emergency Management



Source: <https://blog.ed.gov/2014/04/join-americas-prepareathon/>

The Oklahoma Commission on School Safety, which was created in response to the Newtown tragedy, submitted several recommendations to the Oklahoma Legislature. Based upon the commission's recommendations, the Legislature passed four new laws. Among other things, the laws require schools to update their safety plans every year and have frequent "intruder drills," with students taking cover while the doors are locked and the windows are covered. The state also created a new Oklahoma School Security Institute to help schools keep their policies up to date.

The Oklahoma Department of Emergency Management (ODEM) reports that the state has had an increased number of earthquakes in recent years. In 2017, there were 304 earthquakes across the state with a magnitude of three or higher. Actions that the district can take regarding earthquakes, and teach to students, staff, and visitors are provided on the ODEM website.²⁹

Exhibit 4-29 provides stakeholders' opinions regarding aspects of safety and security. Nearly all staff feel that they know what to do in the face of an emergency. A large majority of parents said that their children feel safe and secure at school. Finally, about half of high school and non-high school student respondents also indicated that they feel safe at school.

²⁹ https://www.ok.gov/OEM/Programs_&_Services/Preparedness/Preparedness_-_Earthquakes.html

Exhibit 4-29
MDPS Survey Results Regarding School Safety

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	I know what to do during a crisis or emergency on campus.	34%	57%	4%	1%	1%
Parent	My child feels safe and secure at school.	21%	58%	12%	6%	2%
High School Student	I feel safe and secure at school.	48%		24%	28%	
Non-High School Student	I feel safe and secure at school.	54%		33%	13%	

Source: Prismatic Survey Results, February 2021

FINDING 4-13

The district is engaged in a comprehensive security program focused on monitored, secure checkpoint lobbies at all main entrances, fenced sites, badge-activated entries, strategically placed interior and exterior cameras in recording mode, and the conduct of all required drills with mandatory reporting to the Oklahoma School Security Institute at all educational facilities. However, there remains room for improvement in a number of areas.

Safety protocols and emergency management plans are implemented district-wide and therefore uniform for all facilities. This includes inspection and servicing of fire extinguishers, illuminated exit signs, emergency lights, defibrillators, etc. In testing a sample of emergency egress signs and lighting, the consulting team found all to be operational. Likewise, all examined fire extinguishers were up to date.

However, the consulting team also found that:

- Several extinguishers were loosely placed on floors in unsecured positions.
- Multiple electrical panels were unlocked and easily accessible by students.
- Many classrooms lacked a posted emergency route sign.
- Eye wash, emergency shower, and fire blanket installations were in functional condition in most locations visited, except in some locations where eyewash stations gave off brown water due to lack of maintenance and long-term lack of use or testing.
- At the warehouse, a mobile eyewash, shower and fire blanket facility will be installed to take the place of a wall-mounted installation that has ceased to function properly.

-
- Safety data sheets (SDS) were generally not available and respondents have referred to a telephone number they have been instructed to call to receive SDS information. In only one case did a custodian have an SDS binder that appeared to be current.
 - In many older schools, classroom door locks cannot be activated from inside, but require a person to come into the corridor to lock the door. This was also raised as a concern by a number of principals. Addressing this problem was one of the key findings of FBI investigations into historical school shooting incidents.
 - Although the fencing at many elementary schools is contiguous and unbreeched, several locations allow access through fence holes or removed fence sections.
 - Playground equipment at some schools sits on pavement or has no cushioning except bare compacted soil. Some Headstart playgrounds are unkempt with rusted playground equipment.
 - Fire suppression systems in school kitchens were typically the automated ANSUL R-102 product, which complies with the UL 300 standard and tests for commercial restaurant kitchens. The UL 300 standard became mandatory for all liquid fire suppression systems in 1994, and systems installed since then must meet this standard by meeting or exceeding the required test protocols. It was beyond the scope of this review to determine whether the current systems comply with UL 300. Regardless, the consulting team questioned the specific placement of the systems: Some systems and accompanying K-type manual fire extinguishers have been installed directly below the ceiling and can only be reached with a step ladder.

In addition, focus groups with principals raised a number of concerns. These are summarized in **Exhibit 4-30**.

Exhibit 4-30
Safety and Security Concerns Raised by School Principals

Focus Group Questions	Relevant Focus Group Concerns
Are the school grounds, playgrounds, athletic fields, etc. safe and secure?	<ul style="list-style-type: none"> • At the high schools fine art facility doors have to remain unlocked because it is a separate building, so that is less secure. Field Houses are the same way – unlocked all day. • Some elementary schools have unsecured playgrounds. • There is a need for more functioning cameras at various elementary schools, to provide eyes on the outside and the playgrounds. This is also a concern at some elementary schools on the inside as well; principals noted “huge” gaps in camera coverages. • One school houses an education program for deaf students that employs some staff who are also deaf. There is no system in place to alert the deaf to an emergency. • Not all classrooms have speakers to hear about lockdowns or other emergency information.
Are the school entries safe and secure?	<ul style="list-style-type: none"> • Two of the three high schools have odd vestibule designs. Once someone is buzzed past that point, they have access to the whole building. • Middle school campus layouts require students to go outside to get to the next segment of the building. This is too accessible from the outside. There are similar problems with some elementary campuses with multiple buildings. • Some campuses have gates that are never locked during the day, due to deliveries. • Badge systems have broken down more than once. Teachers resort to propping doors.
School Resource Officers (SRO)	<ul style="list-style-type: none"> • There are questions regarding who is in charge of the SRO. Should they be reporting to the principal while working at the school? • Some SROs have refused to write tickets for truancy. Clarity of the SRO role in a school would be helpful. • Not all SROs are willing to be visibly “on patrol” in the schools, which makes them a less effective deterrent.

Source: Prismatic onsite visit, February 2021

Ensuring school safety is an ongoing activity in every district. A best security practice is available to all Oklahoma public schools. The Oklahoma School Security Institute offers a Threat and Vulnerability analysis to any district that requests it. The analysis includes:

- a site visit from an OSSI staff member on a traditional school day to observe the normal activities around the school;

- a list of school security best practices in each area assessed by the OSSI staff;³⁰
- a campus overview including a tour of the school with notation on the security practices in place that are working well for the site as well as notation on threats, hazards, and vulnerabilities observed at the site;
- a review of the school's policies and procedures with recommendations to strengthen language or processes if needed; and
- recommendations that are either no cost or low cost for the school site to reduce risk and increase the overall security of the site.

RECOMMENDATION

Request a Risk and Vulnerability Assessment to be conducted by staff of the Oklahoma School Security Institute (OSSI).

OSSI experts will identify any security concerns they feel the district should address. They will then recommend specific actions and responses.

FISCAL IMPACT

This recommendation can be implemented with existing resources. OSSI assessments are free.

FINDING 4-14

The classroom chemical storage facilities in MDPS high schools are inadequately maintained. The problem is most severe at Midwest City High School.

Exhibit 4-31 provides an overview of the classroom chemical storage at Midwest City High School. As shown, in some cases, containers have been completely reacted through or have compromised seals and have spilled hazardous materials onto the storage shelves. Other issues include labels being completely unintelligible because they have deteriorated from age or corrosive reactions, reagents visible on the exterior of the storage containers, chemicals being stored in improper storage vessels, missing labels, and a messy/cramped chemical storage closet that is a potential physical hazard zone as well as a chemical one. The consulting team found no evidence of updated safety data sheets (SDS) in any of the classroom chemical storerooms.

³⁰ [Oklahoma School Security Institute - Risk & Vulnerability Assessments](#)

Exhibit 4-31
Evidence of Improperly Maintained Chemical Storage Facilities at MCHS

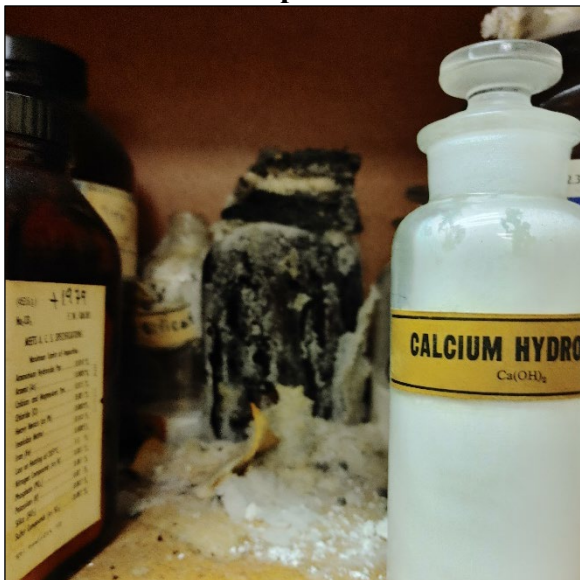
Acids and Bases Stored Together



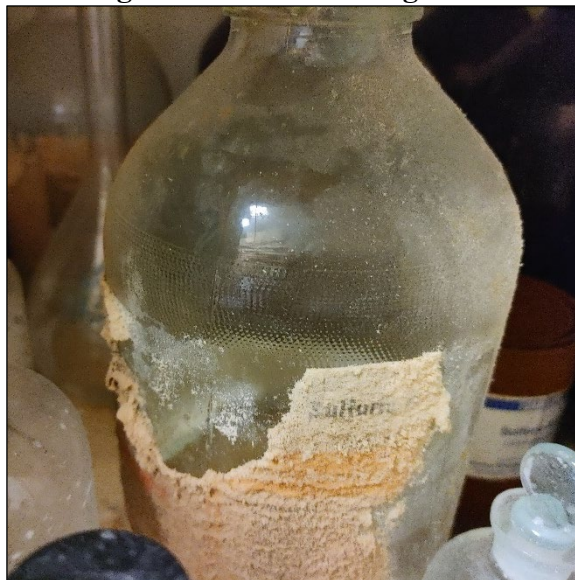
Reagents Present on Exteriors of Containers



Ruptured Storage Container and Chemical Spill



Illegible Chemical Storage Label



Source: Prismatic, March 2021

RECOMMENDATION

Perform a full audit and reorganization of the classroom chemical storage facilities in each high school.

A five-step comprehensive plan should address the needs of the high school chemistry departments:

1. **Inventory** - Chemical inventories should be developed and updated at each school site if they have not been already. A proper chemical inventory should include, at a minimum, the chemical name, the chemical location, the date the chemical was received at the school, and an individual identifier for the storage container (e.g. a lot number, bottle number, bar code, or some other specific identifier). Every chemical is required to have a physical safety data sheet (SDS) available in an easily accessible location and should be curated as part of the inventory process. Chemical storage bottles need to be appropriately labeled with certain information to ensure integrity of the material, including the full chemical name, the date the chemical was packaged, initials of the person who stored the chemical, and the concentration (if applicable).
2. **Disposal** - Once an inventory has been completed, any unlabeled or unidentifiable chemicals should be properly disposed of as hazardous waste according to its chemical class, if that can be determined. Chemicals that have passed their printed expiration date should also be disposed of at this time. Storage containers should be washed thoroughly and stored.
3. **Cleaning** - After the disposal stage, storage areas should be cleaned of any chemical spills. Solid waste present on the shelves should be swept up before any sort of disinfectant/cleaning agent is applied to the storage shelves to reduce or eliminate unforeseen reactions. Shelves and surfaces should be cleaned while they are empty to reduce risk of spills.
4. **Reorganization** - After the storage areas are cleaned, chemicals should be restocked according to chemical class. Flammable/explosive materials should be kept in a lockable, flame-retardant cabinet separate from any other reagents. Solids should be kept separate from solutions to reduce the potential for contamination reactions. Organic reagents should be separated from any oxidizing agents to reduce the risk of hazardous future contamination reactions.
5. **Future planning and maintenance** - After the storage area has been reorganized, a chemical hygiene and safety plan should be established. This part of the plan establishes recordkeeping practices to track usage of chemicals in each location, maintain an updated chemical inventory, a disposal policy for expired or unknown materials, and a cleaning schedule for the storage areas. As an additional measure, a chemical hygiene officer should be appointed to oversee annual inventory process and compliance with chemical storage practices.

The high school principals should direct lead chemistry teachers to complete this 5-step process each summer.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 5:
Support Services

Chapter 5

Support Services

This chapter reviews several areas of support services in Mid-Del Public Schools (MDPS). It is divided into these sections:

- A. Child Nutrition
- B. Technology
- C. Transportation

A. CHILD NUTRITION

Successful administration of the child nutrition program depends upon consistent program organization, strong financial reporting, and precise personnel management. All of these administrative areas must align and support the district's goals for student achievement.

School meal programs began in 1946, when the *National School Lunch Act* was signed, authorizing the National School Lunch Program (NSLP) to “safeguard the health and well-being of the nation's children.” The program, administered by the U.S. Department of Agriculture (USDA), is open to all public and nonprofit private schools, as well as all residential childcare institutions. The NSLP also offers afterschool snacks and dinners for sites that meet the eligibility requirements.

The *Child Nutrition Act of 1966* established the School Breakfast Program (SBP). This is a federally-assisted meal program that provides nutritionally balanced, low-cost, or free breakfasts to children in public schools, nonprofit private schools, and residential child care institutions.

MDPS participates in the NSLP, the SBP, and the USDA Foods in Schools Program. Districts that participate in these federal programs receive cash subsidies and donated commodities from the USDA for each eligible meal they serve. In return, the district must serve student meals that meet federal guidelines for nutritional value, offer free or reduced-price meals to eligible students, and accurately keep required records.

Students in the lowest socioeconomic bracket qualify for free lunches, while others qualify for reduced price lunches. Meals served according to federal guidelines receive some level of reimbursement, including those served to students who pay full price. School districts do not receive federal reimbursement support for teacher or guest meals. **Exhibit 5-1** shows the applicable federal reimbursement rates over three years for breakfast and lunch. MDPS also received an additional \$0.07 cents per meal for meeting the meal pattern requirements – this was increased from \$0.06 per meal for 2018-19 meals.

Exhibit 5-1
School Meals: Federal per Meal Reimbursement Rates

	School Breakfast Program - Severe Need¹		School Breakfast Program	National School Lunch Program (with 7 cents)		School Lunch Program
Meal Type	2018-19	2019-20	2020-21	2018-19	2019-20	2020-21
Free	\$2.14	\$2.20	\$2.375	\$3.39	\$3.49	\$4.1525
Reduced Price	\$1.84	\$1.90		\$2.99	\$3.09	
Paid	\$0.31	\$0.31		\$0.39	\$0.40	

Source: <https://www.fns.usda.gov/school-meals/rates-reimbursement>

Pre-COVID-19, the *Healthy, Hunger-Free Kids Act of 2010 (HHFKA)* provided sweeping modifications to the school nutrition programs and made substantial changes in the required meal components. The new regulations require districts to charge equitable prices for full-pay meals and non-reimbursable à la carte items, establish nutritional requirements for all foods sold on campuses at any time during the school day, provide free water where meals are served, provide nutrition education to students in the district, and require school nutrition directors, managers, and staff managers to meet education, training, and certification requirements.

Exhibit 5-2 provides the nutritional requirements as specified in the *HHFKA*. Both the breakfast and lunch menus now must offer more fruits and vegetables than before. Milk must be low-fat or fat-free. Sodium levels must be reduced. Whole grains must be increased and trans fats must be eliminated. Since the regulation was enacted, while many districts have successfully implemented the requirements of *HHFKA*, there have been discussions at the federal level about rolling back some provisions and delaying the implementation of others. At the time of this report, it was uncertain what the final decision would be. Until a final decision on possible revisions is reached, all the provisions of *HHFKA* are in effect.

¹ MDPS is eligible to receive severe need reimbursements for breakfasts served to eligible students on sites where 40 percent or more of the lunches claimed at the site in the second preceding school year were served free or at a reduced price, and the site is participating in or initiating a school breakfast program.

Exhibit 5-2
Summary of Nutritional Requirements for Breakfast and Lunch
(Pre-COVID-19)

	Breakfast		Lunch	
Fruit and Vegetables	1 cup per day (vegetable substitution allowed). Students are allowed to select ½ cup under Offer Versus Serve.		¾-1 cup vegetables plus ½-1 cup fruit per day.	
Grains	Daily minimum of 1 ounce equivalent minimum per day; weekly minimum ranges, varying by grade: K-5: 7-10 ounces 6-8: 8-10 ounces 9-12: 9-10 ounces		Daily minimums varying by grade: K-5: 1 oz. eq. min. daily (8-9 oz. weekly) 6-8: 1 oz. eq. min. daily (8-10 oz. weekly) 9-12: 2 oz. eq. min. daily (10-12 oz. weekly)	
Meat/Meat Alternate	May substitute meat/meat alternates after minimum daily requirement for grains is met.		K-5: 1 oz. eq. min. daily (8-10 oz. weekly) 6-8: 1 oz. eq. min. daily (9-10 oz. weekly) 9-12: 2 oz. eq. min. daily (10-12 oz. weekly)	
Whole Grains	All must be whole grain rich unless exemption granted.		All must be whole grain rich unless exemption granted.	
Milk	1 cup, 1% (unflavored) or fat-free (unflavored/flavored)		1 cup, 1% (unflavored) or fat-free (unflavored/flavored)	
Sodium*	Target 2 (2017-18): K-5: ≤ 485 mg 6-8: ≤ 535 mg 9-12: ≤ 570 mg	Target 3 (2022-23): K-5: ≤ 430 mg 6-8: ≤ 470 mg 9-12: ≤ 500 mg	Target 2 (2017-18): K-5: ≤ 935 mg 6-8: ≤ 1035 mg 9-12: ≤ 1080 mg	Target 3 (2022-23): K-5: ≤ 640 mg 6-8: ≤ 710 mg 9-12: ≤ 740 mg
Trans Fat	Zero grams per serving (nutrition label)		Zero grams per serving (nutrition label)	

Source: USDA, January 2012

**Target 1 was set to be implemented by 2014-15*

As a result of the COVID-19 pandemic, meal programs in schools have been substantially modified. USDA has issued various waivers to accommodate the special challenges around serving meals to children attending both in-person and virtual school. These waivers began in March 2020 and have been extended for the entire 2020-21 school year. The waivers received by the Oklahoma State Department of Education (SDE) cover several topics:

- Location – meals can be served in schools, as take-home meals, as pick-up meals by parents or students, or delivered to pick-up sites;
- Multiple meals – schools can provide more than one day's worth of meals to eligible children via a single meal pick-up;
- Meal times – meals can be served outside the standard meal times;

- Meal Pattern – allows for flexibility in the requirements of the meal pattern; and
- Cost – allows free meals to be served to all students.

Exhibit 5-3 provides photos of a sampling of MDPS breakfast and lunch trays selected by students during the onsite period.

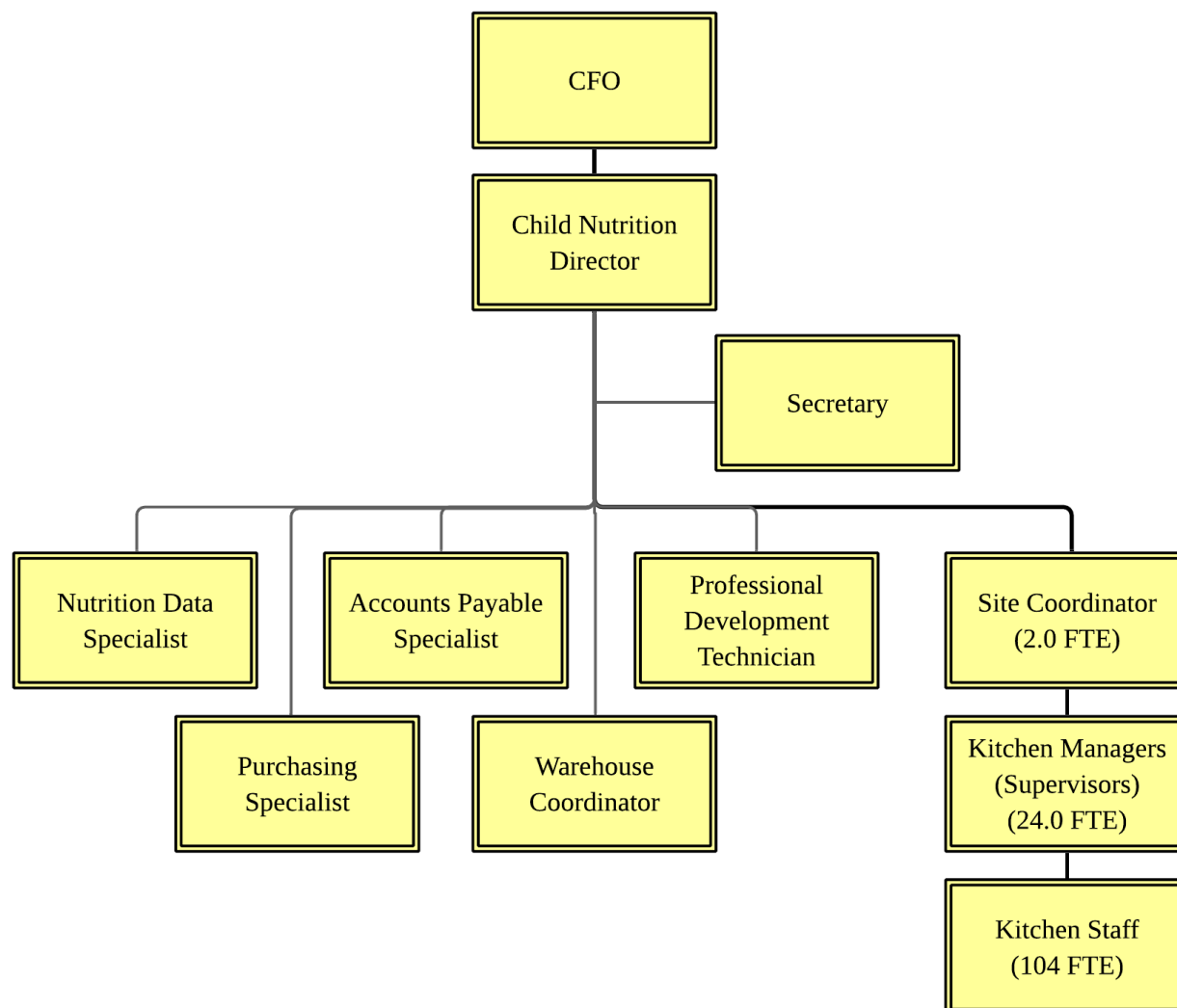
Exhibit 5-3
Breakfast and Lunch Sample Trays



Source: Prismatic, March 2021

Exhibit 5-4 shows the organization of staff within the MDPS child nutrition department. All employees except kitchen staff report to the director.

Exhibit 5-4
MDPS Child Nutrition Organizational Structure



Source: Created by Prismatic, February 2021

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MDPS departments and functional areas. **Exhibit 5-5** provides the results for child nutrition. More than half, 53 percent, gave child nutrition an A or B; 10 percent gave it a D or F.

Exhibit 5-5
Staff Survey Results Regarding Child Nutrition

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Food services	17%	36%	19%	8%	2%	19%

Source: Prismatic Survey Results, February 2021

FINDING 5-1

The child nutrition department is not adequately managing its staffing, as demonstrated by Meal per Labor Hour (MPLH) rates that are below recommended staffing guidelines and high labor operating ratios. This issue was apparent prior to COVID-19 and was exacerbated during COVID-19 when some students switched to virtual learning and the department made numerous changes to meal service, resulting in decreased participation rates. Staffing practices in the district are having a negative impact on the ability for child nutrition to manage staffing in a fiscally sound manner.

The SDE has recommended staffing guidelines for schools in Oklahoma to set goals for productivity relative to meals served. SDE guidelines provide productivity goals based upon the number of meal equivalents served and the number of labor hours needed to prepare those meal equivalents. The student reimbursable lunch meal is the standard unit of conversion for determining meal equivalents. Therefore, all meal types are converted to meal equivalents for the purposes of measurement. A meal equivalent is not a unit of production, but a calculation that allows a child nutrition manager to equate all meals to a standard. By converting all food sales to meal equivalents, a manager can determine production rates. The SDE uses the following conversions to meal equivalents:

- one lunch equates to one meal equivalent;
- two breakfasts equate to one meal equivalent;
- three snacks equate to one meal equivalent; and
- à la carte sales of \$3.77 equate to one meal equivalent.

The most common means of measuring employee productivity in child nutrition is the MPLH measure. This is calculated by dividing the number of meal equivalents produced and served in a day by the number of labor hours required to produce those meals. The SDE guidelines for MPLH staffing are shown in **Exhibit 5-6**. The SDE provides MPLH guidelines for both conventional and convenience systems of food preparation. The consulting team found Mid-Del to be using mainly a convenience food preparation system. Therefore, their productivity in labor hours should be at the low end of the recommended total hours for the convenience system.

Exhibit 5-6
Oklahoma Staffing Guidelines for Onsite Production

Number of Daily Meal Equivalents	Recommended for Conventional Systems ²		Recommended for Convenience Systems ³	
	Meals per Labor Hour (MPLH)	Total Hours	Meals per Labor Hour (MPLH)	Total Hours
10 – 100	12	< 8	16	< 6
101 – 150	12	8 – 12	16	6 – 9
151 – 200	12	12 – 16	16	9 – 12
201 – 250	14	14 – 17	17	12 – 14
251 – 300	14	17 – 21	18	14 – 16
301 – 400	15	20 – 26	18	17 – 21
401 – 500	16	25 – 31	19	21 – 25
501 – 600	17	29 – 35	20	25 – 30
601 – 700	18	33 – 37	22	27 – 31

Source: SDE Child Nutrition Manual Compliance Section, July 2018

MDPS submitted MPLH calculations by kitchen sites to the consulting team for March 2019, which was the last month regular meal service was in place, October 2020, which reflected revised meal service during COVID-19, and January 2021, which is current data. After analysis, the consulting team determined two schools, Barnes and Steed, had correct labor hours for March 2019. All other schools for the three time periods were overstaffed. A summary of total labor hours for all schools is shown in **Exhibit-5-7**. As noted, total labor hours were reduced during COVID-19 serving but are still in excess of the recommended labor hours based on participation levels. These excess hours equate to a large expenditure for the child nutrition department of \$323,988.00 (140 x \$13.30 x 174 days). The actual expenditure is probably higher as many employees are paid more per hour than the beginning salary of \$13.30. The financial position could be improved with a reduction in labor hours.

Exhibit 5-7
MDPS Cafeteria Labor Hours Over Time

Time Frame	Actual Labor Hours	Recommended Labor Hours	Excess Labor Hours
3/2019	716	579	140
10/2020	579	360	219
1/2021	574	434	140

Source: MDPS, February 2021

Interviews with the department directors (current and recently retired), the CFO, and the site coordinators all indicated the department was overstaffed. The superintendent stated the need to

² A system where meals are generally prepared from scratch onsite.

³ A system where meals are generally only re-heated from frozen prepared items onsite.

determine appropriate staffing levels and indicated he was amenable to both a hiring freeze and layoffs.

Site coordinators stated MPLH are usually calculated after October participation data has been recorded. A determination is made of the schools needing labor hour adjustments, but changes are not put in place until the following school year. This practice leads to inaccuracies as participation in the next school year could vary from the current October data. Another result is some sites may have excess labor hours for the rest of the school year, which has a negative effect on the site's financial status.

Another practice at the district level affects kitchen staffing and has led to overstaffing. Job postings are for a specific school. The site coordinators stated in the past, applicants applied for a position such as cafeteria assistant and were assigned and reassigned to schools based on staffing needs. Advance interviews noted involuntary transfers were eliminated in the past four years.

The district job openings page currently has three postings for child nutrition and they are titled for a specific school:

- 2020-21 6-Hour Cafeteria Assistant- Del City Middle School;
- 2020-21 6-Hour Cafeteria Assistant- Del City Elementary; and
- 2020-21 Child Nutrition Supervisor- Midwest City Middle School.

Hiring for a specific school makes it difficult to transfer staff as needed when participation levels change and MPLH are over or under. The Mid-Del Support Employees Association (MDSEA) negotiated agreement states "The scope of bargaining shall be limited to wages, hours, fringe benefits and other terms and conditions of employment. There shall be no negotiations on inherent managerial policy, including but not limited to programs, facilities, job descriptions, organizational structure, selection of personnel, assignment, equipment and supplies, matters affecting the budget or expenditures, and standards of service". Assignments in child nutrition have a direct impact on budget and expenditures at the department and district level. Greater efficiency would be achieved if assignments were within complete control by the department. If child nutrition cannot cover their expenses, the district general fund makes up the difference.

The agreement also addresses postings." The Human Resources Department will announce any full or part-time vacancies within the bargaining unit through District email and post such vacancies electronically through TalentEd. Prior to filling vacancies, the position will be posted at least one (1) week. Employees of the bargaining unit may apply electronically through TalentEd for any open position. Qualified employees of the bargaining unit who apply will be considered for such open positions before applicants from outside the district are considered. (2019)" This policy provides employees with the ability to apply for a transfer to a different location if they are interested in moving.

Another measure frequently used to determine labor hour benchmarks is the labor operating ratio. To calculate this measure, total revenue is divided by total costs for labor and benefits to arrive at an operating ratio. Calculations of data from the Oklahoma Cost Accounting System (OCAS) data

show the labor operating ratio to be higher than industry standards and excessively high once COVID-19 meal service began, as shown in **Exhibit 5-8**. This high operating ratio directly corresponds with the determination that MPLH are lower than industry standards and there is an excess of labor hours.

Exhibit 5-8
MDPS Child Nutrition Operating Ratios Over Time

Category	2016-17	2017-18	2018-19	2019-20	Industry Standard
Labor/Benefits	48.6%	52.3%	56.0%	69.6%	40-45%
Food/Supplies	42.2%	45.0%	45.9%	51.5%	40-45%
Other	5.5%	3.9%	5.7%	4.0%	15-20%
Total	96.3%	101.2%	107.6%	125.1%	N/A

Source: Oklahoma Cost Accounting System (OCAS) and Prismatic calculations

Using MPLH to allocate labor is a common practice in school meal programs. Industry standards have been developed to guide school child nutrition operators in assigning staff to kitchens based upon participation levels. When standards and goals are communicated to employees and they understand the relationship of controlled labor costs to financial stability, their performance becomes tied to higher productivity levels.

Costs for labor and benefits are a major expenditure for child nutrition programs. To maintain a sound financial position, goals for staffing must be established based upon industry standards. The SDE has established guidelines for districts to calculate meal equivalents and assign labor hours. MPLH must be calculated and evaluated on a regular basis to ensure that each kitchen has adequate labor hours but are not overstaffed.

*Financial Management: A Course for School Nutrition Directors*⁴, published by the Institute of Child Nutrition (ICN) recommends using MPLH as a productivity index to monitor the efficiency of the operation and as a guide to determine staffing. This course recommends no more than 40 to 45 percent of revenue is spent on labor.

The following best practices are noted in *Keys to Excellence*,⁵ the self-assessment tool of the national School Nutrition Association (SNA):

1. A staffing plan is developed based on factors such as delivery systems, participation, facilities, and services provided.
2. Meals Per Labor Hour standards are utilized in staffing assignments.

RECOMMENDATION

Examine policies and procedures that have impacted staffing and make adjustments and changes as needed with the goal to staff kitchens according to the Oklahoma recommended MPLH guidelines.

⁴ <http://www.nfsmi.org/documentlibraryfiles/PDF/20151012041124.pdf>

⁵ https://schoolnutrition.org/uploadedFiles/4_Certification_Education_and_Professional_development/3_Keys_to_Excellence/Keys-to-Excellence-Standards.pdf

An analysis should be made for each individual school kitchen to evaluate current productivity and estimate staffing needs for the next school year. Principals should be consulted as to projected changes in enrollment, bell schedules, or any other fluctuations that could impact kitchen staffing needs. This process should be undertaken during the spring/summer so that needed staffing changes can be completed prior to the new school year. Managers should be involved in the process of evaluating and changing assignments and assigned hours.

In order to institute this procedure, the district policy of hiring staff for a specific school assignment should be discontinued. Child nutrition should coordinate with HR and MDSEA to establish clear parameters for transfers based on participation and MPLH. If needed, changes to the agreement should be submitted to the board for approval. This new policy would provide the basis for recommending periodic staff reassignments. Child nutrition staff should receive notification of this change in a formalized manner. This change in policy should be added to the MDSEA Negotiated Agreement similar to the following found in Article 22-Transportation Specifications:

22.5 Bus Drivers/Monitors Assignments: Bus driver and monitor assignments are the responsibility of the Director of Transportation. Employees interested in vacant routes shall notify the Director of Transportation. In addition to the employee's preference, the Director shall also consider the factors such as: student needs, site needs, experience, skill and ability and seniority.

There are established ways school child nutrition operations assess ways to increase the productivity rate and produce more meals per hour of paid labor. The director and site coordinators should examine these approaches and determine if one or a combination will produce the desired result to ensure that schools are performing at industry standards for MPLH. The goals set for each school need to be monitored on a monthly basis, discussed with managers, and adjusted as needed.

- Decrease the number of labor hours – reduce staff at schools where staff hours are above recommended guidelines or decrease the number of staff hours worked daily by adjusting work schedules. An effort should be made to gradually reach staffing goals by adjusting hours as staff retire or resign.
- Increase the number of meal equivalents – implement measures to increase participation. Unless the child nutrition staff is feeding all of the students, faculty, and staff every day, there are possibilities for increasing participation. The child nutrition managers can use eligibility information to help determine where revenue can be increased. Every student who is enrolled and every adult who is employed by the school is a potential customer.
- Increase adult participation – not only does this help generate more revenue, but this also offers additional benefits. Student behavior and attitudes toward the school meals program often improve when faculty participation improves.
- Increase marketing efforts – this should also increase sales. This may include ongoing, regular activities throughout the school year, as well as special events. Without marketing, parents and students are unaware of the benefits and opportunities of the breakfast and lunch

programs, causing participation in these programs to suffer. Adequate marketing helps to ensure more successful program operations.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-2

The efficiency and effectiveness of the child nutrition central office could be improved with reorganization. Several employees perform similar duties that could be combined and completed by one person. Some positions contain duties across multiple specialized functional areas. The department lacks the benefit of a dedicated accountant position which would provide financial expertise the department lacks.

An analysis of job descriptions as well as individual interviews of the office staff revealed several functional areas within one position and several staff doing similar jobs. For example, the nutrition software specialist creates the menus, is responsible for software technology, and manages the direct certification and low income reports. The professional development technician maintains professional development records, finds training and classes, monitors fundraiser activity in schools, checks prices on vendor invoices (as does the purchasing specialist) and checks meal activity reports for claims (as does the nutrition software specialist). The secretary to the director is the main point person for management of the free/reduced program and manages kitchen maintenance requests.

The director prepares the claims for reimbursement as well as any other required state reports. Two other staff check school meal activity in preparation for the claim report. Preparation of the claims as well as other state reports could be reassigned, freeing up the director to focus on overall direction, supervision, coordination, program assessment and analysis, and strategic planning, which are typical duties of a director position.

There is limited financial analysis of the program at the central level and none at the site level. No reports showing financial, or participation data are prepared in the department. There is no analysis of participation levels or food costs for the various menus. The department would benefit from the addition of an accountant position that would focus on a higher level of financial and data preparation. The director indicated she would be performing the task of preparing financial reports. However, the consulting team recommends that task be assigned to an accountant position and the director perform the analysis of the reports.

The span of control for the coordinators could be improved. Best practice staffing guidelines recommend one supervisor for every 20 schools as shown in **Exhibit 5-9**. Staffing according to this guide could result in assigning additional duties to the coordinators, as together they share supervision of the 23 school kitchens.

Exhibit 5-9
Administrative Staffing Guidelines

Number of Schools	Director	Assistant Director	Supervisory Staff
Up to 10	1		
11-20	1		1
21+	1	1	1 for every 20 schools

Source: School Food & Nutrition Service Management Sixth Edition, 2014

Menu preparation could be assigned to one of the site coordinators. They are more knowledgeable of the meal programs given their frequent visits to the schools and observations of student participation. With the use of cycle menus this task could be completed over the summer and would not substantially add to their daily work load during the school year. Responsibility for all professional development activities would be more efficient if assigned to the site coordinators. They are aware of training needs in their schools and can monitor to ensure all staff complete annual training requirements. This task could also be completed over the summer months and would not require daily attention. This reassignment of duties would result in the elimination of the professional development position.

The nutrition software specialist position prepares menus and handles software technology. Shifting menus to the coordinators creates an opportunity for additional duties to be assigned to this position that are strictly technology related. Managers indicated when they have a technology question they call a technology hotline number. Such questions could be handled in the child nutrition department. The department has been charged approximately \$45,000 annually for technology support from staff in the IT department. With their own technology position, the department could assume most of this support and negotiate a large reduction or elimination of this charge.

A central office serves to provide the mechanism for coordinating and integrating all activity toward the achievement of defined objectives. The organizational design of the office plays a major role in how effectively it performs and whether it can achieve the objectives of its operation. Typically, various activities are formed into subsystems such as:

- Purchasing
- Financial
- Human Resources
- Management of the free/reduced program
- Training
- Record keeping and report development
- Marketing
- Menu development and nutritional analysis
- Strategic planning

This division of labor and specialization results in strong departmental organization. The duties of each subsystem should be assigned to just one person if at all possible (with someone else trained as a backup). For example, management of the free/reduced program is assigned to one person.

Spears (1991) discusses departmentalization in *Foodservice Organizations: A Managerial and Systems Approach*⁶. She states:

Departmentalization, which involves grouping activities into work units, is the most frequently used method for implementing division of labor. Although these work units can be structured in a number of ways, they all divide the work and thus establish a pattern of task and authority relationships.

RECOMMENDATION

Reorganize the child nutrition central office.

Create a new accountant position and eliminate the professional development position. Change the responsibilities of the nutrition software specialist to be strictly technology. Reassign the tasks of menu creation and professional development to the coordinators. Reassign the task of preparing claims. These changes will require adjustments to the current job descriptions.

FISCAL IMPACT

The fiscal impact of these personnel changes would result in a net savings of approximately \$38,778. Salary for the new staff position (accountant) was determined by analyzing salaries for other positions in the department as well salaries for similar positions in other departments. \$50,000 is an approximation for salary + fringe. The salary and fringe for the professional development position is \$43,700. The department is being charged \$45,078 for technology services.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Hire accountant.	(\$50,000)	(\$50,000)	(\$50,000)	(\$50,000)	(\$50,000)
Eliminate professional development position.	\$43,700	\$43,700	\$43,700	\$43,700	\$43,700
Eliminate cost of IT assistance.	\$45,078	\$45,078	\$45,078	\$45,078	\$45,078
Total Savings	\$38,778	\$38,778	\$38,778	\$38,778	\$38,778

FINDING 5-3

The financial status of the child nutrition program is problematic. The program operated at a loss for the past three years. This trend was exacerbated with the reduction in enrollment and meal participation beginning in March 2020 due to COVID-19. **Exhibit 5-10** shows the MDPS child nutrition program revenues and expenditures from 2016-17 to 2019-20. The CFO provided data showing revenues and expenditures actual to date 2-17-21 showing a current loss of \$3,621,136.

⁶ Spears, Marian C. (1991). *Foodservice organizations: A managerial and systems approach*, 2nd edition. New York, New York: Macmillan Publishing Company.

Exhibit 5-10
MDPS Child Nutrition Revenues and Expenditures Over Time

	2016-17	2017-18	2018-19	2019-20	Percent Change
Revenues					
Return of Assets (Local Sources)	\$1,541,040	\$1,341,497	\$1,355,844	\$995,449	(35.4%) ▼
State Reimbursement	\$447,439	\$489,242	\$462,071	\$514,991	15.1% ▲
Federal Reimbursement	\$4,656,943	\$4,685,320	\$4,907,262	\$4,103,809	(11.9%) ▼
Total Revenues	\$6,645,422	\$6,519,164	\$6,728,497	\$5,624,148	(15.4%) ▼
Expenses					
Salaries and Benefits	\$3,232,586	\$3,409,453	\$3,765,369	\$3,906,417	20.8% ▲
Food and Supplies	\$2,805,439	\$2,933,779	\$3,087,142	\$2,892,211	3.1% ▲
Other Expenses	\$362,321	\$251,913	\$384,940	\$223,887	(38.2%) ▼
Total Expenses	\$6,400,346	\$6,595,144	\$7,241,791	\$7,068,851	10.4% ▲
Revenues - Expenses	\$245,077	(\$75,980)	(\$513,294)	(\$1,444,703)	(689.5%) ▼

Source: OK SDE, School District Revenue and Expenditure Reports 2016-20 and Prismatic calculations

Note: Totals may not reconcile completely due to rounding

Another determinant of a fiscally sound program is the fund balance. USDA provides guidance on a program's fund balance and recommends a balance of no more than three month's average expenditures so the costs of providing meals can continue while waiting for reimbursement.

Exhibit 5-11 shows the same pattern of a decline in the past five years. The remaining fund balance at the end of 2019-20 is not sufficient to cover the program's projected losses for 2020-21 resulting in the need for a general fund subsidy to cover expenditures. The director indicated the general fund would be covering all expenditures except labor.

Exhibit 5-11
MDPS Child Nutrition Fund Balance Over Time

	2015-16	2016-17	2017-18	2018-19	2019-20
Fund Balance	\$2,822,364	\$2,538,547	\$2,452,849	\$1,982,725	\$870,599
Fund Balance as a percentage of Revenue	41.0%	38.2%	37.6%	29.5%	15.5%

Source: MDPS February 2021

Interviews with the CFO and retired child nutrition director indicated the program has been directly charged on an annual basis for services provided by other departments. District staff stated the practice started in 2005 after the district had major funding issues resulting in cuts to programs. The purpose was to recoup expenses for services provided to child nutrition and improve the general fund. The retired director was not aware of the actual amount of the charges nor the actual services provided. In 2018-19 the total amount of the charges was \$277,789. It included charges for postage, audit, insurance, warehouse driver, security alarm employee, personnel specialist, technology support, maintenance agreements, workers compensation, GCA custodial, and utilities. This charge will not take place in 2020-21 due to extreme losses to the child nutrition program.

School Food & Nutrition Service Management for the 21st Century, sixth edition, states the following regarding school child nutrition programs operating as an enterprise system:

The school food and nutrition service fund is one of the most challenging school district accounts to manage because of the many variables. A good accounting system is essential. It should follow generally accepted governmental accounting principles. The school food and nutrition service fund is an enterprise fund. An “enterprise fund” generates its own income and is different from a “budgetary fund.” The program fund parallels an enterprise account in that it produces goods, provides services, and charges for those goods and services.

School meal programs are unique in a school district because they have both revenue and expenditure accounts. If the programs do not operate with fiscal soundness, they are dependent upon the general fund for subsidization.

RECOMMENDATION

Implement changes that will result in a more cost-effective child nutrition program.

The department should work toward a more positive overall financial picture for the child nutrition program:

- implement changes to policies and procedures to allow staffing kitchens according to recommended guidelines;
- develop customized financial and performance reports for both the central level as well as individual kitchens and train managers on using them for program improvements; and
- increase participation levels for both breakfast and lunch for all grade levels.

The child nutrition director should analyze the categories and amounts of charges for services provided by other departments. An evaluation should be performed to determine if the services are needed, and the costs are justified. An assessment should be performed on an annual basis.

FISCAL IMPACT

This recommendation can be implemented with existing resources and should decrease program costs while increasing program revenues. Using the 2018-19 data, at a minimum the child nutrition program needs to improve its bottom line by \$500,000 per year. This can be achieved by implementing this and other recommendations in this chapter.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Improve financial results of child nutrition program.	\$500,000	\$500,000	\$500,000	\$500,000	\$500,000

FINDING 5-4

The child nutrition department lacks customized reports at the district level showing financial performance. Lacking these, the department does not have adequate tools to assist in monitoring and analysis to help guide decision-making and achieve optimal financial performance.

The recently retired director stated she did not receive financial reports from any district level departments for the child nutrition program. Her practice was to pull financial reports pertaining to child nutrition from the board reports. Data for a board does not contain the depth of information necessary for decision-making at the department level.

The current director indicated the main emphasis of her job will be financial. She wants to determine where to collect data needed for reports and then use that data to develop meaningful reports to guide departmental decision-making. Financial data exists within the department and district but it is not being collected and organized into a usable format for analysis and potential management action.

Standard business practice dictates the development of a well-defined set of reports that can be used for data analysis and program improvement. *Managing Child Nutrition Programs Leadership for Excellence*⁷, second edition, states, “One of the most important aspects of financial management involves the preparation of financial statements that can be used to analyze program operations.” School meal programs are unique in a school district because they have both revenue and expenditure accounts. If the programs do not operate with fiscal soundness, they are dependent upon the general fund for subsidization. The only way to ensure a fiscally solvent program is to prepare reports and then use this information for making decisions.

Exhibit 5-12 shows a listing of reports typically used in school districts to monitor the child nutrition operation. Data contained in each report are noted, as is how the report is used. Samples of these reports can be found in *Financial Management: A Course for School Nutrition Directors*⁸ and *Financial Management Information System*⁹ both from the ICN.

⁷ Martin, J. (2008). *Managing child nutrition programs: Leadership for excellence* (2nd ed.). Sudbury, Mass.: Jones and Bartlett.

⁸ Institute of Child Nutrition. (2017). *financial management: A course for school nutrition directors* (2nd Ed). University, MS: Author

⁹ Institute of Child Nutrition (20145). *ICN financial management information system* (2nd ed). University, MS: Author.

Exhibit 5-12
Sample Financial Management Reports Used to Monitor Child Nutrition Operations

Report	Data	Uses	Frequency
Budget	<ul style="list-style-type: none"> Forecasted revenue by source based upon estimates of participation, reimbursement, meal prices, and new revenue sources Forecasted expenditures based upon a determination of increases or decreases in each category 	<ul style="list-style-type: none"> Allow for a projection of financial performance for the next school year Allow for comparisons between actual and forecasted performance 	Once a year with monthly monitoring and adjustments as necessary
Statement of Revenue and Expenditures (Profit and Loss Statement)	<ul style="list-style-type: none"> All revenues by source and expenditures by category Net gain/loss for the time period Comparison of current month to previous month and year to date Reflects activity over one month 	<ul style="list-style-type: none"> Determine if revenues are sufficient to cover expenditures Identify sites needing adjustments to reduce loss 	End of each month
Statement of Net Position (Balance Sheet)	<ul style="list-style-type: none"> Assets, liabilities, fund balance Reflects financial position at a point in time 	<ul style="list-style-type: none"> Determine amount of fund balance available for expenditures Verify if program has no more than three months average operating costs in reserve Determine financial status of program 	End of each month
Key Operating Ratios	<ul style="list-style-type: none"> An analysis of expenditures to revenue Calculated by dividing each expenditure category by total revenue generated during the same time period 	<ul style="list-style-type: none"> Determine the percentage of revenue that is used for food, labor, benefits, supplies, overhead, capital expenditures, and indirect costs Compare actual ratios to goals set and industry standards Determine if the program is operating at break even or experiencing a profit or loss 	Monthly or quarterly
Meals Per Labor Hour	<ul style="list-style-type: none"> Calculated by dividing total number of meals/meal equivalents by total number of labor hours for each site Meal equivalents are determined by converting all meals and à la carte revenue to a standard unit (lunches) 	<ul style="list-style-type: none"> Analyze staffing patterns by site and compare to goals set Identify sites needing adjustments to labor hours Allow comparison to industry standards 	Monthly
Participation Reports	<ul style="list-style-type: none"> Average daily attendance (ADA), number and percentage of students eligible by category (free, reduced, paid), average number of breakfast and lunch meals served by category, daily participation percentage by eligibility category District level and site level data 	<ul style="list-style-type: none"> Determine what percentage of eligible students are participating in each program Identify eligibility categories to target for participation improvement Identify sites not meeting participation goals Allow comparison to industry standards 	Monthly and at end of year
Pre and Post Menu-Costing	<ul style="list-style-type: none"> Menu items Forecasted and actual amounts used Food cost per menu item Total cost per menu Cost per serving Average food cost per meal District and site level data 	<ul style="list-style-type: none"> Allow for comparison of actual cost per meal to revenue per meal (reimbursement, commodity value, payment) Determine menus needing adjustments for cost effectiveness Assist in purchasing and evaluation of new products 	Monthly

Source: Created by Prismatic, February 2015

RECOMMENDATION

Prepare department-level financial reports on a monthly basis and use them to monitor financial performance, assess if immediate changes are needed, and use for creating budgets.

The director should work with the CFO, the district accounting department, and child nutrition staff to determine what data are needed to assess how well the program is doing. The department's software provider, Heartland School Solutions (Mosaic) may need to be involved in the data collection or report development process. Sources of this data should then be identified, and staff should be assigned to collect and assemble the information in a format usable for evaluation and analysis. Reports should be prepared in a timely manner on a monthly basis and distributed to those involved in decision-making. This process should be completed for implementation school year 2021-22.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-5

The child nutrition department does not prepare reports for individual kitchens showing key financial and performance data. As a result, the department is not able to determine if individual site operations are financially sound or in need of improvement. There is no evaluation by site of potential increased revenue opportunities or cost cutting measures.

The director stated there are no site level reports and the only data calculated by individual sites is MPLH and that metric is not collected on a consistent basis. The CFO stated she has asked the department for financial reporting at the site level. Both site coordinators, who share supervision of the school kitchens, stated in their interviews that site managers do not know how their kitchens are doing financially. Interviews with site managers confirmed they are now aware of the financial status of their operation. When asked about MPLH for her school, one manager pulled a report from Mosaic that showed meal equivalents but the columns for labor hours and MPLH was blank. This is a valuable site level tool that is not being effectively utilized.

The child nutrition department uses Mosaic from Heartland School Solutions which is software for front and back of house data collection and reporting. Data exists in the district to prepare reports showing financial performance but has not been compiled into a format useful for analysis. Revenue data are available from monthly claims for reimbursement. Participation, meal sales and à la carte revenue are available from individual sites from their automated POS. Kitchen managers place orders for their operation with the district warehouse and outside vendors who provide an invoice upon delivery. These invoices are submitted to the child nutrition office where they are tabulated and prepared for payment. These orders and invoices as well as monthly kitchen inventories could be used to determine food costs by site. The CFO stated child nutrition does not currently have access to payroll data but could be given access and taught how to retrieve data so labor costs could be broken out by individual school.

ICN recommends preparing and distributing site-level performance reports in their class *Financial Management: A Course for School Nutrition Directors*.¹⁰ SNA's self-assessment tool, *Keys to Excellence*, includes the following best practices and indicators:

- A Statement of Revenue and Expenditures (Profit and Loss Statement) is prepared on a monthly basis for the department level and for each serving site.
- School nutrition site-level Statements of Revenue and Expenditures are distributed.
- School nutrition personnel at the school site level receive training on controlling costs and revenue generation.
- School nutrition personnel at the school site level are encouraged to develop and implement practices to increase revenue and control costs.¹¹

One cafeteria-level report distributed by another school district is shown in **Exhibit 5-13**. This sample provides a variety of data, including financial and performance data, in a format that is easy to read and understand. Additional sample reports can be found in the ICN financial management class materials.

¹⁰ Institute of Child Nutrition. (2017). *Financial management: A course for school nutrition directors* (2nd Ed). University, MS: Author.

¹¹http://schoolnutrition.org/uploadedFiles/4_Certification_Education_and_Professional_development/3_Keys_to_Excellence/Keys%20to%20Excellence%20Standards%202015-2016.pdf

Exhibit 5-13 Sample Monthly Cafeteria Report

Revenue:		Current Month	Year to Date
Meal Revenue	\$2,411.40		
Supplemental Sales	\$1,648.90		
Other Revenue	\$75.34		
Total Reimbursement	\$15,061.75		
TOTAL REVENUE:	\$19,197.39		\$139,903.44

Expenses:		Current Month	Year to Date
<i>Inventory/Food Cost</i>			
Beginning Inventory	\$5,973.00		
Purchases	\$7,167.00		
Transfers	(\$70.00)		
Ending Inventory	\$5,932.00		
Total Food Usage:	\$7,138.00		\$51,686.00
<i>Inventory/Supply Cost</i>			
Beginning Inventory	\$1,413.00		
Purchases	\$753.00		
Transfers	\$311.00		
Ending Inventory	\$1,564.00		
Total Supply Usage:	\$913.00		\$6,618.00
<i>Labor Costs</i>			
School Staff	\$8,186.19		
Temporary Labor	\$0.00		
Total Labor:	\$8,186.19		\$67,638.24
Overhead	(\$108.37)		\$6,207.11
TOTAL EXPENSES:	\$16,128.82		\$132,149.35
GAIN or (LOSS):	\$3,068.57		\$7,754.09
% GAIN or (LOSS):	15.98%		5.54%

Supervisor Comments/Suggestions:

Percent of Revenue			
	Total Cost	% of Total Revenue	Goal Less Than
Food	\$7,138.00	37.18%	40%
Supplies	\$913.00	4.76%	5%
Labor	\$8,186.19	42.64%	40%
Overhead	(\$108.37)	-0.56%	7%
Total Cost	\$16,128.82	84.02%	92%

Total Meal Equivalents Per Day	
Total Breakfasts:	56
Total Lunches:	264
Supplemental Sales:	36
Total Meal Equivalents:	357

% of Eligible Meals Served			
Average Daily Attendance:		426	
	# Eligible	% Served	Goal
Free	223	85.67%	
Reduced	14	88.72%	
Paid	219	26.56%	

Current Month Plate Cost			
	Total School Cost	Cost Per ME	Goal
Food	\$7,138.00	\$1.05	\$1.08
Supplies	\$913.00	\$0.13	\$.13
Labor	\$8,186.19	\$1.38	\$1.08
Overhead	(\$108.37)	(\$0.02)	\$.19
Total Cost	\$16,128.82	\$2.55	\$2.48

YTD Plate Cost			
	Total School Cost	Cost Per ME	Goal
Food	\$51,686.00	\$1.05	\$1.08
Supplies	\$6,618.00	\$0.13	\$.13
Labor	\$67,638.24	\$1.37	\$1.08
Overhead	\$6,207.11	\$0.12	\$.19
Total Cost	\$132,149.35	\$2.67	\$2.48

Source: Prismatic files, December 2013

RECOMMENDATION

Develop site-level financial and performance reports for each kitchen operation on a monthly basis and use them for program improvements as well as manager training.

The director and child nutrition accounting staff should work with the district accounting department and Heartland School Solutions to develop customized cafeteria level reports. The

reports should contain sufficient financial data for a thorough analysis by site to determine if each is operating in a cost-effective manner, or if any are experiencing a loss. Management should then work with appropriate kitchen staff to implement changes that will improve the financial status. The reports should be distributed to site-level staff on a monthly basis, and they should be trained on how to interpret and use the data for program improvement. ICN has developed a course *Financial Management; A Course for School Nutrition Managers*¹² that could be used to introduce the concepts of financial reports to site level managers. The reports should be ready for use in the 2021-22 school year.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-6

The department has implemented the Community Eligibility Provision (CEP) at three schools. The new director indicated she is evaluating the benefits of that program, as well as Provision 2, to expand offering free meals to students in eligible schools once the waiver to serve free meals to all students during COVID-19 expires.

MDPS implemented the Community Eligibility Provision (CEP) in 2017-18 in one school. Two more were added the next year. Del City ES, Epperly Heights ES, and Highland Park ES currently participate. Site coordinators indicated participation in all schools did increase. An analysis of percent participation of enrollment showed these schools had the highest levels and met industry best practices.

CEP was established as a part of the *HHFKA* and became available to all schools in 2015. The program streamlines school meal operations by allowing schools in high-poverty areas to offer breakfast and lunch to all students at no charge. One of the key simplifications of the initiative is that schools no longer collect meal applications. This reduces paperwork for parents, and schools do not have the administrative burden of processing applications. Another benefit is that programs no longer must collect payment for meals, so the POS process is streamlined. Issues with nonpayment of charges are also eliminated.

The Food Research and Action Center (FRAC) reports that in initial pilot states, schools that implemented the provision for two years saw breakfast participation increase by 25 percent and lunch participation increase by 13 percent. Participation rates for both meals in all three schools are higher than recommended best practices.

COMMENDATION

MDPS has implemented CEP in three schools, resulting in increases in breakfast and lunch participation, and eliminating the need for meal applications and costs to parents for student meals. The new director is to be commended for evaluating and comparing the

¹² <https://theicn.org/icn-resources-a-z/financial-management-a-course-for-school-nutrition-directors-2/>

financial benefits of it compared to Provision 2 with the intent of offering free meals to as many district students as possible.

FINDING 5-7

Breakfast participation for most schools was below industry best practices prior to COVID-19. Breakfast participation has been negatively impacted to even lower levels during COVID-19.

One of the basic measures of child nutrition operations is student meal participation. All meals served according to federal guidelines receive some level of reimbursement, including those served to students who pay full price. Student participation in a district's meal programs is directly impacted by a variety of operational factors, including student access to food, food quality and variety, alternatives to the school meal, and cafeteria environment.

Because participation rates are highly variable across the nation, depending greatly on local circumstances and management, only a few rules of thumb exist for assessing student participation. The Healthier US School Challenge (HUSSC) was established by USDA and included basic criteria and goals for participation. These goals provide a best practice for schools to use to compare a district's participation rates to those established as a benchmark.

Exhibit 5-14 shows best practice rates for breakfast. These benchmarks are the recommended percentage of participation of enrollment.

Exhibit 5-14
Best Practice Breakfast Participation Rates

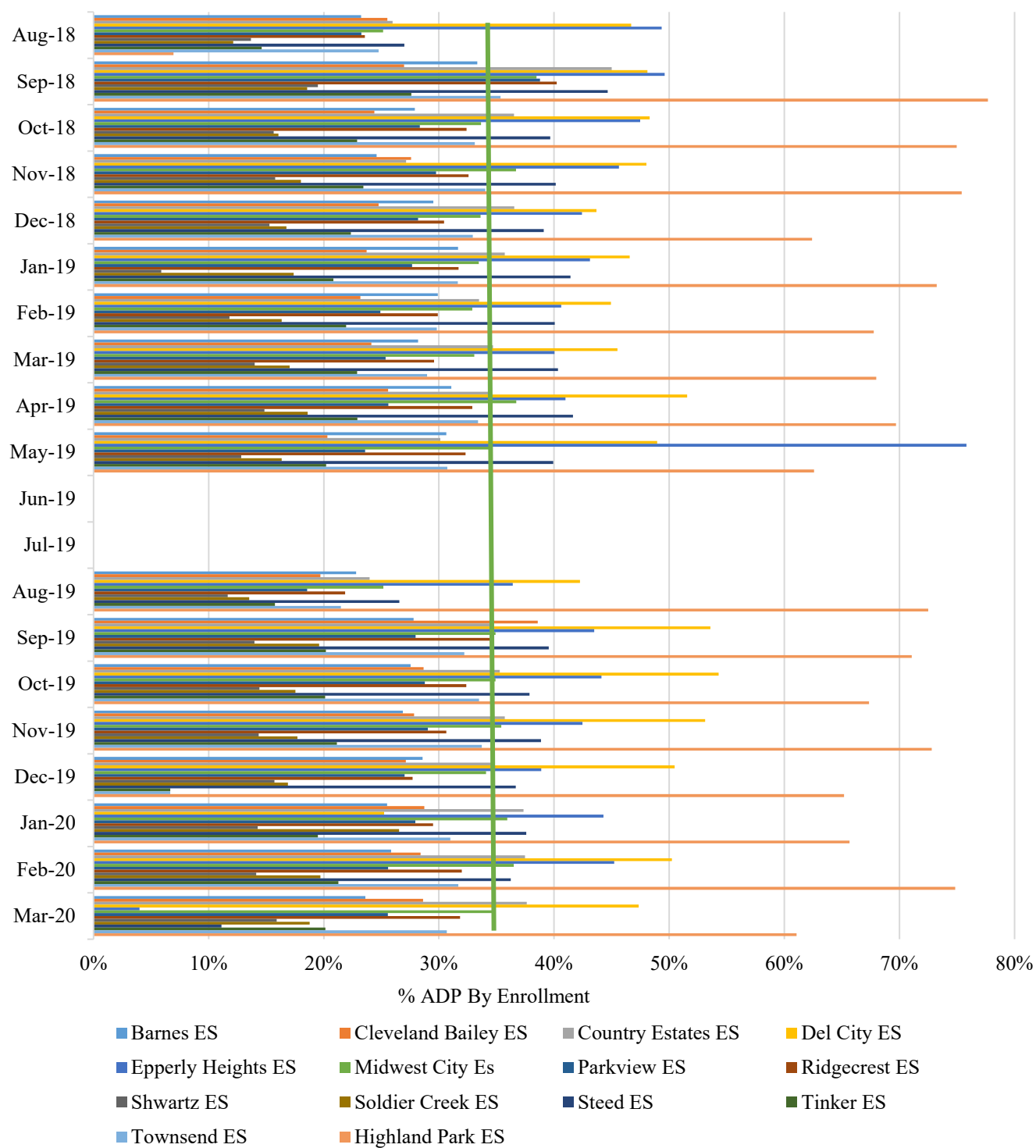
School Level	Best Practice
Elementary	35%
Middle	35%
High	25%

Source: HealthierUS School Challenge Criteria, 2014

Exhibits 5-15, 5-16, and 5-17 show breakfast participation pre-COVID-19 by schools over time. Only three schools, Highland Park, Del City Elementary, and Epperly Heights met best practices. These were all CEP schools, which means all students are offered a free breakfast. In addition to being a CEP school, Highland Park serves breakfast in the classroom to grades Pre-K-2. Grades 3rd through 5th come to the cafeteria for breakfast.

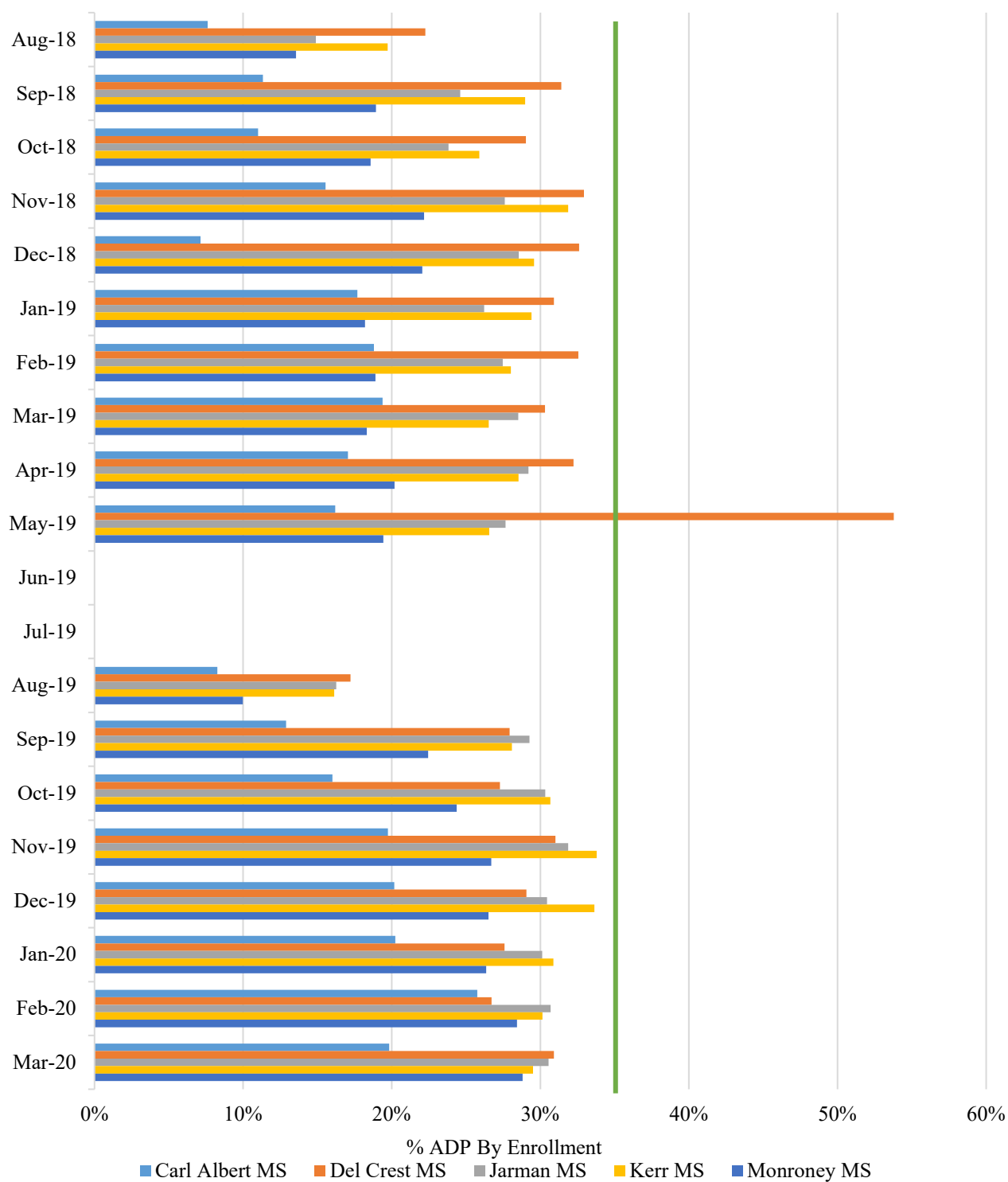
All secondary level schools had low participation. As shown, participation is consistently well below the industry standards. With approximately 70.4 percent of students eligible for free or reduced price meals, as noted in the SDE Low Income Report 2020, the extremely low breakfast participation is a concern.

Exhibit 5-15
MDPS Elementary School Average Daily Participation (ADP) for Breakfast



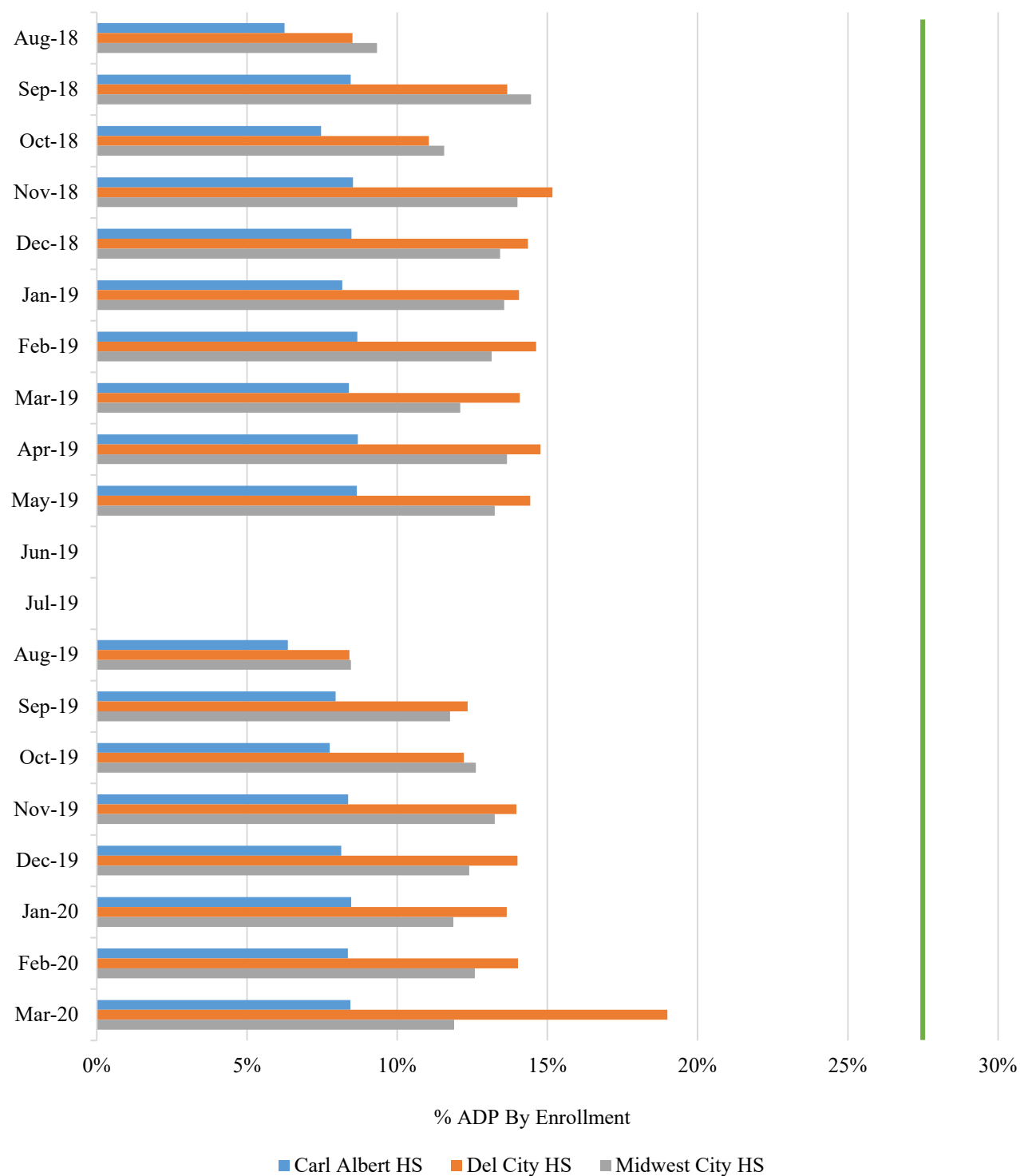
Source: MDPS and Prismatic calculations, February 2021

Exhibit 5-16
MDPS Middle School Average Daily Participation (ADP) for Breakfast



Source: MDPS and Prismatic calculations, February 2021

Exhibit 5-17
MDPS High School Average Daily Participation (ADP) for Breakfast



Source: MDPS and Prismatic calculations, February 2021

The consulting team found several practices contributing to rates lower than industry best practices:

- Elementary menu lacked variety – over 19 days (February) only nine different menu items and only a cereal choice on six of those days;
- Secondary menus lacked variety – over 19 days (February) only 11 different main items;
- No choices of main item in elementary;
- Fresh fruit not offered daily; and
- No yogurt offered, which is a popular breakfast item.

There are several alternative meal service models for breakfast that have resulted in increased participation. These include:

- Breakfast in the classroom after the bell is an approach that brings meal components to students in hallways or in their classroom. Students eat in their classrooms during first period. Meals are either served off carts in the hallway with students making selections or portioned out by classroom attendance in individual thermo containers.
- Second Chance Breakfast is a model where breakfast is served during a break in the morning usually after first period. It is served in the cafeteria or from kiosks outside the cafeteria.
- Breakfast served from kiosks or carts inside or outside the cafeteria. These are grab and go meal packages.

In its *2018 Operations Report*, the School Nutrition Association stated that nearly half of school districts offer an alternative service venue other than the cafeteria line:

- 44.0 percent offer breakfast through direct delivery to classrooms;
- 61.8 percent offer breakfast through grab and go kiosks outside the cafeteria;
- 48.8 percent offer breakfast using grab and go kiosks inside the cafeteria; and
- 4.0 percent offer breakfast through reimbursable vending machines.

RECOMMENDATION

Develop strategies for increasing breakfast participation.

- Organize focus groups of students at all three grade levels to determine why they are not participating in breakfast and ways to increase participation.
- Survey parents to determine why their child does not eat breakfast at school and what changes could be made to encourage participation.

- Adjust menus to provide choices at elementary level and less repetition at all grade levels. Provide a choice of fresh fruit daily. Offer yogurt as a choice daily and include additional items such as breakfast burritos, and sausage biscuits.
- Evaluate alternative service models and determine which would best service each of the three grade levels. A different approach may be needed for each level.
- Once a specific service model is selected by grade level, child nutrition should purchase appropriate carts, kiosks, or delivery bags and implement as quickly as possible. Explore the availability of grants for the purpose of breakfast expansion. The child nutrition department should develop training for teachers on the new service models and demonstrate to parents at enrollment day and communicate on the district website.

FISCAL IMPACT

Any fiscal impact will be dependent upon changes to service models and cannot be determined until those decisions are made. All other strategies can be implemented without a fiscal impact.

FINDING 5-8

Lunch participation rates for most schools were below industry best practices prior to COVID-19. Lunch participation has been negatively impacted to even lower levels during COVID-19.

HUSSC has established best practice rates for lunch as was also noted for breakfast. **Exhibit 5-18** shows the best practice rates. These benchmarks are the recommended percentage of participation of enrollment.

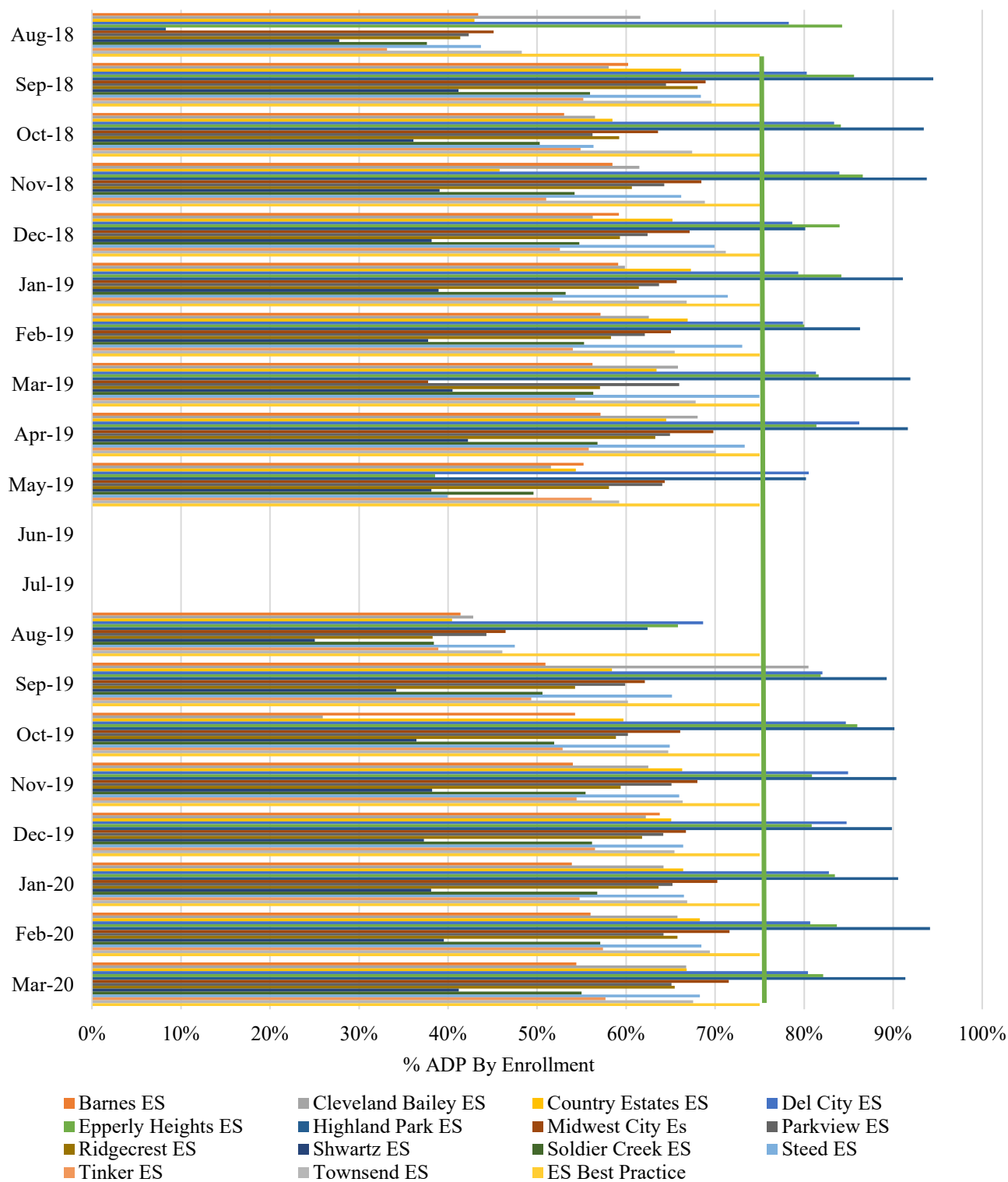
Exhibit 5-18
Best Practice Lunch Participation Rates

School Level	Best Practice
Elementary	75%
Middle	75%
High	65%

Source: Healthier US School Challenge Criteria, 2014

Exhibit 5-19 shows average daily lunch participation by month in the elementary schools. As shown, Highland Park, Del City Elementary and Epperly Heights are the only elementary schools that had participation rates above the best practices both before COVID-19 and after. These are CEP schools that serve all meals at no cost to students.

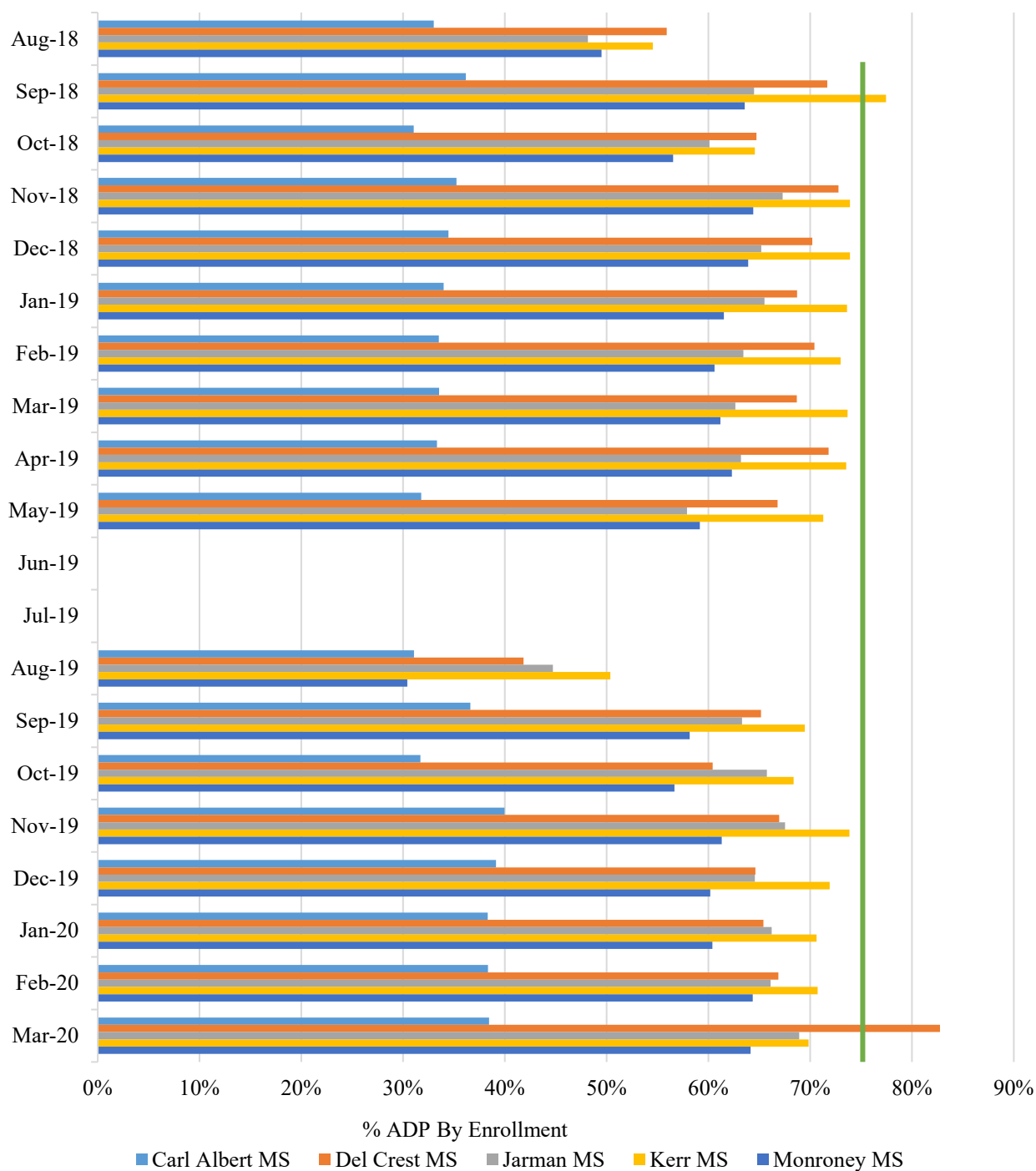
Exhibit 5-19
MDPS Elementary School Average Daily Participation (ADP) for Lunch



Source: MDPS and Prismatic calculations, February 2021

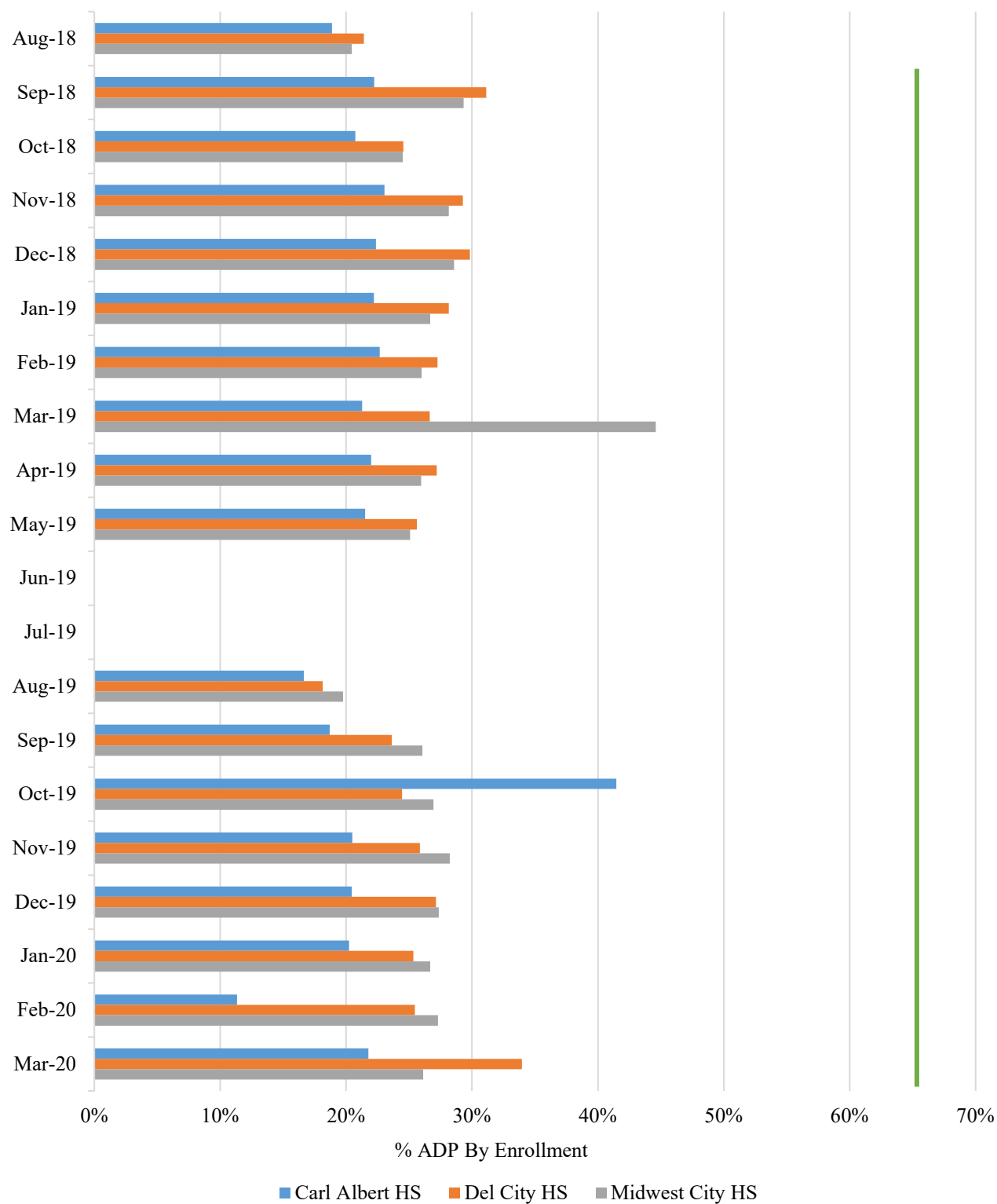
Exhibits 5-20 and 5-21 show lunch participation for the middle and high schools. Neither level met the benchmarks and the high schools show extremely low rates of participation.

Exhibit 5-20
MDPS Middle School Average Daily Participation (ADP) for Lunch



Source: MDPS and Prismatic calculations, February 2021

Exhibit 5-21
MDPS High School Average Daily Participation (ADP) for Lunch



Source: MDPS and Prismatic calculations, February 2021

The consulting team found several practices likely contributing to lunch participation rates lower than industry best practices:

- Vending machines are on and available to high school students during meal times. Not all items met Smart Snacks requirements.
- The high schools are open campus at lunchtime.
- Clubs were observed selling snacks in the HS lunchroom on the day of observation. Not all items were Smart Snacks compliant.
- Food items in the high schools are only available for purchase in the serving area. No snack bars or carts in additional areas are used.
- Student input using advisory groups to gauge satisfaction with the program is not solicited on a regular basis.
- Fresh fruit was not available in all schools.
- Minimal scratch cooking was being utilized.
- Menus were not posted at most schools.
- There are minimal marketing materials in the lunchrooms.

An analysis of current COVID-19 menus in the peer districts showed most are serving more choices of entrees than is MDPS especially in the elementary schools (**Exhibit 5-22**). All peer schools offered fresh fruit daily.

Exhibit 5-22
Lunch Entrée Choices in Peer Districts

District	Elementary	Middle	High
Mid-Del	1	5	5
Lawton	3	5	5
Moore	3	5	6
Norman	4	6	12
Putnam City	3	5	5
Union	2	7	9

Source: District websites and Prismatic tabulations, March 2021

Results from student surveys indicated stronger negative opinions about the food than about discipline, time to eat, and wait times. **Exhibit 5-23** shows the responses from the 496 students who responded. Most respondents (74 percent) were in grades 9th through 12th, so responses are most applicable to the high schools. These survey data substantiate the need for major improvements to the meals programs, which should result in improved participation levels.

Exhibit 5-23
Student Survey Results Regarding Child Nutrition

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Discipline and order are maintained in the school cafeteria.	11%	41%	38%	6%	4%
I have enough time to eat my lunch each day.	10%	37%	15%	18%	20%
I usually have to wait in line longer than five minutes to get a lunch.	15%	21%	46%	13%	5%
I like the food served in the cafeteria.	6%	14%	35%	22%	23%
The cafeteria serves a good variety of food for breakfast.	5%	11%	61%	10%	13%
The cafeteria serves a good variety of food for lunch.	6%	21%	41%	15%	16%

Source: Prismatic Survey Results, February 2021

There are a variety of resources and training materials available to assist child nutrition programs with increasing participation:

- The Smarter Lunchrooms Movement at the Cornell Center for Behavioral Economics in Child Nutrition Programs has an assortment of training materials, best practices, research articles, and self-assessment forms.
- The School Nutrition Association has a self-assessment section on menu planning and marketing in their *Keys to Excellence*.
- The Institute of Child Nutrition (ICN) has a publication *Best Practices for Marketing the School Nutrition Program* as well as training courses for staff such as *Focus on the Customer*.
- USDA's Team Nutrition has a toolkit *Fruits and Vegetables Galore* which contains a workbook titled *Meal Appeal Attracting Customers*.

SNA's *Keys to Excellence* self-assessment program indicates the following as best practices when planning menus:

- student preferences are considered when planning menus;
- students are included in panels and/or committees used to select products and/or plan menus;
- menus are designed to accommodate flavor, texture, and service preferences of students;

-
- school nutrition personnel solicit feedback from students about meal choices;
 - school nutrition personnel are trained to monitor plate waste;
 - the offer versus serve option is available to students at all grade levels; and
 - students, parents, and other stakeholders are encouraged to provide feedback on the menu (i.e., via email, suggestion boxes, comment cards, surveys, website, social media, etc.).

RECOMMENDATION

Evaluate practices pre-COVID-19 that impacted participation levels and develop strategies for increasing meal participation.

- Organize focus groups of students at all three school levels to determine why they are not participating in lunch and ways to increase participation. Involve them in testing of new menu items and recipes.
- Survey parents of elementary students to determine why their child does not eat lunch at school and what changes should be made to encourage participation.
- Amend district and board policy to implement the following:
 - a. Ensure vending machines are on timers and not available to students during meal times.
 - b. Discontinue practice of allowing clubs to sell food items during meal times.
 - c. Close campus for all grades except seniors. An open campus policy impacts lunch participation in a negative way. Efforts to improve students' health, nutrition, and wellness are undermined when there is an open campus. Other negative results of an open campus are problems with safety, tardiness and truancy, and negative impacts on the neighborhood.
- Prepare a monthly summary participation report for each school site showing enrollment, number of students approved by eligibility and number and percentage of students participating by eligibility. Distribute this report to all managers and train them on how to determine the potential market of students not participating.
- Establish participation goals for elementary, middle, and high school levels. Involve managers in the process to develop goals.
- Post menus and other attractive marketing materials.
- Monitor plate waste and participation by grade level to determine which menu items are not well-received. Adjust menus as needed.

- Explore options for increasing scratch cooking and adjust purchasing practices to accommodate changes.
- Participate in initiatives such as *Harvest of the Month*.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-9

The child nutrition department's website contains multiple sections offering nutritional information to various groups. Resources are targeted toward students, parents, and teachers. The topics of nutrition and fitness, and nutrition education each provide extensive resources in a variety of formats that are user friendly and easy to navigate. The amount of information is comprehensive and collected from a variety of sources.

The Nutrition and Fitness area is subdivided into basic nutrition which includes topics such as ask the nutritionist, understanding nutrition labels, and a grow nutrition section about gardening. There is a link to find a registered dietician. The Sports Nutrition area includes resources for athletes and videos. The Fitness area contains a video series and BMI calculator.

The Nutrition Education area is divided into three sections. The student area includes games, activities, songs, and videos. The teacher area contains resources by age group and includes activity sheets and resource materials for the classroom. The nutrition at home area is targeted towards parents and includes recipes and articles.

Nutrition promotion is one of the requirements of the *Healthy Hunger Free Kids Act of 2014*. In addition, the wellness policy outlined in the *Child Nutrition Reauthorization Act* requires nutrition education. Since the passage of the *National School Lunch Act*, there has been an expectation that nutrition education should be a strong component of the program. It has been anticipated that child nutrition programs would become the schools' learning laboratory for effective nutrition education in their communities.

COMMENDATION

MDPS child nutrition has developed an outstanding nutrition and nutrition education section on their website that is comprehensive, geared to all audiences, and user friendly.

FINDING 5-10

The child nutrition department uses a cloud-based web menu app that allows students and parents the ability to view menus and nutrient information from their smart phones. The posted menus are interactive, providing users with a wealth of useful information.

The Mobile Menu App is free to download onto a smart phone. Users can select a school, date, and menu. It includes the ability to view daily menus, see a photo and description of menu items,

and get nutrient and allergen information. It also provides a link to the district's online payment system, My School Bucks, as well as a link to the child nutrition department website.

Menus on the website are interactive. Users click on the icon beside each day's menu and a sheet pops up listing the total nutritional content of each menu item as well as allergens. The menu can be quickly viewed in a large number of languages as well as printed in several formats.

Parents and students have a keen understanding of technology, use it in their daily lives, and come to expect it when they participate in the school meals program. On the surveys conducted for this performance review, 85 percent of Mid-Del students reported they regularly use technology and 74 percent of parents said they regularly access information via the district website. Most parents (94 percent) indicated they have Internet access at home.

COMMENDATION

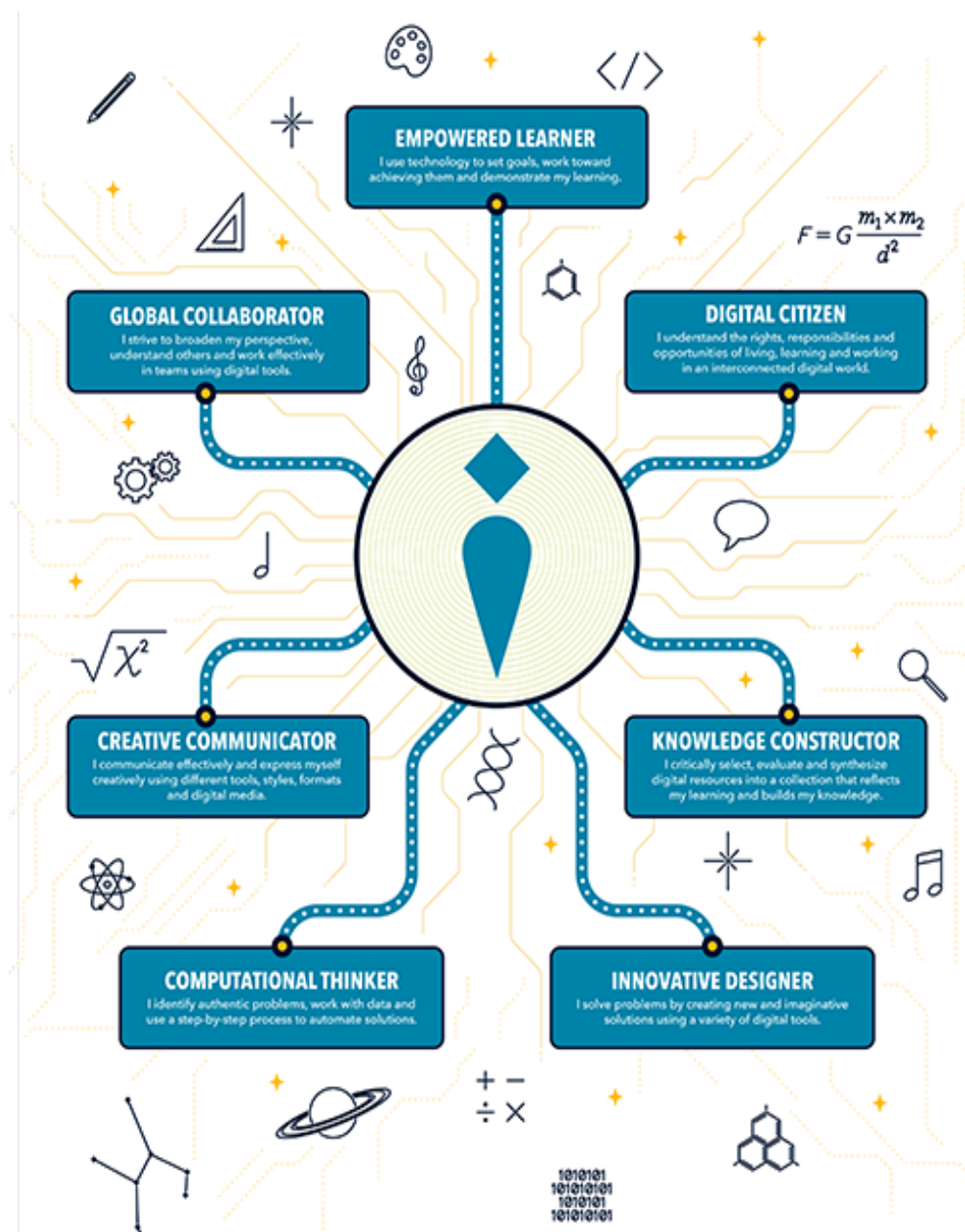
The MDPS child nutrition department makes good use of technology to inform as well as market and advertise their menus to parents and students.

B. TECHNOLOGY

The International Society for Technology in Education (ISTE) has created standards for the use of technology to enhance education. Part of preparing students for the digital age includes helping them become responsible consumers and curators of online content. For this reason, digital citizenship is a benchmark integrated into the ISTE Standards for Students, ISTE Standards for Education Leaders and ISTE Standards for Coaches. Oklahoma has adopted the International Society for Technology in Education's Student Standards for the Oklahoma Academic Standards.¹³ These standards are designed to empower student voice and promote learning as a student-driven process and have evolved from just using technology learn to transformative learning with technology. **Exhibit 5-24** outlines the seven key standards for students.

¹³ <https://www.iste.org/standards/for-students>

Exhibit 5-24
ISTE Standards for Students



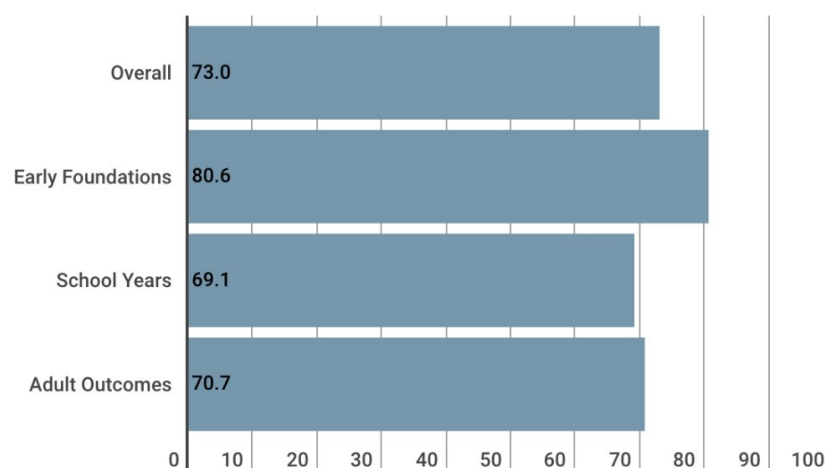
Source: <https://www.iste.org/standards/for-students>

The implementation of technology in schools follows a broader societal trend – teens’ technology use is creeping up. In 2015, 29 percent of teens said they used a computer for homework, but by 2019, 59 percent of teens said the same, according to a media census from Common Sense Media.¹⁴ Since the 2010 report card, on which Oklahoma earned a C+, Oklahoma has worked to develop various aspects of education to improve these areas of concern

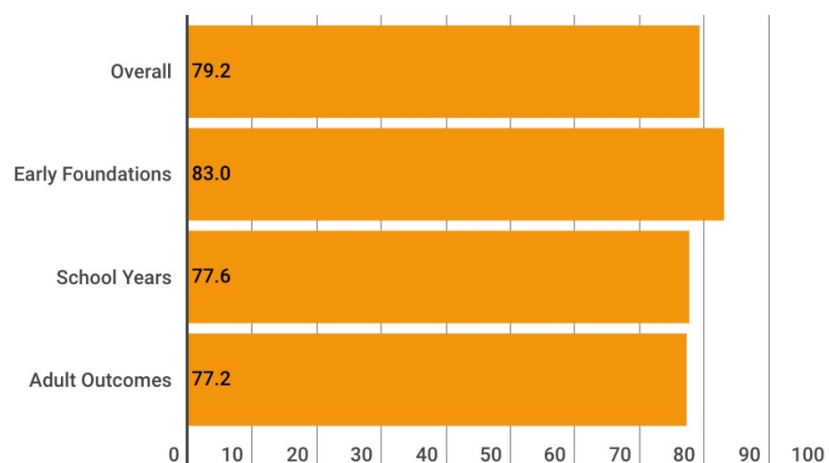
¹⁴ https://www.common Sense Media.org/sites/default/files/uploads/research/census_researchreport.pdf

and to emphasize the role of technology in digital citizenship. In 2019, there were 163 Oklahoma schools districts with a one-to-one program in which at least one grade at one school had Internet-connected device for each student.¹⁵ Oklahoma continues to make advances in online assessment practices and in the use of instructional technology in the PK-12 classroom. Despite the heavy focus the state has placed on transformational learning with technology, Oklahoma's overall score earned on the Chance-for-Success Index in Quality Counts 2020 was a C (**Exhibit 5-25**). The purpose of this report card is to rank states on educational opportunities and performance.¹⁶

Exhibit 5-25
Chance-for-Success Results in Oklahoma



U.S. Score



Source: <https://www.edweek.org/ew/collections/quality-counts-2020/state-grades-on-chance-for-success-2020.html>

¹⁵ <https://sde.ok.gov/sites/default/files/documents/files/Fast%20Facts%20July%202019.pdf>

¹⁶ <https://www.edweek.org/ew/collections/quality-counts-2020/state-grades-on-chance-for-success-2020.html>

Oklahoma was previously one of 22 states and one territory to create K-12 assessments aligned to Common Core State Standards through the Partnership for the Assessment of Readiness for College and Careers (PARCC).¹⁷ A major impact of PARCC's Common Core assessments, and a concern of many Oklahoma school districts, involved technology. Oklahoma transitioned to a new vendor, Measured Progress, now called Cognia, for the Online Oklahoma School Testing Program (OSTP) to assess student mastery of the Oklahoma Academic Standards rather than the Common Core Standards; however, technology remains a major component of the assessment process. The State Department of Education (SDE) has released technology guidelines for the Cognia assessments for schools so they will be properly equipped and ready to administer the tests.¹⁸

Exhibit 5-26 illustrates the most current assessment technology specifications that districts in Oklahoma must consider as they administer assessments in 2019-20 and beyond. Unlike specifications provided in previous years, the technology guidelines are required. In the past, there were minimum and recommended specifications. These specifications provide the levels of computer and network capacity that are required to provide a smooth testing experience for students. Android devices will not be supported.

The stated technology requirements further illustrate the importance of an adequate technology infrastructure and effective long-range planning to accommodate an increasing number of students participating in online testing in the coming years.

¹⁷ <http://www.parcconline.org/>

¹⁸ <https://oklahoma.onlinehelp.cognia.org/>

Exhibit 5-26
Oklahoma Spring 2020 Assessment Technology Specifications¹⁹

System Requirements – All Hardware	
Connectivity	Student devices must be able to connect to the Internet via wired or wireless networks
Screen Size	9.7” screen size or larger 10-inch class” tablets or larger
Screen Resolution	1024 x 768
Browsers ^{20,21} (used for practice test only)	Chrome™ 79 or newer Firefox® 70 or newer Microsoft Edge™ 44.18 or newer Safari® 13 or newer
Headphone/Earphone/ Ear Buds	Required for students who have a text-to-speech accommodation
Desktop and Laptop Specific Requirements	
CPU	1.3 Ghz
Memory	2 GB 4 GB is strongly recommended for best performance
Input Device	Keyboard – wired or wireless Bluetooth® enabled mouse or touchpad
Windows®	Windows® 8.1, and 10 (32-bit and 64-bit)
macOS®	10.13 – 10.15 (64-bit only)
Linux®	Ubuntu® 16.04.3 LTS (64-bit only) Fedora™ 27 (64-bit only)
Tablet/Netbook/2-in-1 Specific Requirements	
iOS®	12.4, 13.1 - 13.3
Chromebook™ notebook computer	Chrome OS™ 74 - 79
Windows®-based tablets/netbooks/2-in-1	Windows® 10 (32-bit and 64-bit) ²²

Source: <https://oklahoma.onlinehelp.cognia.org/guides/>

MDPS has a full-time director and staff. The current technology organization for MDPS is shown in **Exhibit 5-27**.

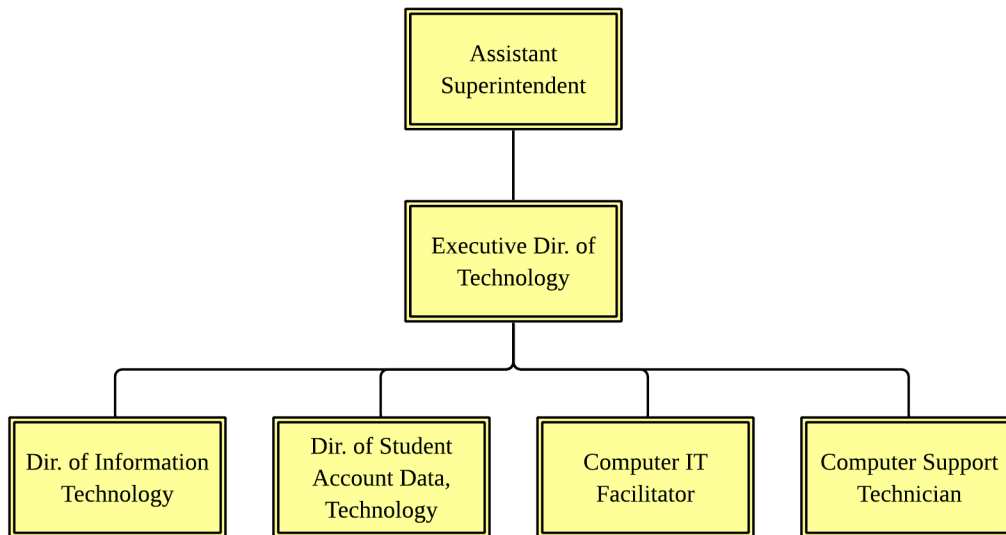
¹⁹ Windows is a registered trademark of Microsoft Corporation. Firefox is a registered trademark of the Mozilla Foundation. Safari, Mac, and iPad are registered trademarks of Apple Inc. Chrome and Chromebook are registered trademarks of Google Inc. Fedora is a trademark of Red Hat, Inc. Linux is the registered trademark of Linus Torvalds in the U.S. and other countries. The Bluetooth is a registered trademark owned by Bluetooth SIG, Inc.

²⁰ Text-to-speech on browsers is partially supported.

²¹ As new operating system and browser versions are released, eMetric will update technology guidelines following successful compatibility testing.

²² Windows 10 S is not supported.

Exhibit 5-27
Mid-Del Technology Services Organizational Chart

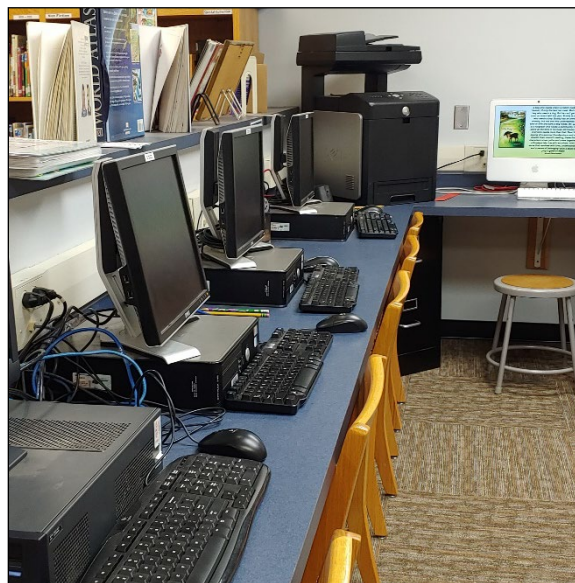


Source: Created by Prismatic, February 2021

The district utilized E-Rate funding for technology equipment, networking, and connectivity. The district has wireless access in place throughout. A current inventory system is in place.

Exhibit 5-28 provides some examples of technology in use in the district.

Exhibit 5-28
Examples of Technology in MDPS



Source: Prismatic, March-April 2021

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MDPS departments and functional areas. **Exhibit 5-29** provides the results for technology areas. Less than half of staff gave administrative and instructional technology an A or B but a slight majority gave technology management and support an A or B.

Exhibit 5-29
Staff Survey Results Regarding Technology

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Administrative technology	11%	31%	20%	6%	3%	29%
Instructional technology	11%	32%	22%	12%	6%	16%
Technology management and support.	17%	36%	22%	8%	4%	13%

Source: Prismatic Survey Results, February 2021

FINDING 5-11

The district does not have sufficient staff to adequately support teachers with instructional technology. MDPS has only two full-time staff members for technology integration, which is often insufficient for the support needs of teachers and students. To date, there has been no succession planning or cross-training in place.

MDPS has launched a new learning management system, Canvas, and a one-to-one initiative. The district does not have adequate staff to respond to instructional technology questions or issues with these systems. A need exists for templates, checklists, and instructional aides for Canvas and one-to-one implementation. Current staff cannot meet all the needs or requests.

Currently two staff members serve the district as instructional technology specialists, a computer IT facilitator and a computer support technician. One staff member is certified and one is not. The skills needed for these positions do not require teaching certification.

In focus groups and surveys, MDPS teachers noted a need for assistance and on-going training on instructional technology specific to district initiatives. Administrators in focus groups highlighted a need for teacher professional development and instructional modeling in order to change teaching practices.

A 2015 nationwide survey of 173 district officials, principals, and teachers found that 71 percent believed a specific office or department should be dedicated to technology in their district. The survey also found that 53.9 percent of those surveyed felt the technology training available was insufficient.²³

RECOMMENDATION

Hire additional instructional technology specialists to assist teachers with one-to-one and Canvas implementation.

Supporting teachers with instructional technology and troubleshooting assistance should be primarily handled through the technology department. Given new district implementations and

²³ https://s3.amazonaws.com/dive_assets/rtps/State_of_EdTech_Survey_2015.pdf

initiatives, hiring additional support staff should take precedence to ensure project success and attain staff buy-in. The district should hire two additional, non-certified technology specialists.

FISCAL IMPACT

Based on the current salary of the computer support technician, the consulting team estimates \$40,000 per additional position will be needed. Funds from the general fund should be allocated to hire the technology specialists.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Hire additional instructional technology specialists.	(\$80,000)	(\$80,000)	(\$80,000)	(\$80,000)	(\$80,000)

FINDING 5-12

Instructional technology staffing is limited and teachers are ill-prepared for one-to-one implementation. The roll-out of Canvas as a learning management system has been met with resistance. An unacceptably wide range of instructor competencies with technology exists.

During focus groups and interviews, teachers indicated a need for focused and leveled training on Canvas and other technologies. Additionally, they requested more guidance in the development of lessons, including sample modules and frameworks. Currently only two staff members are available to support instructors across the district with instructional technology. Duties primarily are to support teachers use of technologies, troubleshoot instruction and research instructional resources. One staff member focuses on primary grades and the other on secondary.

Some teachers indicated a personal lack of confidence and skill when teaching remotely or using Canvas. Others expressed a desire to assist colleagues and share their best practices. Not only are technologies underutilized but the quality of instruction greatly varies. As a result, teachers and students are missing needed skill development through the application of technologies.

On the staff survey, a portion of classroom teachers indicated a lack of technology skill among their ranks (**Exhibit 5-30**). Only half indicated that MDPS teachers know how to use technology in teaching. A substantial proportion indicated that the district lacks sufficient instructional technology. And, while a majority of teachers felt that MDPS teachers use student data to improve instruction, 11 percent *disagreed*.

Exhibit 5-30
Classroom Teacher Survey Results Regarding Teacher Technology Competency

Survey Statement	Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
Teachers know how to use the technology they have for teaching.	5%	45%	11%	32%	6%
The district lacks sufficient instructional technology.	20%	33%	19%	22%	6%
Teachers effectively use student data to improve instructional practices.	14%	60%	16%	10%	1%

Source: Prismatic Survey Results, February 2021

Likewise, a portion of both in-person and online high school learners noted that some teachers do not effectively use technology for teaching (**Exhibit 5-31**). Nearly one-third of in-person high school learners did not feel that their teachers knew how to use technology, while 11 percent of online high school learners felt the same.

Exhibit 5-31
High School Student Survey Results Regarding Teacher Technology Competency

Survey Statement	In-Person Learners		Online Learners		All	
	% SA + A	% D + D	% SA + A	% D + D	% SA + A	% D + D
Teachers know how to use the technology they have for teaching.	51%	32%	62%	11%	53%	27%

Source: Prismatic Survey Results, February 2021

RECOMMENDATION

Develop and implement a “teachers teaching teachers” program to supplement technology integration and skill building at the sites.

The superintendent should work with the principals, instructional technology staff, technology committee and teacher representatives to identify the kinds of skills that would be most helpful for teachers. Teachers with those skills should be identified throughout the district and invited to participate in the project. Having sufficient technical and instructional support is critical to successful technology use in classrooms and labs and to increase student and teacher use.

FISCAL IMPACT

Similar-sized districts pay teachers to conduct staff development for their peers at a rate of \$20 per hour. Using this as a guide, the consulting team estimates \$5,000 should be allocated for a “teachers teaching teachers” pilot project. Instructors would provide 250 additional hours of

training. If the project proves successful, additional funds should be allocated in subsequent years.

Recommendation	2021-21	2021-22	2022-23	2023-24	2024-25
Hire teachers to conduct staff development.	(\$5,000)	(\$5,000)	(\$5,000)	(\$5,000)	(\$5,000)

FINDING 5-13

The district lacks a technology plan. Planning has been conducted by the superintendent and technology director. However, no actual technology plan exists.

MDPS has not formalized a process for including multiple stakeholders on a technology committee or the development of a current technology plan. Multiple stakeholders include parents, students, community members, and businesses. Community and business partnerships could provide additional perspective in planning, implementation, and evaluation.

From interviews and focus groups, staff indicated there is no input by parents or community members and currently no committee exists. Including stakeholders such as parents, students, community members, and businesses could provide additional perspective in planning, implementation, and evaluation.

The National Center for Technology Planning²⁴ recommends five phases for an effective planning model:

- **Phase 1: Recruit and organize the planning team.** It is important that the planning team consists of all stakeholder groups, and members should excel in planning and communication skills. Stakeholders may include technology specialists, district leaders, parents, students, community members, and business leaders;
- **Phase 2: Research.** This phase consists of a needs assessment and an effort to identify the technologies that can be applied to those needs and ascertain how they can be applied;
- **Phase 3: Construct the technology plan.** This phase focuses on applying the research to establish the district's vision/mission and to define the goals and objectives that will lead to fulfilling that vision and mission;
- **Phase 4: Formalize the planning.** This phase culminates into a comprehensive document that analyzes the present state of the district with respect to technology, articulates specific goals and objectives, incorporates clearly defined strategies and budgetary plans to realize the desired state of technology in the district, and includes a process for evaluation; and

²⁴ <http://www.nctp.com/downloads/guidebook.pdf>

- **Phase 5: Continually implement, evaluate, and revise.** This phase deals with the ongoing implementation, evaluation, and revision of the plan to ensure progress is made.

The consulting team found no evidence that MDPS has a technology plan, although many initiatives have been started. No benchmarks or evaluations are in place to measure the success of those initiatives. Key to the planning process is conducting periodic needs assessments and structuring the plan around the results. Additionally, there are no parents, students, community members, or business leaders on a planning team. During the review, the consulting team found no evidence of a technology planning document or committee in place.

RECOMMENDATION

Improve the technology planning process and create a long-term strategic plan for technology with input from a variety of stakeholders.

Establishing a committee that includes staff and outside stakeholders should provide additional perspectives in planning, implementation, and evaluation of technology. Such stakeholders could include parents, students, community members, and businesses as partners. Including teacher leaders on the technology committee could also enhance opportunities for strategic planning and could increase buy-in among staff members, as well as increase understanding of what is possible.

The MDPS technology plan should be a current, comprehensive document that drives technology expenditures, implementation, and decision-making. The plan should be tied to the district strategic plan and professional development plan. The district should formalize and utilize a process for including a technology committee in technology strategic planning and the development of a long-term planning document. The superintendent should direct the technology committee to develop and periodically update a comprehensive technology plan. The plan should be achievable and based upon the current state of the district. By incorporating clearly articulated vision and mission statements, followed by specific goals, measurable objectives, adequate funding, and a detailed evaluation process, the district ensures that technology purchases and services are in line with the goals set forth in the plan and result in student achievement gains. The plan and progress should then be communicated to all stakeholders to ensure a common understanding and purpose. To facilitate effective use of technology funds, the technology committee should:

- periodically review the technology plan for accuracy and make necessary additions and deletions;
- develop hardware and software standards, and review them with all personnel;
- centralize the software purchasing process to avoid purchases that cannot be supported or will not function properly on the district's equipment;
- recommend the types of computer equipment that should be purchased and the most effective distribution of that equipment;

- develop a training program for all staff; and
- establish a policy on the purchase of extended warranties for hardware and the standardization of operating systems, antivirus, applications, and office software.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-14

The district lacks a disaster recovery plan. MDPS lacks an adequate data backup and disaster recovery plan. In the event of a natural disaster or severe power surge, the district does not have procedures in place to ensure that its critical data, systems, and programs can be brought back to pre-disaster status.

The limited district procedures currently in practice have not been formalized and are inadequate considering the large amounts of data and equipment that could be lost. According to onsite interviews, the district relies on a second onsite physical server to backup district data. Lost data could include administrative work, emails, student data and work, and data from instructional applications. The district has not established policies and procedures adequate to mitigate the damage. No plans are in place for cloud-based back-ups, putting district data at-risk.

A disaster recovery plan would aid the district in reloading district data, programs, and systems, as well as recovery of hardware and software, in the event of a loss. **Exhibit 5-32** defines the process of developing an effective disaster recovery plan.

Exhibit 5-32
Key Elements of a Disaster Recovery Plan

Step	Details
Build the disaster recovery team.	Identify a disaster recovery team that includes key policy makers, building management, end-users, key outside contractors, and technical staff.
Obtain and/or approximate key information.	Develop an exhaustive list of critical activities performed within the system.
	Develop an estimate of the minimum space and equipment necessary for restoring essential operations.
	Develop a timeframe for starting initial operations after a security incident.
	Develop a list of key personnel and their responsibilities.
Perform and/or delegate key duties.	Develop an inventory of all computer technology assets, including data, software, hardware, documentation, and supplies.
	Set up a reciprocal agreement with comparable organizations to share each other's equipment or lease backup equipment to allow the system to operate critical functions in the event of a disaster.
	Make plans to procure hardware, software, and other equipment as necessary to ensure that critical operations are resumed as soon as possible.
	Establish procedures for obtaining off-site backup records.
	Locate support resources that might be needed, such as equipment repair, trucking, and cleaning companies.
	Arrange with vendors to provide priority delivery for emergency orders.
	Identify data recovery specialists and establish emergency agreements.
Specify details within the plan.	Identify individual roles and responsibilities by name and job title so that everyone knows exactly what needs to be done.
	Define actions to be taken in advance of an occurrence or undesirable event.
	Define actions to be taken at the onset of an undesirable event to limit damage, loss, and compromised data integrity.
	Identify actions to be taken to restore critical functions.
	Define actions to be taken to re-establish normal operations.
Test the plan.	Test the plan frequently and completely.
	Analyze the results to improve the plan and identify further needs.
Deal with damage appropriately.	If a disaster actually occurs, document all costs and videotape the damage.
	Be prepared to overcome downtime on your own; insurance settlements can take time to resolve.
Give consideration to other substantial issues.	Do not make a plan unnecessarily complicated.
	Make one individual responsible for maintaining the plan, but have it structured so that others are authorized and prepared to implement if it is needed.
	Update the plan regularly and whenever changes are made to your system.

Source: National Center for Education Statistics, "Safeguarding Your Technology," April 2003

RECOMMENDATION

Develop and test a disaster recovery plan that includes the district's critical data, systems, and programs.

The district should address this problem immediately. The district should develop and test a

disaster recovery plan that includes the district's critical data, systems, and programs through cloud-based storage. The district technical designee can lead the process of developing a plan adequate to meet the needs of MDPS. The costs associated with losing vital information, services, and equipment in the event of a disaster could greatly impact the district.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-15

The district lacks a staff development plan for instructional technology. Little or no staff development or plan exists around technology. No technology integration sessions are planned or scheduled for staff.

During focus groups and interviews, staff reported a wide range of technology skills among the teaching staff. Initial training was provided when interactive whiteboards or touchscreen panels were purchased but limited follow-up training has been made available. Some sessions were offered on Canvas during the roll-out. Currently staff development sessions are held at the start of school and in the summer. Start of school sessions focus on state requirements such as school security, and classroom management. Additionally, some software specific training, such as Google Classrooms, has been offered. Some sessions are offered on staff development days throughout the year, but attendance is optional. Administrators and technology coaches noted a need for input from teachers related to technology staff development offerings. A need for practical and tiered sessions on existing technologies were highlighted in focus groups and interviews. Staff noted that Wednesdays are available for professional development sessions as students are not in attendance.

The impact of technology on student achievement revolves around how well technology is integrated into everyday activities that support student instructional objectives. This requires not only placing computers in schools and classrooms but also providing the resources needed to incorporate technology into lesson plans and other educational activities. Substantial professional development emphasizing both technology applications and its integration into curriculum and classroom instruction is necessary in MDPS.

While staff members indicated an understanding of technology and its utilization generally, the consulting team found in onsite interviews and focus groups that this knowledge is at a basic level. This is compounded by the continued purchase of new and varied equipment and software. Implementing technology effectively into classroom instruction requires a teacher have a higher level of understanding, redirected teaching methodology, much practice, and continuous training.

During the onsite interviews and focus groups, all MDPS instructors and administrators indicated a need for additional professional development or training focused on the use of existing technology and software. Specifically, a need for tiered practical training was noted, as well as, limiting additional purchases and new initiatives. Less than a majority of survey respondents indicated that there was adequate technology training overall (**Exhibit 5-33**).

Exhibit 5-33
Staff Survey Results Regarding Professional Development

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
There is adequate high quality professional development for principals and teachers.	10%	39%	26%	20%	4%
Our district provides adequate technology training.	7%	40%	18%	27%	9%

Source: Prismatic Survey Results, February 2021

The National Education Technology Standards (NETS), an ongoing initiative of the ISTE, has defined standards for students, describing what students should know and be able to do with technology. The SDE has adopted the NETS standards from which state standards for instructional technology were derived.

Building on the NETS for Students, the ISTE has also developed NETS for teachers (NETS-T) and NETS for administrators, which define standards for classroom teachers and administrators with accompanying performance indicators. While the State of Oklahoma has not adopted the standards for teachers and administrators at this time, it should be considered a best practice as many states and districts have already incorporated NETS into training programs and established technology proficiency skill levels for teachers and administrators.

NETS-T (2008) defines the fundamental concepts, knowledge, skills, and attitudes for applying technology in educational settings. The five standards areas and performance indicators are designed to be general enough to be customized to fit state or district guidelines and include specific outcomes to be measured when developing technology assessment tools. NETS for teachers include:

- using their knowledge of subject matter, teaching and learning, and technology to facilitate experiences that advance student learning, creativity, and innovation in both face-to-face and virtual environments;
- designing, developing, and evaluating authentic learning experiences and assessment incorporating contemporary tools and resources to maximize content learning in context and to develop the knowledge, skills and attitudes identified in NETS-S;
- exhibiting knowledge, skills, and work processes representative of an innovative professional in a global and digital society;
- understanding local and global societal issues and responsibilities in an evolving digital culture and exhibiting legal and ethical behavior in their professional practices; and
- continuously improving their professional practice, modeling lifelong learning, and exhibiting leadership in their school and professional community by promoting and demonstrating the effective use of digital tools and resources.

NETS (2011) for technology coaches include:

- inspiring and participating in the development and implementation of a shared vision for the comprehensive integration of technology;
- assisting teachers in using technology effectively for assessing student learning, differentiating instruction, and providing rigorous, relevant, and engaging learning experiences for all students;
- creating and supporting effective digital-age learning environments to maximize the learning of all students;
- conducting needs assessments, developing technology-related professional learning programs, and evaluating the impact on instructional practice and student learning;
- modeling and promoting digital citizenship; and
- demonstrating professional knowledge, skills, and dispositions in content, pedagogical, and technological areas as well as adult learning and leadership and are continuously deepening their knowledge and expertise.

NETS (2009) for administrators include:

- inspiring and leading development and implementation of a shared vision for comprehensive integration of technology to promote excellence and support transformation throughout the organization;
- creating, promoting, and sustaining a dynamic, digital-age learning culture that provides a rigorous, relevant, and engaging education for all students;
- promoting an environment of professional learning and innovation that empowers educators to enhance student learning through the infusion of contemporary technologies and digital resources;
- providing digital age leadership and management to continuously improve the organization through the effective use of information and technology resources; and
- modeling and facilitating understanding of social, ethical and legal issues and responsibilities related to an evolving digital culture.

Data from the National Science Foundation (NSF)²⁵ indicates that the actual impact technology has on classroom instruction is causally related to the amount of quality professional development an educator receives in a targeted context. NSF studies indicate that at least 80 hours of professional development extended across time were needed to develop, enhance, and change the practices of teachers. Ongoing opportunities for professional development must be available to teachers, administrators, and support personnel at all levels. Successful professional

²⁵ <http://www.nsf.gov/statistics/seind06/c1/c1s3.htm> - c1s3l2

development focuses on the specific needs of individual staff and is sustained through coaching and periodic updates. A technology-training plan outlines the opportunities afforded to district staff for learning job specific technology skills. This information is essential in developing the technology professional development plan that meets the needs of MDPS and is aligned with data-driven goals supported by long-term professional development activities.

RECOMMENDATION

Develop and implement an instructional technology plan in conjunction with the district's professional development plan.

The district should move beyond mere technology acquisition and ensure that the hardware and software tools are being used in ways that result in continuous improvement of classroom instruction and practices and higher student achievement. Ongoing opportunities for professional development should be made available to teachers and administrators at all skill and development levels.

The technology committee and a cross-section of teachers should work to develop a district-wide program for teacher training and technology integration. Consideration should also be given to providing training opportunities for all staff in their specific job needs. This technology-training program should be part of an overall professional development plan. A first step should be for each staff member to complete a needs assessment. The committee might consider developing an assessment to gather, analyze, and report information about how technology is used for teaching and learning in their schools. Additionally, the International Society for Technology in Education (ISTE) provides the NETS for Teachers.²⁶

A second step should be to discuss and define technology integration for MDPS classrooms. Based upon this definition and interview results, the program should seek to increase teacher competencies and levels of technology integration. The program should also identify software and hardware needs necessary for successful integration. The program should be submitted to the superintendent and school board for approval.

A number of online professional development resources should be considered including:

- TED: Ideas Worth Spreading;²⁷
- Classroom 2.0 Live;²⁸
- the K12 Online Conference;²⁹
- the Global Education Conference;³⁰ and

²⁶ <http://www.iste.org/standards/nets-for-teachers.aspx>

²⁷ <http://www.ted.com/>

²⁸ <http://live.classroom20.com/index.html>

²⁹ <http://k12onlineconference.org/>

³⁰ <http://globaleducation.ning.com/>

- Simple K12 Webinars.³¹

The district should also consider tapping into additional resources offered through the University of Oklahoma K20 Center, the Oklahoma State Department of Education (SDE), the Oklahoma Department of Career and Technology Education. Additionally, area colleges and universities and vendors provide customized training, continuing education, professional development and other resources for K-12 teachers and administrators.³² MDPS should also continue forming partnerships with neighboring school districts and formalize the implementation of a shared professional development initiative.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-16

The district does not operate on a replacement cycle for technology equipment. No adopted replacement cycle for technology assets exists.

MDPS does not have a plan for replacing its current computers, Chromebooks, iPads, and related equipment. These factors and more impact the volume and timeliness of technology support and the resulting budget.

A large amount of equipment has been purchased over the last couple of years with E-Rate, CARES Act and bond funds. While this currently provides a positive technology environment, no plan exists for replacing the equipment once its usefulness cycle has been reached. In staff surveys, when asked about the lifespan of district technology equipment, 23 percent *agreed* and 39 percent *strongly agreed* that equipment was operated past its usefulness.

According to The Gartner Group, an independent technology research and consulting firm, the useful life of computers in public education is four to five years. To achieve satisfactory efficiency status on the ISTE Index, equipment should be placed on a four to five-year life cycle. Some categories, such as student lab computers, may require more frequent replacement than those computers used in administrative capacities. Additionally, the ISTE Index indicates that lacking a computer replacement schedule of any kind falls into the low efficiency category. Failing to surplus equipment until it is no longer usable and continuing to service obsolete equipment, also falls in the low efficiency category.

RECOMMENDATION

Develop a replacement cycle for technology equipment.

The technology director should use the current inventory to establish a priority list of which types of computers are to be replaced first (i.e. student use, and, then, in what order others will be replaced) and with what type of device. The technology director should also establish the

³¹ <http://simplek12.com/tlc/webinars/>

³² <http://www.okhighered.org/econ-dev/business-services/>

expected longevity and scheduled replacement for each computer category.

Once these replacement schedules have been established, the superintendent should annually link district funds designated for computer replacement to the number of computers to be replaced. The same process can be used for other computer-related equipment, such as printers. The same process can be used for other computer-related equipment. The district should consider selling surplus equipment in an online auction and utilizing a complete surplus management system. One option to consider is Public Surplus.³³ The company:

- provides a detailed audit record of all activity;
- automatically reallocates surplus items internally; and
- provides a dynamic bid auction for those items not internally reallocated.

FISCAL IMPACT

The fiscal impact of this recommendation will depend upon the replacement schedule adopted. The implementation of a four- to five-year replacement cycle is recommended. According to district inventory, currently there are approximately 6,994 Chromebooks and 1,871 iPads for students. Staff has 173 iPads and 1,083 laptops. The district should begin with the budget estimates noted in the new district technology plan. Given that large numbers of iPads and Chromebooks were purchased in 2020-21 year, a small number will need replacement in 2021-22 and subsequent school years as students graduate or move from the district. The replacement cycle focus should be placed on student devices, particularly Chromebooks and iPads. The projected cost of Chromebooks and iPads is \$250 each.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Develop technology replacement cycle.	(\$100,000)	(\$150,000)	(\$250,000)	(\$375,000)	(\$375,000)

FINDING 5-17

Due to necessities caused by COVID-19, the district has moved into some one-to-one technology implementation without adequate planning. No written plan is in place for the district initiative.

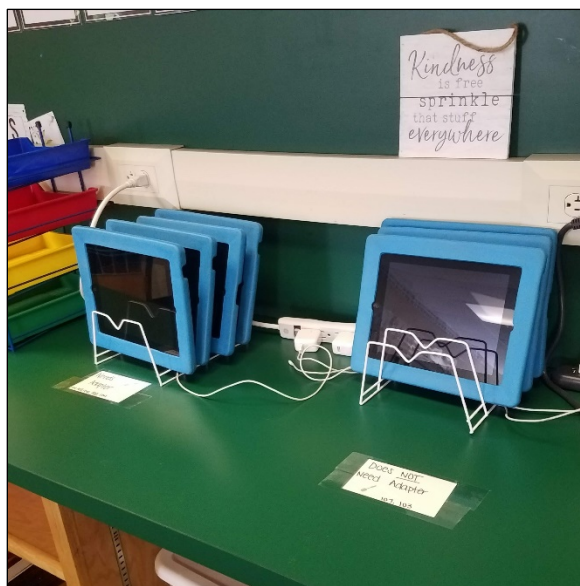
MDPS introduced a one-to-one technology environment for students as part of its response to COVID-19. The district is currently in the first year of implementing a one-to-one technology initiative that began in 2020. Students in primary grades have iPads (**Exhibit 5-34**). Secondary students use Chromebooks at school and home. In addition, each classroom is equipped with an interactive whiteboard and wireless access that allows teachers to link the student devices with engaging learning experiences for students.

During focus groups and interviews, staff and administration noted a lack of procedures or checkout policy with Chromebooks and iPads. Staff further indicated concerns with a lack of

³³ <http://www.publicsurplus.com/sms/browse/home>

devices for classroom use. Other concerns included retrieving devices when families move or replacement costs when a device is damaged.

Exhibit 5-34 Elementary Classroom Devices



Source: Prismatic, February 2021

While the use of Chromebooks and iPads for a one-to-one initiative at MDPS is commendable, funds for technology are always a challenge. Forming policies and procedures for any technology equipment, including student devices, ensures good stewardship of the district's money, and makes parents and students responsible for the care and proper use of the device.

RECOMMENDATION

Improve policies and procedures regarding district technology resources.

The superintendent, technology director, and technology committee should develop a formal process for checkout and return of district equipment, specifically Chromebooks and iPads. The same process can be used for other computer-related equipment.

Many Chromebook checkout forms are available online. Some to investigate include:

- Chromebook Checkout Policies and Procedures from Mount Zion, Georgia;³⁴
- Mana Academy Charter School Chromebook Checkout Form in West Valley City, Utah;³⁵ and

³⁴http://images.pcmac.org/SiSFiles/Schools/GA/CarrollCounty/MtZionMiddle/Uploads/Forms/chromebook_form_2019-2020.pdf

³⁵<https://form.jotform.com/200854942895063>

- Idaho Falls, Idaho School District 91 Chromebook Checkout Form.³⁶

FISCAL IMPACT

This recommendation can be implemented with existing resources and should reduce district expenses related to technology loss and damage.

FINDING 5-18

Policies and procedures for Canvas do not exist. The district has implemented a new learning management system without policies and procedures or expectations in place prior to launch.

MDPS introduced a new learning management system district-wide. Some initial training was conducted prior to implementation and optional follow-up sessions have been offered. Roll-out has been met with resistance by teachers according to staff interviews and surveys. Google Suites and SeeSaw (elementary) are also used. Staff also indicated the number of new initiatives launched by the district this past year has been overwhelming.

Some teachers have expressed a need for clarity in what is expected with respect to instructional technology. During focus groups and interviews, staff and administration noted a lack of expectations or best practices associated with Canvas. Other concerns included the wide range of instructional practices associated with Canvas use. Some teachers are using the system to house worksheet assignments while others have embraced the potential for developing instructional content. Focus group participants requested model lessons, templates, and checklists to guide instructional development.

While the use of a robust learning management system to support initiatives at MDPS is commendable, introducing multiple systems is a challenge for instructors and training staff. Forming policies and procedures for any technology, including learning systems, is ensuring buy-in of instructional staff and subsequent student success.

RECOMMENDATION

Develop and implement policies and procedures for the district's learning management system, Canvas.

The instructional technology staff and a committee of instructors should develop sample lessons, templates, a checklist of expectations, and other instructional aides for Canvas development. Additionally, the superintendent and technology staff should develop and adopt policies and procedures specific to Canvas.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

³⁶ https://docs.google.com/document/d/1Wjl2yEOt7-RTlilZ_46Hv5TKmse6TZLikfSFy6f7Auw/edit#!

FINDING 5-19

The district website is hard to navigate and lacks organization. The website lacks clear consistent methods of communicating with stakeholders, student, and staff.

The district uses the website as a place to retrieve documents and forms and other static information. Social medias sites such as Facebook and Twitter are used to update parents and staff on current happenings at Mid-Del.

According to district documents, the Community Relations Department oversees the website content and design. Apptegy is contracted to host and maintain the website. Each school is responsible for maintaining the content on individual school webpages. The Community Relations Department makes changes to the district webpages as administrators.

The consulting team found the website hard to navigate and lacking organization. This view was supported in staff interviews and Parent Surveys. Parent comments focused on difficulty in navigating the site, layout, and a wish for better communication through the website rather than social media. The district has a Facebook page where staff share photos and highlight events, but content is limited. As a result, communication with staff, parents, and students is lacking.

Parent survey results indicate frequent use of the MDPS website (**Exhibit 5-35**). In the surveys, 17 percent of parents comments focused on communication issues. Parents commented they could be informed more effectively using the website, email, phone and other methods.

Exhibit 5-35
Parent Survey Results Regarding the MDPS Website

Survey Statement	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I regularly access information via the district website.	15%	59%	10%	14%	2%

Source: Prismatic Survey Results, February 2021

Moveable Online regularly outlines best practices for websites by industry. They note that desktops and laptops are no longer the most common access point for users browsing the web. Many people use smart phones to navigate the Internet.³⁷ Simple navigation is also an important factor in any website design, but especially for schools as stakeholders and prospective students depend on easily accessible information.³⁸ Simple does not necessarily mean minimal. A website with simple navigation in mind should not have outdated information or empty tabs that lead the user to a dead end.

For students, an effective district website includes schedules, policies, and faculty contact information that are up to date. Teacher pages on the website should include assignments, files that can be shared with students and parents, classroom rules and procedures, links to useful

³⁷ <http://moveableonline.com/blog/2014/08/20/8-key-features-websites-education-sector/>

³⁸ <https://www.eschoolview.com/What-Makes-a-Good-School-Website.aspx>

educational content, and links to instructional support programs that students may access from home.

RECOMMENDATION

Update and expand the district website.

The technology director and staff should develop a list of priorities where content should be kept up-to-date and comprehensive. From there, a timeline should be established for providing updates and establishing information on the website. Teachers and administrators should be encouraged to update and use the website as a communication device with parents and students.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-20

Parents lack needed technology skills to support their children with virtual learning. With the advent of remote learning, parents in the district are supporting student's online instruction at home.

During focus groups and interviews, teachers indicated a need for computer basic instruction for students and additional assistance for parents. Teachers further indicated amounts of time spent on the phone with parents and grandparents troubleshooting technical issues. Secondary teachers specifically noted students lack basic computer skills and a need to prioritize training. Elementary teachers were concerned about the lack of skills on the part of the parents. Teachers recommended a Parent Help Desk or other support be made available.

The move to remote learning has forced districts across the country to address parent skill levels in technology. Many districts have successfully offered classes, workshops, webinars, etc. for parents to provide support, learning and communication. The Parent Academy, Miami-Dade County Public Schools in Florida, offers a robust program.³⁹ The Parent Academy build skills plus serves as a direct communication device with parents. Locally, Norman Public Schools hosts the iTech Parent Academy. Four nighttime sessions are scheduled where parents learn about technology in the classroom, digital citizenship, cyberbullying and managing home wifi.⁴⁰

RECOMMENDATION

Create a Parent Academy to build parents' computing skills with an ultimate goal of supporting students.

The instructional technology staff should work with the principals, and teacher representatives to identify the kinds of skills that would be most helpful for parents. Teacher volunteers with skills in place and instructional technology staff should be identified and invited to participate in the

³⁹ <https://parentacademymiami.com/>

⁴⁰ <https://www.normanpublicschools.org/Page/3014>

project. Having sufficient technical and instructional support for parents is critical to remote learning and to ensure student success.

FISCAL IMPACT

Some districts that use teachers to conduct staff development for their peers offer a pay rate of \$20 per hour. Using this same amount, the consulting team estimates \$2,100 should be allocated for a Parent Academy. Instructors and instructional technology staff would provide five hours of annual training at each of the 21 schools.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Hire teachers to conduct staff development.	(\$2,100)	(\$2,100)	(\$2,100)	(\$2,100)	(\$2,100)

FINDING 5-21

The district has technology and associated equipment in place but is not evaluating whether it is being used fully. The district is not ensuring that it is spending dollars wisely by regularly assessing the use of technology available to students and staff.

The district has no structured procedures in place to assess staff, student, or parent use of, and satisfaction with, technology available in the district. There is no formal process in place for evaluating technology implementation and use. MDPS has made a substantial number of technology investments in infrastructure, hardware, and software, and continues to invest in technology. However, by not following up after the initial purchase and set up to determine the use of technology or the problems preventing its use, the district lacks the kind of information that leads to sound decision-making and improvement.

With the onset of online instruction and assessments, web-based textbooks, and college and workplace requirements, students must be comfortable and adept at using computers, the Internet, and other technology resources. For students to develop and build the necessary skills and comfort level, students must have reliable, consistent access and integrated use of technology. In addition to providing access to students, it is critical that the district identify what technologies are being used, provide teachers with the tools and training to integrate those technologies into instruction, and evaluate whether or not these strategies result in student achievement gains.

RECOMMENDATION

Develop procedures to assess technology use and satisfaction with the goal of establishing higher use.

The district should frequently gauge user satisfaction and adjust, in order to ensure optimal technology service. The district should track and analyze technology use in classrooms, in order to ensure it has used its technology resources most effectively. This will also identify whether additional supports, such as training or improved infrastructure, are needed. The district could

also implement a method to assess staff, student, and community satisfaction with technology-integrated classes and instruction. This knowledge could help inform future planning in technology acquisition and implementation.

Several survey instruments and checklists are available free of charge. Survey examples may be found at the Wufoo Form Gallery,⁴¹ including technology support surveys, website content surveys, and student satisfaction surveys. Additionally, in 2019, ISTE presented a new research-based classroom observation tool, Technology Integration Panel⁴² that provides districts with a framework to record and analyze technology use in classrooms. The framework looks at dimensions including pedagogy, learning context and access to technology and use of technology tools. This tool allows district personnel to determine what best practices look like for their specific needs. Once the information is gathered, district personnel should discuss the findings with staff and make needed adjustments.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-22

MDPS has secured funding through E-Rate to procure technology equipment, networking, and connectivity. This has allowed the district to make large purchases of technology and improve connectivity.

MDPS over the last five years has successfully applied for Category 1 E-Rate funding, as shown in **Exhibit 5-36**. Plans are to apply for both Category 1 and Category 2 E-Rate Funding during the 2021 funding year.

Exhibit 5-36
Trend in MDPS E-Rate Funding

E-Rate	Requested	Funded
FY 2016	\$798,274	\$614,679
FY 2017	\$789,675	\$602,833
FY 2018	\$686,961	\$549,568
FY 2019	\$751,907	\$601,526
FY 2020	\$634,232	\$539,386

Source: MDPS, February 2021

Technology can no longer be an afterthought or add-on in today's classrooms. It must be purposely integrated into instructional strategies and practices and available to teachers and students. In order for that to happen, funding must be available to ensure that classroom technology is up-to-date and usable.

⁴¹ <http://www.wufoo.com/gallery/>

⁴² <https://ISTE19 - EdTech Conference | Philadelphia, June 23-26>

COMMENDATION

MDPS is commended for securing funding through E-Rate to fund technology equipment, networking, and connectivity.

FINDING 5-23

The district lacks standards for equipment purchases. The district does not currently have minimum technology standards or protocols.

District and building leaders indicated that teachers have varying skill levels in using technology in the classroom and integrating technology into the learning process. The district lacks explicit, written expectations as to what teachers should be able to do in the classroom with technology or what to purchase.

The use of classroom technology enhances the teaching process and helps students to learn course material and how to function in technologically dependent workplaces. A curriculum that incorporates technology improves instructional material and familiarizes students with technology. The ISTE has recently revised its Standards for Educators. The revised ISTE Standards for Educators define the fundamental concepts, knowledge, skills, and attitudes for applying technology in educational settings that all teachers should be able to demonstrate. The recently revised Standards for Educators to define these roles for teachers in using technology:

- Learner – learn from and with others and explore promising practices that leverage technology to improve student learning;
- Leader – seek opportunities to support student empowerment, help shape a shared vision and advocate for student equity;
- Citizen – inspire students to contribute responsibly in the digital world and guide them to be curious, wise, empathetic, safe, and ethical;
- Collaborator – collaborate with others to improve practice, discover, and share resources, and solve problems with others around the globe;
- Designer – design authentic, learner-driven activities and environments that recognize and accommodate learner variability;
- Facilitator – model creative expression, empower students to take ownership of their learning and create opportunities for students to innovate and solve problems; and
- Analyst – use data to drive instruction and provide alternate ways for students to demonstrate competency and use assessment data to guide progress.

RECOMMENDATION

Develop a district standard for technology equipment purchases.

The responsibility and technical expertise needed to meet user demands can no longer be performed in a fragmented fashion. All district technology needs must be prioritized and addressed in a systematic manner beginning with the development of standards.

The district should develop district standards for all hardware, software, and network purchases. The Oklahoma Technology Guidelines for 2019 should be the starting point of the discussion on district needs and standards.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-24

The district manages an up-to-date technology inventory system. Items are recorded in a digital file by serial number, tagged, and have their location and person of primary responsibility noted, as well as date of purchase. Plans are to continually update the inventory as new purchases are received and obsolete equipment is retired. An annual inventory of all equipment is conducted. The technology director has made technology inventory a priority.

Defined processes for inventory systems insure when equipment from future purchases are delivered, it is received by the technology director or designee and then processed into the inventory system. Physical inventories are taken, and status reports generated according to the adopted school board policy. Having the receiving, tagging, assignment and inventory processes standardized prevents confusion about the count, value, age, and location of district technology assets.

COMMENDATION

The district is commended for having a technology inventory system that is up-to-date and maintained.

FINDING 5-25

Limited funds for technology initiatives exist. The district would benefit from identifying and seeking additional funding sources for technology purchases, upgrades, and particularly professional development.

The district has had two administrators participate in the K20 Center's OK-ACTS Leadership program⁴³, Mid-Del Steed ES in 2010 and Mid-Del Midwest City HS in 2020. Registration for OK-ACTS is \$399 per superintendent or head principal and includes three days of training, an iPad for district use, the Classwalk app, and a set of instructional strategy cards. The district has not pursued other grants or training opportunities through the K20 Center.

⁴³ <https://k20center.ou.edu/programs/phase1/>

The K20 SKIE Awards⁴⁴ target innovative Oklahoma educators. These awards, supported by the K20 Center and Oklahoma's Electric Cooperatives, are for educators or teams of educators who have demonstrated the ability to link student learning with the innovative use of technology. Each regional awardee or team will receive \$1,000. To date, the district has not taken advantage of this funding source or a number of other funding resources which may be available. Sources could include state and national grants as well.

During onsite focus groups and interviews, participants expressed concerns about teachers' utilization of technology resources and equipment, specifically Canvas and one-to-one implementation. Staff surveys indicated concerns about implementing one-to-one while maintaining devices within the classrooms. Given the current needs in technology, professional development and the impact of decreasing school funding, a variety of additional funding entities need to be identified and pursued.

In addition to the K20 Center, grants are available through a number of sources including the Oklahoma State Department of Education and the Oklahoma Department of Career and Technology Education.⁴⁵

RECOMMENDATION

Seek additional funding sources and grants to support long-range planning in technology.

Moving forward, and given the current needs in technology and professional development and the impact of decreasing school funding, MDPS should identify and pursue additional grants. Grants are available through a number of sources, including the Oklahoma State Department of Education and the Oklahoma Department of Career and Technology Education.⁴⁶

FISCAL IMPACT

This recommendation can be implemented with existing resources.

C. TRANSPORTATION

The primary objective of school transportation is to provide safe, timely, and efficient transportation services to students. Oklahoma's 7,600 school buses travel more than 67 million miles a year, carrying nearly 369,000 children every day.

The Oklahoma School Code (OSC) authorizes school districts to provide student transportation services between school and home, from school to career and technology location, and for approved extracurricular activities. The federal *Individuals with Disabilities Education Act* (IDEA) requires districts to provide transportation services to students who must travel to receive special education services, if they provide regular school transportation services.

⁴⁴ <https://k20center.ou.edu/skie-awards/>

⁴⁵ Updated lists of grants can be found at: <http://oklahoma.grantwatch.com>, <http://schoolfundingcenter.com> and <http://www.getedfunding.com/>, in addition to many other sites.

⁴⁶ <https://OklahomaGrantsforNonprofits-GrantWatch>

The Oklahoma State Department of Education (SDE) provides some funding for regular transportation of students who live more than 1.5 miles from the assigned school. Oklahoma school districts receive a transportation supplement that is calculated based upon a per capita allowance, the district's student density, and the number of students who live more than 1.5 miles from school (considered the average daily haul or ADH). These factors are multiplied by a state funding figure of \$1.39 (transportation factor), a figure that has not been updated since 1988.

This level of funding does not begin to support all transportation expenses in a typical Oklahoma school district. In general, the state transportation supplement provides just 16 percent of the funding needed to operate a district transportation program. Thus, every dollar saved in a school district's transportation program can instead be spent in other district programs, including classroom instruction.

The Oklahoma Department of Public Safety (ODPS) requires bus drivers to obtain a specialized bus driver's license. The SDE requires bus drivers to obtain bus driver certification and training and to pass a license history review. MDPS conducts criminal background checks on all new employees and annually evaluates the motor vehicle records of the personnel who drive school vehicles. New bus drivers also must pass an alcohol and drug test for pre-employment and submit to random drug tests that are administered throughout the year, as defined by the Federal Motor Carrier Safety Administration's regulation § 382.305.

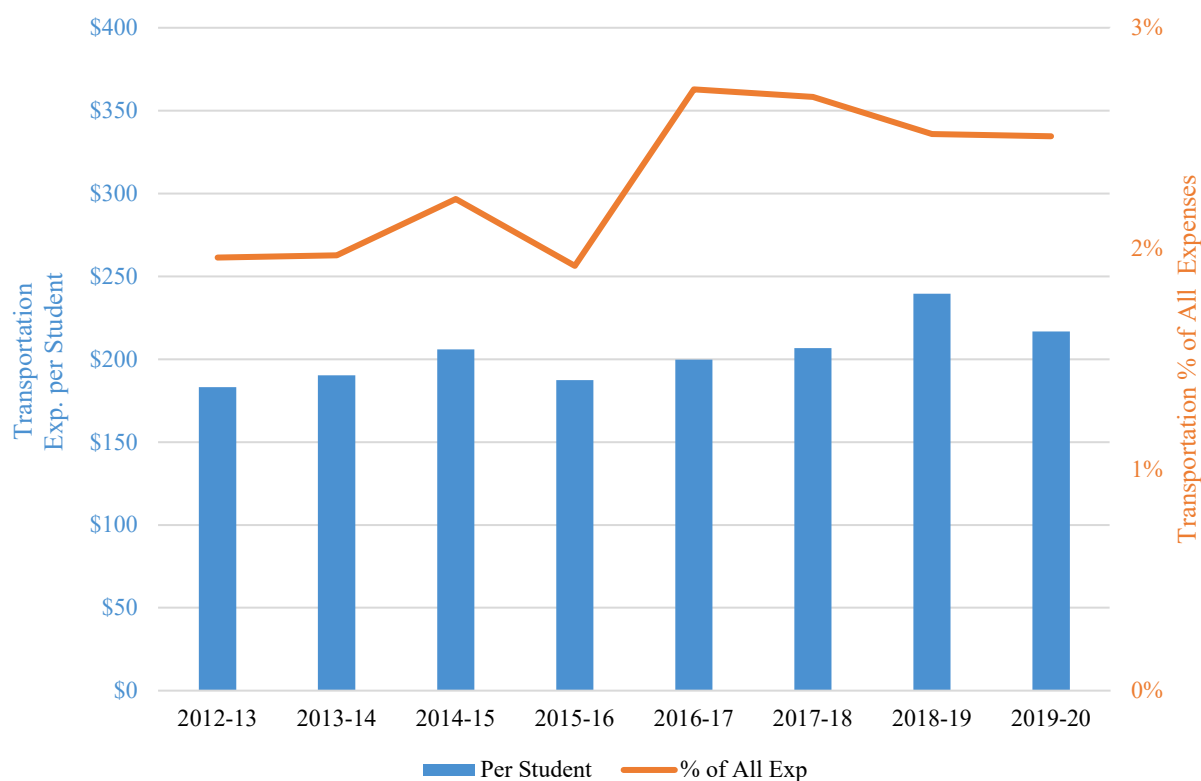
The MDPS transportation department provides route and extracurricular transportation for its approximately 14,500 students. With approximately 32 square miles to cover, the district fleet includes 67 regular buses, 22 special needs buses, 27 other vehicles. The district also leases eight additional regular buses and two special needs buses. The lease agreements for those ten vehicles expires in June 2021.

Of the 116 district-owned vehicles, 21 buses have been placed *out of service* due to age, mechanical issues, or other problems. All but two of the 21 buses were ready to be auctioned or sold at the time of the onsite work.

Currently, the district transportation department has 48 Oklahoma Commercial Driver's License (CDL) certified drivers to operate school buses. Of the 48, 35 are assigned as regular bus routes while ten are utilized on the special needs buses. The remaining three with CDLs are administrative staff. Drivers are required to maintain a current Oklahoma CDL, with the proper endorsements and must report any moving violations to the director of transportation. Before the start of each school year and before any drivers are permitted to drive a school bus, drivers must submit to a full license review. MDPS then reviews the licenses for proper endorsement and infraction history. The district maintains and files driving records that comply with the ODPS. The department maintains these records for the duration of the school year.

Exhibit 5-37 provides an eight-year comparison of MDPS transportation expenditures as a percent of total expenditures as well as the annual transportation expenditures per student. Over that time, transportation expenses have never accounted for more than 2.7 percent of all expenditures. Transportation dollars per student have varied from \$183 to \$240 per student.

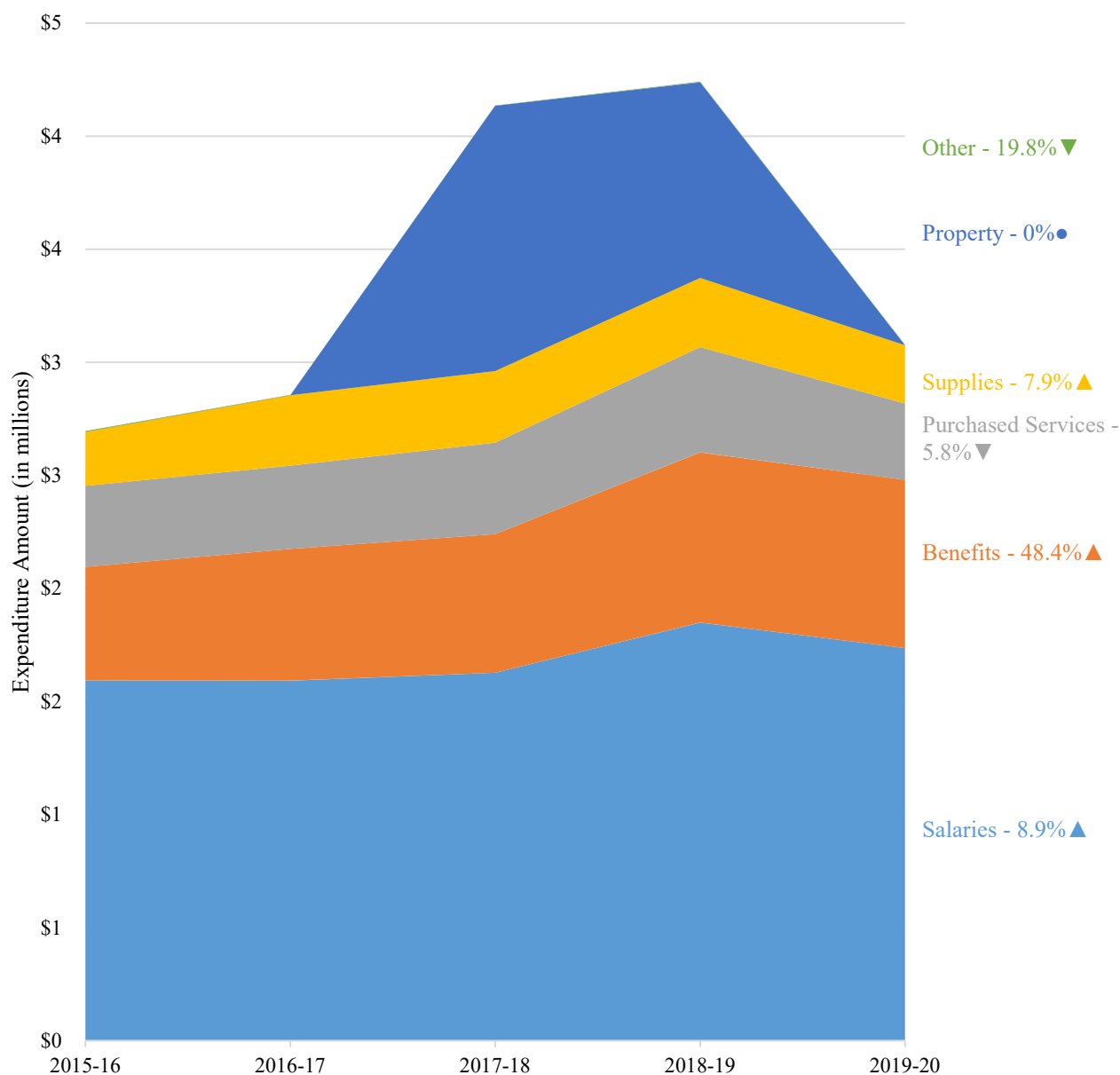
Exhibit 5-37
Trend in MDPS Transportation Expenses



Source: OK SDE, OCAS and Prismatic calculations

Exhibit 5-38 compares MDPS' transportation costs over time. The exhibit includes all transportation expenses by category. The largest increase in expenditures came from spending on benefits, increasing by 48.4 percent. Salary and supplies costs increased by 8.9 and 7.9 percent respectively, and the district reduced its spending on purchased services and other, noncategorized expenses. Overall, the district has increased transportation spending by 14.2 percent since 2015-16, but reduced spending by 27.4 percent since 2018-19.

Exhibit 5-38
Trend in MDPS Transportation Operating Costs



Source: OK SDE, OCAS, School District Expenditures and Prismatic calculations

Exhibit 5-39 and **Exhibit 5-40** compare the change in MDPS and the peer districts' transportation costs over time with and without property expenses, respectively. **Exhibit 5-41** provides a better ongoing expenditure comparison due to the removal of large, single year expenses (typically school buses). In four out of the five years, MDPS spent the least overall on transportation. The exception was 2017-18 due to property expenses. Excluding property expenses, the district always spent the least on transportation. The district's increase in transportation spending was the third largest among the peer districts.

Exhibit 5-39
Trend in Transportation Costs (Including Property Expenses)

Entity	2015-16	2016-17	2017-18	2018-19	2019-20	Percent Change
Mid-Del	\$2,695,418	\$2,855,778	\$4,135,738	\$4,241,045	\$3,862,875	43.3% ▲
Lawton	\$6,054,340	\$5,830,602	\$5,296,549	\$6,187,770	\$4,788,442	(20.9%) ▼
Moore	\$5,729,559	\$5,290,552	\$5,719,046	\$5,770,817	\$5,720,419	(0.2%) ▼
Norman	\$4,487,661	\$4,358,414	\$7,143,093	\$7,149,033	\$6,284,344	40.0% ▲
Putnam City	\$3,874,515	\$4,753,640	\$4,052,278	\$6,704,100	\$4,275,531	10.4% ▲
Union	\$4,001,099	\$5,517,049	\$4,403,620	\$7,323,116	\$4,840,684	21.0% ▲
Peer Average	\$4,829,435	\$5,150,051	\$5,322,917	\$6,626,967	\$5,181,884	7.3% ▲

Source: OK SDE, OCAS, School District Expenditures, All Funds, 2015 through 2020, and Prismatic calculations

Exhibit 5-40
Trend in Transportation Costs (Excluding Property Expenses)

Entity	2015-16	2016-17	2017-18	2018-19	2019-20	Percent Change
Mid-Del	\$2,695,418	\$2,855,778	\$2,962,279	\$3,376,687	\$3,077,973	14.2% ▲
Lawton	\$4,457,385	\$4,604,187	\$4,685,485	\$4,534,033	\$4,600,708	3.2% ▲
Moore	\$4,657,137	\$4,549,225	\$5,055,116	\$5,106,620	\$4,926,442	5.8% ▲
Norman	\$4,269,511	\$4,258,789	\$4,811,262	\$5,661,545	\$5,791,569	35.6% ▲
Putnam City	\$3,795,655	\$3,772,525	\$3,962,578	\$4,378,949	\$4,220,043	11.2% ▲
Union	\$3,910,143	\$4,046,957	\$4,385,927	\$4,674,075	\$4,782,550	22.3% ▲
Peer Average	\$4,217,966	\$4,246,337	\$4,580,074	\$4,871,044	\$4,864,262	15.3% ▲

Source: OK SDE, OCAS, School District Expenditures, All Funds, 2015 through 2020, and Prismatic calculations

Exhibit 5-41 provides a comparison of cost per rider per day in MDPS and the peers for 2018-19. As shown, MDPS had the second-lowest cost per student, despite spending the least overall on transportation and being the third smallest district.

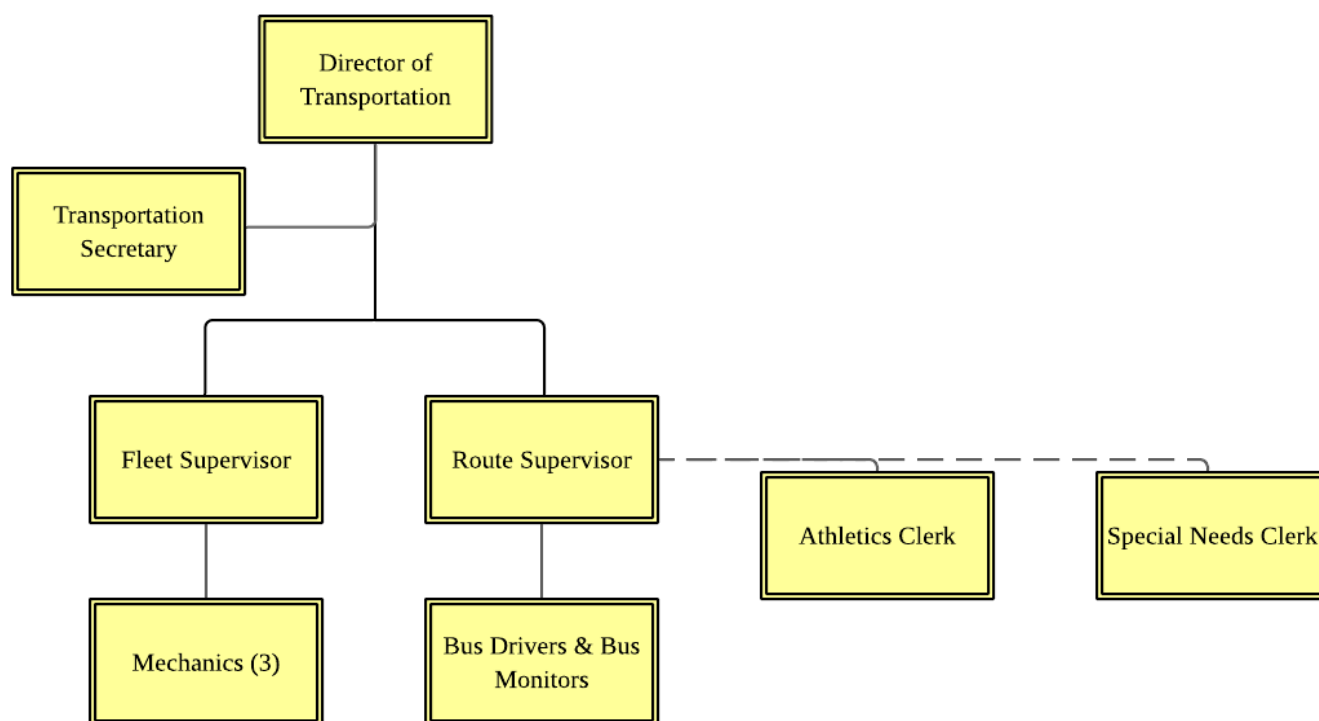
Exhibit 5-41
Comparison of Cost per Rider per Day, 2018-19

Entity	Total Annual Operating Cost	ADH	Attendance Days	Overall Cost per Rider per Day	District Size (mi ²)
MDPS	\$3,376,687	6719	171	\$2.94	70
Lawton	\$4,534,033	5428	166	\$5.03	185
Moore	\$5,106,620	9313	182	\$3.01	125
Norman	\$5,661,545	7514	173	\$4.36	128
Putnam City	\$4,378,949	7507	171	\$3.41	43
Union	\$4,674,075	9895	177	\$2.67	27
Peer Average	\$4,871,044	7,931	174	\$3.53	102

Source: OK SDE, OCAS, School District Expenditures, All Funds, 2019, and Prismatic calculations

The organization of the transportation department is shown in **Exhibit 5-42**. The transportation director is in his seventh year managing the pupil transportation department.

Exhibit 5-42
MDPS Transportation Organization



Source: Created by Prismatic, February 2021

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MDPS departments and functional areas. **Exhibit 5-43** provides the results for transportation. Less than half the staff gave transportation an A or B, but 33 percent had no opinion about it.

Exhibit 5-43
Staff Survey Results Regarding Transportation

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Transportation	12%	32%	17%	4%	2%	33%

Source: Prismatic Survey Results, February 2021

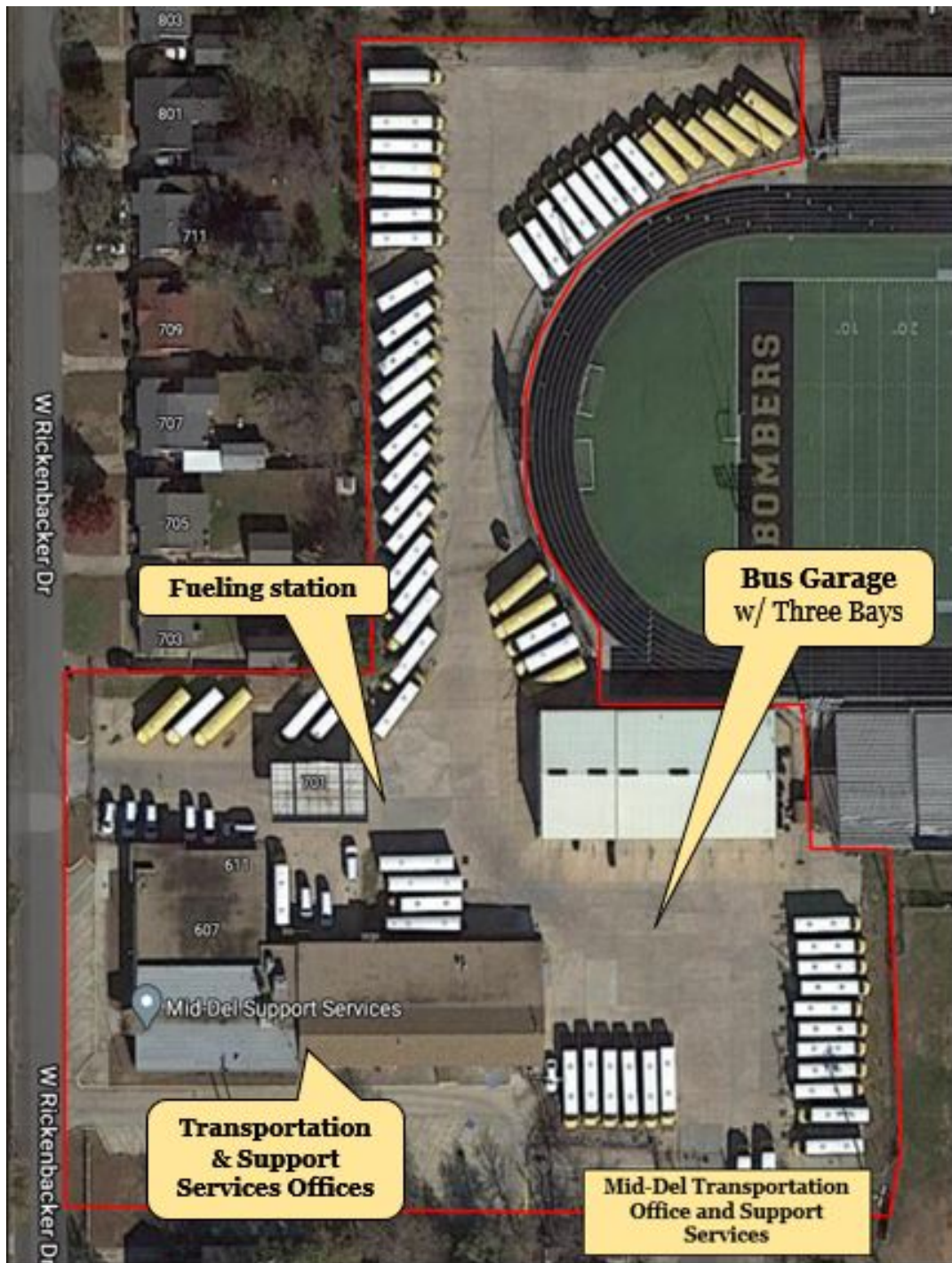
FINDING 5-26

The MDPS transportation office staffing is adequate in size for the operational bus fleet and support vehicles. Space has been delegated to work on school buses and support vehicles. A system of records management has been instituted for better information retrieval.

The director of transportation maintains and files all records pertaining to the daily operation.

The transportation building (**Exhibit 5-44, 5-45, and 5-46**) which is shared with district general support services printing office has the ability to fit three regular size school buses or support vehicles in dedicated service bays at any given time for vehicle maintenance and repairs. The shop area is open for ease of work and the center aisle, along the building walls supports and area for tools and storage. Additional storage space is located above and below a mezzanine near the fleet supervisor's office. The maintenance shop is currently furnished with an area designed for machining and welding repairs and equipment storage. The transportation director's operational responsiveness and facility constraints allows for major repairs to be referred to a service center or contracted vendor better equipped to handle the more complex and time-consuming repairs. Additionally, the bus garage is equipped with an indoor wash bay, complete with a drying station with proper draining. At the time of the site visit, the transportation director had recently updated the operational response plan to the COVID-19 pandemic by purchasing an automatic sprayer system to be introduced to further slow and mitigate the spread of the virus.

Exhibit 5-44
MDPS Transportation Building Aerial View



Source: Google maps and Prismatic, February 2021

**Exhibit 5-45
Transportation Building**

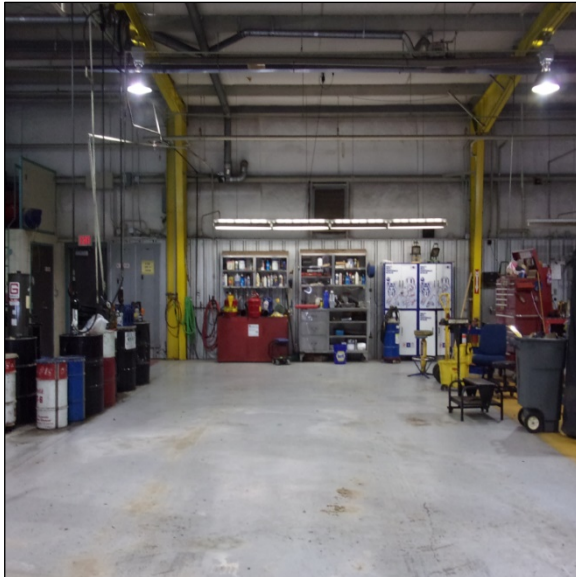
Transportation Building Front View



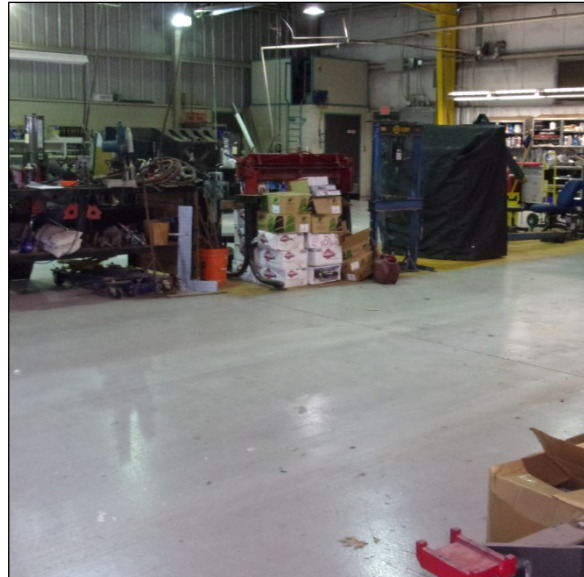
Transportation Building Interior View



Transportation Building Bay View



Transportation Building Interior View



Source: Prismatic, February 2021

Exhibit 5-45
Transportation Building (continued)

Transportation Building Interior View



Transportation Building Mezzanine



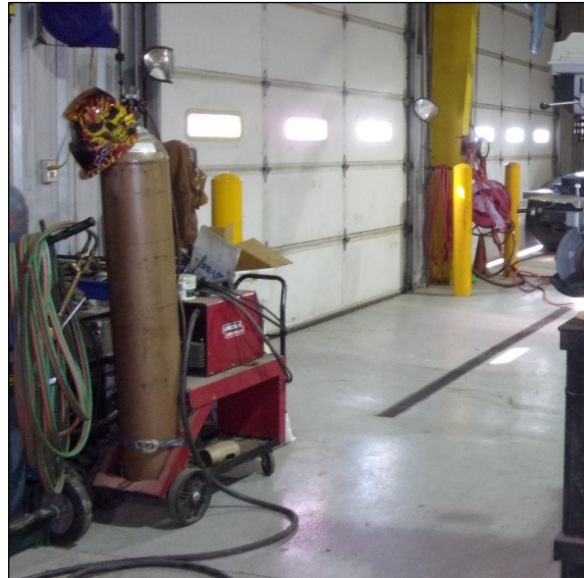
Source: Prismatic, February 2021

Exhibit 5-46
Bus Garage Machines and Tools

Bus Garage Milling Tool



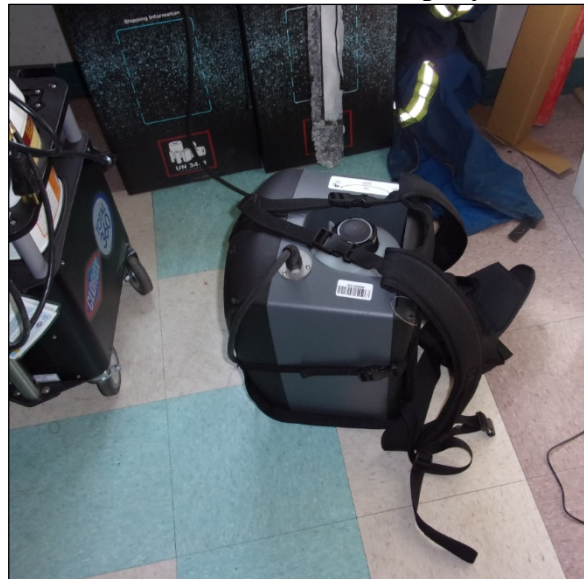
Bus Garage Welding Machine



Indoor Wash Area Bay



Automatic Disinfectant Sprayer



Source: Prismatic, February 2021

Additionally, the transportation director and the transportation administrative staff is responsible for the data management of the transportation department and are required to submit, generate, file, and maintain all records pertaining to the daily operation of pupil transportation. A sampling of records and data maintained by the transportation office staff are:

- Oklahoma School Bus Driver Certification/ In- Service Attendance Verification Forms;

-
- Annual School Bus Inspection report;
 - MDPS Vehicle Forms;
 - MDPS On-Hand Inventory Forms; and
 - Bus Driver “Sound Driver Solutions” Certifications.

COMMENDATION

The MDPS transportation department is well-staffed, well-equipped, and well-organized.

FINDING 5-27

Bus drivers do not receive or have a Mid-Del specific procedure manual on the operational functions or practices of the transportation department. Bus drivers do receive copies of several publications, but none are specifically developed to meet their information needs.

Presently, the transportation department does not offer a uniform booklet or information manual, specific to MDPS transportation department, as it relates to the daily function and operation of pupil transportation. Bus drivers can review the MDPS *School Bus Riders Handbook*, various SDE publications, copies of department forms, such as student conduct report form, and the *Mid-Del Support Employees Association 2020-21 Agreement*, but there is no operations manual of policies, procedures, or expectations on record or in use.

Organizations only operate effectively when the expectations and procedures are documented. The national Pupil Transportation Safety Institute recommends a transportation department handbook listing the employee roles, responsibilities, and safety procedures for the department. The SOP is critical for the training of new employees in the districts policies and procedures.

As an example, Edmond Public Schools provides its transportation employees with a 52-page handbook that covers all aspects of employment as well as directions on how to pick up and drop off students, road courtesy, and what to do in case of an accident. **Exhibit 5-47** provides the table of contents for the Edmond Handbook.

Exhibit 5-47

EPS Transportation SOP Table of Contents

Table of Contents	
Welcome to Edmond Public Schools Transportation	0
Table of Contents	4
Sexual Harassment	6
Harassment/Intimidation/Bullying	6
Employee Leave	6
Criminal Record Questionnaire	7
Family Educational Rights and Privacy Act and Health Insurance Portability and Accountability Act	8
Evaluation	8
Ethical Conduct Code	8
Dress/Appearance	9
F.M. Radio	9
Inclement Weather	9
Injuries At Work	10
Omnibus Act of 1991 (Drug Testing)	10
Performance Expectations	11
Drivers' and Monitors' Section	12
Requirements	14
Responsibilities	14
Assignment of Routes and Activity Trips*	14
Clocking In and Out	14
Time Centre and Payroll	15
Care of Bus	15
Flag Out Procedure	18
Loading and Unloading Students	19
Routes	20
Accidents	20
Student Management	21
Key Procedure	22
Bus Street Use and Parking Procedure at Office	22
Information You Really Need to Know!!! A Practical Guide for the Edmond Public Schools Transportation	
Department	24
Thriving at the Transportation Department	26
Employee Lounge	28
Bus Compound	29
Pick Up/Drop Off	29
Bus Loops	32
High Schools	32
Middle Schools	33
Late Elementary Schools	37
Choice Schools	40
On the Road	41
Road Courtesy	41
Accident Processing	42
Administration	43
POLICY ON ALCOHOL AND DRUG TESTING FOR DRIVERS	45
Notes	55

Source: EPS Transportation, October 2013

RECOMMENDATION

Develop an operations manual specific to the MDPS pupil transportation department.

The transportation department should develop, distribute, and file a MDPS specific driver's information notebook annually, to be used by each employee that has reason to operate a school

bus. Notebooks should be distributed during the in-services held twice each school year. The transportation director should also set aside time during the in-service to brief and instruct employees to the use and purpose of the notebook. A potential table of contents is shown in **Exhibit 5-48**.

Exhibit 5-48 School Bus Rider's Handbook

<u>Table of Contents</u>	<u>Page</u>		
Table of Contents	1 – 2	Transportation Forms	28-39
Purpose / Mission Statement / Vision / Goals	3	<ul style="list-style-type: none"> Parking Lot Diagram 	28
Organization Chart	4	<ul style="list-style-type: none"> Pre-Trip Inspection Form 	29-30
Qualifications and Responsibilities	5 – 10	<ul style="list-style-type: none"> Damaged Seat Report Form 	31
<ul style="list-style-type: none"> School Bus Operator Qualifications 	5	<ul style="list-style-type: none"> Shop Work Order Form 	32
<ul style="list-style-type: none"> School Bus Operator Duties and Responsibilities 	6 - 8	<ul style="list-style-type: none"> Radio Ten-Codes 	33
<ul style="list-style-type: none"> School Bus Attendant Qualifications 	9	<ul style="list-style-type: none"> Bus Change Form 	34
<ul style="list-style-type: none"> School Bus Attendant Responsibilities 	10	<ul style="list-style-type: none"> School Bus Incident Report Form 	35
Disciplinary Guidelines	11 – 13	<ul style="list-style-type: none"> Student Injury / Accident Report Form 	36
Policy and Procedures	14 – 27	<ul style="list-style-type: none"> Student Incident Form 	37
<ul style="list-style-type: none"> Dress Code 	14	<ul style="list-style-type: none"> Field & Athletic Trip Form 	38
<ul style="list-style-type: none"> Bus Keys 	14	<ul style="list-style-type: none"> Leave Request Slip Form 	39
<ul style="list-style-type: none"> Pre-Trip Inspections 	15	Agreement Form (To be signed and returned to the transportation office)	40
<ul style="list-style-type: none"> Equipment Failure 	15	Covid-19	41
<ul style="list-style-type: none"> Bus Fueling 	15	<ul style="list-style-type: none"> COVID-19 Employee Expectations 	
<ul style="list-style-type: none"> Cellular Telephone Usage 	16	<ul style="list-style-type: none"> Employee Return to Work 	
<ul style="list-style-type: none"> Radio Communications 	16	<ul style="list-style-type: none"> Families First Coronavirus Response Act 	
<ul style="list-style-type: none"> Seatbelts 	17	<ul style="list-style-type: none"> COVID-19 Employee Self-Certification 	
<ul style="list-style-type: none"> Speed Limits 	17	<ul style="list-style-type: none"> COVID-19 Guidelines for Workplace 	
<ul style="list-style-type: none"> Selecting Bus Stops and Walk-to-Stop Distances 	17	<ul style="list-style-type: none"> Guidelines for Cleaning and Disinfecting your Vehicle 	
<ul style="list-style-type: none"> Loading and Unloading 	18		
<ul style="list-style-type: none"> Unauthorized Riders 	18		
<ul style="list-style-type: none"> Cultural Diversity 	18		
<ul style="list-style-type: none"> Student Information Confidentiality 	19		
<ul style="list-style-type: none"> Teamwork and Student Management 	19		
<ul style="list-style-type: none"> Student Management Techniques 	20		
<ul style="list-style-type: none"> School Bus Idling 	21		
<ul style="list-style-type: none"> Tobacco Free Environment 	21		
<ul style="list-style-type: none"> Cleanliness of Bus 	21		
<ul style="list-style-type: none"> Student Injuries / Illnesses 	22		
<ul style="list-style-type: none"> School Bus Crash / Accidents / Incidents 	22		
<ul style="list-style-type: none"> Bus Breakdowns / Reflective Triangles 	23		
<ul style="list-style-type: none"> Chain of Command Incident Reporting Procedure 	23		
<ul style="list-style-type: none"> Drug and Alcohol Testing 	24		
<ul style="list-style-type: none"> Field Trips 	25		
<ul style="list-style-type: none"> Smart Tag Transponders 	25		
<ul style="list-style-type: none"> Attendance 	26		
<ul style="list-style-type: none"> Pay Time Sheets 	26		
<ul style="list-style-type: none"> Personal Leave Request(s) 	26		
<ul style="list-style-type: none"> Sick Leave Absences 	26		
<ul style="list-style-type: none"> Understanding of Employment 	27		

Source: Created by Prismatic, February 2021

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-28

The district has a shortage of bus drivers. However, this is not a new problem; stakeholders noted it as being a problem potentially going back a decade or more. The current driver shortage has been exacerbated by a lax district stance in response to driver absenteeism.

Currently, there are 35 contracted school bus drivers for regular education routes and 10 drivers for special needs routes. The transportation office has not been able to remedy the problem of absenteeism. The department does not consistently track excessive absenteeism or investigate potential abuses of employee leave. On one day in January 2021, 11 bus drivers called out for various reasons. During a discussion with the transportation director about absenteeism, the consulting team found that some drivers frequently “just call out” with no regards to the effect this may have on the transportation operational day, and that going to the local curb-side health clinic and getting a doctor’s note was excuse enough.

There are no substitute bus drivers beyond the transportation department. On many occasions mechanics and other office staff fill the void when drivers call out and drive buses themselves. This means that they are not available to do their regularly assigned duties. There are CDL drivers in the schools, but there is no appetite or policy to use the coaches, teachers, or others to fill the void when bus drivers do not report to work.

The transportation department and district appear to have simply accepted the current (and long-standing) state of affairs. The situation worsened during the COVID-19 pandemic. During the onsite work, the consulting team was told some drivers felt emboldened to push the limits of attendance policies, because they knew the district was: “desperate enough to keep the drivers they had, and they were not going to get rid of anyone.”

The figures to quantify the cost of the absenteeism were not readily available. With the information available, the consulting team was unable to develop satisfactory answer to the questions of:

- How many runs were/have been impacted?
- How much overtime was granted and to whom?
- Were the late runs done after the normal course of the contract day?

RECOMMENDATION

Hold drivers accountable for excessive absenteeism.

Simply stated: MDPS drivers have been allowed to circumvent policies of attendance with no regard to consequence. The transportation department has not instituted policies that discourage absenteeism, including punitive measures for drivers who are habitually absent and positive measures to reward drivers who are never absent.

The department should develop a structure and procedure to counsel employees who are excessively absent. The department should also develop and implement a program to recognize drivers and monitors who have perfect attendance each month and semester.

FISCAL IMPACT

This recommendation can be implemented with existing resources. A small monetary/recognition reward for perfect attendance each semester can be accomplished with existing budget resources.

FINDING 5-29

The MDPS transportation department has not aggressively recruited for bus drivers. This has contributed to a long-standing driver shortage and the acceptance of poor employee behavior under the belief that the district cannot find anyone else to drive a bus.

The district appears to offer a competitive wage for bus drivers, based on the consulting team's informal scan of bus driver wages in the local area. The district also offers new drivers a one-time "signing bonus" of \$120. However, the district does a poor job of advertising its rate of pay for bus drivers. A review of the documents available on the human resources portion of the MDPS website and the posted 2020-21 bus driver job listing does not show the starting salary or the salary range for potential job applicants. This lack of wage transparency is likely a strong deterrent for potential driver applicants.

Beyond that, the transportation department does little to no active recruiting for drivers. The transportation department briefly placed some advertising material on the back bumper of the school buses to recruit bus drivers, but this measure was not followed through. Active recruiting for more responsible employees has since ended.

The Mid-Del Technology Center does not currently offer a CDL training program. When asked why, one school administrator stated that it was believed there might be a lack of space for practice driving. However, the Technology Center is adjacent to various other MDPS properties and there are a number of potentially usable parking lots for driver skills practice.

RECOMMENDATION

Implement an ongoing bus driver recruitment plan that includes a partnership with the Tech Center to develop a CDL training program, regular attendance at local recruiting events, advertising on the district's website, and annual verifications that the starting pay of MDPS bus drivers exceeds those of the neighboring districts.

It is not enough to hope that qualified bus drivers will apply for positions with the district on their own. The district should develop a CDL training program that grows their own bus drivers and actively recruit for drivers. The transportation department should work with the district human resources and communications areas on methods and strategies to better recruit potential bus drivers, by using, but not limited to:

- local TV news outlets;
- billboards;
- job fairs;

- offering a higher signing bonus; and
- advertising on the MDPS website.

Annually, the human resources department should survey the surrounding school districts and verify that MDPS is offering the highest starting wage for school bus drivers.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-30

The district's current bus routes result in unacceptably poor service. The transportation department utilizes routing software to create routes, but no effort has been taken to match route times to bell times, nor did the transportation department have any knowledge that there were structured bell times, causing students to arrive early without supervision or causing students to wait for long periods before the first bell and again after afternoon dismissals.

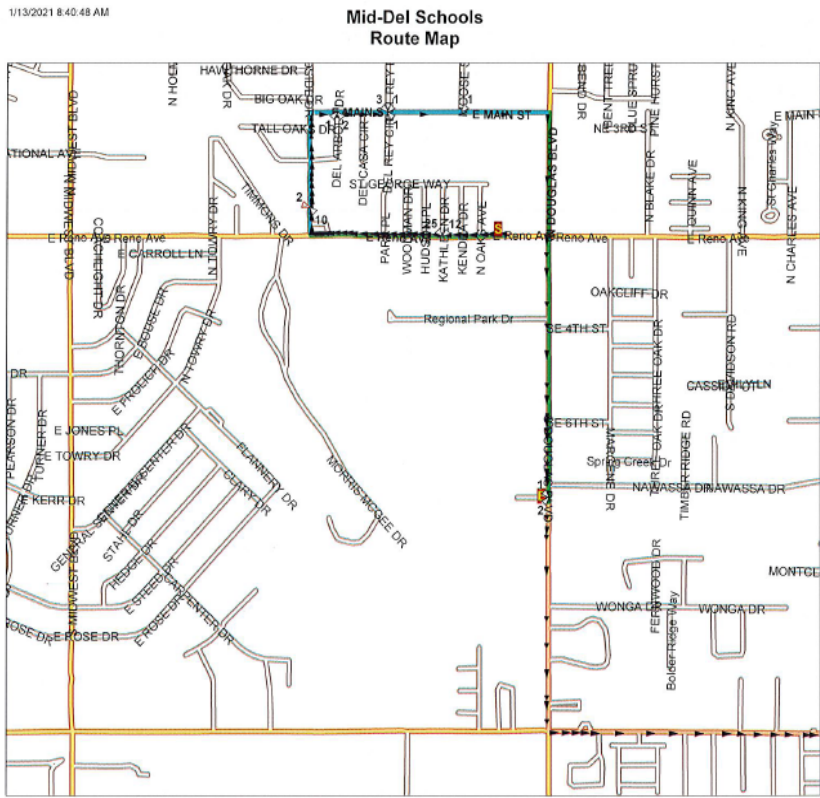
The MDPS transportation department uses routing software to develop and maintain its bus routes. Department documents noted that routes are regularly reviewed to see how many students are riding and whether routes can be combined to save time or money.

For 2020-21, the MDPS school start and end times are:

- Elementary – 9:00 a.m. to 3:50 p.m.
- Middle – 8:25 a.m. to 3:20 p.m. or 7:45 a.m. to 2:45 p.m.
- High – 7:45 a.m. to 2:50 p.m.

In interviews, transportation department staff indicated they were unaware of these times and that they were not considered in developing/maintaining the bus routes and schedule. District staff instead stated that they were working from “some document” that was generated when they were first hired. The document could not be produced, nor any other such document giving credence to the arrival times be replicated, but district staff was certain the schools gave this information to the transportation department a long time ago.

Prior to the COVID-19 pandemic, MDPS bus routes had basically remained the same for many years, and a pattern of driving set routes along a set corridor was the normal process. Routes were altered during the pandemic to account for social distancing needs. Prior to and during the pandemic, each driver receives a route map and route directions that includes the names of students to pick up at each stop (**Exhibit 5-49**).

Exhibit 5-49

Route:	CAHS 8A	Desc:	CARL ALBERT HS AM
Vehicle:		Driver:	
Anchor:	CAHS	Max Load:	61
Start Time:	6:59 AM	Arrival Time:	7:15 AM
Pickups:	61	Transfers On:	
Distance:	3.87 mi.	Transfers Off:	0
		Days:	MTWHF

1/13/2021 8:41:02 AM

Bus Driver Directions For CAHS 8A CARL ALBERT HS AM CARL ALBERT HS AM

Mid-Del Schools

Page 1

Route: CAHS 8A CARL ALBERT HS AM

Bus: [REDACTED]

Driver: [REDACTED]

Anchor: [REDACTED] T HS

Start Time: 06:59 am

End Time: 07:15 am

Total Time: 15:07

Distance: 3.87 mi.

Total Riders: 61

Max Load: 61

Route Days: MTWTF

Schedule Day: Monday

Driver Sign-On Time: N/A

Driver Sign-Off Time: N/A

			Distance	Pick Up	Drop Off
6:59 am	START	E Reno Ave No Intersection			
	Continue on	E Reno Ave	0.13		
7:00 am	STOP	Pedestrian Crossing Light @ Kathleen & Reno		37	
		<u>PICK UP</u>			
		[REDACTED]			
		ID: 73420			
		[REDACTED]			
		ID: 72610			
		[REDACTED]			
		ID: 42662			
		[REDACTED]			
		ID: 10054			
		[REDACTED]			
		ID: 22911			
		[REDACTED]			
		ID: 15685			
		[REDACTED]			
		ID: 20979			
		[REDACTED]			
		ID: 13491			
		[REDACTED]			
		ID: 13075			
		[REDACTED]			
		ID: 22915			
		[REDACTED]			
		ID: 72968			
		[REDACTED]			
		ID: 21645			
		[REDACTED]			
		ID: 14031			
		[REDACTED]			
		ID: 34852			
		[REDACTED]			
		ID: 11144			
		[REDACTED]			
		ID: 73360			
		[REDACTED]			
		ID: 34769			

Source: MDPS, Transportation Office, February 2021

According to many MDPS stakeholders, bus routes are routinely early for the morning drop-off and late for the afternoon dismissal. The morning drop-off times generally did not match the established bell times. According to surveys, focus groups, and interviews conducted by the consulting team, bus arrival times have not matched order the scheduled bell times at the schools for the past ten years. In focus groups, principals provided these observations:

- At elementary schools, buses routinely arrive 15 minutes or more before the school doors open for breakfast. Drivers are told to hold students on the bus until a responsible adult is present to receive them in the school. However, there have been many instances where staff opens the school doors only to find students waiting there, with no bus in sight.
- In the afternoon, elementary school principals reported that buses are often not present when school lets out. One principal said that the buses were late to their school “every day” last year.
- At the middle schools, buses are routinely dropping students off at 7:00 a.m. even though the school doors do not open until 7:20 a.m. and school does not start until 7:45 a.m. At another middle school, the principal reported that buses routinely drop students at 7:30 a.m. for a school start time of 8:25 a.m. That school developed an unpaid duty period in order to have an adult on hand to provide supervision; prior to that, the bus drivers were dropping students off and leaving them unsupervised.
- In the afternoon, one middle school principal noted that they are supposed to have 14 buses. If there are ten buses on campus at dismissal time, it is a “great day.”
- High school principals noted that the buses are generally on time to their schools in the morning. However, some students are picked up as much as 40 minutes before the start of school so that some buses can do two high school runs.
- In the afternoon, the high school principals stated that students wait at school as long as 40 minutes for the bus to pick them up.
- High school principals also noted that a number of buses are also doubled up in the afternoon. The bus will do a run with a group of students, then come back to the high school to pick up another group of students. One principal stated that three of the ten buses assigned to their school does this every day, resulting in one segment of the student body getting home much later than other students. The principals stated that the same students who are picked up overly early in the morning are also the ones taken home much later than others.
- When asked whether they thought the current service problems were caused by a driver shortage, principals noted that the poor on-time performance problems have been going on for ten or more years.

Based on the published routes and the observations of stakeholders, it appears that the root cause of poor on-time performance is not a lack of drivers, but poor route planning and scheduling. In breakfast observations, the consulting team observed a number of buses dropping students before the cafeteria was open to serve students breakfast. A review of route sheets show a variety of

planned morning drop times that do not seem to correlate to when schools open or when breakfast is served.

As a general rule, bus routes should be planned so that students arrive to school in time for breakfast and are picked up immediately after the end of the school day. Students should not be left unsupervised at school in the mornings. Student ride times should be minimized and no group of students should have substantially longer ride times unless they live particularly far from their school.

RECOMMENDATION

Implement morning bus routes that drop students no earlier than 15 minutes prior to the start of school and afternoon bus routes that pick up students from their schools within five minutes of the end of school.

The current poor on-time performance of MPDS school buses is unacceptable. The transportation department should review all the current school bell times and generate routes accordingly. Route times should be set to arrive no earlier or later than 15-20 minutes before the scheduled school start so that students can take part in breakfast. In no cases should routes be schedule so that students are left waiting more than a few minutes for a ride home after school. Given the staffing MDPS has available to tackle the routing challenge, the district may need to hire an outside expert to complete an overhaul of all bus routes in the summer of 2021. As part of this work, the district should review whether modifications to current bell times results in a reduced need for buses.

FISCAL IMPACT

This recommendation can be implemented with existing resources, but the district will likely better and more quickly succeed in implementing this recommendation if it contracts with an external firm. A complete overhaul of bus routes is needed and the district has limited staff with routing skills. The consulting team estimates the cost of hiring a routing firm to be approximately \$40,000. However, much of that cost (or more) is likely to be recouped in annual savings from a reduced need for buses, particularly if the district is amenable to some adjustments in school start/end times to minimize bus requirements. The expected improvements in on-time performance, while not directly linkable to a cost savings, should be valued by school-based staff, students, and families.

Recommendation	2021-22	2022-23	2023-24	2024-25	2025-26
Improve bus routes.	(\$40,000)	\$0	\$0	\$0	\$0



FINDING 5-31

There is a lack of communication and effective implementation of bus discipline procedures in MDPS. There is confusion as to who dispenses discipline when on the school buses, should an issue arise.

When there is an incident on a bus, the bus driver completes a form that includes 17 predefined categories and one “other” category (**Exhibit 5-50**). The reports are then submitted to principals

for resolution. During the site visit, the consulting team learned that many issued reports have gone unattended, with no resolution given to the bus drivers or discipline issued for the student, even when a student is reported for repeated incidents. This lack of response has created an atmosphere of discontent with the operational staff, particularly bus drivers. Several bus drivers reported that they keep logs of incidents for which no discipline has occurred.




Exhibit 5-50
MDPS Transportation Unsafe Conduct Form

	TRANSPORTATION DEPARTMENT UNSAFE CONDUCT REPORT																					
<p style="text-align: center;">NOTICE TO: Principals • Teachers • Parent/Guardian</p> <p>Distribution of Copies: <input checked="" type="checkbox"/> White – Principal <input checked="" type="checkbox"/> Yellow – Parent/Guardian <input checked="" type="checkbox"/> Pink – Bus Driver</p> <ol style="list-style-type: none"> 1. The purpose of this report is to inform you of an unsafe conduct incident on the school bus that involved the student listed below. 2. You are urged to both appreciate the action taken by the driver and to cooperate with the corrective action initiated 3. All students in our school system who ride a bus are subject to district rules and regulations while riding the bus and at bus stops. 4. Any behavior which distracts the driver is a very serious hazard to the safe operation of the vehicle, and as such, jeopardizes the safety of all passengers. 																						
<p>To Be Completed by Driver • Please Print Driver's Name: _____ Route #: _____</p>																						
Student's Name: _____	Grade: _____	School: _____																				
<p>Type of Unsafe Conduct: Date: _____ Time: <input type="checkbox"/> AM <input type="checkbox"/> Noon <input type="checkbox"/> PM</p> <table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/> Failure to Remain Seated</td> <td><input type="checkbox"/> Unnecessary Noise</td> <td><input type="checkbox"/> Eating / Drinking</td> <td><input type="checkbox"/> Littering</td> </tr> <tr> <td><input type="checkbox"/> Refusing to Obey Driver</td> <td><input type="checkbox"/> Fighting</td> <td><input type="checkbox"/> Pushing / Tripping</td> <td><input type="checkbox"/> Lighting Matches</td> </tr> <tr> <td><input type="checkbox"/> Smoking on the Bus</td> <td><input type="checkbox"/> Throwing Objects</td> <td><input type="checkbox"/> Hanging out of Window</td> <td><input type="checkbox"/> Spitting</td> </tr> <tr> <td><input type="checkbox"/> Bothering Others</td> <td><input type="checkbox"/> Vandalism</td> <td><input type="checkbox"/> Safety Procedures</td> <td><input type="checkbox"/> Profanity / Language</td> </tr> <tr> <td colspan="2"><input type="checkbox"/> Disrespectful Comments / Actions toward Driver</td> <td colspan="2"><input type="checkbox"/> Other: _____</td> </tr> </table> <p>Details of Incident: _____</p> <p style="text-align: right;">Driver's Signature: _____</p> <p>Action Taken By Principal: _____</p>			<input type="checkbox"/> Failure to Remain Seated	<input type="checkbox"/> Unnecessary Noise	<input type="checkbox"/> Eating / Drinking	<input type="checkbox"/> Littering	<input type="checkbox"/> Refusing to Obey Driver	<input type="checkbox"/> Fighting	<input type="checkbox"/> Pushing / Tripping	<input type="checkbox"/> Lighting Matches	<input type="checkbox"/> Smoking on the Bus	<input type="checkbox"/> Throwing Objects	<input type="checkbox"/> Hanging out of Window	<input type="checkbox"/> Spitting	<input type="checkbox"/> Bothering Others	<input type="checkbox"/> Vandalism	<input type="checkbox"/> Safety Procedures	<input type="checkbox"/> Profanity / Language	<input type="checkbox"/> Disrespectful Comments / Actions toward Driver		<input type="checkbox"/> Other: _____	
<input type="checkbox"/> Failure to Remain Seated	<input type="checkbox"/> Unnecessary Noise	<input type="checkbox"/> Eating / Drinking	<input type="checkbox"/> Littering																			
<input type="checkbox"/> Refusing to Obey Driver	<input type="checkbox"/> Fighting	<input type="checkbox"/> Pushing / Tripping	<input type="checkbox"/> Lighting Matches																			
<input type="checkbox"/> Smoking on the Bus	<input type="checkbox"/> Throwing Objects	<input type="checkbox"/> Hanging out of Window	<input type="checkbox"/> Spitting																			
<input type="checkbox"/> Bothering Others	<input type="checkbox"/> Vandalism	<input type="checkbox"/> Safety Procedures	<input type="checkbox"/> Profanity / Language																			
<input type="checkbox"/> Disrespectful Comments / Actions toward Driver		<input type="checkbox"/> Other: _____																				

Source: MDPS Transportation Office, February 2021

The district distributes a “School Bus Rider Handbook” that includes student conduct guidelines (**Exhibit 5-51**). The guidelines outline responsibilities of students, parents, bus drivers, and school administrators in ensuring appropriate student bus behavior.

Exhibit 5-51 Portion of MDPS School Bus Rider Handbook

<div style="border-bottom: 1px solid black; margin-bottom: 10px;"> <h4 style="margin: 0;">LOST & FOUND</h4> <div style="text-align: right;"></div> </div> <p>Items accidentally left on the school bus will generally be kept on the bus by the driver for one or two days. If unclaimed, items will be turned in to the respective school. If unable to determine the school, items will be placed in the Transportation Department's Lost & Found box.</p> <div style="border-bottom: 1px solid black; margin-bottom: 10px;"> <h4 style="margin: 0;">SAFE CONDUCT GUIDELINES</h4> <div style="text-align: right;"></div> </div> <p>A student's behavior on the bus directly impacts the safety of all other students on the bus. To safely transport students, the bus driver must be able to concentrate on driving the bus without distractions from students who are misbehaving; therefore, unacceptable behavior by students will not be tolerated and will ultimately result in loss of bus riding privileges.</p> <p>In addition, the quality of the ride and atmosphere inside the bus affects the student's ability to learn and his/her attitude for the whole day. Therefore, it is important that other, disruptive students, not be allowed to negatively impact a child's school day. Students who disrupt the bus will not be allowed to ride the bus.</p> <p>Parents should also be aware that the inside of a bus is a confined space where children are sitting very close together, usually with several age groups mixed together. This creates an atmosphere where even minor behaviors can be annoying to other students and cause conflicts. Also, since so many children are together at the same time, peer pressure may cause a child to act out, when under other circumstances, the child may not. Because of these factors, which are unique to the bus, a child may not exhibit the same behavior on the bus as he/she does in the classroom, at home, or in a less stressful environment. Parents are requested to instruct their children in appropriate bus behavior and tolerance. Please help reinforce the authority of the bus driver as you would a teacher's authority in the classroom.</p>	<div style="border-bottom: 1px solid black; margin-bottom: 10px;"> <h4 style="margin: 0;">SAFE CONDUCT GUIDELINES (CONT.)</h4> <div style="text-align: right;"></div> </div> <p>Drivers are trained to recognize and deal appropriately with misbehavior. They do not arbitrarily choose a student to "pick on". If a child is continually getting in trouble on the bus, it is because of some behavior that is inappropriate or may be because of the other children the child is choosing to sit with. Many times, the best way to keep a child out of trouble is to separate him/her from other children who are not making good decisions or are causing the child to act out. For these reasons, the bus driver's second step, after talking, is to assign a seat. Parents, or the child, can request an assigned seat to keep the student out of trouble.</p> <p>Parents should also recognize that the driver's attention is divided between the traffic outside the bus and the children inside the bus. A driver can only monitor students through a mirror while maneuvering a large vehicle through heavy traffic. Misbehavior, which distracts the driver's attention, could result in a catastrophe, while the same behavior in the classroom may result in only a slight disruption. Therefore, misbehavior and/or unsafe conduct cannot be tolerated on the bus. Parents please keep these factors in mind when instructing your children in bus behavior or in dealing with unsafe conduct on the bus.</p> <p>Generally, the bus driver will take the following approach in handling unsafe conduct problems on the bus.</p> <p>A. For minor, disruptive misbehavior such as not remaining seated, name calling, eating on the bus, etc., a student may receive the following:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 30%;"><i>1st Offense</i></td> <td>Verbal warning by the driver.</td> </tr> <tr> <td><i>2nd Offense</i></td> <td>Assigned seat for a minimum of three (3) days, but not limited to three (3) days. Bus drivers have the authority to assign seats to any or all students for any length of time for reasons they deem appropriate.</td> </tr> <tr> <td><i>3rd Offense</i></td> <td>An Unsafe Conduct Report will be submitted, by the bus driver, to the school principal</td> </tr> </table>	<i>1st Offense</i>	Verbal warning by the driver.	<i>2nd Offense</i>	Assigned seat for a minimum of three (3) days, but not limited to three (3) days. Bus drivers have the authority to assign seats to any or all students for any length of time for reasons they deem appropriate.	<i>3rd Offense</i>	An Unsafe Conduct Report will be submitted, by the bus driver, to the school principal
<i>1st Offense</i>	Verbal warning by the driver.						
<i>2nd Offense</i>	Assigned seat for a minimum of three (3) days, but not limited to three (3) days. Bus drivers have the authority to assign seats to any or all students for any length of time for reasons they deem appropriate.						
<i>3rd Offense</i>	An Unsafe Conduct Report will be submitted, by the bus driver, to the school principal						
<div style="display: flex; justify-content: space-between;"> Page 10 • TRANSPORTATION DEPARTMENT • </div>	<div style="display: flex; justify-content: space-between;"> • TRANSPORTATION DEPARTMENT • Page 11 </div>						

Source: MDPS Bus Rider's Handbook, February 2021

In focus groups, school principals also expressed some frustrations with the problem student behaviors on buses. One noted that 60 percent of all the discipline issues she handles are bus discipline problems. Other comments included:

- One indicated she created her own discipline policy for bus students because it was consuming a great deal of her time. Her response was a two-step system: 1. warning, 2. two-day bus suspension.
- Another principal has a different discipline matrix for bus offenses, starting with a three-day bus suspension. This indicates a lack of consistent procedure across the district.
- Some drivers are allowing students to be bus monitors – those students are allowed to walk around on the bus while it is in motion, which is a safety violation.

- One principal passes out bus rules to parents and requires them to sign it. This practice is not consistently followed across the district.
- One principal has required seating charts. She makes them for the bus drivers and gives the drivers labels to use on them. This practice is not consistently followed across the district.

In Edmond Public Schools, the assistant director for transportation handles all bus discipline issues, serving as a bridge between drivers and school administrators. At the time the consulting team reviewed the Edmond operation, the assistant director was receiving all bus discipline referrals, supervising their input into the district's student information system, meeting with school administrators on each incident, and informing drivers of discipline consequences administered. Edmond staff reported high satisfaction with the use of a single point-of-contact within the transportation department for discipline issues.

RECOMMENDATION

Clarify and implement effective bus discipline procedures.

Discipline reports submitted to the principal from bus drivers should receive attention in a timely manner. Each report should be filed for records management, at both the school level and in the transportation office. Both the transportation department and school administrators should make sure every student riding on the school buses is aware of what behavior is expected, as well as the consequences for bad behavior.

The transportation director should assign the route supervisor the responsibility as the primary point of contact within the transportation department for managing the student discipline process. Every bus referral should be submitted to the school principal and the transportation department. The transportation secretary should be assigned responsibility for tracking the submission and resolution of all bus incidents. Making these assignments would support equitable treatment of incidents and provide both drivers/monitors and school administrators with consistent contacts for bus issues. In addition:

- The reduction in time spent chasing referral details and potential eventual reduction in referrals overall will free time for the school administrators.
- The route supervisor can provide coaching as needed to bus drivers. If there are systemic problems, the route supervisor can arrange for additional training for groups of bus drivers.
- Employee morale should show an improvement as drivers receive updates on their referrals.

FISCAL IMPACT

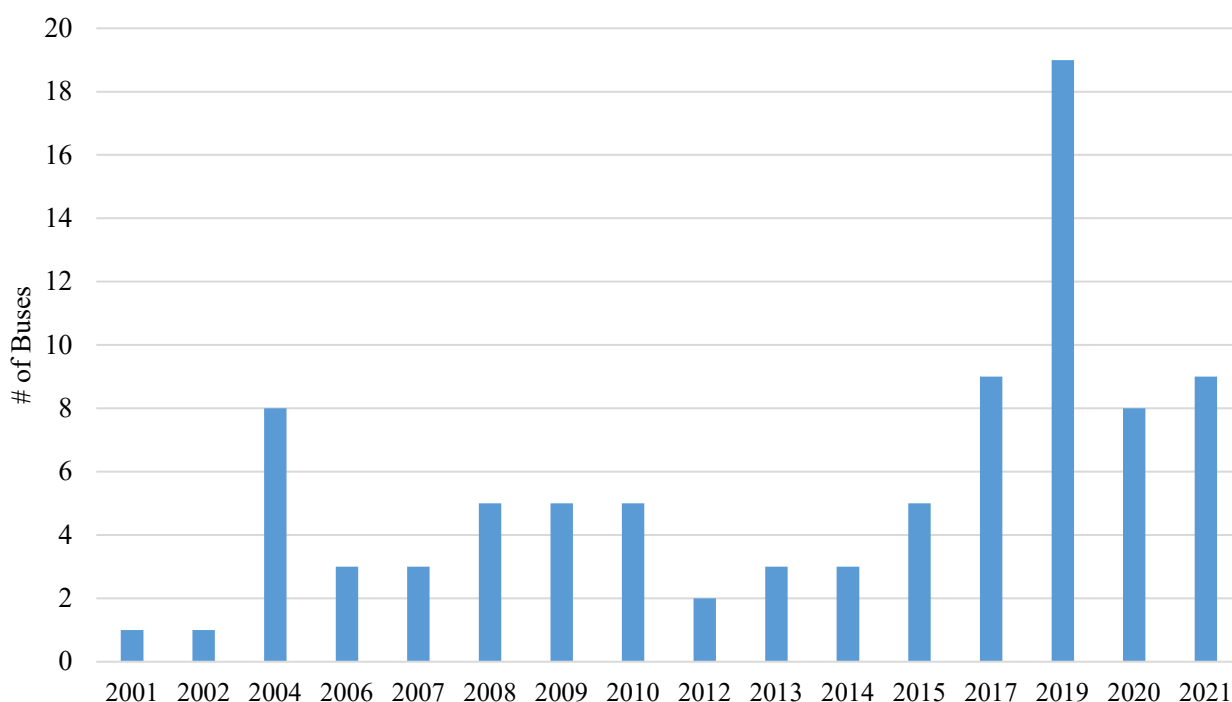
This recommendation can be implemented with existing resources.

FINDING 5-32

The school district utilized a bond referendum during the 2017 budget cycle to purchase vehicles. MDPS secured a bond that ensures the replacement of buses older than 15 years of service as well as support vehicles. This standard will ensure buses are compliant with evolving regulations and vehicle specifications. This funding stream for new buses was implemented to replace older buses annually as the old buses aged out of usable service.

The average age of the MDPS bus fleet was 6.9 years at the time of the onsite work, but 13 buses were 15 years or older (**Exhibit 5-52**).

Exhibit 5-52
Age of MDPS Bus Fleet



Source: MDPS Transportation Office, February 2021⁴⁷

During the 2017 budget cycle a bond was approved for \$9.3 million. It was/is to be issued in ten series. Series One was issued for \$1.2 million in January 2018 (**Exhibit 5-53**). The remaining series are to be issued annually in July for \$900,000.00 which began in July 2019 and will end in July 2026.

⁴⁷ It is noted, as for this review, there are four classes of buses present in the MDPS Fleet. Buses may be in service under a specific function, such as a “Special Needs Bus” which would call for the vehicle being listed as a “Lift Bus”, but other terms may apply to a bus without a wheelchair lift apparatus, placed it in a functioning class of a “Passenger Bus”, but used in a special needs function.

Exhibit 5-53 MDPS Approved Bond Worksheet

Mid-Del Schools Bond 39 - Kays Format								
2016-2017								
Updated as of 3-31-2018								
Election:	Series 1 - \$1,200,000 --Jan. 23, 2018	Series 3 - \$900,000 July 2019	Series 9 - \$900,000 July 2025					
	Series 2 - \$900,000 July 2018	Series 4 - \$900,000 July 2020	Series 10 - \$900,000 July 2026					
10/10/2017	Total Bond Issue: \$9,300,000							
		Series 1	Series 1-10	FY18		Total	Percent	Balance
		Resolution	Resolution	Expenditures	Encumbrances			
Project #:	PROPOSITIONS:	Amount	Amount	2017-2018	2017-2018	Expended	Expended	3/31/2018
053	Purchase Transportation Equipment	1,200,000.00	1,200,000.00		0.00	-	0.00%	1,200,000.00
099								0.00
	END BALANCE IN FUND 35	1,200,000.00	1,200,000.00	-	-	-	0.00%	\$ 1,200,000.00

Q:\Bond Fund\Bond35\Bond35 Resolution Spreadsheet-Kay's format.xlsx

Source: MDPS Transportation Office, February 2021

Rotating and replacing an aging fleet with newer buses:

- costs less to operate.
- substantially increase the operating mileage between repairs.
- improves average vehicle mileage.
- gives the district vehicles with newer technology; and
- helps ensure the fleet meets the latest specifications.

COMMENDATION

MDPS has developed a plan to replace older school buses annually.

FINDING 5-33

The district provides effective vehicle maintenance. This includes:

- Sufficient maintenance staffing. Vehicle maintenance is handled by two full-time mechanics, with a third to be hired. The mechanics repair and diagnose gasoline/diesel vehicles and maintain the fleet and support vehicles. If the problem is too severe and vehicle repairs require more mechanical work than the facility can handle, the vehicle is sent to a local repair shop.
- Regular preventive maintenance. Preventive maintenance inspections are performed each day on all buses. The transportation mechanic prepares a list of repairs according to most needed, and proper attention is given each issue. The transportation mechanics maintain the daily

inspections records for the school year and have instituted a 120-day preventative maintenance schedule, which coincides with the state required annual inspections.

- Use of SDE forms: The transportation department uses the SDE forms to document pre-trip inspections. The transportation fleet supervisor and the mechanics maintain and have incorporated required and recommended user forms and best practices in the daily operation of pupil transportation. Further, the mechanics have incorporated these vital forms from the SDE in the areas of safety and regulation to the knowledge and use archive and have provided these materials to the bus drivers during mandated in-service meetings. SDE forms in use include:
 - MDPS Pre-Trip Sheets: (**Exhibit 5-54**);
 - Emergency Evacuation Sheets for Bus Passengers;
 - Oklahoma School Bus Inspection Guide; and
 - School Bus Idling Reduction.

Exhibit 5-54 MDPS Pre-Trip Sheets

SDE Pre-Trip form OAC 210:30-5-6
6/2016 Chapter 2 of the Oklahoma School Bus Driver's Manual has thorough Pre-Trip instructions

District _____
 Dates _____ Bus _____
 Starting Mileage _____
 Ending Mileage _____
 Driver _____
 V - satisfactory condition
 X - repair needed
 O - Repair completed

Exterior Cross through days for weekend trips

	mo	tu	we	th	fr
Lights, Lenses and Reflective material					
Windshield					
Windows					
Wipers					
Service Door					
Mirrors					
Bumpers					
Fuel Cap/Door					
Drive Shaft					
Exhaust					
Frame					
Suspension					
Brakes					
Stop Arm					
Battery Box					
Optional equipment					

Engine Compartment

Fluids					
Belts and Hoses					
Fuses					
Wiring					
Air compressor					
Alternator					
Water pump					
Steering assembly					
Suspension					
Wheels					
Tires (CTI)					
Rims/Lugs					
Hubs					

Inside

Step well					
Emergency Equipment					
Driver's Seat					
Mirrors					
Windshield					
Wipers					
Switches and gauges					
Lights (dome)					
Exits					
Seats					
Aisles					

Air Brake Test

Pressure Retention					
Low pressure warning					
Spring brake test					
Pressure build					
Parking brake hold					
5mph test					

Hydraulic Brake Test

Brake hold test (Emergency/Parking)					
Pedal pressure test					
Reserve system test (if equipped)					

Other Items (if equipped)

Lift					
Securement Equipment					
Crossing Gates					
A/C					

Comments on defects

Repairs complete by _____
 Date _____

POST TRIP Child Check

--	--	--	--	--	--

Source: OK SDE/ MDPS Transportation Office, February 2021

The fleet maintenance operation is self-sufficient, using best practices established by SDE and MDPS policies. Over the course of the school year the mechanics have instituted a 120-day preventative maintenance schedule that allows buses to be checked on a more frequent cycle than

the one-year cycle accepted by the State of Oklahoma standard. The transportation department tracks the status of bus problems on a whiteboard (**Exhibit 5-55**).

Exhibit 5-55
Maintenance Office “Whiteboard”

Protocol	Buses out of Service						
	Route	Bus	Problem	Spare	Mechanic	Date	Time
Outside Service				Ted			
	RT 8		wiper blades				
		121	window			2-1-21	
	Route	Bus	Problem	Spare	Mechanic	Date	Time
		154	Brakes			1-29-21	
	RT 75	151W	RT 73	NAISKE	Ted	12-10-20	
		155	Brakes ?		Ted	12-17-20	
		128			Ted		

Source: MDPS Transportation Office, February 2021

The consulting team inspected a sample of ten of the 89 MDPS buses (**Exhibit 5-56**). Due to the COVID-19 pandemic, buses that were inspected did have hand sanitizer and masks. The general location of these items varied, and in some instances the containers were not secured. Only one problem was found. On one bus the consulting team found a tire check baton on the floor. The baton could be used as a weapon and should be kept secure and out of reach of students (**Exhibit 5-57**).

Exhibit 5-56
Bus Inspection Completed by the Consulting Team⁴⁸

Bus	187	190	193	196	201	216	217	218	L83	L86
Mirrors	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Glass	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Tires	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Body Damage	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Seats	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Flooring	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Emergency Door	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Clean Inside	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Clean Outside	✓	✓	✓	✓	✓	N/R	✓	✓	✓	✓
Fire Ext.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
First Aid	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Body Fluid Kit	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Triangles	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Placard (Sleeping Kids)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

✓ = OK, N/R = Needs Review

Source: Prismatic, February 2021

⁴⁸ Due to a major winter weather event at the time of the onsite work, a near perfect inspection was impossible on the entirety of the fleet.

**Exhibit 5-57
Bus 216**

Bus Front View



Bus Driver's Seat



Aisle to Rear - Tire Check Baton



Source: Prismatic, February 2021

COMMENDATION

The MDPS transportation department provides effective bus maintenance.

Appendix A:
Staff Survey Results

Staff Survey

Surveys Completed: 880

Totals may not add to 100 percent due to rounding.

Statistical Data

How long have you been employed by the school district?	
5 years or less	39%
6 – 10 years	23%
11 – 15 years	12%
16 – 20 years	8%
21 years or more	18%
What is your role in the school district?	
School Administrator	7%
Classroom Teacher	59%
Other Certified (Librarian, Guidance Counselor)	9%
School Aide/Nurse	5%
Instructional Aide	5%
Other Support Staff (Cafeteria, Office, Custodial)	19%

Survey Questions

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
1	Most administrative practices in our district are highly effective and efficient.	6%	45%	16%	28%	6%
2	Administrative decisions are made promptly and decisively.	8%	43%	16%	26%	7%
3	Central office administrators are easily accessible and open to input.	8%	34%	22%	25%	11%
4	Authority for administrative decisions is delegated to the lowest possible level.	3%	17%	48%	24%	9%
5	The district ensures adequate input from teachers and staff on most important decisions.	4%	27%	14%	34%	20%

	Survey Questions	Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
6	The district gives student needs a high priority when making major decisions.	13%	47%	13%	20%	7%
7	Our district has too many layers of administrators.	25%	27%	28%	18%	3%
8	Most district administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient.	7%	40%	39%	11%	3%
9	Central office administrators are responsive to school needs.	6%	34%	25%	26%	9%
10	School-based personnel play an important role in making decisions that affect schools in our district.	6%	31%	23%	29%	11%
11	Parents/families play an active role in decision making in our schools.	10%	39%	22%	23%	5%
12	School-based personnel value parent/family input and engagement.	15%	56%	18%	9%	2%
13	Our district works with local businesses and groups in the community to help improve education.	8%	45%	35%	9%	3%
14	Parents/families participate in school activities and organizations.	4%	45%	19%	27%	5%
15	Parents/families receive regular communications from the district.	19%	59%	12%	8%	2%
16	The curriculum is broad and appropriately challenging for most students.	8%	57%	18%	13%	4%
17	The district's curriculum is aligned from grade to grade and from class to class.	7%	49%	27%	12%	4%
18	Teachers in our schools know the material they teach.	19%	58%	15%	7%	1%

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
19	Teachers have adequate supplies and equipment needed to perform their jobs effectively.	4%	24%	13%	40%	18%
20	Teachers know how to use the technology they have for teaching.	5%	45%	17%	28%	5%
21	The district lacks sufficient instructional technology.	16%	31%	26%	21%	6%
22	Test data from district-adopted benchmarks and mandated end-of-year tests are used to improve the district's curriculum.	3%	27%	47%	17%	6%
23	Teachers effectively use student data to improve instructional practices.	10%	50%	27%	11%	1%
24	Sufficient student services are provided in this district (e.g., counseling, speech therapy, health).	9%	46%	15%	21%	8%
25	The district adequately implements policies and procedures for the administration and coordination of special education.	7%	36%	36%	17%	4%
26	There is generally cooperation and collaboration regarding special education issues in our district.	7%	36%	34%	18%	5%
27	The district adequately implements policies and procedures for the administration and coordination of the English Language Learner Program.	5%	30%	54%	9%	2%
28	The district provides documents to parents in their native language.	5%	30%	52%	10%	3%

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
29	Most staff in our school/department are intentional in honoring the cultural differences within our student body.	15%	58%	17%	8%	2%
30	Most staff in our school/department treat student diversity as an asset and not a deficit.	19%	56%	15%	9%	2%
31	Most staff in our school/department have high expectations for all students regardless of their race, ethnicity, or language.	27%	55%	9%	8%	2%
32	Salary levels in this district are competitive.	2%	21%	21%	34%	23%
33	This district values diversity in its employees.	10%	49%	28%	9%	4%
34	I have an accurate, written job description to guide me in my work.	12%	53%	13%	15%	7%
35	My supervisor evaluates my job performance annually.	31%	60%	5%	3%	1%
36	My salary level is adequate for my level of work and experience.	3%	19%	11%	42%	25%
37	I am actively looking for a job outside of this district.	7%	11%	23%	32%	26%
38	I am very satisfied with my job in this district.	14%	44%	17%	21%	5%
39	District leaders enforce high work standards.	11%	50%	21%	14%	4%
40	I feel that my work is appreciated by my supervisor.	34%	44%	7%	10%	4%
41	Teachers who do not meet expected work standards are disciplined.	3%	16%	45%	24%	12%
42	Staff (excluding teachers) who do not meet expected work standards are disciplined.	4%	18%	48%	20%	11%
43	I feel that I am an integral part of team here.	22%	52%	10%	12%	5%

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
44	The work standards and expectations in this district are equal to or above those of most other school districts.	9%	35%	40%	13%	4%
45	There is adequate high quality professional development for principals and teachers.	10%	39%	26%	20%	4%
46	Non-teaching staff has opportunities for professional development relevant to their responsibilities.	5%	26%	46%	16%	6%
47	At least some of the required annual professional development is offered online.	8%	53%	26%	10%	2%
48	Our district has an effective teacher recruitment plan.	3%	21%	61%	10%	5%
49	Funds are managed wisely to support education in this district.	3%	22%	39%	25%	11%
50	The budgeting process effectively involves administrators and staff.	3%	17%	44%	25%	12%
51	My school/department allocates financial resources equitably and fairly.	5%	29%	43%	16%	7%
52	The purchasing process takes too long.	6%	20%	52%	19%	3%
53	Our schools have sufficient space and facilities to support the instructional programs.	5%	35%	19%	30%	11%
54	Our facilities are clean.	12%	49%	9%	20%	9%
55	Our facilities are well maintained.	9%	42%	11%	28%	10%
56	Parents, citizens, students, faculty, and staff have opportunities to provide input into facility planning.	3%	21%	39%	27%	11%
57	The district effectively encourages staff to minimize utilities use.	4%	36%	38%	17%	4%

	Survey Questions	Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
58	The process for requesting a facility repair is inefficient.	7%	25%	30%	34%	5%
59	There are facility concerns throughout the campus.	13%	37%	31%	16%	3%
60	I know what to do during a crisis or an emergency on campus.	34%	57%	4%	4%	1%
61	Students in this district are accepting of other students who are different.	13%	57%	16%	10%	3%
62	Student bullying is a problem in this district.	5%	22%	34%	35%	4%
63	Adult bullying is a problem in this district.	6%	18%	32%	35%	8%
64	Poor student behavior is a problem in this district.	11%	40%	23%	24%	2%
65	The food services department provides nutritious and appealing meals.	8%	39%	27%	19%	7%
66	I often purchase the school lunch meal.	3%	10%	14%	29%	45%
67	Cafeteria staff are helpful and friendly.	25%	47%	21%	5%	2%
68	Cafeteria facilities are clean and neat.	22%	53%	19%	4%	1%
69	School cafeterias are calm environments in which to eat.	14%	44%	25%	13%	5%
70	Many students bring their lunch from home every day.	5%	26%	44%	19%	6%
71	Buses arrive and depart on time each day.	9%	40%	32%	13%	6%
72	There are enough working buses to meet the needs of the district.	6%	22%	52%	14%	6%
73	Bus drivers maintain adequate discipline on the buses.	4%	17%	69%	8%	2%
74	Buses arrive early enough for students to eat breakfast at school.	9%	46%	40%	4%	1%
75	Our district provides adequate technology training.	7%	40%	18%	27%	9%
76	Our district provides adequate technical support.	11%	51%	13%	19%	6%

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
77	I have adequate equipment and computer support to conduct my work.	10%	55%	10%	18%	7%
78	Administrative computer systems are easy to use.	8%	44%	33%	12%	3%
79	Instructional computer systems are easy to use.	7%	42%	29%	17%	5%
80	The district's technology equipment is often used past its useful lifespan.	23%	39%	26%	11%	1%
81	Many administrative processes are still paper based.	5%	15%	45%	31%	4%

Please grade each of these school district programs and functions.

Department/Topic	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Strategic planning	9%	26%	31%	8%	5%	21%
Community relations and communication	16%	32%	26%	10%	4%	13%
Internal communications	13%	25%	27%	17%	9%	9%
Budgeting	7%	22%	24%	13%	7%	26%
Financial management	8%	23%	21%	12%	7%	28%
Purchasing	8%	24%	23%	9%	5%	32%
Personnel recruitment	8%	25%	22%	8%	5%	32%
Personnel selection	10%	30%	24%	8%	4%	24%
Personnel evaluation	18%	36%	21%	8%	3%	14%
Staff development	14%	35%	26%	11%	4%	4%
Special education	17%	27%	18%	9%	5%	25%
Elementary education	17%	33%	15%	3%	1%	31%
Middle school education	9%	25%	17%	4%	1%	42%
High school education	11%	26%	16%	4%	1%	41%
Alternative education	7%	15%	11%	4%	4%	60%
Facilities planning	7%	19%	22%	9%	6%	37%
Facilities maintenance	11%	26%	26%	14%	9%	14%
Custodial services	14%	28%	25%	14%	13%	6%
Food services	17%	36%	19%	8%	2%	19%
Administrative technology	11%	31%	20%	6%	3%	29%
Instructional technology	11%	32%	22%	12%	6%	16%
Technology management and support	17%	36%	22%	8%	4%	13%
Transportation	12%	32%	17%	4%	2%	33%
Central office administration	10%	26%	23%	12%	10%	19%
School-level administration	36%	34%	13%	3%	2%	12%
School Board members' knowledge of educational needs of students	8%	19%	20%	16%	14%	23%
School Board members' knowledge of operational needs in the district	9%	19%	19%	14%	12%	26%
Superintendent's work as the educational leader of the district	24%	27%	18%	11%	7%	12%
Superintendent's work as the chief administrator of the district	25%	26%	19%	11%	7%	11%
Principals' work as instructional leaders	38%	32%	14%	4%	2%	9%
Principals' work as managers of the staff and teachers	42%	31%	14%	4%	2%	7%
Overall quality of education in this district, compared to other districts in Oklahoma	14%	35%	30%	8%	2%	11%

Written Responses – Summary

If you would like to provide any additional comments about the district, please do so here.
Where is the district doing well? In what areas could it be improved?

Topic Addressed	Percent of comments
Need to improve 1-to-1 technologies	4%
District improvement (Maintenance, areas, organization, etc.)	7%
Cafeteria food	2%
Inefficient resource allocations	7%
Micromanaging problems	7%
Admin staff do not care	2%
Low level of accountability	2%
Canvas issues	2%
Negative Communications	18%
Negative COVID-19 Response	9%
Need for Diversity, Equity, and Inclusion training and processes	5%
Negative facilities maintenance	5%
Favoritism	2%
Lack of discipline	2%
Negative leadership	8%
Negative logistics (purchasing and ops)	5%
Unmotivated staff	8%
Pay worth negative	10%
Lack of planning	3%
Lack of software and apps training	2%
Lack of teacher involvement on decisions and overall	8%
Lack of teacher recognition	6%
Excessive administrative roles	2%

Appendix B:
Parent Survey Results

Parent Survey

Surveys Completed: 3,067

Totals may not add to 100 percent due to rounding.

Grades and Modality

Grade	Percentage
Kindergarten	12%
1	13%
2	13%
3	13%
4	12%
5	13%
6	14%
7	12%
8	13%
9	12%
10	12%
11	11%
12	10%
Other	7%

In-Person with Remote Wednesday	83%
Online Only	12%
Children in both options	5%

Survey Questions

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1	School board members listen to the opinions and desires of parents and community members.	9%	35%	31%	16%	8%
2	School board members know and understand the educational needs of students in the district.	11%	42%	24%	16%	6%
3	The Superintendent is a respected and effective leader.	16%	37%	35%	8%	5%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
4	District and school staffs are accessible to parents.	18%	53%	10%	14%	5%
5	Parents play an active role in decision-making in our schools.	12%	32%	22%	24%	10%
6	Education is the main priority in our school district.	18%	49%	13%	14%	6%
7	In this district, students learn the necessary material to be prepared for the next grade.	14%	56%	11%	14%	5%
8	I receive enough information from the district regarding academic expectations for my child (i.e., student testing, retention, etc.).	14%	46%	11%	22%	7%
9	Teachers are held accountable for ensuring that students learn.	14%	40%	24%	16%	6%
10	Students are treated equitably in this district.	12%	45%	22%	14%	6%
11	Our school can be described as a “good place to learn.”	20%	55%	13%	9%	3%
12	The district spends its money wisely.	7%	21%	49%	15%	8%
13	The district needs to spend more of its budget on its facilities.	10%	26%	49%	13%	2%
14	The district needs to spend more of its budget on classroom supplies.	23%	44%	29%	4%	0.2%
15	The districts ask the community for input when developing its budget.	5%	15%	51%	21%	8%
16	District facilities are open for community use.	3%	11%	57%	20%	8%
17	Students in this district are accepting of other students who are different.	12%	44%	27%	12%	5%
18	Student bullying is a problem in this district.	10%	22%	40%	25%	4%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
19	Poor student behavior is a problem in this district.	8%	21%	42%	26%	3%
20	Drugs are a problem in this district.	5%	11%	54%	22%	8%
21	The school buildings and grounds are safe and secure.	14%	61%	15%	8%	2%
22	I regularly access information via the district website.	15%	59%	10%	14%	2%
23	I regularly use technology to keep up to date on my child's education (emailing teachers, online gradebook, etc.).	29%	56%	6%	7%	2%
24	Teachers know how to use technology in the classroom.	17%	52%	20%	9%	2%
25	Discipline and order are maintained in school cafeterias.	9%	34%	50%	5%	2%
26	I feel welcome at my child's school.	21%	45%	18%	11%	5%
27	My child feels welcome and accepted at school.	25%	55%	10%	8%	2%
28	I receive timely communications from my child's teachers regarding his/her progress in school.	21%	45%	10%	18%	6%
29	My child's school encourages parents to be involved in the school and offers a variety of ways to do so.	15%	36%	24%	19%	6%
30	Teachers have high expectations for my child.	20%	48%	21%	9%	2%
31	My child is appropriately challenged by his/her schoolwork.	16%	56%	12%	12%	3%
32	I am satisfied with the education my child is receiving.	17%	52%	10%	16%	5%
33	My child's school is clean.	20%	51%	24%	4%	1%
34	My child's school is attractive and welcoming.	19%	54%	18%	7%	2%

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
35	My child's school is well maintained.	18%	51%	23%	6%	2%
36	My child feels safe and secure at school.	21%	58%	12%	6%	2%
37	Discipline is fairly and equitably administered in my child's school.	12%	39%	35%	9%	4%
38	My child regularly uses technology at school.	20%	57%	18%	4%	1%
39	My child has regular internet access at home.	52%	42%	2%	2%	2%
40	The school lunch period is long enough for my child to eat.	8%	36%	24%	23%	8%
41	My child often waits longer than five minutes in the lunch line.	7%	16%	66%	8%	2%
42	My child likes the food served in the cafeteria.	4%	23%	28%	26%	19%

Survey Question		Yes	No
43	Does your oldest child regularly ride the bus?	20%	80%

If child rides the bus:

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
44	My oldest child's school bus runs on time nearly every day.	8%	15%	68%	5%	4%
45	My oldest child feels safe riding the bus.	6%	18%	71%	3%	2%
45	Bus drivers effectively handle discipline issues on the bus.	5%	11%	80%	3%	2%
46	The length of my oldest child's bus ride is reasonable	6%	18%	72%	3%	1%

Written Responses – Summary

If you would like to provide any additional comments about the district, please do so here.
Where is the district doing well? In what areas could it be improved?

Topic Addressed	Percent of Comments
A/B Schedule preferred	2%
Perception Academics and Arts are not treated as Athletics	3%
Bathroom maintenance (restrooms need updates, and sanitation/cleaning processes)	1%
Bullying concerns & reports	3%
Canvas comments (negative, not useful for certain grades)	1%
Communications issues (parents feel they could be informed more efficiently, using website, email, phone, and other methods)	17%
Need for more counseling (for students seeking for extra help, and applicants)	2%
Perceived poor COVID-19 response	12%
Diversity, Equity, & Inclusion (negative perception or suggestions on training and dev)	4%
Parents feeling disappointed	3%
Drug concerns	1%
Edgenuity issues, lack of understanding	1%
Perceived favoritism (to certain parents' groups)	1%
Improve technology instruction for teachers, and directions in general	3%
Feel there need to be more investment in students	2%
Feel there should be better investments overall	3%
Lunch concerns (including lunch times and quality of food)	8%
Maintenance concerns (in general)	3%
Request to start in person learning	8%
Parents lost participation	1%
Transportation issues (delays, wait times, skipped stops)	4%

Appendix C:
Students Survey Results

Student Survey

Surveys Completed: 496

Totals may not add to 100 percent due to rounding.

Grades and Modality

Grade	Percentage
Kindergarten	1%
1	1%
2	2%
3	1%
4	0%
5	2%
6	3%
7	8%
8	8%
9	17%
10	13%
11	23%
12	21%
Other	0%

In-Person with Remote Wednesday	68%
Online Only	32%

Survey Questions – All Students

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1	Education is the main priority in our school district.	21%	49%	15%	12%	3%
2	Students learn the necessary material to be prepared for the next grade.	13%	48%	19%	16%	4%
3	I have plenty of choices when selecting academic and elective courses.	15%	47%	13%	20%	4%
4	My school can be described as a “good place to learn.”	12%	46%	22%	13%	7%
5	I feel that I am challenged in my classes.	20%	45%	16%	15%	4%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
6	My teachers have high expectations for me.	27%	44%	20%	6%	2%
7	Most staff in our school have high expectations for all students regardless of their race, ethnicity, or language.	29%	37%	20%	12%	2%
8	All students have equitable access to courses offered at my school.	14%	39%	33%	12%	2%
9	Most adults in my school treat student diversity as a good thing, not a bad thing.	20%	37%	32%	8%	3%
10	I knew what to expect on the state tests.	11%	29%	31%	19%	10%
11	There is at least one adult at school to whom I can go when I have a problem.	32%	37%	13%	8%	10%
12	I have at least one adult in this school who cares about me.	34%	39%	18%	4%	5%
13	I have at least one adult in this school who mentors me.	23%	31%	26%	13%	8%
14	I feel welcomed and accepted by other students in this school.	14%	32%	29%	14%	10%
15	I feel welcomed and accepted by the adults in this school.	18%	44%	26%	8%	5%
16	The school library meets my needs for books and other resources.	18%	32%	41%	6%	3%
17	I have access to good college counseling at this school.	12%	25%	49%	9%	6%
18	I have access to good career counseling at this school.	11%	24%	48%	8%	9%
19	My school connects me to real-world issues and experiences.	10%	28%	22%	24%	18%
20	My teachers communicate regularly with me about my academic progress.	13%	36%	17%	25%	9%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
21	My school is clean.	13%	38%	19%	17%	13%
22	My school is attractive and welcoming.	12%	38%	25%	15%	9%
23	My school building is well maintained.	14%	42%	23%	13%	8%
24	My school building needs a lot of repairs.	17%	22%	32%	22%	7%
25	I feel safe and secure at school.	12%	38%	26%	14%	10%
26	Student bullying is a problem in this school.	15%	21%	37%	17%	10%
27	Students in this school accept each other's differences.	10%	29%	29%	22%	10%
28	The school buildings and grounds are safe and secure.	12%	42%	30%	12%	4%
29	Discipline is fairly and equitably administered in this school.	11%	33%	28%	15%	13%
30	Teachers and staff respect students in this school.	12%	39%	27%	17%	6%
31	Drugs are a problem in this school.	11%	17%	40%	17%	14%
32	Discipline and order are maintained in the school cafeteria.	11%	41%	38%	6%	4%
33	I have enough time to eat my lunch each day.	10%	37%	15%	18%	20%
34	I usually have to wait in line longer than five minutes to get a school lunch.	15%	21%	46%	13%	5%
35	I like the food served in the cafeteria.	6%	14%	35%	22%	23%
36	The cafeteria serves a good variety of food for breakfast.	5%	11%	61%	10%	13%
37	The cafeteria serves a good variety of food for lunch.	6%	21%	41%	15%	16%
38	I regularly use technology to keep up-to-date on schoolwork (emailing teachers, using online gradebook, etc.).	41%	44%	8%	6%	2%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
39	I regularly use computers or other technology at school.	26%	41%	18%	12%	3%
40	The technology available to me at my school is new enough to be useful.	18%	47%	24%	9%	3%
41	Teachers know how to use the technology they have for teaching.	14%	41%	22%	17%	6%
42	I have regular Internet access at home.	53%	37%	5%	3%	2%

	Survey Question	Yes	No
43	Do you regularly ride the bus?	20%	80%

If student rides the bus:

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
44	My bus runs on time nearly every day.	23%	46%	10%	13%	7%
45	Students feel safe riding the bus.	14%	53%	18%	8%	6%
46	Bus drivers effectively handle discipline issues on the bus.	16%	40%	24%	11%	8%
47	The length of my bus ride is reasonable.	23%	54%	13%	7%	2%

Survey Questions – High School Only

% SA + A = % Strongly Agree + % Agree

% SD + D = % Strongly Disagree + % Disagree

Survey Questions		High School Students					
		In-Person Learners n = 293		Online Learners n = 73		All n = 366	
		% SA + A	% D + D	% SA + A	% D + D	% SA + A	% D + D
1	Education is the main priority in our school district.	68%	17%	62%	19%	67%	18%
2	Students learn the necessary material to be prepared for the next grade.	55%	25%	60%	12%	56%	22%
3	I have plenty of choices when selecting academic and elective courses.	61%	28%	58%	29%	60%	28%
4	My school can be described as a “good place to learn.”	58%	22%	51%	18%	57%	21%
5	I feel that I am challenged in my classes.	62%	23%	60%	15%	62%	21%
6	My teachers have high expectations for me.	72%	10%	58%	7%	69%	10%
7	Most staff in our school have high expectations for all students regardless of their race, ethnicity, or language.	65%	16%	64%	16%	65%	16%
8	All students have equitable access to courses offered at my school.	54%	16%	50%	15%	53%	16%
9	Most adults in my school treat student diversity as a good thing, not a bad thing.	59%	10%	47%	21%	57%	12%
10	I knew what to expect on the state tests.	34%	37%	36%	26%	34%	35%
11	There is at least one adult at school to whom I can go when I have a problem.	73%	18%	58%	23%	70%	19%
12	I have at least one adult in this school who cares about me.	77%	10%	70%	5%	76%	9%

Survey Questions		High School Students					
		In-Person Learners n = 293		Online Learners n = 73		All n = 366	
		% SA + A	% D + D	% SA + A	% D + D	% SA + A	% D + D
13	I have at least one adult in this school who mentors me.	56%	21%	51%	23%	55%	21%
14	I feel welcomed and accepted by other students in this school.	44%	26%	42%	26%	44%	26%
15	I feel welcomed and accepted by the adults in this school.	60%	15%	59%	15%	60%	15%
16	The school library meets my needs for books and other resources.	45%	12%	41%	4%	44%	10%
17	I have access to good college counseling at this school.	40%	19%	37%	12%	39%	17%
18	I have access to good career counseling at this school.	36%	20%	36%	15%	36%	19%
19	My school connects me to real-world issues and experiences.	30%	51%	36%	40%	31%	48%
20	My teachers communicate regularly with me about my academic progress.	45%	41%	51%	28%	46%	39%
21	My school is clean.	55%	32%	41%	34%	52%	33%
22	My school is attractive and welcoming.	51%	28%	49%	21%	50%	27%
23	My school building is well maintained.	60%	22%	44%	23%	56%	23%
24	My school building needs a lot of repairs.	37%	35%	44%	22%	39%	32%
25	I feel safe and secure at school.	49%	28%	44%	28%	48%	28%
26	Student bullying is a problem in this school.	33%	31%	38%	16%	34%	28%
27	Students in this school accept each other's differences.	37%	37%	27%	30%	35%	35%
28	The school buildings and grounds are safe and secure.	54%	19%	50%	15%	53%	18%

Survey Questions		High School Students					
		In-Person Learners n = 293		Online Learners n = 73		All n = 366	
		% SA + A	% D + D	% SA + A	% D + D	% SA + A	% D + D
29	Discipline is fairly and equitably administered in this school.	41%	34%	36%	29%	40%	33%
30	Teachers and staff respect students in this school.	49%	26%	40%	25%	48%	26%
31	Drugs are a problem in this school.	33%	29%	29%	22%	32%	27%
32	Discipline and order are maintained in the school cafeteria.	52%	12%	45%	11%	51%	12%
33	I have enough time to eat my lunch each day.	47%	45%	38%	36%	45%	43%
34	I usually have to wait in line longer than five minutes to get a school lunch.	37%	19%	37%	8%	37%	17%
35	I like the food served in the cafeteria.	16%	53%	16%	38%	16%	50%
36	The cafeteria serves a good variety of food for breakfast.	12%	28%	14%	23%	13%	27%
37	The cafeteria serves a good variety of food for lunch.	21%	39%	27%	26%	23%	37%
38	I regularly use technology to keep up-to-date on schoolwork (emailing teachers, using online gradebook, etc.).	88%	6%	85%	6%	87%	6%
39	I regularly use computers or other technology at school.	72%	16%	64%	11%	70%	15%
40	The technology available to me at my school is new enough to be useful.	64%	15%	56%	11%	63%	14%
41	Teachers know how to use the technology they have for teaching.	51%	32%	62%	11%	53%	27%
42	I have regular Internet access at home.	88%	7%	93%	1%	89%	6%

Survey Questions		High School Students					
		In-Person Learners n = 293		Online Learners n = 73		All n = 366	
		% SA + A	% D + D	% SA + A	% D + D	% SA + A	% D + D
	Bus Riders:	n = 63		n = 15		n = 78	
44	My bus runs on time nearly every day.	62%	28%	73%	7%	64%	24%
45	Students feel safe riding the bus.	63%	17%	73%	7%	65%	15%
46	Bus drivers effectively handle discipline issues on the bus.	52%	23%	67%	7%	55%	20%
47	The length of my bus ride is reasonable.	73%	8%	87%	0%	76%	7%

Survey Questions – Non-High School Only

% SA + A = % Strongly Agree + % Agree

% SD + D = % Strongly Disagree + % Disagree

Survey Questions		Non-High School Students					
		In-Person Learners n = 42		Online Learners n = 83		All n = 125	
		% SA + A	% D + D	% SA + A	% D + D	% SA + A	% D + D
1	Education is the main priority in our school district.	81%	10%	82%	6%	80%	7%
2	Students learn the necessary material to be prepared for the next grade.	71%	14%	72%	13%	72%	13%
3	I have plenty of choices when selecting academic and elective courses.	71%	12%	64%	16%	67%	15%
4	My school can be described as a “good place to learn.”	64%	19%	61%	14%	62%	17%
5	I feel that I am challenged in my classes.	74%	14%	74%	15%	74%	14%
6	My teachers have high expectations for me.	83%	5%	74%	4%	78%	4%
7	Most staff in our school have high expectations for all students regardless of their race, ethnicity, or language.	76%	7%	65%	7%	69%	7%
8	All students have equitable access to courses offered at my school.	64%	7%	47%	11%	54%	9%
9	Most adults in my school treat student diversity as a good thing, not a bad thing.	57%	14%	57%	5%	57%	8%
10	I knew what to expect on the state tests.	50%	14%	58%	10%	56%	11%
11	There is at least one adult at school to whom I can go when I have a problem.	71%	14%	63%	16%	66%	15%
12	I have at least one adult in this school who cares about me.	67%	7%	64%	8%	65%	9%

Survey Questions		Non-High School Students					
		In-Person Learners n = 42		Online Learners n = 83		All n = 125	
		% SA + A	% D + D	% SA + A	% D + D	% SA + A	% D + D
13	I have at least one adult in this school who mentors me.	50%	21%	48%	17%	49%	19%
14	I feel welcomed and accepted by other students in this school.	57%	26%	53%	13%	54%	18%
15	I feel welcomed and accepted by the adults in this school.	71%	10%	63%	6%	65%	7%
16	The school library meets my needs for books and other resources.	67%	10%	65%	6%	66%	7%
17	I have access to good college counseling at this school.	36%	10%	26%	7%	29%	8%
18	I have access to good career counseling at this school.	33%	12%	35%	8%	34%	9%
19	My school connects me to real-world issues and experiences.	55%	26%	54%	19%	54%	22%
20	My teachers communicate regularly with me about my academic progress.	59%	20%	58%	22%	58%	21%
21	My school is clean.	60%	31%	40%	18%	46%	22%
22	My school is attractive and welcoming.	57%	26%	49%	12%	51%	17%
23	My school building is well maintained.	71%	19%	46%	14%	54%	16%
24	My school building needs a lot of repairs.	34%	34%	40%	13%	37%	21%
25	I feel safe and secure at school.	61%	12%	52%	12%	54%	13%
26	Student bullying is a problem in this school.	40%	29%	39%	23%	40%	25%
27	Students in this school accept each other's differences.	57%	26%	45%	23%	48%	25%
28	The school buildings and grounds are safe and secure.	67%	12%	55%	8%	58%	9%

Survey Questions		Non-High School Students					
		In-Person Learners n = 42		Online Learners n = 83		All n = 125	
		% SA + A	% D + D	% SA + A	% D + D	% SA + A	% D + D
29	Discipline is fairly and equitably administered in this school.	67%	17%	52%	16%	56%	16%
30	Teachers and staff respect students in this school.	64%	12%	62%	11%	62%	11%
31	Drugs are a problem in this school.	5%	57%	27%	36%	19%	43%
32	Discipline and order are maintained in the school cafeteria.	74%	5%	48%	6%	56%	6%
33	I have enough time to eat my lunch each day.	57%	24%	48%	22%	52%	22%
34	I usually have to wait in line longer than five minutes to get a school lunch.	26%	36%	35%	14%	32%	22%
35	I like the food served in the cafeteria.	29%	40%	32%	27%	30%	32%
36	The cafeteria serves a good variety of food for breakfast.	24%	14%	30%	11%	28%	12%
37	The cafeteria serves a good variety of food for lunch.	45%	24%	37%	14%	40%	17%
38	I regularly use technology to keep up-to-date on schoolwork (emailing teachers, using online gradebook, etc.).	81%	12%	80%	8%	80%	9%
39	I regularly use computers or other technology at school.	63%	15%	57%	13%	58%	14%
40	The technology available to me at my school is new enough to be useful.	85%	7%	60%	1%	69%	3%
41	Teachers know how to use the technology they have for teaching.	64%	12%	60%	10%	61%	11%
42	I have regular Internet access at home.	86%	5%	99%	0%	94%	2%

Survey Questions		Non-High School Students					
		In-Person Learners n = 42		Online Learners n = 83		All n = 125	
		% SA + A	% D + D	% SA + A	% D + D	% SA + A	% D + D
	Bus Riders:	n = 42		n = 9		n = 51	
44	My bus runs on time nearly every day.	92%	8%	78%	11%	64%	24%
45	Students feel safe riding the bus.	92%	0%	44%	33%	65%	15%
46	Bus drivers effectively handle discipline issues on the bus.	67%	8%	56%	33%	55%	20%
47	The length of my bus ride is reasonable.	85%	15%	78%	22%	76%	7%

Written Responses – Summary

If you would like to provide any additional comments about the district, please do so here.
Where is the district doing well? In what areas could it be improved?

Response Categories	
Bad academic planning perceived	3%
Bullying	4%
Cafeteria food needs improvement	4%
Communications issues (Teacher/Student, policies, etc.)	3%
COVID response	4%
DEI professional development need	2%
Dress code (negative)	2%
Lack of admin trust	2%
Longer lunch requests	5%
Schools maintenance/cleanliness	8%
Mask mandate (Enforcement)	5%
Masks not needed (request)	2%
Mental health support needed	6%
More applicable life learning needed (taxes, investments, financial literacy)	3%
Feeling overworked	2%
Request to come back to in person	2%
Unsafe feelings regarding COVID 19	14%

Appendix D:
Community Focus Group

Community Input Focus Group Comments

The Community Input Focus Group was held on December 15, 2021. There were seven participants (community members) who were asked to provide their opinions and concerns regarding most areas of the school district. The comments below are those provided by the participants.

MANAGEMENT, PERSONNEL, AND COMMUNICATIONS

Management

- Art teachers need more space to be able to showcase the work of their students. Program died out but hoping to bring it back post-COVID-19. Seen as a powerful way to help teachers feel sense of belonging.
- Teachers need help in applying for grants.
- We should have prepared teachers better for handling remote learning than we did. We are putting older teachers in a place they are not comfortable with. We ought to cross this bridge so that we don't have to worry about snow days being lost time.
- We have teachers who are not doing what they need to do. One student emailed all of his teachers and a week later had only heard back from one of them.
- We need to have our outstanding teachers teach others in the district.
- One great teacher left because she didn't feel appreciated as a great teacher.
- "We have never stuck with anything to see if it works. Never." All of us need some kind of consistency, teachers and students included. If you set a bar, don't move it somewhere else two weeks later.
- Teachers know how to educate kids. We need to stop paying someone with a doctorate to come up something and just get out of the way.
- We need to make sure everything has purpose.
- Stop flying in people from out of state to do professional development. We have great people here. Sometimes we almost get to that point but then someone from outside the district gets hired and then come in with an agenda.
- We need opportunities for professional learning communities where teachers can meet by grade level to share best practices. Teachers don't know what other teachers in the district are doing. We have an obligation to do this kind of sharing. This is also a much cheaper way to help teachers learn. We need to validate employees. We have teachers doing great things – what are we doing to show everyone the great things they are doing?
- Teachers want to be able to be heard.

- There are many ways to reach a particular goal.
- There is a concern that school counselors will be on the chopping block when there is a financial crunch. We need to resist that. Students have ongoing mental health needs.
- There is a need for more counselors in the schools. Kids are lacking in real-life supports and counselors are needed to help fill that void.
- A lot of kids have faced a lot of trauma due to COVID-19. Child abuse seems to be on the rise nationally and probably also here. We need to put resources in that area.
- Caseload regarding crimes against children has been greatly increased once lockdown was lifted. Suicides and homicide are way up among children. We are going to be seeing repercussions from COVID-19 for a long time. Kids are being phished online by older men.

Personnel

- Money is a big deal and the driving factor in where a lot of people go.
- Teachers have to take 30-40 steps. Can we remove some rungs so they climb the ladder faster?
- We could do a better job of recruiting former students to work here.
- PD is inconsistent here and we lose teachers as a result. We recycle the PD every 10 years with a new bow on top or we chase the latest fad. We don't have a long-term plan. We don't ask veteran teachers what structures we have in place that we can build upon.
- Teachers feel like they are on a wheel and they can't get off unless they move to another district. Stop renaming thinking maps 10 years later.
- District needs to be more diverse. There is a committee that looked at this. We should be advertising the diversity of the district when we recruit. Also, kids need to see people who look like them in the front of the classroom. Committee had some initial conversations in July, met for about six weeks. Still a lot of work to do in this area. More than 60 percent of the kids are of color. We like cultural competence among the staff.
- Often teachers want to teach students that look like them. If we target more college students of color, we can likely recruit many of them. Districts don't start engaging with future teachers until they are seniors in their programs – we need to catch them sooner.

FACILITIES

- There is paint missing on the walls of Carl Albert. Parents and churches would donate this if we asked for it. We need to set aside more funds in bond issues. We need to ask for more partners in this area.
- Upkeep is a problem in multiple schools.

- Sometimes we drive by and the grass is 1.5 feet tall.
- We could paint and refresh stuff a lot more than we do.
- We could keep the outside appearance better than we do – we do a horrible job in this area. We need to look better. We need to look better in order to get more growth.
- At some point we need a new high school.
- We need a facilities master plan so that the next superintendent can keep the ball rolling.
- The new addition looks great at some schools. We need to keep doing that.
- Feeling that some parents didn't give the district a chance when they saw the outside of the schools.
- From middle school and up, they pick up on district not taking pride in district facilities and internalizing that. They would take more pride if the facilities looked better. Right now, we have weeds growing in the summer.
- We don't take care of our new schools either.
- It's frustrating because it seems like little things that could easily be done – pulling weeds, etc.
- When people come to our athletic venues, it's embarrassing.
- Happy that every school got touched in the bond issue.
- Our buildings are so ugly from the outside that community members are turned off. The outside doesn't show all the amazing things going on inside the school.
- We are concerned with what people see when they drive by. A lot of it looks low class.
- Some of the new stuff does not match the older elements.

SUPPORT SERVICES

Child Nutrition

- Some kids are eating more because it is free.
- Meals seem well balanced.
- They do a good job communicating.
- Staff is always pleasant when kids go through the line.
- COVID-19 part – they have done a good job.

- We are giving people food on Monday to last through Wednesday. The food won't last that long. The three days of food disappear before the three days are up.

Technology

- One thing that would be helpful is to have devices for checkout or devices loaned from them. Some households have devices, others do not.
- Homes with two kids often only had one device and they had to share. One student saved up her money to buy her own Chromebook. Some programs do not work on desktops – only on items with touch screens.
- Age-appropriate technology is needed.
- Some have heard that students really like Canvas. They are able to push themselves further and they are taking on internship projects on the side.
- Purchase of Canvas was one of the best things that district did. It's also going to prepare kids to be college and career ready.
- Oklahoma City and other districts got COVID-19 money to purchase devices for all kids – why didn't we jump on that bandwagon? This is the time to outfit our kids for free unless there is another round of money. Sounds like we didn't go after grants.
- This whole thing is never going to work if the district doesn't put the device in the hands of the kid. It's not the parent's responsibility.
- There is an equity problem with technology. Certain schools got tons of the new technology, while some schools didn't get it. How were the decisions made in handing out equipment?
- Some teachers are doing well with the technology while some are struggling. Some high school students have figured out which assignments are graded, and which are busy work, so they go right to the graded stuff and skip the rest. One great student is only putting in 40 percent of the effort compared to what she was doing in person.
- Middle school teachers have been great. But students are still figuring out what they can get away with not doing.
- Elementary has been a different experience; are those teachers unwilling to adapt? There is a disconnect. We are trying to be really patient.
- 2 out of 7 teachers for one student have been consistently amazing. Some teachers are not making assignments, feels there is not consistent expectations among the teachers.
- Elementary teachers were initially trained in seesaw then asked to switch to do CANVAS.
- Some families are doing "night school" because kids are in daycare during the day.

- Experiences have been inconsistent across schools – example of first graders at two schools having very different experiences in terms of what is expected – 15 assignments versus none.
- Canvas has been helpful in a content way. Previously there were not enough textbooks – now they have greater access.
- Core teachers have not been as helpful as they could have been. They are not reaching out as much as the speech teacher. Been getting better since they switched to the 4 days/week. It seems like a training thing.
- Workload between Midwest City and Carl Albert are very different – way less at Midwest City.
- Teachers don't answer emails.

Transportation

- The activity buses are gorgeous.
- We do a good job of keeping things running.
- We struggle with bus drivers.

Appendix E:
Sample Demographic Study

Durant Independent School District



*Learn from Yesterday...
Understand Today...
Plan for Tomorrow*

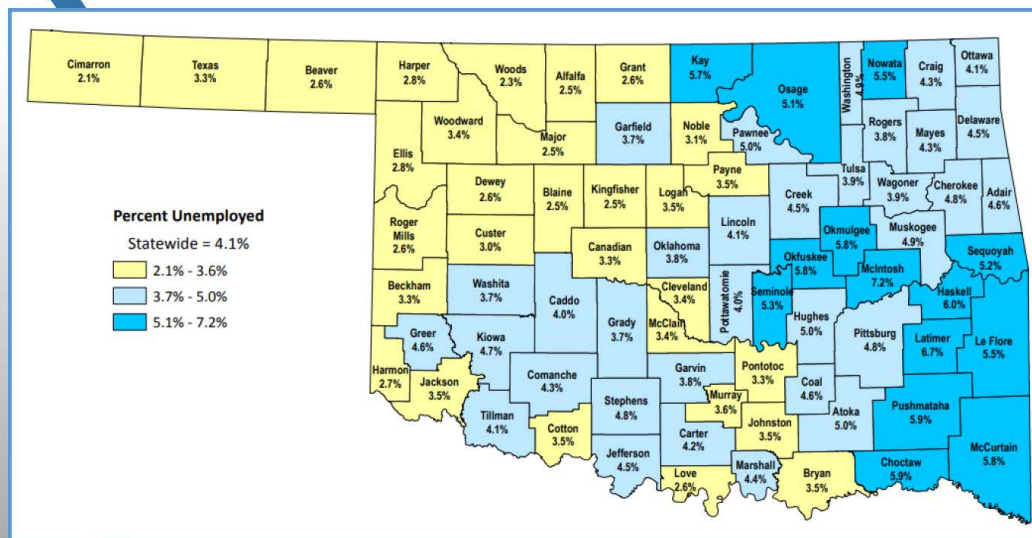
Demographic Summary Spring 2018

TD
TEMPLETON
DEMOGRAPHICS
hanleywood | metrostudy



Economic Conditions

County Unemployment Rate, February 2018

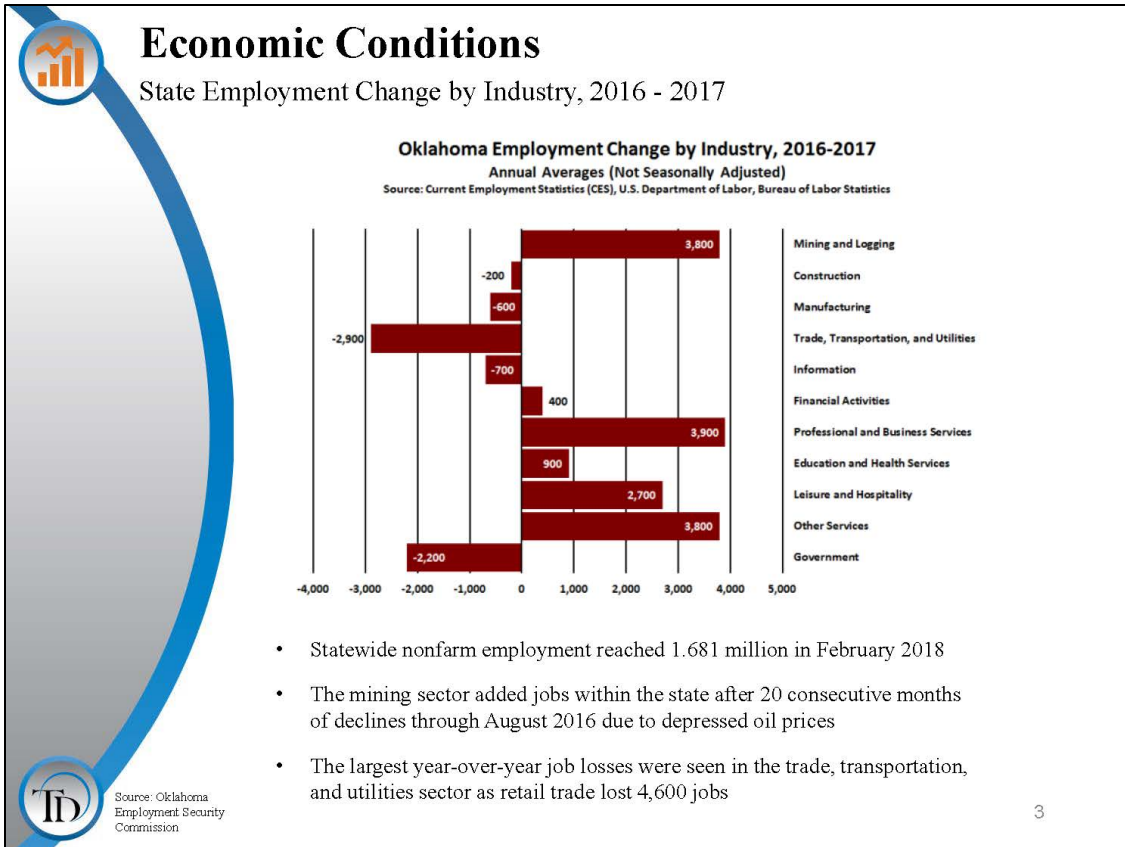


- Oklahoma's statewide unemployment rate was 4.1% in February 2018
- This is down roughly 0.5% from February 2017
- Bryan County's unemployment rate is below the state, at 3.5%, down 0.7% year-over-year

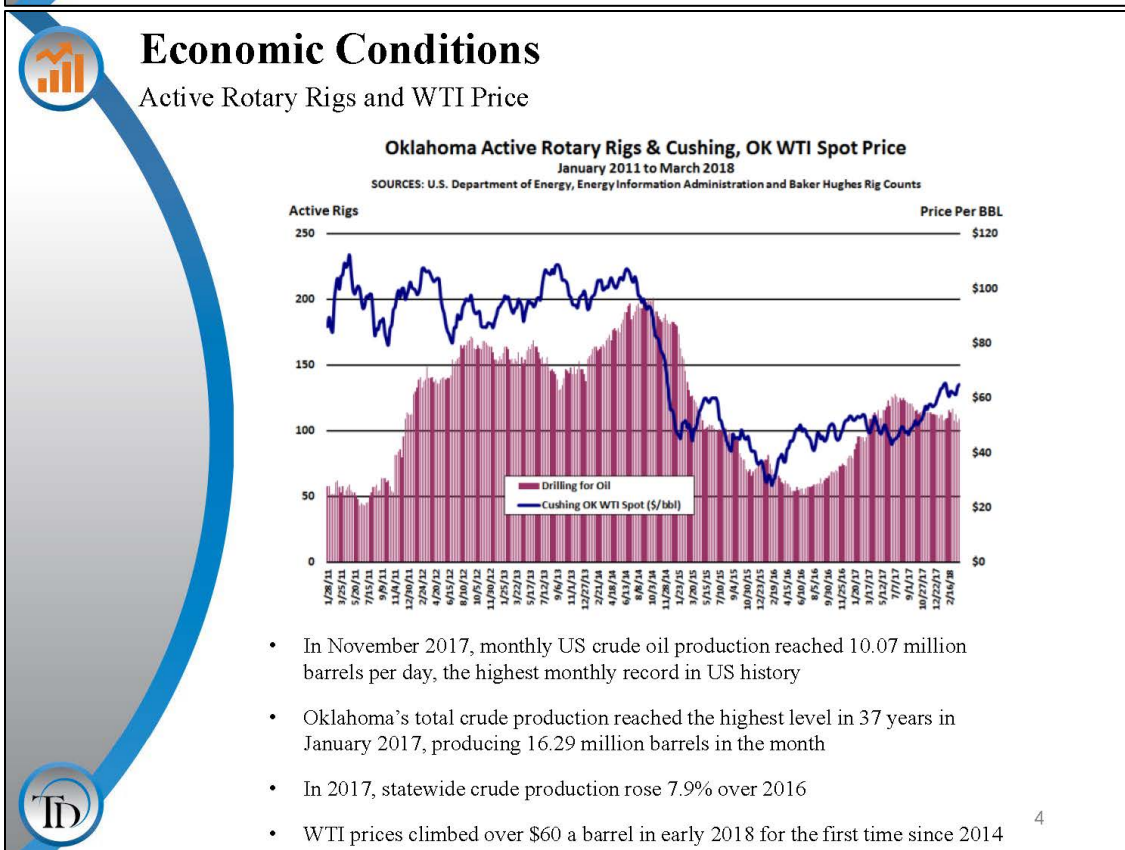


Source: Bureau of Labor
Statistics and Oklahoma
Employment Security
Commission

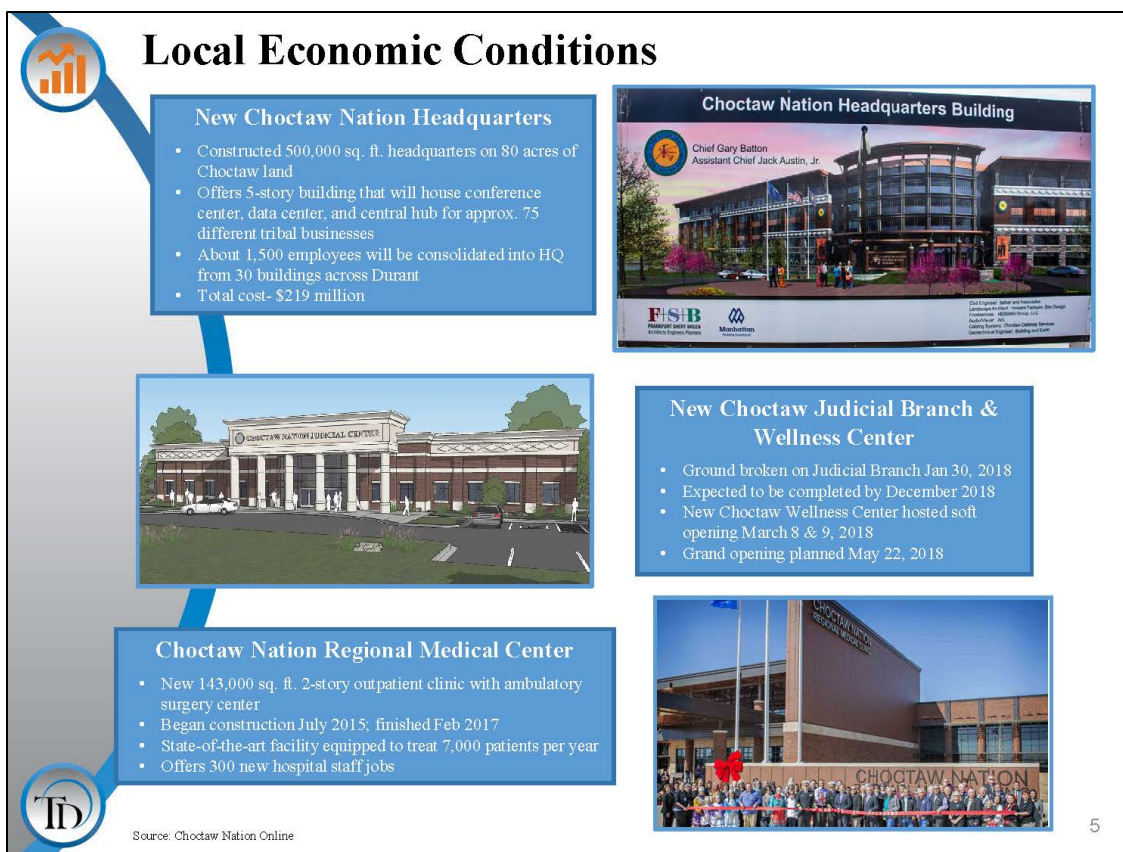
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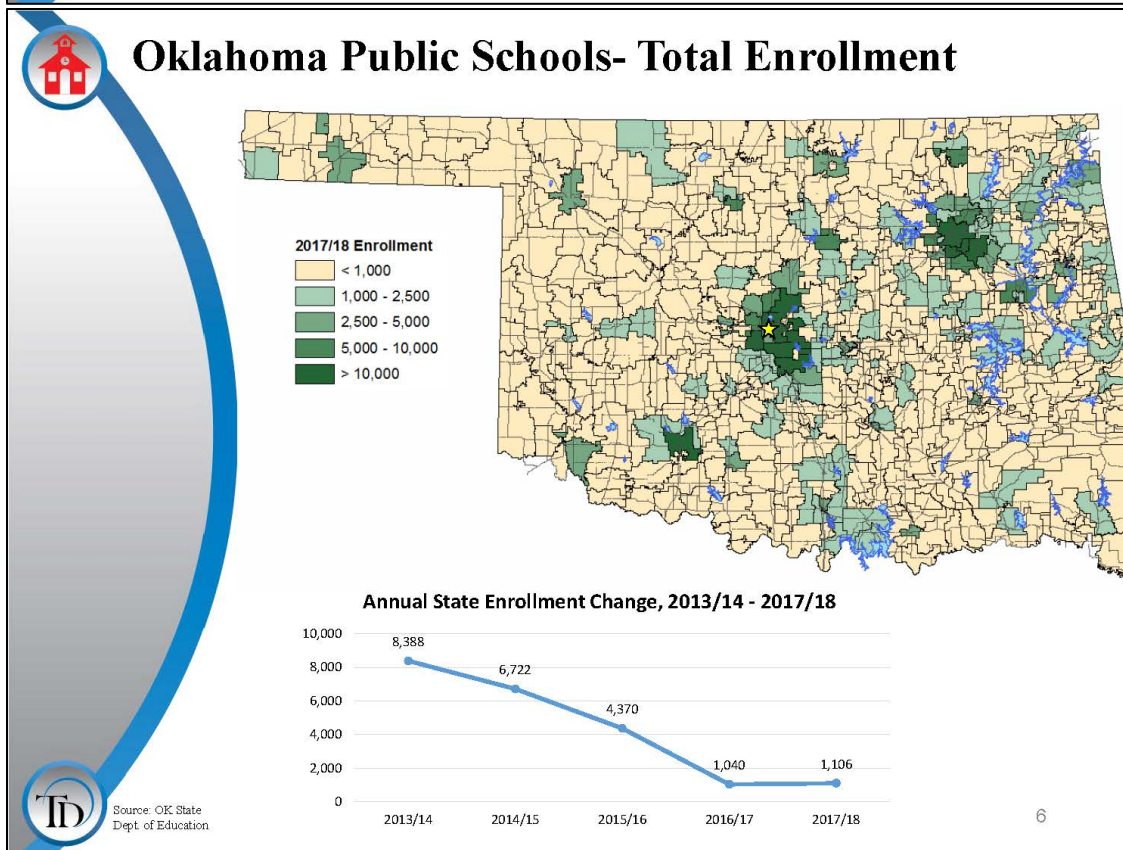
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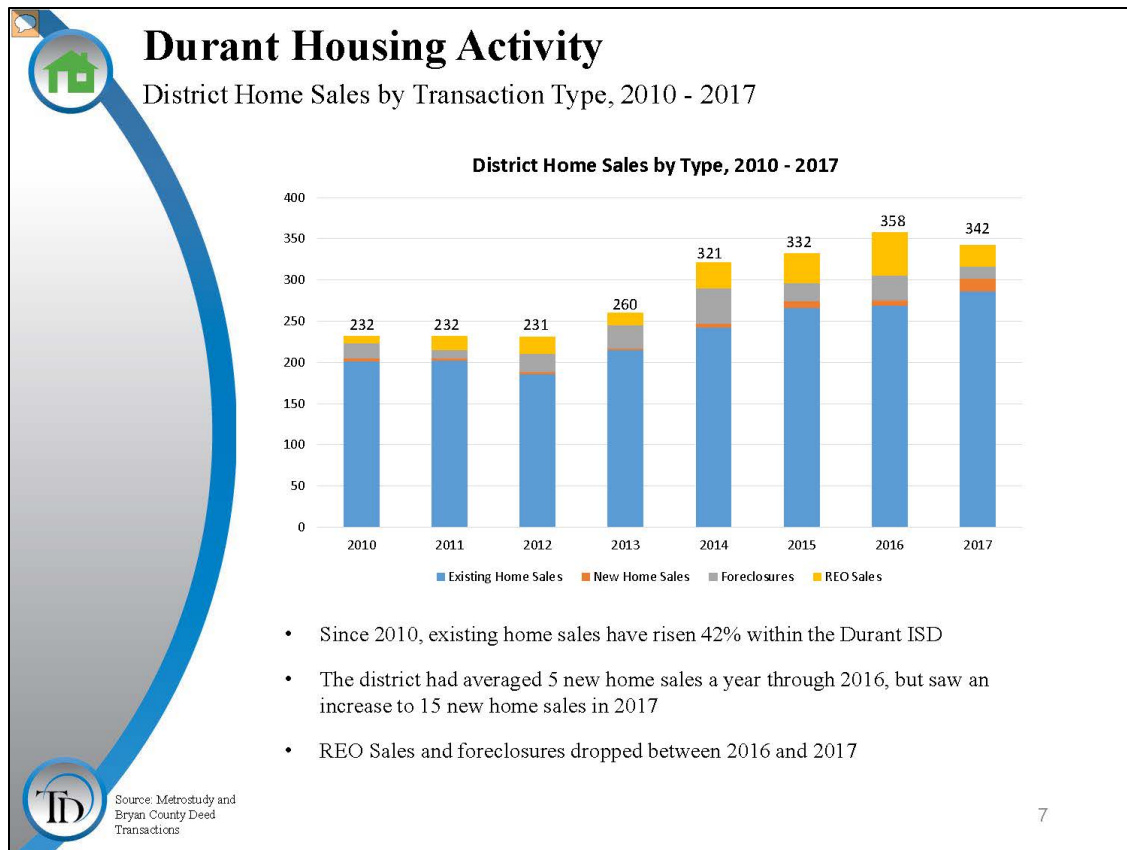
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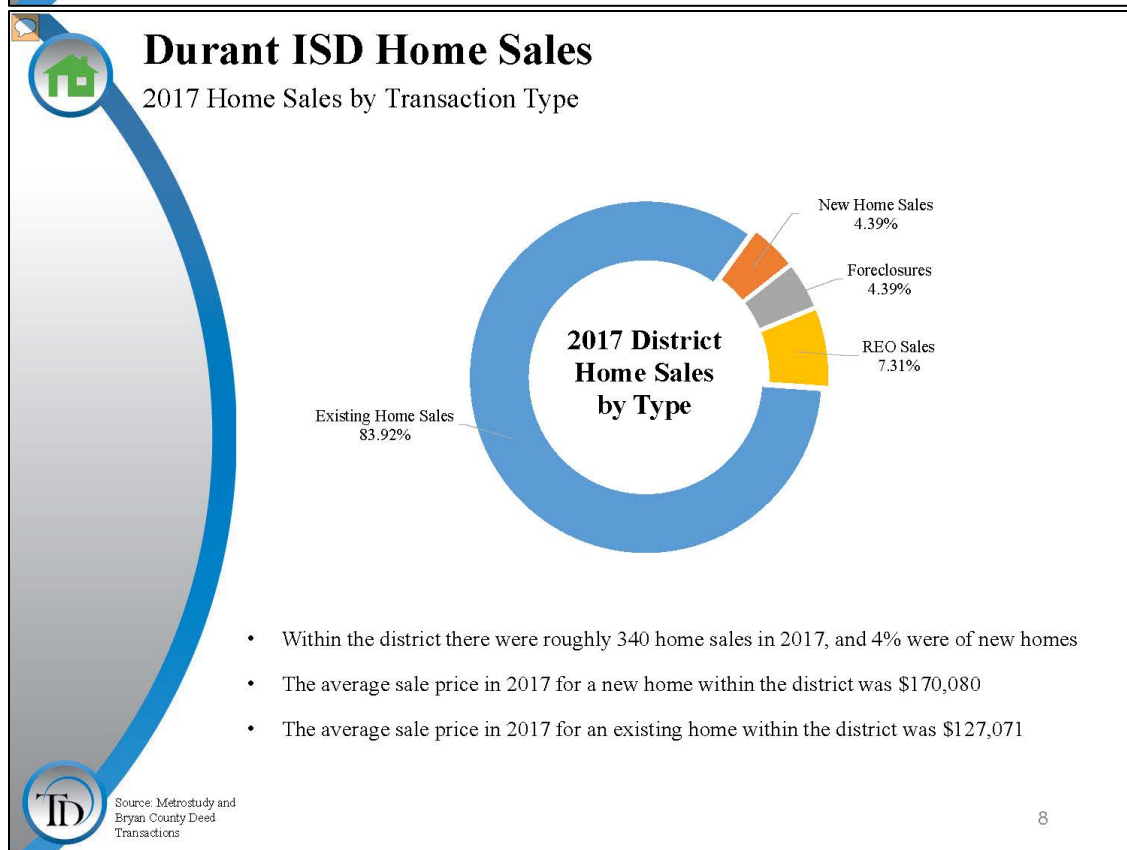
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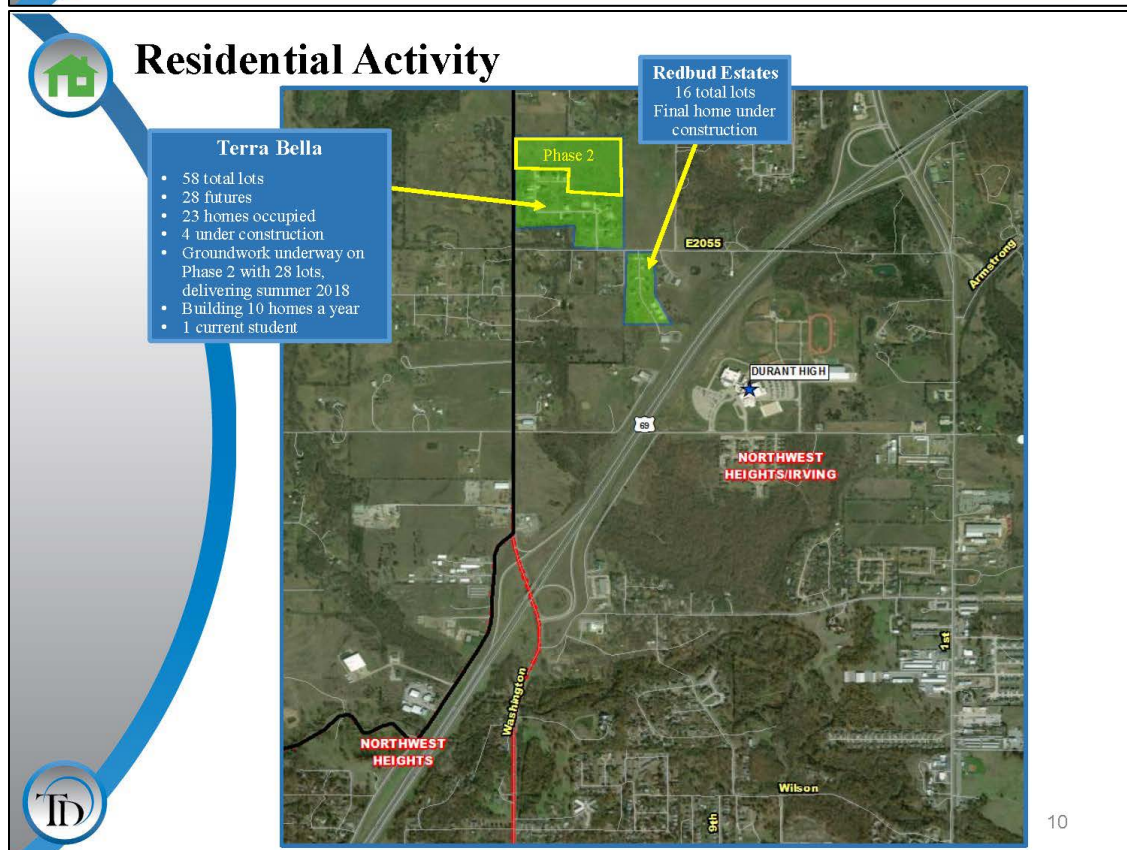
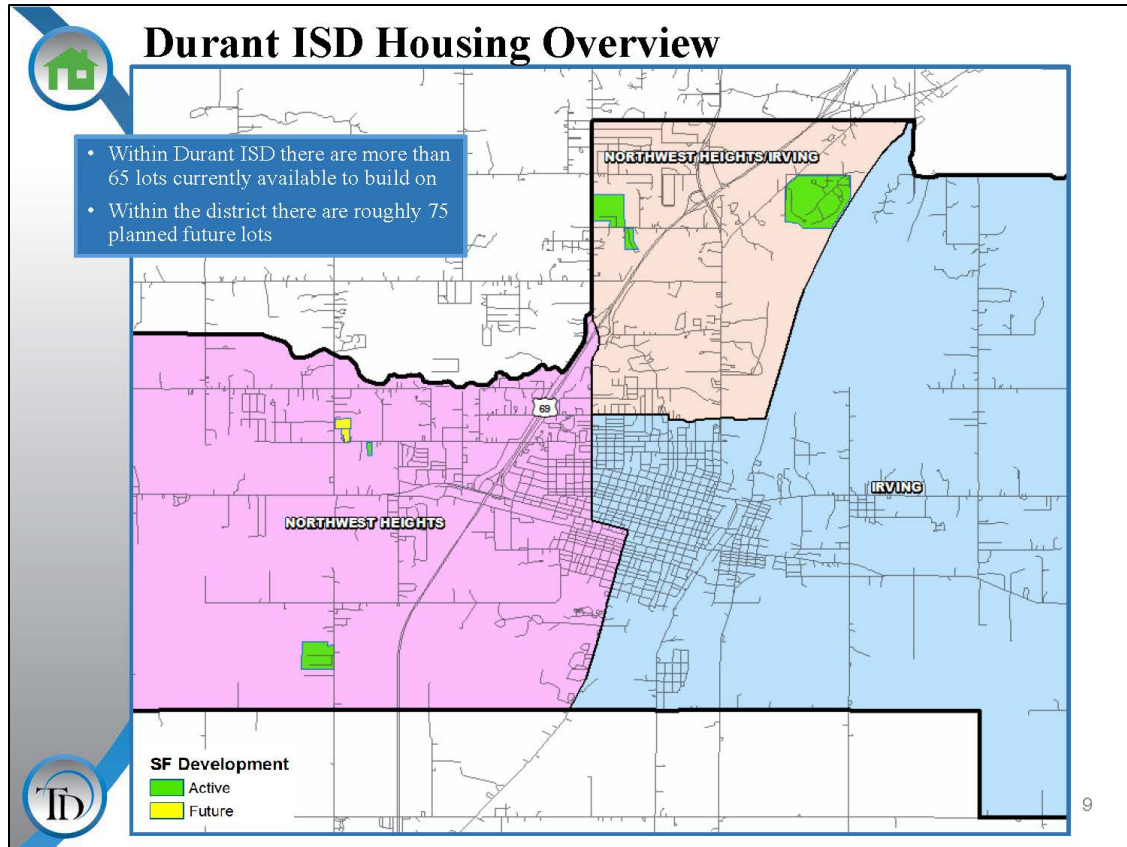
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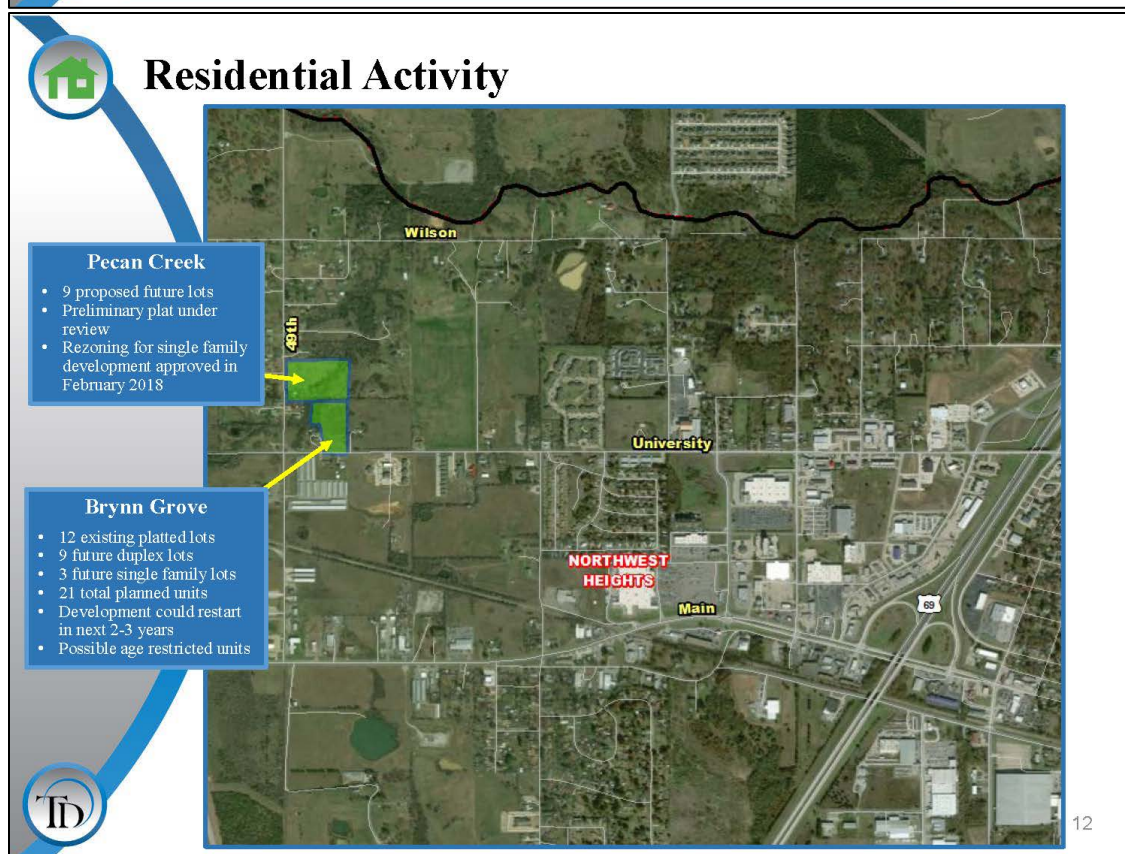
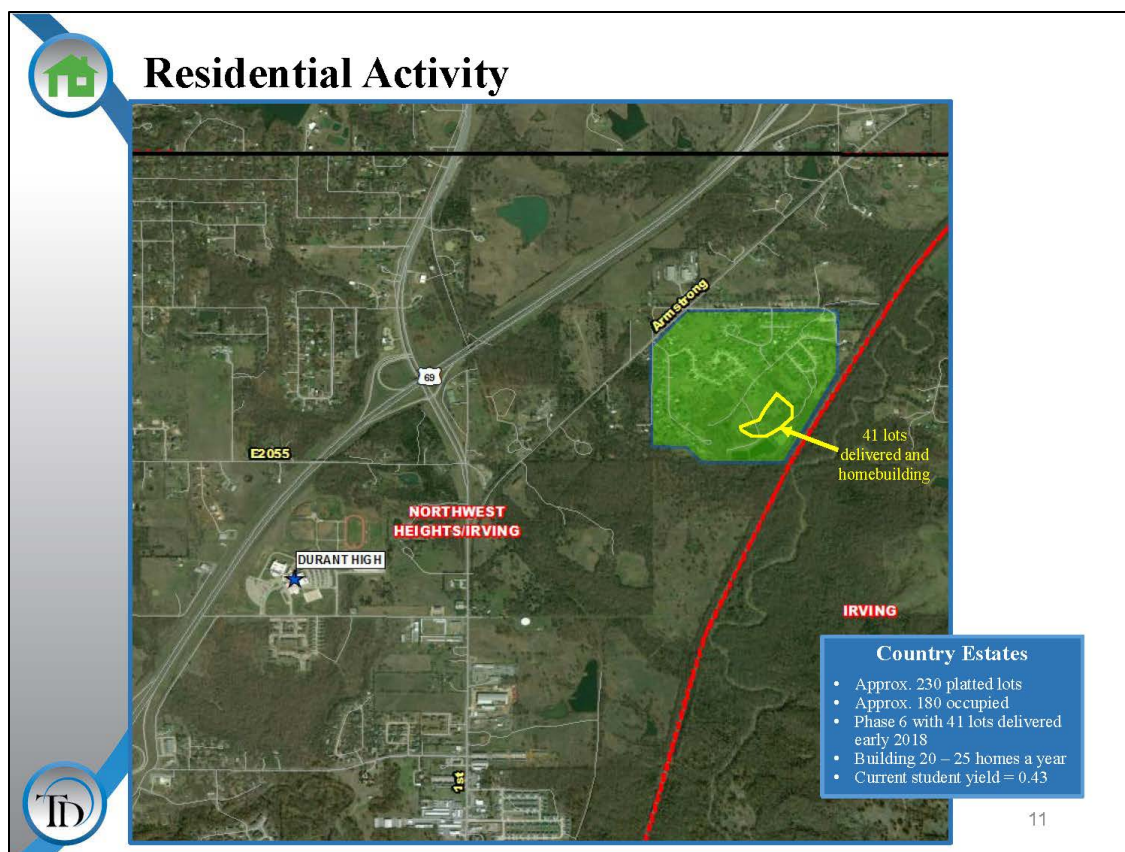


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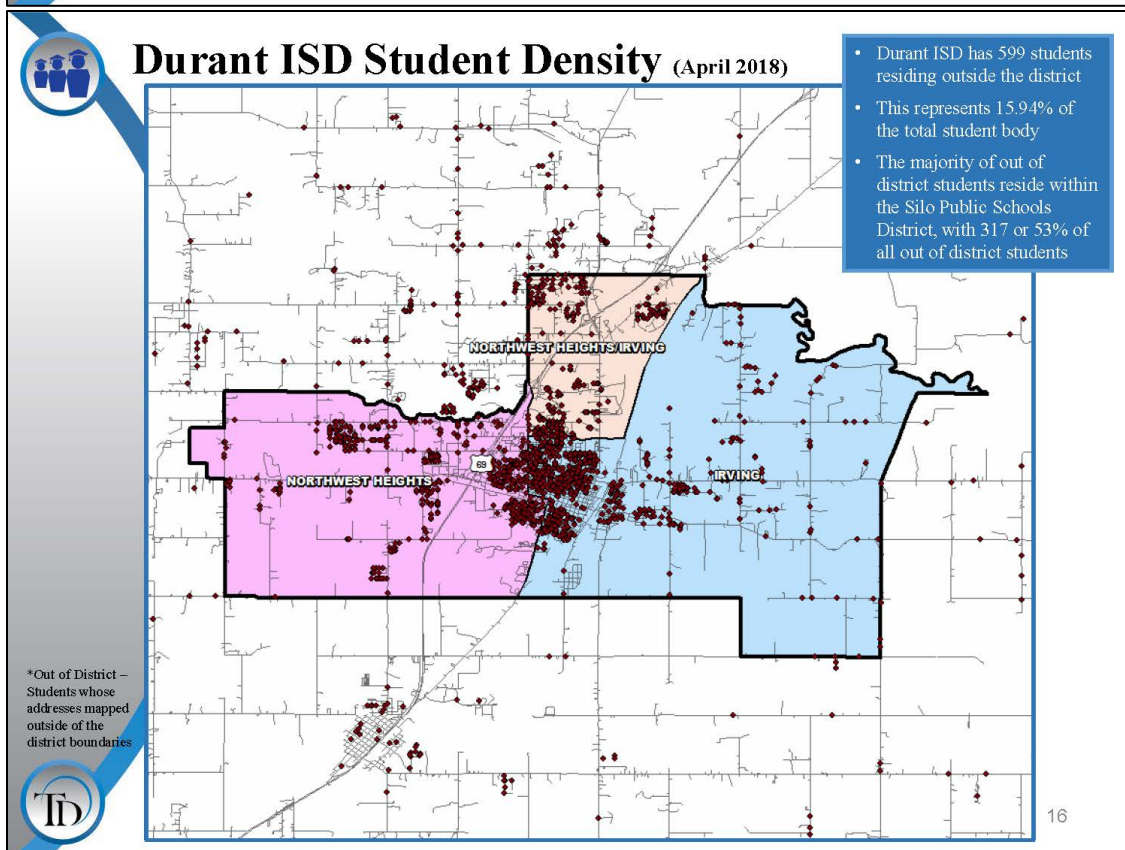
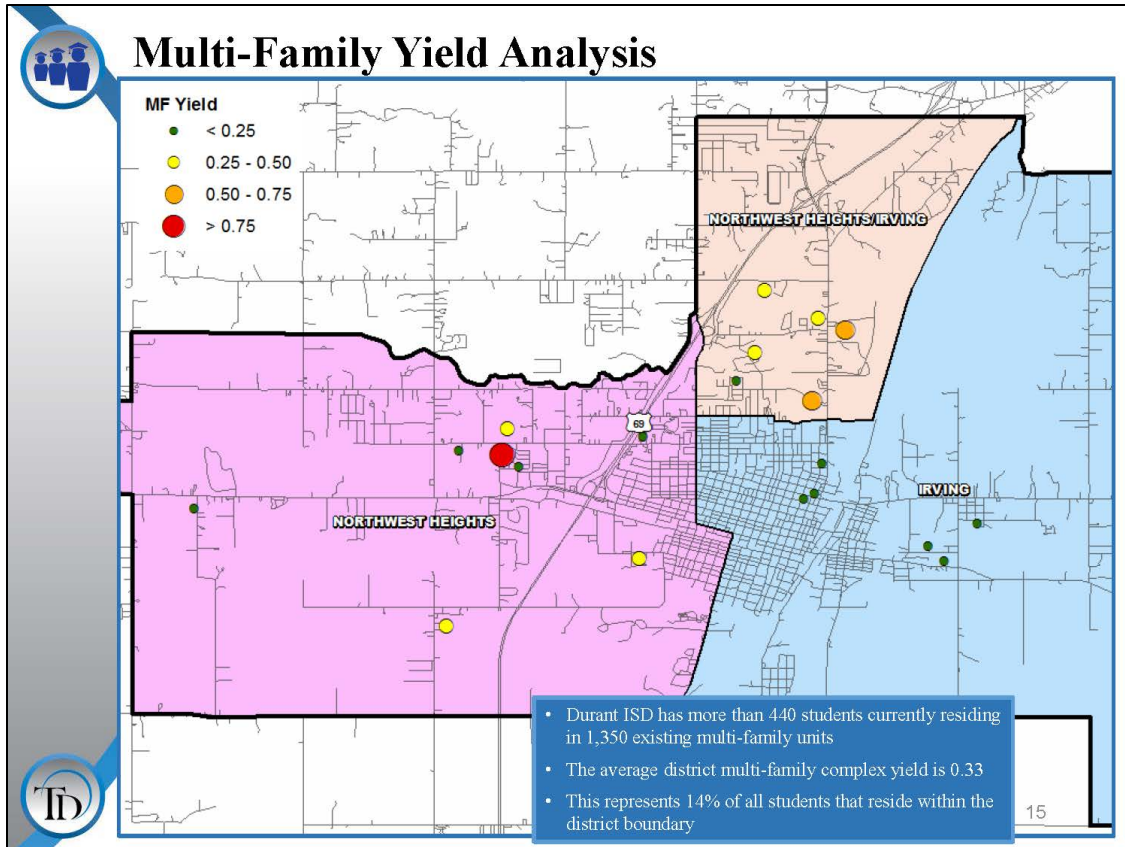


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Historical Enrollment

By Grade Level

Year (Oct.)	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2013/14	253	289	302	315	264	235	245	262	247	223	266	244	211	178	3,534		
2014/15	269	324	346	272	275	262	231	245	270	252	242	237	215	199	3,639	105	3.0%
2015/16	293	331	344	292	252	252	261	235	243	274	274	237	210	197	3,695	56	1.5%
2016/17	241	356	347	278	296	259	248	252	240	251	294	236	233	187	3,718	23	0.6%
2017/18	263	354	346	310	280	281	245	244	251	242	248	273	210	203	3,750	32	0.9%

*Yellow box = largest grade per year
*Green box = second largest grade per year

	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Growth
Roll-up	354	354	346	310	280	281	245	244	251	242	248	273	210	3,901	151
Prev Cohort	352	344	309	312	266	266	241	243	253	239	230	243	183	3,744	-6
3-Year Cohort	365	364	294	305	270	274	242	245	256	254	229	251	187	3,798	48



17



Ten Year Forecast

By Grade Level


Year (Oct.)	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2013/14	253	289	302	315	264	235	245	262	247	223	266	244	211	178	3,534		
2014/15	269	324	346	272	275	262	231	245	270	252	242	237	215	199	3,639	105	3.0%
2015/16	293	331	344	292	252	252	261	235	243	274	274	237	210	197	3,695	56	1.5%
2016/17	241	356	347	278	296	259	248	252	240	251	294	236	233	187	3,718	23	0.6%
2017/18	263	354	346	310	280	281	245	244	251	242	248	273	210	203	3,750	32	0.9%
2018/19	263	348	371	299	307	274	275	242	249	256	259	223	240	187	3,793	43	1.1%
2019/20	263	367	375	330	298	303	266	269	240	254	276	232	194	212	3,879	86	2.3%
2020/21	263	364	383	324	334	290	292	262	277	245	271	251	206	171	3,933	54	1.4%
2021/22	263	374	381	335	324	327	282	287	275	280	263	244	221	185	4,041	108	2.7%
2022/23	263	373	395	333	336	317	317	277	284	280	300	237	215	196	4,123	82	2.0%
2023/24	263	356	392	343	335	328	307	312	283	288	299	271	209	191	4,177	54	1.3%
2024/25	263	379	374	342	344	328	318	302	319	287	308	270	239	187	4,260	83	2.0%
2025/26	263	377	399	326	344	336	318	313	305	324	307	278	238	213	4,341	81	1.9%
2026/27	263	379	396	347	328	336	326	313	319	310	347	277	245	212	4,398	57	1.3%
2027/28	263	387	399	346	349	321	326	321	318	324	332	313	244	218	4,461	63	1.4%

*Yellow box = largest grade per year
*Green box = second largest grade per year

- Durant ISD may enroll more than 3,800 students by 2019 and more than 4,000 students by 2021
- 5 year growth = 373 students
- 2022/23 enrollment = 4,123
- 10 year growth = 711 students
- 2027/28 enrollment = 4,461 students



18





Ten Year Forecast

By Campus

Campus	Capacity	HISTORY	Current	ENROLLMENT PROJECTIONS									
		2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
Irving Elementary	660	629	668	693	711	724	724	741	732	741	751	755	772
Lee Early Childhood	240	262	263	263	263	263	263	263	263	263	263	263	263
Northwest Heights Elementary	660	627	622	632	659	681	690	696	694	698	695	695	709
ELEMENTARY SCHOOL TOTAL		1,518	1,553	1,588	1,633	1,668	1,677	1,700	1,689	1,702	1,709	1,713	1,744
Elementary Absolute Change		6	35	35	45	35	9	23	-11	13	7	4	31
Elementary Percent Change		0.40%	2.31%	2.25%	2.83%	2.14%	0.54%	1.37%	-0.65%	0.77%	0.41%	0.23%	1.81%
Durant Intermediate School	700	759	770	791	838	844	896	911	947	948	967	975	968
INTERMEDIATE SCHOOL TOTAL		759	770	791	838	844	896	911	947	948	967	975	968
Intermed. Absolute Change		11	11	21	47	6	52	15	36	1	19	8	-7
Intermed. Percent Change		1.47%	1.45%	2.73%	5.94%	0.72%	6.16%	1.67%	3.95%	0.11%	2.00%	0.83%	-0.72%
Durant Middle School	850	491	493	505	494	522	555	564	571	606	629	629	642
MIDDLE SCHOOL TOTAL		491	493	505	494	522	555	564	571	606	629	629	642
Middle School Absolute Change		-26	2	12	-11	28	33	9	7	35	23	0	13
Middle School Percent Change		-5.03%	0.41%	2.43%	-2.18%	5.67%	6.32%	1.62%	1.24%	6.13%	3.80%	0.00%	2.07%
Durant High School	1,200	950	934	909	914	899	913	948	970	1,004	1,036	1,081	1,107
HIGH SCHOOL TOTAL		950	934	909	914	899	913	948	970	1,004	1,036	1,081	1,107
High School Absolute Change		32	-16	-25	5	-15	14	35	22	34	32	45	26
High School Percent Change		3.49%	-1.68%	-2.68%	0.55%	-1.64%	1.56%	3.83%	2.32%	3.51%	3.19%	4.34%	2.41%
DISTRICT TOTALS		3,718	3,750	3,793	3,879	3,933	4,041	4,123	4,177	4,260	4,341	4,398	4,461
District Absolute Change		23	32	43	86	54	108	82	54	83	81	57	63
District Percent Change		0.62%	0.86%	1.15%	2.27%	1.39%	2.75%	2.03%	1.31%	1.99%	1.90%	1.31%	1.43%


*Yellow box = enrollment exceeds stated campus capacity


19



Summary

- Bryan County's unemployment rate is below 4%.
- In January 2017 Oklahoma's total crude oil production reached the highest level in over 35 years, producing over 16 million barrels in the month.
- The district experienced 340 homes sales in 2017, 4% of which were new homes.
- Country Estates has approx. 230 total lots, 41 of which were delivered in early 2018 to begin construction on Phase 6 of subdivision.
- Durant ISD may add 373 students in the next 5 years, for a fall 2022 enrollment of 4,123.
- DISD is projected to enroll 4,461 students for the 2027/28 school year.


20

Appendix F:
ASBO Budget Award Criteria



www.asbintl.org/MBA



PROUD SPONSOR





MBA Essentials

Thank you for applying to the Meritorious Budget Award (MBA) program. Your application demonstrates the importance you, your finance team, and the school district place on presenting a high-quality budget document to

your community. An easy-to-understand budget increases credibility, provides clarity and transparency on how funds are generated and allocated, and offers an opportunity to communicate future budget concerns and challenges.

Tips to Prepare a Better MBA Budget Submission

1. An effective budget document is:
 - Technically well-prepared.
 - Clear and logical in its narration of facts and data.
 - Mathematically accurate and free of spelling and grammatical errors.
 - Consistent in formatting and form throughout the entire document, including writing style, fonts and font sizes, and formatting. Information pulled from other documents should be formatted to conform to the style of the budget document.
2. The **Cover Letter** should identify information required by the MBA Criteria Checklist that is not applicable to the school district and explain why it is not included. For example, some school district's assessed and market value of taxable property and tax rates may not be relevant to their budgets.
3. **Responding to the comments of the previous year's review team (if applicable) is mandatory.** Address each comment and, if a comment is not relevant, state this in the response.
4. Carefully monitor **rounding numbers** to avoid significant fluctuation of data.
5. Use charts and graphs in all sections to enhance the quality and presentation of the budget and to highlight financial and statistical information and effectively display trending data. Include narrative to explain charts or graphs and **cite the source**.
6. **Number pages** consecutively, with the Executive Summary as page 1.
 - Any pages preceding the Executive Summary, including the Table of Contents, are numbered i, ii, iii, etc.
 - If criteria are in multiple places, indicate all applicable page numbers, e.g., page 5 or pages 7–10.
7. Include a **Glossary of Terms** in the Informational Section to define acronyms and terms. Define an acronym upon its first use in a document, e.g., Every Student Succeeds Act (ESSA). Include one glossary of terms and acronyms.
8. Ensure everything is included when you submit your application. If the **MBA application documentation is not complete**, the review process may be delayed.
9. **Resources:** A free **MBA Seminar** is offered at ASBO's Annual Meeting & Expo to provide additional information. Resources are available at asbointl.org.



CHECKLIST

MERITORIOUS BUDGET AWARD CRITERIA CHECKLIST

NAME OF SCHOOL DISTRICT _____

STATE/PROVINCE _____

BUDGET YEAR _____

A. GENERAL REQUIREMENTS

If some criteria are not applicable to the school district or the information is not available, please provide an explanation in the Cover Letter.

A1.	Is a Cover Letter included with the submission? Refer to the "MBA Essentials" page.	<input type="checkbox"/> YES <input type="checkbox"/> NO
A2.	Are the responses to the previous year's review comments provided? Note: Respond to each comment requiring action; explain what was revised.	<input type="checkbox"/> YES <input type="checkbox"/> NO
A3.	Does the budget document cover include the following features? <ul style="list-style-type: none"> • The title "Budget" <input type="checkbox"/> YES <input type="checkbox"/> NO • Budget year being submitted <input type="checkbox"/> YES <input type="checkbox"/> NO • Full name of the school district <input type="checkbox"/> YES <input type="checkbox"/> NO • City/County <input type="checkbox"/> YES <input type="checkbox"/> NO • State/Province <input type="checkbox"/> YES <input type="checkbox"/> NO • Zip/Postal Code <input type="checkbox"/> YES <input type="checkbox"/> NO • School district's website address <input type="checkbox"/> YES <input type="checkbox"/> NO Optional: Applicants are encouraged to use students' artwork or school district photos to enhance the cover.	
A4.	Is a copy of the previous year's MBA Certificate included?	<input type="checkbox"/> YES <input type="checkbox"/> NO
A5.	Is the budget document divided into the four major sections: Executive Summary, Organizational, Financial, and Informational? Note: Do not add or rename any other major sections; however, minor separations within the major sections are acceptable.	<input type="checkbox"/> YES <input type="checkbox"/> NO



CHECKLIST

A6. Are the four major sections easy to locate? ☐ YES ☐ NO

- **PDF file:** At a minimum, bookmark the four major sections.
- **Hard copy submission:** Sections must be separated with tabs or other easily identifiable dividers.

A7. **Table of Contents**

Does the Table of Contents precede the Executive Summary?

☐ YES ☐ NO

Are the four major sections listed in the Table of Contents (Executive Summary, Organizational, Financial, and Informational)?

☐ YES ☐ NO

Note: Page numbers and section titles in the Table of Contents must correspond to the exact page in the document.

B. Executive Summary

If some criteria are not applicable to the school district or the information is not available, please provide an explanation in the Cover Letter.

Document page number(s)

B1. The Executive Summary must:

- Be a stand-alone, "liftable" component.
- Present a comprehensive financial picture of the school district in narrative, numeric, and graphic form.

Note: Information provided in the Executive Summary must also be included in the appropriate budget section (Organizational, Financial and/or Informational).

B1a. The Organizational component of the Executive Summary must:

- Discuss the school district's major goals and objectives.
- Describe the budget process and timeline.
- Note any significant changes from the current year in the budget process and/or budget policies and the underlying causes of those changes.
- Explain the allocation of human and financial resources to achieve goals and objectives.
- List the members of the school board.
- List first-level administrative personnel.



CHECKLIST

Document page number(s)

B1b. The Financial component of the Executive Summary must:

- Summarize revenues and expenses/expenditures for all funds.
- Show at least the fiscal year budget comparisons for all funds.
- Discuss significant trends, events, and initiatives.
- Explain any significant financial and demographic changes.
- Include a budget forecast for all funds.

B1c. The Informational component of the Executive Summary must:

- Include student enrollment trends and forecast.
- Include tax base and rate trends.
- Include personnel resource changes and reasons for changes.
- Explain any changes in debt.

Optional: Provide benchmark data comparable to other school districts or state assessments:

- Per-pupil expenditure
- Student-teacher ratio
- Average class size

Optional: Explain how the school district ties school budget dollars to student achievement.

C. ORGANIZATIONAL SECTION

If some criteria are not applicable to the school district or the information is not available, please provide an explanation in the Cover Letter.

C1. Provide an explanation of the school district's:

- Legal autonomy, fiscal independence/dependence.
- Level of education provided.
- Geographic area served, including a map.
- Current number of students and number of schools/campuses.

C2. Describe the governance structure, including:

- An organizational chart of the administrative staff by position and title.
- The school board structure and listing of school board members.



CHECKLIST

Document page number(s)

C3. Provide an overview of the organization's mission and goals, including:

- The school district's mission statement.
- The major goals and objectives and any additional information regarding the future direction of the school district.
- The cost of a goal or objective if it is significant and measurable.
- The fiduciary and/or budgetary goals, if they are not included in the school district's mission statement or major goals and objectives.

C4. Discuss the following significant budget and financial items applicable to your district and/or state:

- Policies, e.g., budget development, implementation.
- Regulations that govern the budget process.
- Applicable fund types and titles.
- Classification of revenues and expenditures.
- Disclosure information on any minimum or maximum fund balance policies.

C5. Describe the basis of accounting for financial reporting, including any method for accounting that differs from generally accepted accounting practices.

C6. Describe the budget development process, including:

- The budget process for all funds, including capital projects budget.
- The budget timeline/calendar.
- The budget administration and management process.

C7. Describe other sustaining local revenue sources, e.g., cell towers, partnerships, tuition-based programs, alternative schools that generate income, etc.



CHECKLIST

D. FINANCIAL SECTION

If some criteria are not applicable to the school district or the information is not available, please provide an explanation in the Cover Letter.

ASBO International's Meritorious Budget Award (MBA) is a gold star-level designation for a school district's budget process. The criteria are built on best practices that set apart an exemplary budget process from a traditional budget process. The MBA Criteria Checklist includes the use of a pyramid approach in communicating the district financials. The pyramid approach begins at a broad level and drills down into more detail as each level of the pyramid is addressed.

Level One	Summary of Total Budget (All Funds Combined) Total Revenues by Source Total Expenditures by Object
Level Two	Summary Data for All Operating Funds Revenues by Source Expenditures by Object Expenditures by Function (Optional)
Level Three	Summary Data for Individual Funds Revenues by Source Expenditures by Object Expenditures by Function (Optional)
Level Four (Optional)	Information by Program, Location, and/or Administrative Unit Revenues by Source Expenditures by Object

The requested information must be presented in a consistent and comparable form and format, based on the level of detail required by law or adopted by the governing body.

- **The budget document must include eight years of data:**

- Three prior years of actual (comparative).
- The current year budget and/or estimated actual.
- Proposed budget year.
- Three years of forecasted data.

- **To include:**

- Revenues.
- Expenditures.
- Fund balances.
- Other financing sources/uses.
- Explanation of major shifts from current year.



CHECKLIST

Document page number(s)

D1. Level One – Summary Data for Total Budget (All Funds Combined)

- Describe significant revenue sources and expenditure categories.
- Explain the underlying assumptions and significant trends for each major revenue source and major expenditure category.
- Provide eight years of financial data (detailed on page 7):
 - Total Revenues by Source
 - Total Expenditures by Object
 - Other Financing Sources/Uses
 - Fund Balances
- Explain major shifts from current year.
- Describe significant changes in fund balances.
- Describe plans to address negative trends if the budget forecast shows declining fund balances.

D2. Level Two – Summary Data for Operating Funds

- Describe significant revenue sources and expenditure categories.
- Explain the underlying assumptions and significant trends for each major revenue source and major expenditure category.
- Provide eight years of operating data (detailed on page 7):
 - Operating Revenues by Source
 - Operating Expenditures by Object
 - Operating Expenditures by Function (Optional)
 - Operating Fund Balances
- Explain major shifts from current year.
- Describe any significant changes in fund balances.
- Describe plans to address negative trends if the budget forecast shows declining fund balances.

D3. Level Three – Summary Data for Individual Funds

- Describe significant revenue sources and expenditure categories.
- Explain the underlying assumptions and significant trends for each major revenue source and major expenditure category.
- Provide eight years of summary data for individual funds (detailed on page 7):
 - Revenues by Source
 - Expenditures by Object



CHECKLIST

Document page number(s)

- Expenditures by Function (Optional)

- Fund Balances

- Explain major shifts from current year.
- Describe significant changes in fund balances.
- Describe plans to address negative trends if the budget forecast shows declining fund balances.

D4. **Optional:** Level Four – Summary by Program, Location, and/or Administrative Unit

- Describe significant revenue sources and expenditure categories.
- Explain the underlying assumptions and significant trends for each major revenue source and major expenditure category.
- Provide eight years of summary data for program, location, and/or administrative unit (detailed on page 7):

- Revenues by Source

- Expenditures by Object

- Fund Balances

- Explain major shifts from current year.
- Describe any significant changes in fund balances.
- Describe plans to address negative trends if the budget forecast shows declining fund balances.

D5. Describe additional costs and savings (direct and indirect) for capital projects.

- Describe budgeted capital expenditures.
- Describe the long-range capital improvement plan, e.g., replacement schedules, funding sources, life span, etc.
- Outline major capital projects for the budget year.
- Indicate the fund that is used to account for capital expenditure projects.
- Describe the total amount of the capital improvement plan budget. Indicate when the plan will start and when it will be completed.
- Disclose the funding source to address the plan and how it will affect the current budget.



CHECKLIST

Document page number(s)

- D6. Explain how the current budget will be impacted by debt obligations.
- Include financial data on current debt obligations.
 - Describe the relationship between current debt levels and legal debt limits.
 - Explain the effect of existing debt levels on current and future budgets.

- D7. Disclose the accrued obligation for OPEB (other post-employment benefits), such as retiree health insurance (if applicable).

E. INFORMATIONAL SECTION

If some criteria are not applicable to the school district or the information is not available, please provide an explanation in the Cover Letter.

- E1. Present the assessed value of taxable property.
- Describe how tax rates are calculated using assessed valuations.
 - Provide eight years of assessed values:
 - A minimum of three years of past assessed values.
 - The current year budget and/or estimated current year actual.
 - The proposed budget year.
 - Three years of forecasts.

- E2. Provide property tax rates and collections for the taxing entity.
- Describe how the tax rate is used to calculate a tax bill, i.e., \$100 of taxable value, or some other form of rate or ratio.
 - Provide five years of information about property tax rates and collections:
 - Three years actual.
 - The current year budget and/or estimated current year actual.
 - The proposed budget year.

- E3. Provide an analysis of the tax rate's effect on the average taxpayer for five years:
- Three years actual.
 - The current year budget and/or estimated current year actual.
 - The proposed budget year.



CHECKLIST

Document page number(s)

E4. Include alternative tax collections, e.g., sales tax, sin tax, for five years, if applicable:

- Three years actual. _____
- The current year budget and/or estimated current year actual. _____
- The proposed budget year. _____

E5. Present student enrollment history.

- Describe forecasting methodology and techniques. _____
- Provide student enrollment by school or by district for eight years:
 - Three years of actual student enrollment history. _____
 - The current year enrollment. _____
 - The proposed budget year enrollment. _____
 - Three years of enrollment forecasts. _____

E6. Provide personnel resource allocations within defined employee groups, by full-time equivalent, i.e., teachers, administrators, maintenance, support staff, etc., for five years:

- Three prior years actual. _____
- The current year budget and/or estimated current year actual. _____
- The proposed budget year. _____

E7. Include outstanding bond issues and bond amortization schedule(s), including a description of the projects funded by any outstanding bond issues that are still being paid. _____

E8. Provide performance measures for three prior years:

- District-selected standardized test scores. _____
- Drop-out rates. _____
- Percentage of free or reduced-price meals. _____
- Other performance measures the school district may use. _____
- **Optional:** Parent/student satisfaction surveys. _____
- **Optional:** Teacher retention rate. _____

E9. Glossary of Terms and Acronyms, listed in alphabetical order. _____

Appendix G:
Areas of Maintenance Need

High Schools

The three high schools in Mid-Del Public Schools are:

- Carl Albert High School
- Del City High School
- Midwest City High School

Exhibit G-1 Carl Albert High School

Fire Extinguisher too High for Quick Access



Damaged Cafeteria Table



Damaged Wall



Stains on Wall



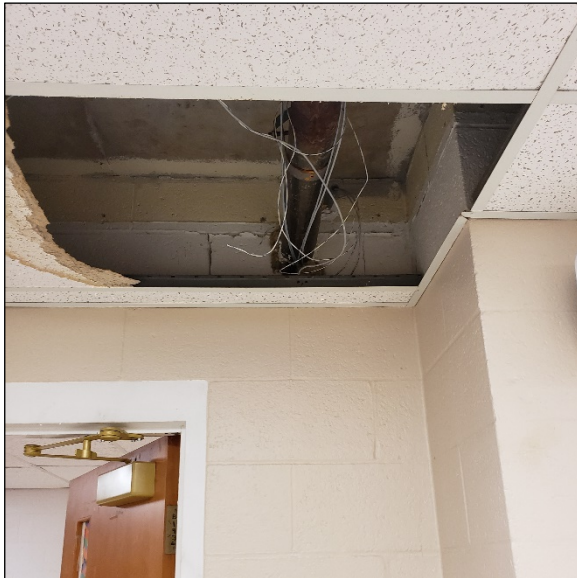
Source: Prismatic, February 2021

Exhibit G-1 (continued)
Carl Albert High School

Handicapped Access Door Jammed Behind Stop



Missing Ceiling Tile



Dirty Water Leak from Eyewash Station



Source: Prismatic, February 2021

Exhibit G-1 (continued)
Carl Albert High School

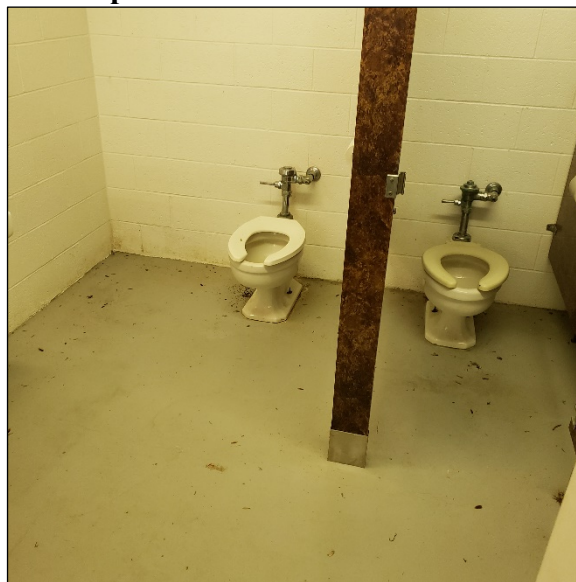
Stained Ceiling Tile



Graffiti on Chemistry Lab Closet



“Exposed” Toilets in Locker Room



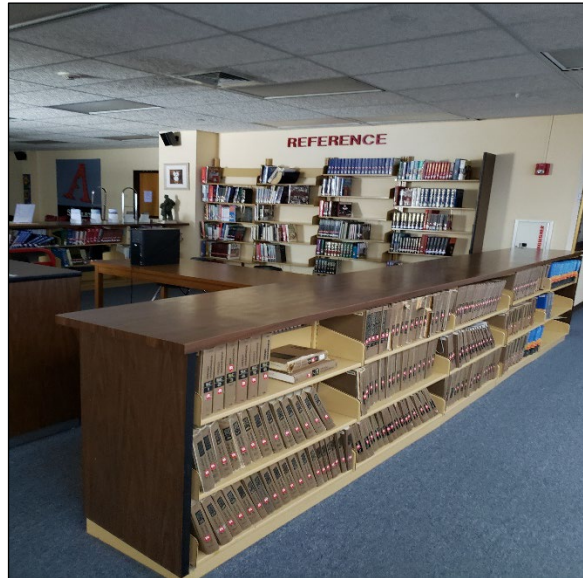
Source: Prismatic, February 2021

**Exhibit G-2
Del City High School**

Leak at Library Sawtooth Roof



Leak at Library Sawtooth Roof



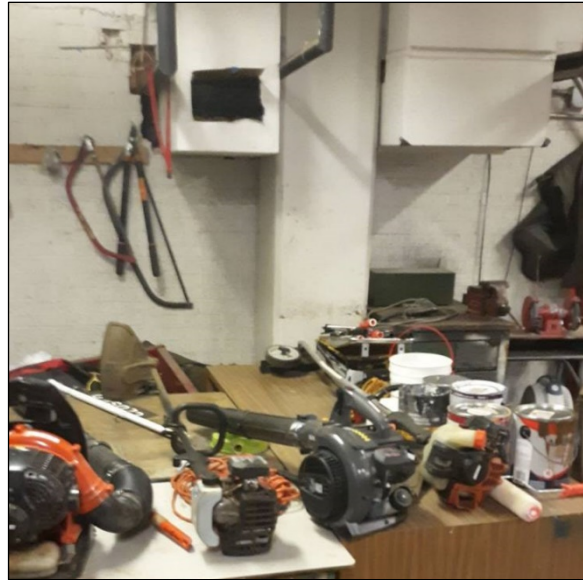
Source: Prismatic, February 2021

Exhibit G-2 (continued)
Del City High School

Leak at Library Sawtooth Roof



Lack of Access to Wall-Mounted Utilities



Source: Prismatic, February 2021

Exhibit G-3
Midwest City High School

“Soot” from Ceiling Diffuser



Left-Overs from Demolished Phone Booth



Damaged Flooring



Damaged Walls



Source: Prismatic, February 2021

Exhibit G-3 (continued)
Midwest City High School

Damaged Stair Railing



Damaged Stair Railing



Rusting Chemical Storage Cabinet



Source: Prismatic, February 2021

Exhibit G-3 (continued)
Midwest City High School

Cluttered Closet in Performing Arts Center



Cluttered Closet in Performing Arts Center



Source: Prismatic, February 2021

Middle Schools

The three middle schools in Mid-Del Public Schools include:

- Carl Albert Middle School
- Del City Middle School
- Midwest City Middle School

Exhibit G-4 Carl Albert Middle School

Damaged Stairs



Wall Cracks



Damaged Flooring



Source: Prismatic, February 2021

Exhibit G-4 (continued)
Carl Albert Middle School

Stained Ceiling Tiles



Source: Prismatic, February 2021

**Exhibit G-5
Del City Middle School**

Stained Ceiling Tiles



Stained Ceiling Tile



Damaged Ceiling Tile



Source: Prismatic, February 2021

Exhibit G-5 (continued)
Del City Middle School

Damaged/Dirty Flooring



Damaged Flooring



Stains on the Floor



Stained Flooring



Source: Prismatic, February 2021

Exhibit G-5 (continued)
Del City Middle School

Disorganized Custodian Closets

Boxes on the Floor



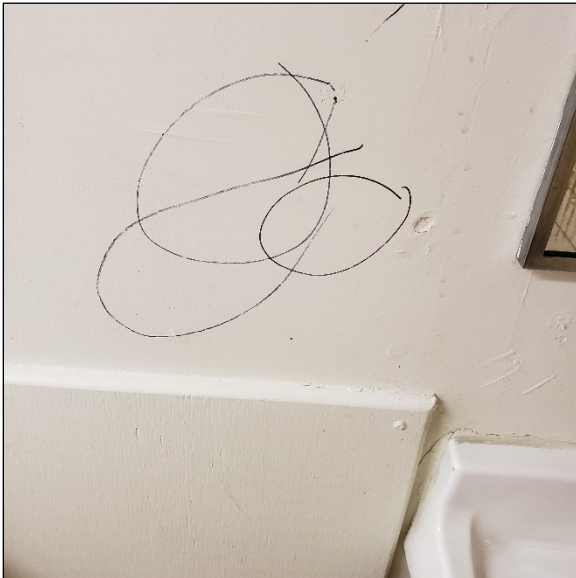
Clothing on the Floor



Source: Prismatic, February 2021

Exhibit G-6
Midwest City Middle School

Graffiti on the Wall



Ceiling Damage



Ceiling Damage



Holes in Structural Clay Tile Wainscot



Source: Prismatic, April 2021

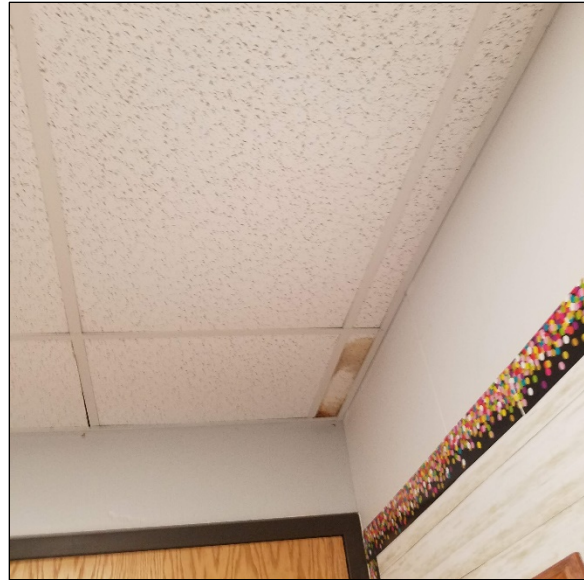
Elementary Schools

The 15 elementary schools in Mid-Del Public Schools include:

- Barnes Elementary School
- Cleveland Bailey Elementary School
- Country Estates Elementary School
- Del City Elementary School
- Epperly Heights Elementary School
- Highland Park Elementary School
- Midwest City Elementary School
- Parkview Elementary School
- Pleasant Hill Elementary School
- Ridgecrest Elementary School
- Schwartz Elementary School
- Soldier Creek Elementary School
- Steed Elementary School
- Tinker Elementary School
- Townsend Elementary School

**Exhibit G-7
Barnes Elementary School**

Damaged Ceiling Tiles



Holes on the Wall



Damaged Ceiling Tile



Source: Prismatic, February 2021

Exhibit G-7 (continued)
Barnes Elementary School

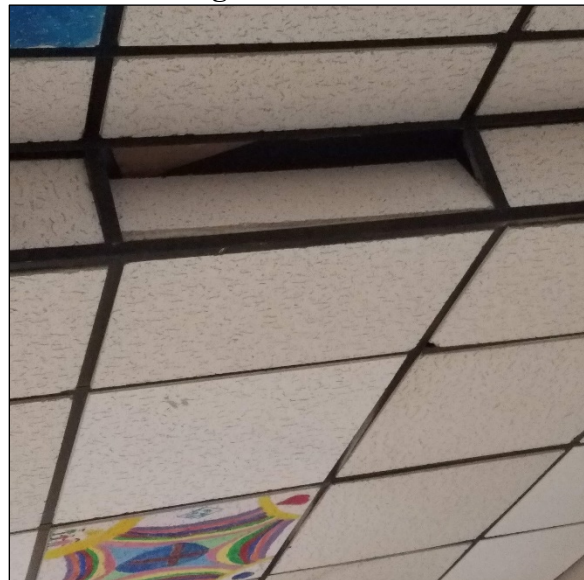
Stains on Ceiling Tiles



Damaged Ceiling Tile



Ceiling Tile Out of Place



Source: Prismatic, February 2021

Exhibit G-8
Cleveland Bailey Elementary School

Messy Custodian Closet



Damaged Flooring



Paint Peeling on Walls



Scratches on the Doorway



Source: Prismatic, February 2021

Exhibit G-9
Country Estates Elementary School

Damaged Ceiling



Messy Exposed Network Wiring Clutter



Clutter Blocking Electrical Panels



Source: Prismatic, February 2021

Exhibit G-9
Country Estates Elementary School

Stained and Damaged Flooring



Stained, Damaged, and Unsanitary Flooring



Source: Prismatic, February 2021

Exhibit G-10
Del City Elementary School

Damaged Ceiling



Source: Prismatic, February 2021

Exhibit G-11
Epperly Heights Elementary School

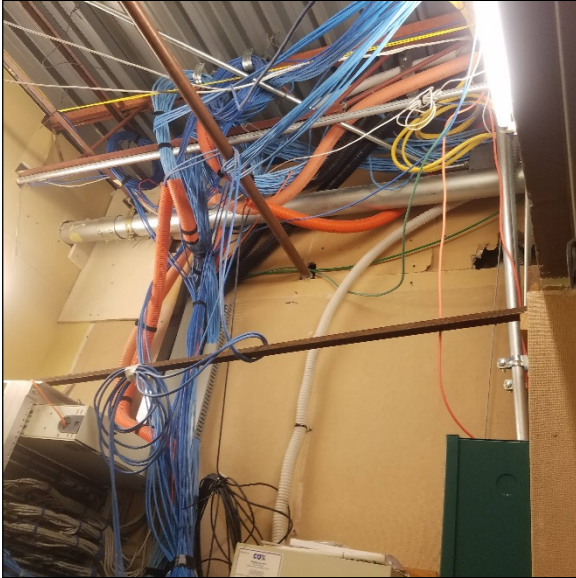
Stained Carpet



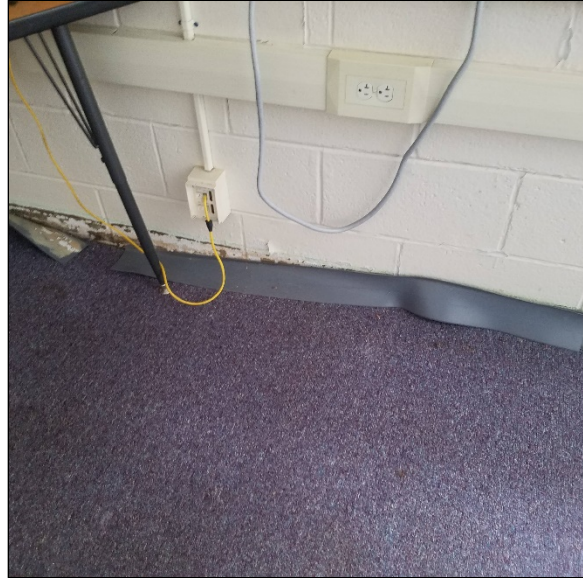
Source: Prismatic, February 2021

Exhibit G-12
Highland Park Elementary School

Wire Management Issues



Cove Base and Wires Out of Place



“Soot” from Diffuser



Floor Stain



Source: Prismatic, February 2021

Exhibit G-12 (continued)
Highland Park Elementary School

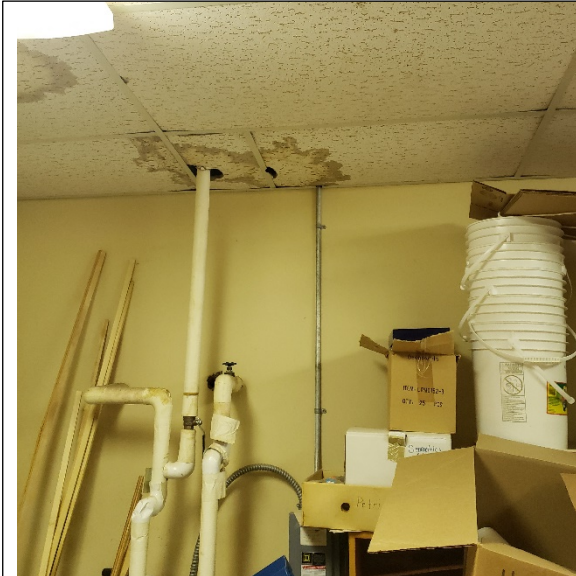
Marks on the Floor



Defaced Exterior Door



Ceiling in Custodial Closet Shows Damage



Hard Surface Unmowed Playground



Source: Prismatic, February 2021

Exhibit G-12 (continued)
Highland Park Elementary School

Missing Cushioned Ground Materials in Playground



Source: Prismatic, February 2021

**Exhibit G-13
Midwest City Elementary School**

Hard Surface Materials in Playground



Source: Prismatic, April 2021

Exhibit G-13 (continued)
Midwest City Elementary School

Hard Surface Materials in Playground



Damage on Merry Go Round



Hard Surface Materials in Playground



Source: Prismatic, April 2021

Exhibit G-13 (continued)
Midwest City Elementary School

Hard Surface Materials in Playground



More Mulch or Pea Gravel Needed



Hard Surface Materials in Playground



Source: Prismatic, April 2021

Exhibit G-13 (continued)
Midwest City Elementary School

Hard Surface Materials in Playground



Source: Prismatic, April 2021

Exhibit G-14
Parkview Elementary School

Stained Ceiling Tiles



Source: Prismatic, February 2021

Exhibit G-15
Pleasant Hill Elementary School

Stained Ceiling Tiles



Damaged Cafeteria Table



Damaged Ceiling Tiles



Source: Prismatic, February 2021

Exhibit G-16
Ridgecrest Elementary School

Damaged Flooring



Source: Prismatic, February 2021

Exhibit G-17
Steed Elementary School

Damaged Flooring



Damaged Wall



Sparse Protective Ground Materials in Playground Area



Source: Prismatic, February 2021

Exhibit G-17 (continued)
Steed Elementary School

Sparse Protective Ground Materials



Breached Fencing in Playground



Source: Prismatic, April 2021

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