

Oklahoma

School Performance Review

July 2023



Maryetta Public Schools



OKLAHOMA
Educational Quality
and Accountability

July, 2023

Fellow Oklahomans:

The Office of Educational Quality & Accountability is pleased to present the Maryetta Public Schools Performance Review upon the request of Maryetta Public Schools (MPS).

Maryetta Public Schools (MPS) 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 MPS 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 MPS 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.oeqa.ok.gov

Respectfully yours,



Ms. Renee Launey- Rodolf
Interim Executive Director

Oklahoma School Performance Review

Maryetta Public Schools

July 2023



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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 initiated the performance review of Maryetta Public Schools (MPS) in December 2022. The Office of Educational Quality and Accountability contracted with Prismatic Services to perform 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 riding along on school bus routes. Administrators, teachers, support staff, parents, community members, and secondary 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**.

For comparison purposes, Prismatic selected five Oklahoma school districts as peer districts based upon size, geography, and demographics. They are Bishop, Colcord, Grand View, Keys, and Oktaha. These districts are called peer districts throughout this report.

For further comparison, a Community Group average is also used throughout the report. MPS falls into community group F2, which includes districts with an Average Daily Membership (ADM) of between 500-999 students. The “2” indicates that the percentage of MPS students eligible to receive free or reduced price meals is above the state average.

During this review, Prismatic developed 68 recommendations; 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 6**.

ACKNOWLEDGMENTS

The Office of Educational Quality and Accountability and Prismatic wish to express their appreciation to the Board of Education of Maryetta Public Schools, its superintendent, Ms. Lori Means, its principal, Ms. Carlene Yell, and the many district employees, students, parents, and community residents who supported and provided input for this review.

MARYETTA PUBLIC SCHOOLS

Located in the town of Stilwell in Adair County in northeastern Oklahoma, Maryetta is approximately 25 miles east of the town of Tahlequah, which is the tribal complex of the

Cherokee Nation of Oklahoma. Stilwell is the county seat of Adair County and has a population of approximately 3,700 as of 2020. MPS, as a school district, covers 22 square miles.

In 2022-23, the fall enrollment in MPS was 645, with most identifying as Native American (**Exhibit 1**). MPS has 83 percent of students eligible for free and reduced-price meals. However, all students eat free based on the federal Community Eligibility Provision program.

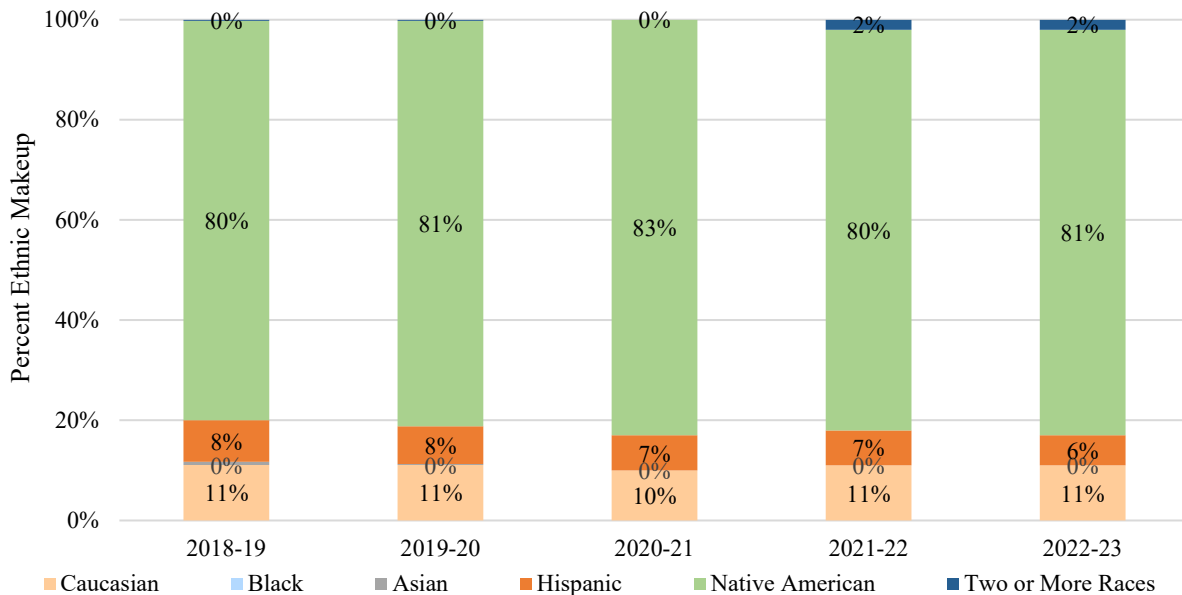
Exhibit 1
MPS Student Enrollment and Socioeconomic Characteristics, 2022-23

School	Grade Span	Fall Enrollment	Caucasian	Black	Asian	Hispanic	Native American	Two or More Races	Eligible for Free or Reduced-Price Meals
Maryetta	PK-8	645	11%	0%	0%	6%	81%	1%	100%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2 illustrates changes in MPS student demographics over the past five years. The largest portion of students has been Native American each year, with little fluctuation. The Asian student population was zero or nearly zero each year.

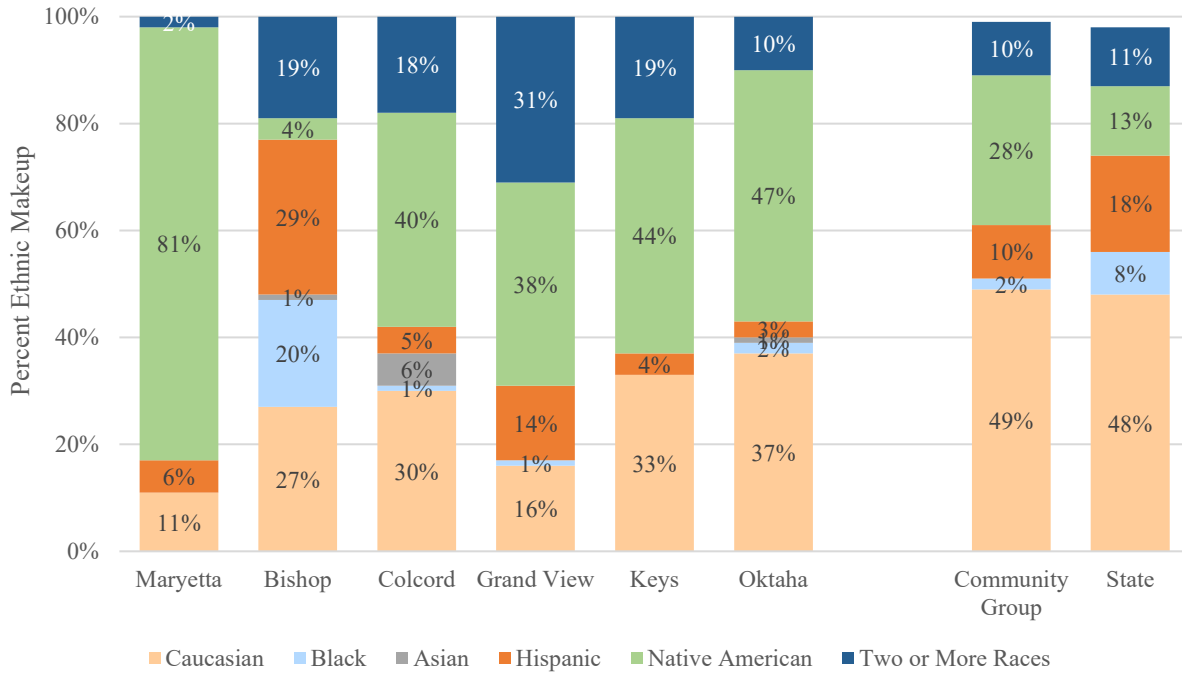
Exhibit 2
Trend in MPS Student Demographics



Source: Office of Educational Quality and Accountability, Profiles Database, and Oklahoma Department of Education, <https://sde.ok.gov/average-daily-membership-adm-and-average-daily-attendance-ada>

Exhibit 3 provides a 2022-23 comparison to the peer districts. While all the districts were diverse, MPS was slightly more diverse than the peers, with the highest proportion of students identified as being two or more races.

Exhibit 3
Comparison of Student Demographics, 2022-23



Source: Office of Educational Quality and Accountability, Profiles Database, and Oklahoma Department of Education, <https://sde.ok.gov/average-daily-membership-adm-and-average-daily-attendance-ada>

The data in **Exhibit 4** reflect average daily membership (ADM) trends compared to the peers, community group, and state. Community group data were not yet available for the more recent years. The state ADM was generally flat. Only two peers experienced growth. Of the peer districts with decreasing enrollment, MPS had the smallest decrease.

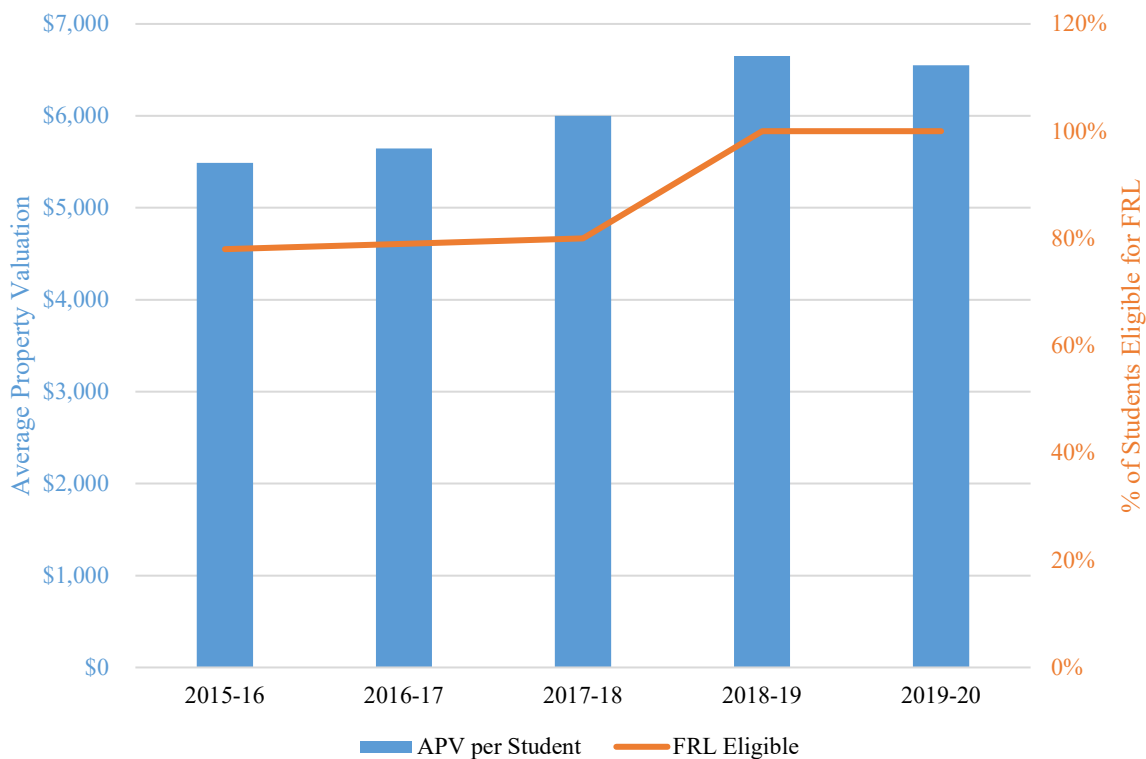
Exhibit 4
Maryetta, Peer Districts, and State Student ADM Trends

Entity	ADM					Percent Change
	2018-19	2019-20	2020-21	2021-22	2022-23	
Maryetta	639	641	631	652	632	(1.1%) ▼
Bishop	583	573	504	570	569	(2.4%) ▼
Colcord	598	619	643	690	754	26.1% ▲
Grand View	601	588	494	488	502	(16.5%) ▼
Keys	737	676	687	749	745	1.1% ▲
Oktaha	701	672	659	698	707	0.9% ▲
Community Group	703	706	NA	NA	NA	NA
State	1,289	1,304	1,272	1,286	1,294	0.4% ▲

Source: Office of Educational Quality and Accountability, Profiles Database, and Oklahoma Department of Education, <https://sde.ok.gov/average-daily-membership-adm-and-average-daily-attendance-ada>

Exhibit 5 shows the trend in MPS assessed property value per student and the percentage of students eligible for free/reduced-price meals over the last five years. Over that period, assessed property valuation has increased by 16 percent, while eligibility for free and reduced-price meals increased by 22 percent.

Exhibit 5
Trend in Assessed Property Value and Student Eligibility for Free/Reduced Meals



Source: Office of Educational Quality and Accountability, Profiles Database

COMMENDATIONS

Prismatic identified “exemplary” or “best practices” in Maryetta Public Schools that led to 22 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 Board, Superintendent, and administration have created a climate that encourages positive teacher interactions and relationships.

The board and superintendent relationship is built on trust and respect.

The district has leadership opportunities for staff and faculty.

MPS provides individual training for employees to verify and understand their compensation.

MPS has regular parent involvement opportunities.

Chapter 2: INSTRUCTIONAL DELIVERY SYSTEM

MPS administrators are visionary instructional leaders.

MPS has a committed, visionary, and comprehensive counseling program.

Chapter 3: BUSINESS OPERATIONS

MPS has prioritized professional development for employees that work in business operations.

MPS is commended for its dedication to pursuing competitive grant funds.

MPS has effective written purchasing procedures.

Chapter 4: FACILITIES USE AND MANAGEMENT

MPS has saved time, money, and effort by concentrating facilities planning and budgeting efforts for small facilities projects largely completed with in-house expertise.

MPS is commended for the astute selection of materials of high initial cost that have yielded savings for decades and reached an early return on investment.

MPS has achieved excellent energy efficiency results, equaling the best results of \$0.88 per square foot per year reported by member districts of the Council of Great City Schools.

MPS shows its commitment to security and safety by employing one full-time SRO and one part-time SSO, to address directly concerns about school security, safety, and student behavior.

MPS is commended for its continuing commitment to improving the security and safety of the school campus.

Chapter 5: SUPPORT SERVICES

The MPS child nutrition program is currently operating in a financially net positive manner.

Maryetta has implemented the Community Eligibility Program (CEP), resulting in high participation levels for breakfast and lunch, and eliminating the need for program applications and costs to parents for student meals.

MPS employs a full-time staff member to manage and support the district's technology resources.

An instructional technology committee has been created and MPS plans to expand it.

Wireless Internet access is available in every MPS classroom and is accessible to students or staff.

MPS routinely includes technology components in grant proposals, which has resulted in an abundance of technology.

MPS bus drivers are commended for their safe driving habits and their contributions to the students' positive school experiences.

RECOMMENDATIONS AND PROJECTED COSTS AND SAVINGS

A list of recommendations with their associated costs or savings is provided in **Exhibit 6**. 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.

The Office of Educational Quality and Accountability contracted for the first performance review of MPS in 2013. In completing this current, second review, the consulting team found that the district had been successful in implementing most of the 2013 recommendations. Further, MPS has maintained many district practices that resulted in a commendation in 2013. There was substantial evidence that 66 out of the 120 commendations/recommendations made (55 percent) were implemented or sustained. This high level of recommendation implementation and sustainment of commendable practices indicates it is likely that MPS will continue to improve as it reviews and implements the recommendations of this current performance review.

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.

To best benefit from this review, Prismatic recommends that the Maryetta Board of Education ask district administrators to review the recommendations, develop an implementation plan, and monitor its progress.

**Exhibit 6
Summary of Costs and Savings by Recommendation**

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2022-23	2023-24	2024-25	2025-26	2026-27	
Chapter 1	Management, Personnel, and Communications						
1	Adopt a process for the regular review of all policies for MPS and maintain the updated policies on the districts website to allow accessibility for all stakeholders.	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)	(\$20,000)
2	Provide teachers with regular and frequent opportunities for collaboration and then work with the principal, grade-level, subject-area teacher teams, and the professional development committee to utilize this time for curricular and instructional purposes.						\$0
3	Include teachers and community stakeholders in development of long-term strategic goals to meet ongoing capital and instructional needs of the district.	(\$20,000)	(\$10,000)	\$0	\$0	\$0	(\$30,000)
4	Improve the availability and preparedness of substitutes.						
5	Hire an additional full-time site administrator.	(\$80,000)	(\$80,000)	(\$80,000)	(\$80,000)	(\$80,000)	(\$400,000)
6	Establish a committee of certified and support employees for the purpose of reviewing and communicating personnel policies, job descriptions, and extra-duty assignments.						\$0
7	Cross-train staff members and develop written administrative procedures to begin succession planning for staff who may be promoted, dismissed, or close to retirement.						\$0
8	Develop a coordinated volunteer program that promotes parent and community involvement in the district’s academic efforts.						\$0
	Subtotal	(\$104,000)	(\$94,000)	(\$84,000)	(\$84,000)	(\$84,000)	(\$450,000)
Chapter 2	Instructional Delivery System						
9	Develop and implement with fidelity core content area Pre-K-8 horizontal and vertical standards-based curriculum frameworks and pacing processes to align, pace, and monitor OAS.						\$0

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2022-23	2023-24	2024-25	2025-26	2026-27	
10	Develop and implement district-wide processes and procedures for administering formative and summative assessments to monitor student progress and measure mastery of OAS, then use the data to pace and adjust curriculum, instructional practices, and inform targeted remediation and interventions.	(\$2,500)	\$0	\$0	\$0	\$0	(\$2,500)
11	Adopt and implement with fidelity a district-wide instructional plan.	(\$2,500)	\$0	\$0	\$0	\$0	(\$2,500)
12	Implement a comprehensive evaluation process to ensure textbooks, software, and complementary instructional materials/resources are: developmentally appropriate; relevant; consistent across grade levels and content areas; aligned with student performance data; implemented with fidelity; and aligned vertically and horizontally with the OAS or need to be selectively abandoned.	(\$3,000)					(\$3,000)
13	Implement and hold teachers accountable for regularly scheduled, structured, PLC release time opportunities for administrators and teachers to collaborate horizontally and vertically regarding aligning and pacing core content, high impact instructional strategies, and practices and interventions that drive improved learning for all students.	(\$5,000)	\$0	\$0	\$0	\$0	(\$5,000)
14	Improve implementation of the RtI, resource, and I Read programs to maximize supplemental reading support for all learners.						\$0
15	Adjust the special education program to ensure compliance and improve all aspects of student services.						\$0
16	Strengthen all aspects of the gifted program.						\$0
17	Explore options for reactivating the middle school library so that all MPS students nurture a love for reading.						\$0
Subtotal		(\$10,000)	\$0	\$0	\$0	\$0	(\$10,000)
Chapter 3	Business Operations						
18	Develop desk procedures for the important duties performed by key personnel and cross-train other office staff members to prepare for succession purposes or emergency situations.						\$0
19	Develop a budget process that is timely, easily understood, and involves a variety of stakeholders.						\$0

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2022-23	2023-24	2024-25	2025-26	2026-27	
20	Adopt a formal policy for the district’s general fund balance that establishes a fund balance target range, provides guidance on how to maintain the minimum balance, and requires reports of fund balance status to the school board.						\$0
21	Develop a standardized procedures handbook for all district activity funds to help ensure that funds are administered.						\$0
22	Develop an electronic process to import hours worked after each payroll period from the timekeeping system into Wengage.						\$0
23	Create an electronic process for employees to submit leave for accountability and tracking purposes.						\$0
24	Develop a process for local banks to compete for district’s idle funds so that the district increases its return on investment.	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$100,000
25	Develop and adopt fixed asset policies and procedures, such as capitalization thresholds, surplus procedures, and lost asset recovery; then inventory fixed assets using a consolidated inventory listing.	(\$7,000)	\$0	\$0	\$0	\$0	(\$7,000)
26	Create a long-range capital improvement plan involving community stakeholders and partners as well as identify necessary funding sources to complete projects.						\$0
27	Implement the electronic purchase requisition workflow module available in Wengage.						\$0
	Subtotal	\$13,000	\$20,000	\$20,000	\$20,000	\$20,000	\$93,000
Chapter 4	Facilities Use and Management						
28	Select a digital work order and purchase order software that can be employed district wide.						\$0
29	Consciously and purposefully allocate 2-4 percent of MPS building replacement value as the annual maintenance and repair budget.						\$0
30	Develop and implement a succession plan for key facilities positions in the district.						\$0
31	Expand the number of PM tasks routinely completed by district staff.						\$0
32	Add a 0.5 FTE custodial position once the cafeteria addition is opened.	(\$15,600)	(\$15,600)	(\$15,600)	(\$15,600)	(\$15,600)	(\$78,000)
33	Pursue new and improved energy conservation opportunities.						\$0

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2022-23	2023-24	2024-25	2025-26	2026-27	
34	Request that OSSI complete a comprehensive security and safety review.						\$0
	Subtotal	(\$15,600)	(\$15,600)	(\$15,600)	(\$15,600)	(\$15,600)	(\$78,000)
Chapter 5	Support Services						
35	Staff the kitchen using industry staffing standards based upon MPLH calculations.	\$10,168	\$10,168	\$10,168	\$10,168	\$10,168	\$50,840
36	Ensure that all food/meals served are claimed for reimbursement.	\$6,300	\$6,300	\$6,300	\$6,300	\$6,300	\$31,500
37	Improve management of the child nutrition program by: preparing child nutrition financial reports that will provide meaningful data in a format that can be used for analysis and decision-making; providing the reports to the child nutrition supervisor and train her on how to interpret and analyze; training her on the preparation and submittal of claims; and, assigning preparation of the reimbursement claim to the supervisor.						\$0
38	Improve lunch menus by: developing lunch menus by age groups utilizing student advisory groups; offering a variety of choices and incorporate self-serve for these options; and, adjusting portions to follow USDA meal pattern guidelines.						\$0
39	Develop breakfast menus that include a variety of choices and incorporate self-serve for these options.						\$0
40	Incorporate the fruit/vegetable bar as part of the reimbursable meal.	\$27,429	\$27,429	\$27,429	\$27,429	\$27,429	\$137,145
41	Improve the Breakfast in the Classroom program by creating a different menu and revamping the service process for middle school students.						\$0
42	Implement a Point of Sale (POS) system in the cafeteria.	(\$400)	\$0	\$0	\$0	\$0	(\$400)
43	Ensure the child nutrition director and at least one subordinate receive training on the available components of the Nutrikids program and implement applicable elements.						\$0
44	Work with the various vendors to set up an automated order system for all cafeteria purchases.						\$0
45	Establish a district technology budget that is realistic, supportive of classroom needs, and includes a replacement cycle.	\$0	\$0	(\$15,000)	(\$17,500)	(\$20,000)	(\$52,500)

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2022-23	2023-24	2024-25	2025-26	2026-27	
46	Develop job descriptions for technology staff and create procedures to regularly update them, provide them to employees, and link them to performance evaluations.						\$0
47	Develop teacher leaders to provide instructional support to teachers as they utilize a variety of technology in their classrooms.	(\$1,500)	(\$1,500)	(\$1,500)	(\$1,500)	(\$1,500)	(\$7,500)
48	Expand the technology planning process and create a long-term strategic plan for technology with input from a variety of stakeholders.						\$0
49	Develop a plan to balance digital instructional time with teacher guided instruction.						\$0
50	Develop and implement a disaster recovery plan that includes the district’s critical data, systems, and programs.						\$0
51	Assess technology placement, use, and effectiveness to ensure the district is maximizing its technology investments.						\$0
52	Adopt expectations for teacher and administrator competencies in technology and provide additional professional development focused on increasing staff technology skills and understanding.						\$0
53	Implement an online work order system and procedure to track technology issues and increase issue resolution efficiency.						\$0
54	Create technology resource standards for teachers to share instructional resources and communicate with each other and parents.						\$0
55	Develop formal written technology standards, procedures, and processes for inventory, administrative tasks, equipment and software purchases, implementation, and upgrades.						\$0
56	Develop a transportation department handbook.						\$0
57	Extend bus transportation service to more students who live less than 1.5 miles from school.						\$0
58	Include all students in bus drills and lengthen the amount of time spent on them.						\$0
59	Raise bus driver stipends to remain competitive.	(\$7,850)	(\$7,850)	(\$7,850)	(\$7,850)	(\$7,850)	(\$39,250)
60	Develop guidelines for how far students of different grade levels might be expected to travel to their bus stop.						\$0
61	Explore options for installation of a few child safety seats on each bus.	(\$1,800)	\$0	\$0	\$0	\$0	(\$1,800)

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2022-23	2023-24	2024-25	2025-26	2026-27	
62	Provide spare bus drivers with more frequent opportunities to practice their bus driving skills.	(\$500)	(\$500)	(\$500)	(\$500)	(\$500)	(\$2,500)
63	Develop written bus route sheets.						\$0
64	Update the MPS website to include information on the transportation program.						\$0
65	Encourage and enable the transportation supervisor to join and participate in OAPT activities regularly.	(\$100)	(\$100)	(\$100)	(\$100)	(\$100)	(\$500)
66	Clean the garage area.						\$0
67	Extend use of full-sized buses to 12-15 years, or approximately 100,000 miles.	\$24,000	\$24,000	\$24,000	\$24,000	\$24,000	\$120,000
68	Expand the capabilities of the bus maintenance crew to include brake work, steering and suspension, exhaust repair, tire installation, and body work so that there are fewer instances when MPS buses must be sent out of district for repairs and preventive maintenance.	(\$500)	(\$500)	(\$500)	(\$500)	(\$500)	(\$2,500)
	Subtotal	\$55,247	\$57,447	\$42,447	\$39,947	\$37,447	\$232,535
	Total savings	\$88,397	\$88,397	\$88,397	\$88,397	\$87,397	(\$649,450)
	Total costs	(\$142,784)	(\$115,384)	(\$118,584)	(\$121,084)	(\$83,584)	\$436,985
	Total net savings and costs	(\$54,387)	(\$26,987)	(\$30,187)	(\$32,687)	(\$42,153)	(\$212,465)

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

Of the 68 recommendations made, Prismatic believes these seven recommendations to be the most critical:

- **Provide teachers with regular and frequent opportunities for collaboration and then work with the principal, grade-level, subject-area teacher teams, and the professional development committee to utilize this time for curricular and instructional purposes.** MPS should schedule common planning times to allow teachers to collaborate on curriculum and instruction, and to allow for vertical/horizontal curriculum planning. There should also be an online file area where teams can house and share resources.
- **Adopt and implement with fidelity a district-wide instructional plan.** The district needs an instructional plan that clearly details instructional processes and procedures and only includes programs and resources that have robust evidence of tight correlation to OAS and have a direct impact on improved student achievement. District-wide expectations and accountability procedures should be established to create Pre-K-8 continuity and consistency in data-driven, student-centered classrooms. The MPS instructional plan should be implemented in the 2023-24 school year. Staff meetings, professional development days, PLC meetings, and grade level and content area meetings should be venues to set expectations for understanding and implementing the instructional plan.
- **Develop desk procedures for the important duties performed by key business office personnel and cross-train other office staff members to prepare for succession purposes or emergency situations.** Desk procedures and cross-training help protect district operations from disruption when staff is out unexpectedly or changes. A standard format for creating desk procedure manuals should be developed and each employee trained in the use of the format. Each staff member should develop procedures for each of their duties. The superintendent should review and approve the draft manuals and determine which staff members will be cross trained in 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.
- **Consciously and purposefully allocate 2-4 percent of MPS building replacement value as the annual maintenance and repair budget.** To ensure the district continues to adhere to this best practice, the superintendent should annually review the maintenance budget, keeping it between 2-4 percent of CRV at a minimum, and increasing it when extraordinary circumstances arise. Preventative maintenance should be completed on a regular basis to preserve the integrity and lifespan of facilities.
- **Incorporate the fruit/vegetable bar as part of the reimbursable meal.** The district should discontinue the practice of serving fresh fruit and vegetables on the serving line and instead

offer these items on the fruit and vegetable bars. The bars should be positioned so students choose items after the serving line. The cashier positioned after the bars should be responsible for ensuring each plate contains the required components for reimbursement.

- **Create technology resource standards for teachers to share instructional resources and communicate with each other and parents.** MPS has the resources needed to increase communication with each other and with parents. The superintendent, principal, and a group of teacher leaders should develop structure and guidelines for teacher collaboration, which should serve as a vehicle for PLCs and the development of grade-level resources aligned to academic standards. The team should also develop standards and guidelines for parent communication, determine disparities in parent communication, select a resource that meets the needs, and create an implementation and training plan.
- **Enhance safety of bus operations by joining the Oklahoma Association for Pupil Transportation (OAPT) and expanding bus safety instruction.** The superintendent should require the transportation supervisor to join OAPT and then provide time for the supervisor to attend OAPT activities. The supervisor should bring back to the district resources and lessons learned to share with drivers and maintenance staff. In addition to regularly scheduled drills, MPS should arrange a school meeting for all students where they can watch videos and have discussions about school bus safety and the drills required to keep children safe in case of an emergency. Because it is likely that most students will ride at some point during the year on a field or sports bus, these students too, who do not otherwise ride a bus daily, should receive much the same bus safety instruction as those students who ride daily.

Chapter 1:

*Management, Personnel, and
Communications*

Chapter 1

Management, Personnel, and Communications

This chapter addresses the management, personnel, and communications of Maryetta Public Schools (MPS) in the following sections:

- A. Governance
- B. Organization and Management
- C. Planning and Evaluation
- D. Personnel Management
- E. Community and Parent Involvement

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 BOE 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

The mission of MPS is “to provide support, freedom, and empowerment to meet unique needs, and involve all people in facilitating academic excellence”.

Maryetta is a dependent school with one campus that serves approximately 650 students from Pre-K through 8th grade. MPS is in the town of Stilwell in Adair County in northeastern Oklahoma, approximately 25 miles east of the town of Tahlequah, which is the tribal complex of the Cherokee Nation of Oklahoma. Stilwell is the county seat of Adair County and has a population of approximately 3,700 as of 2020. MPS, as a school district, covers 22 square miles.

In 2022-23, the fall enrollment in MPS was 645, with most identifying as Native American (**Exhibit 1-1**). MPS has 83 percent of students eligible for free and reduced lunch. However, all students eat free based on the Community Eligibility Provision.¹

¹ Currently, all MPS students receive free meals due to the district's participation in Community Eligibility Provision (CEP), a non-pricing meal service option for school districts in low-income areas established by the U.S. Department of Agriculture. See <https://www.fns.usda.gov/cn/community-eligibility-provision> for additional information.

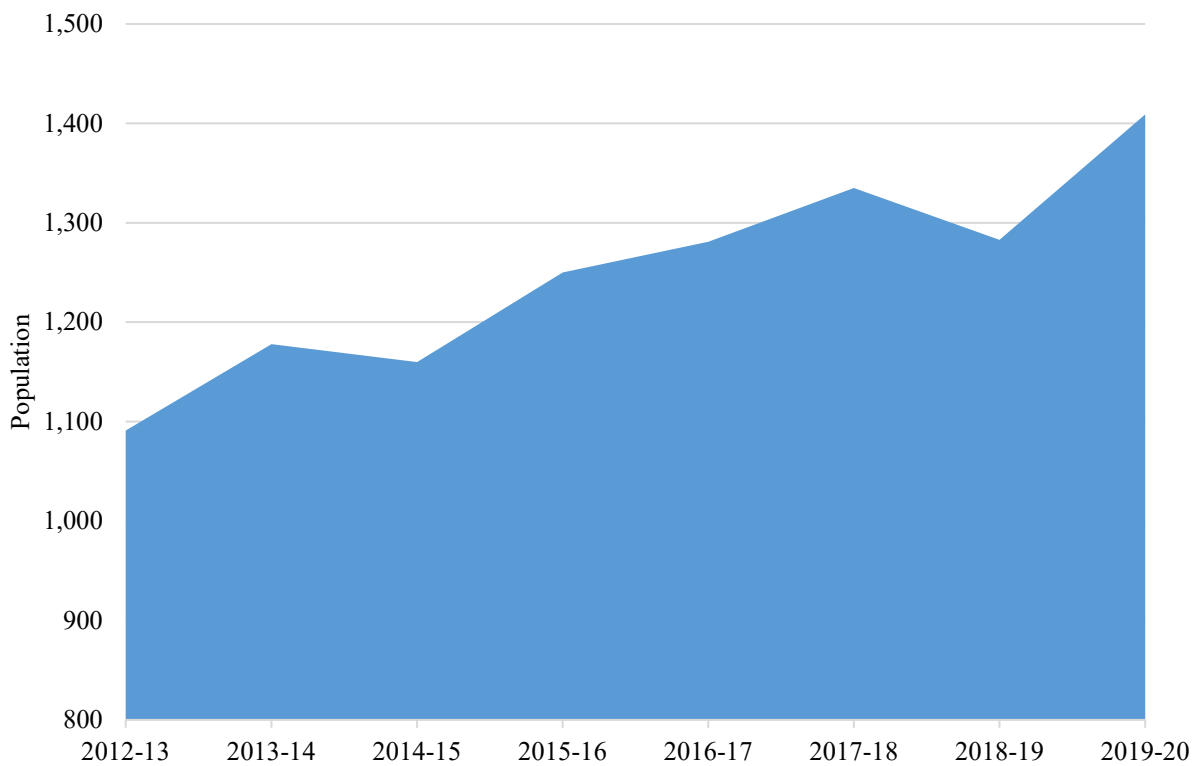
Exhibit 1-1
Maryetta Student Enrollment and Socioeconomic Characteristics, 2022-23

School	Grade Span	Fall Enrollment	Caucasian	Black	Asian	Hispanic	Native American	Two or More Races	Eligible for Free or Reduced-Price Meals
Maryetta	PK-8	645	11%	0%	0%	6%	81%	1%	100%

Source: Oklahoma Department of Education, <https://sde.ok.gov/documents/state-student-public-enrollment>

Exhibit 1-2 displays the population trend for the Maryetta community. There has been a 29 percent increase in overall population since 2012-13.

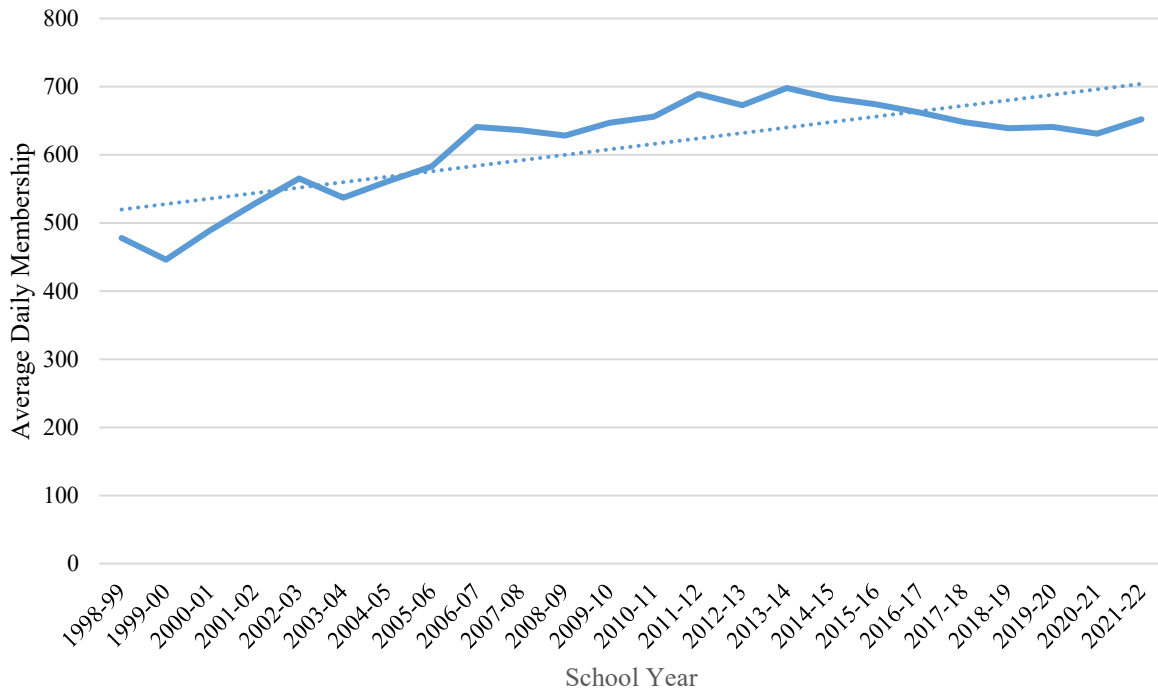
Exhibit 1-2
Population Trend for Maryetta Community



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-3 shows trends in average daily membership (ADM) at MPS. As shown, ADM slowly declined from its peak in 2013-14 through 2020-21. However, it has increased from 2020-21 to 2021-22.

**Exhibit 1-3
Trend in MPS 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. Community group data were not yet available for the more recent years. The state ADM was generally flat. Only two peers experienced growth. Of the peer districts with decreasing enrollment, MPS had the smallest decrease.

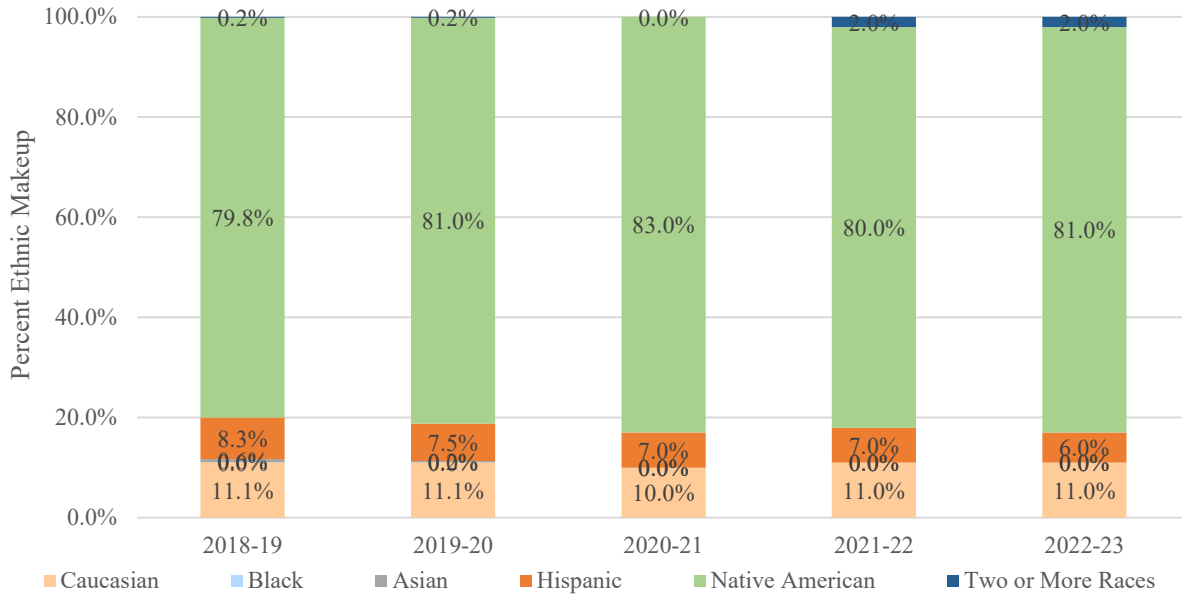
**Exhibit 1-4
Maryetta, Peer Districts, and State Student ADM Trends**

Entity	ADM					Percent Change
	2018-19	2019-20	2020-21	2021-22	2022-23	
Maryetta	639	641	631	652	632	(1.1%) ▼
Bishop	583	573	504	570	569	(2.4%) ▼
Colcord	598	619	643	690	754	26.1% ▲
Grand View	601	588	494	488	502	(16.5%) ▼
Keys	737	676	687	749	745	1.1% ▲
Oktaha	701	672	659	698	707	0.9% ▲
Community Group	703	706	NA	NA	NA	NA
State	1,289	1,304	1,272	1,286	1,294	0.4% ▲

Source: Office of Educational Quality and Accountability, Profiles Database, and Oklahoma Department of Education, <https://sde.ok.gov/average-daily-membership-adm-and-average-daily-attendance-ada>

Exhibit 1-5 illustrates changes in MPS student demographics over the past five years. The largest portion of students was Native American each year, with little fluctuation. The Asian student population was zero or nearly zero each year.

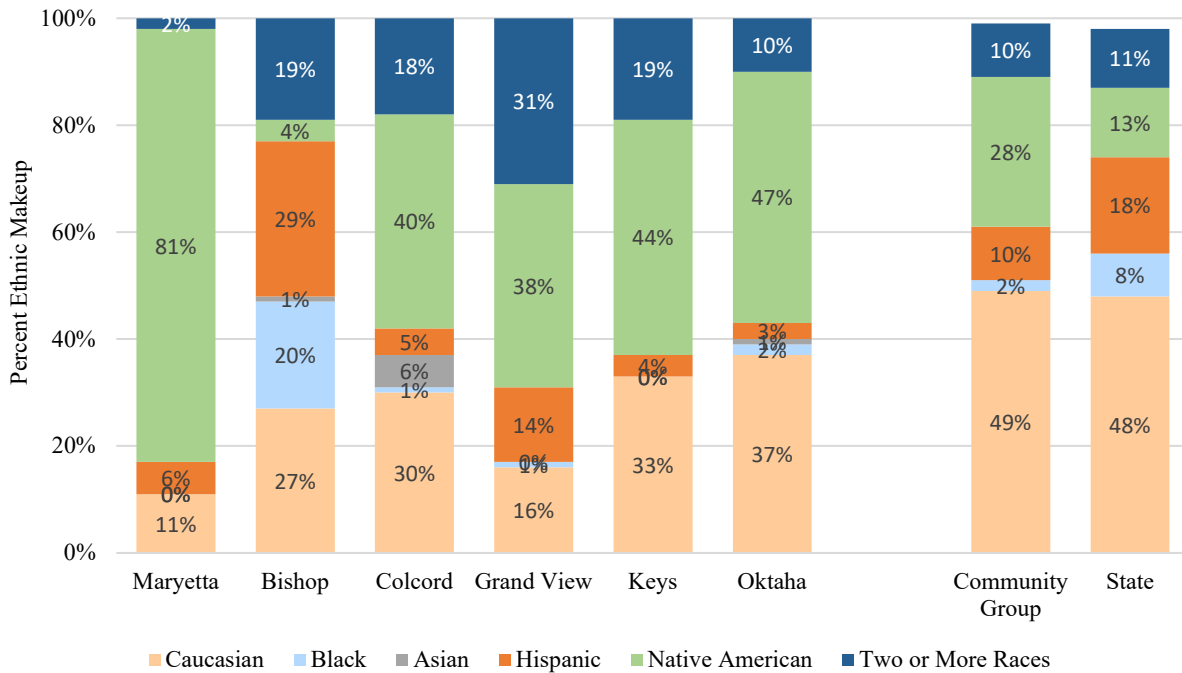
**Exhibit 1-5
Trend in MPS Student Demographics**



Source: Office of Educational Quality and Accountability, Profiles Database, and Oklahoma Department of Education, <https://sde.ok.gov/average-daily-membership-adm-and-average-daily-attendance-ada>

Exhibit 1-6 compares MPS’ demographics with its peers and the state for 2022-23 (community group data were not yet available). Like MPS, peer districts were also majority non-White, with several having a high percentage of Native American students. However, none had as high a percentage of Native American students as MPS.

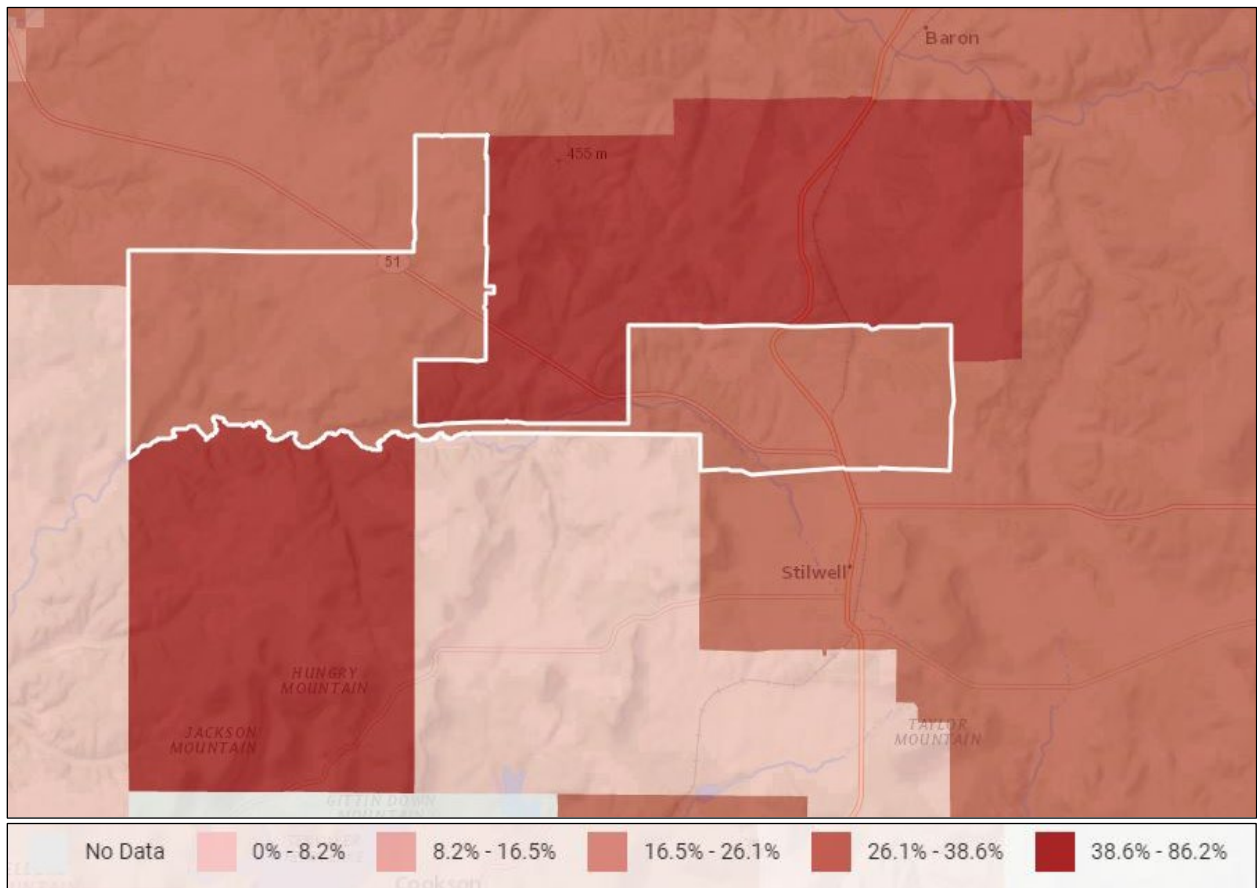
**Exhibit 1-6
Comparison of Student Demographics, 2022-23**



Source: Office of Educational Quality and Accountability, Profiles Database, and Oklahoma Department of Education, <https://sde.ok.gov/average-daily-membership-adm-and-average-daily-attendance-ada>

Maryetta is generally challenged by poverty. **Exhibit 1-7** displays a comparative map of the child poverty rate for Maryetta and the surrounding districts. According to the National Center for Education Statistics, 28 percent of Maryetta residents under the age of 18 live in poverty.

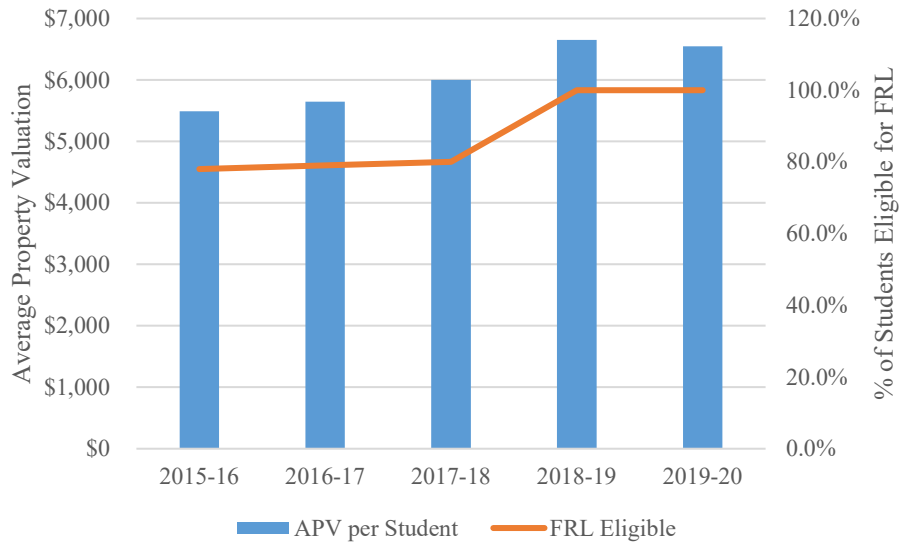
Exhibit 1-7
Rate of Child Poverty in Maryetta Area



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

Exhibit 1-8 shows the trend in MPS assessed property value per student and the percentage of students eligible for free/reduced-price meals over the last five years. Over that period, assessed property valuation has increased by 16 percent, while eligibility for free and reduced-price meals increased by 22 percent.

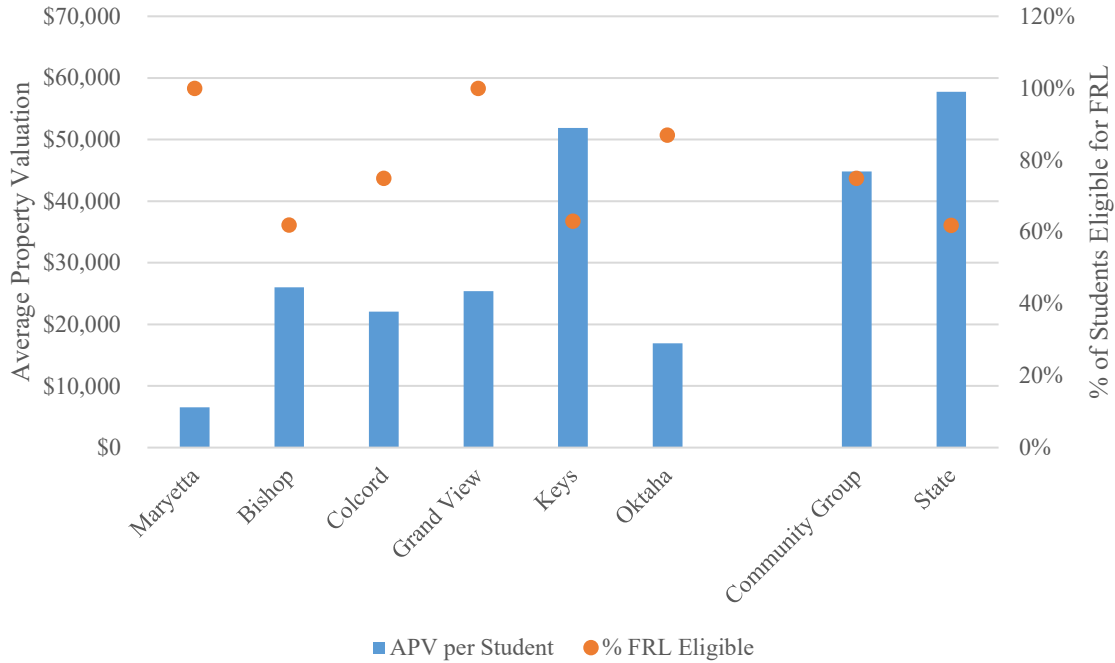
Exhibit 1-8
Trend in Assessed Property Value and Student Eligibility for Free/Reduced Meals



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-9 shows the comparison of MPS Assessed Property Value (APV) and percent of student eligibility for free/reduced-price meals to its peer districts, community group, and state. MPS had the lowest APV and was one of two peer districts participating in the Community Eligibility Program.

**Exhibit 1-9
Comparison of Assessed Property Valuation and
Student Eligibility for Free/Reduced Meals, 2019-20**



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 BOE 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	123
Independent and Dependent School Districts – Board of Education – Members Election	125
Expansion of Board	126
Workshops for New Board Members – Expenses of Members Attending	127
Relation by Affinity or Consanguinity Prohibition	129
Employment of Relative of Member of Board of Education	130
Excluding Litigious Board Member from Proceedings	131
School District Treasurer – Assistant Local Treasurer	132
Local Treasurer – Surety Bond – Duties – Cash Investment Ledgers	133
Oath of Office	135
Requirements for Bonds for Employees and Officers	136
Powers and Duties	138
Meetings of Board – Executive Sessions – Compensation of Members of Boards of Districts with ADA Exceeding 15,000 or Population Exceeding 100,000	148
Officers of Board	149
President – Duties	150
Vice President – Duties	151
Clerk – Duties	152
Oklahoma Open Meeting Act	787
Executive Sessions	793

Source: Oklahoma School Law Book, 2021

Powers and duties of the local board of education are contained in Sections 125 and 138 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.

Section 126 of the School Law Book addresses the size and election of local boards of education in Oklahoma, and Section 149 provides a description of the required officers for them. The MPS board of education consists of three members, each of whom is elected to a three-year term. School districts having fewer than 1,800 students in average daily membership, such as MPS, choose to elect all board members at large. **Exhibit 1-11** reflects the year elected and the next election date for each MPS school board member. Of note is that two of the MPS board members have served on the board for 15 or more years.

Exhibit 1-11
Maryetta Board of Education Members

Board Member	Board Position	Year of Election or Appointment	Term Expires
Larry Eagleton	President	2021	2024
Joel Bean	Vice President	2022	2025
Kevin Stuhmer	Clerk	2020	2023

Source: MPS, March 2023

The district holds school board elections each April for a general election if only two candidates file for election. A primary election is held in February if three or more candidates file for election. The board of education members swear in elected members and vote on officers at the next meeting. A contract is in place for an annual audit of district finances.

The Maryetta Board of Education meets at noon on the first Thursday of the month in the MPS Board Room. The meeting place and time may be changed by agreement of a majority of the board members. They are open to the public. Special meetings are held as needed, and board members receive agendas and any supporting information in advance of the meeting.

Section 127 outlines the training requirements for school board members. Within 15 months following the 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.

Reelected board members are required to complete six hours of instruction within 15 months of reelection. 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 set forth above for new members.

FINDING 1-1

Through board and administrative interviews, the consulting team found that district policies were in the process of being updated; however, there was not an updated policy book accessible to the staff or public at the time of the review. MPS has contracted with OSSBA to update their policies and is in the process of getting all policies updated.

Policies adopted by the board of education provide direction, control, and/or management of its legal functions. The goals of all policies are to present clear, concise, and specific directives to the staff and to serve as a primary communication tool with the general public, students, and parents. Regulations state that procedures and rules developed by board policy are to guide and direct the administration in the implementation of all school board policies. Adoption of new policies or revision of existing policies is solely the responsibility of the school board. The updated policy manuals must be made available to the public and placed for easy access at district locations for use by employees and the public. Many school districts post computerized versions of the policies on the school website. This provides a convenient and effective venue for keeping all stakeholders informed.²

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. School boards help themselves by closely examining policies and keeping policies current.

RECOMMENDATION

Adopt a process for the regular review of all policies for MPS and maintain the updated policies on the districts website to allow accessibility for all stakeholders.

The school board and superintendent should review options available through the Oklahoma State School Boards Association OSSBA or the Center for Education Law for regular policy updates, so that a wholesale review of all policies is not necessary in the future. Both entities follow new legislation and can provide guidance on which policies may need to be updated. Once an option has been selected and implemented, the superintendent should direct the inclusion of all policies on the district's website.

² An example can be found here: https://www.netq.org/dmsView/PolicyManual_75079

FISCAL IMPACT

The OSSBA and the Center for Education Law provides districts with multiple options for keeping policies updated. The costs can vary from \$750 to \$6,000 per year for a customized policy service. The fiscal impact of this recommendation will depend upon the school board’s direction regarding which services the superintendent should purchase. The consulting team estimates an average annual cost of \$4,000.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Develop procedures to review, maintain, and make available district policies.	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)

FINDING 1-2

The board of education, superintendent, and principal consistently demonstrate a philosophy that the student-teacher interaction and relationship are the central elements affecting each student’s overall school experience and academic success. Student absences and behavioral issues are minimized as a result of their philosophy.

The consulting team observed positive interactions between students and teachers throughout the school during their onsite visit. The principal stated that developing positive interactions was a priority at the school. To support this priority, the district is participating in a Transform grant that supports implementation of positive behavior interventions and supports in their school. The grant provides professional development and resources for building a positive school culture.

Data for 2019-20 in **Exhibit 1-12** reflects a lower number of average days absent from MPS’s community group and the State. The student suspension ratio, the ratio of students to the number of suspensions, is significantly higher than their community group and the State. A higher suspension ratio is more desirable.

**Exhibit 1-12
Preparation, Motivation, and Parental Support Indicators**

Indicator	Maryetta	Community Group	State
Average number of days absent per student	7.1	9.7	9.9
Suspension Ratio: There was 1 suspension (of 10 days or less) for every ___ students	91.1	29.1	18.2
Suspension Ratio: There was 1 suspension (of more than 10 days) for every ___ students	638.0	241.2	221.1

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

Research shows that increasing positive student teacher interactions improves the classroom climate and increases student engagement, student academic achievement and behavioral outcomes. According to Hamre and Pianta (2006) “Forming strong and supportive relationships

with teachers allows students to feel safer and more secure in the school setting, feel more competent, make more positive connections with peers, and make greater academic gains.”³ Building positive teacher interactions and relationships is fundamental to the success of students in school.

COMMENDATION

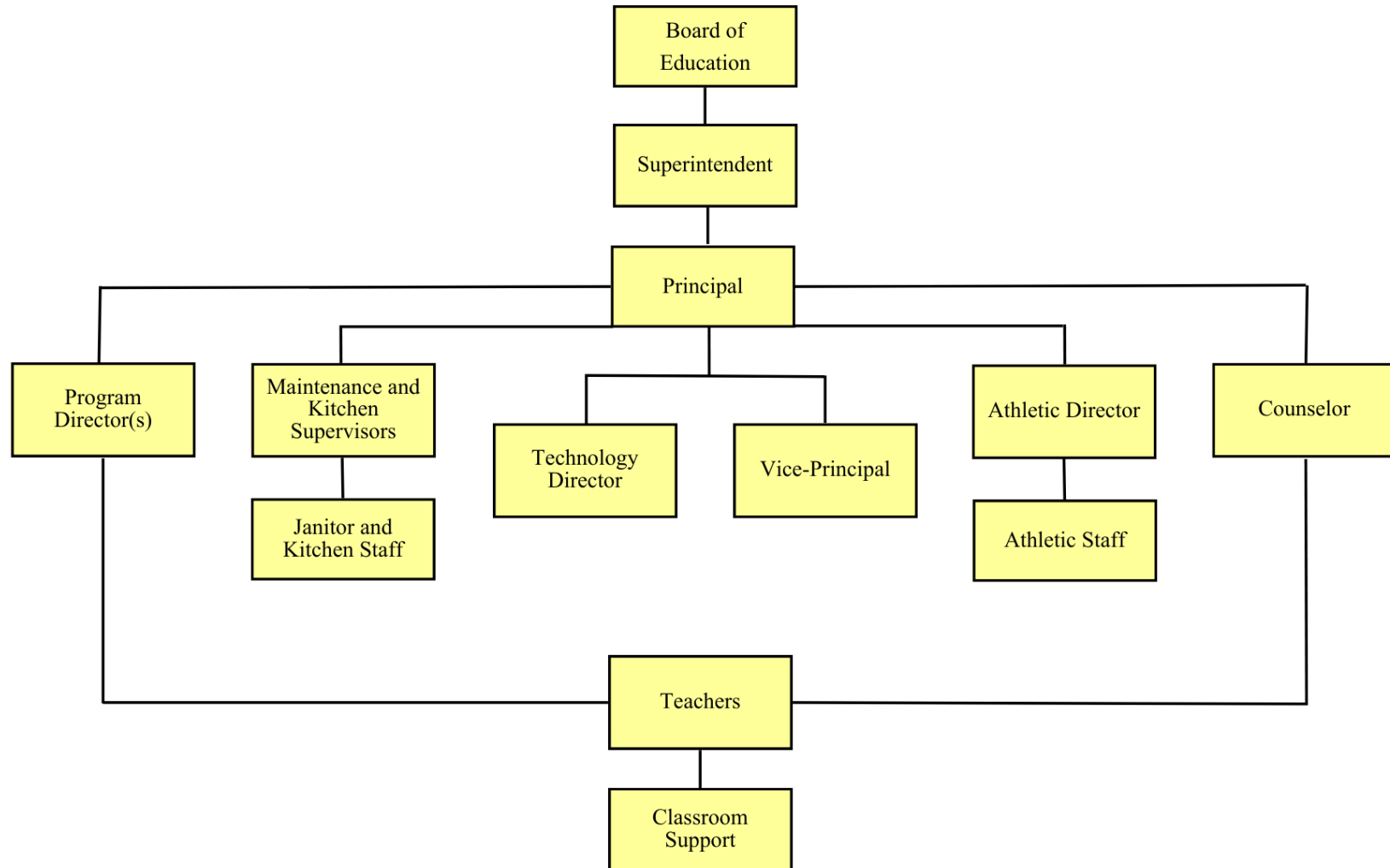
The Board, Superintendent, and administration have created a climate that encourages positive teacher interactions and relationships.

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 organizational structure is essential to the efficient delivery of services in a school district. Effective structures encourage communication at all levels. **Exhibit 1-13** reflects the current organizational chart for MPS.

³ Hamre, B. K., & Pianta, R. C. (2006). Student-Teacher Relationships. In G. G. Bear & K. M. Minke (Eds.), *Children's needs III: Development, prevention, and intervention* (pp. 59–71). National Association of School Psychologists.

**Exhibit 1-13
MPS Organizational Chart**



Source: Created by Prismatic, March 2023

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MPS functional areas. **Exhibit 1-14** provides the results for the principal and the superintendent. A majority (87 percent) of staff gave the superintendent an A or B grade. The principal also earned high marks.

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.	69%	16%	4%	3%	0%	7%
Superintendent’s work as the chief administrator of the district.	63%	24%	3%	4%	0%	6%
Principal’s work as instructional leader.	67%	22%	3%	1%	1%	4%
Principal’s work as manager of the staff and teachers.	61%	25%	4%	0%	3%	6%

Source: Prismatic Survey Results, March 2023

Similar to staff results, a majority of parents gave the superintendent high marks (**Exhibit 1-15**). None of the parents disagreed or strongly disagreed that the superintendent is a respected and effective leader.

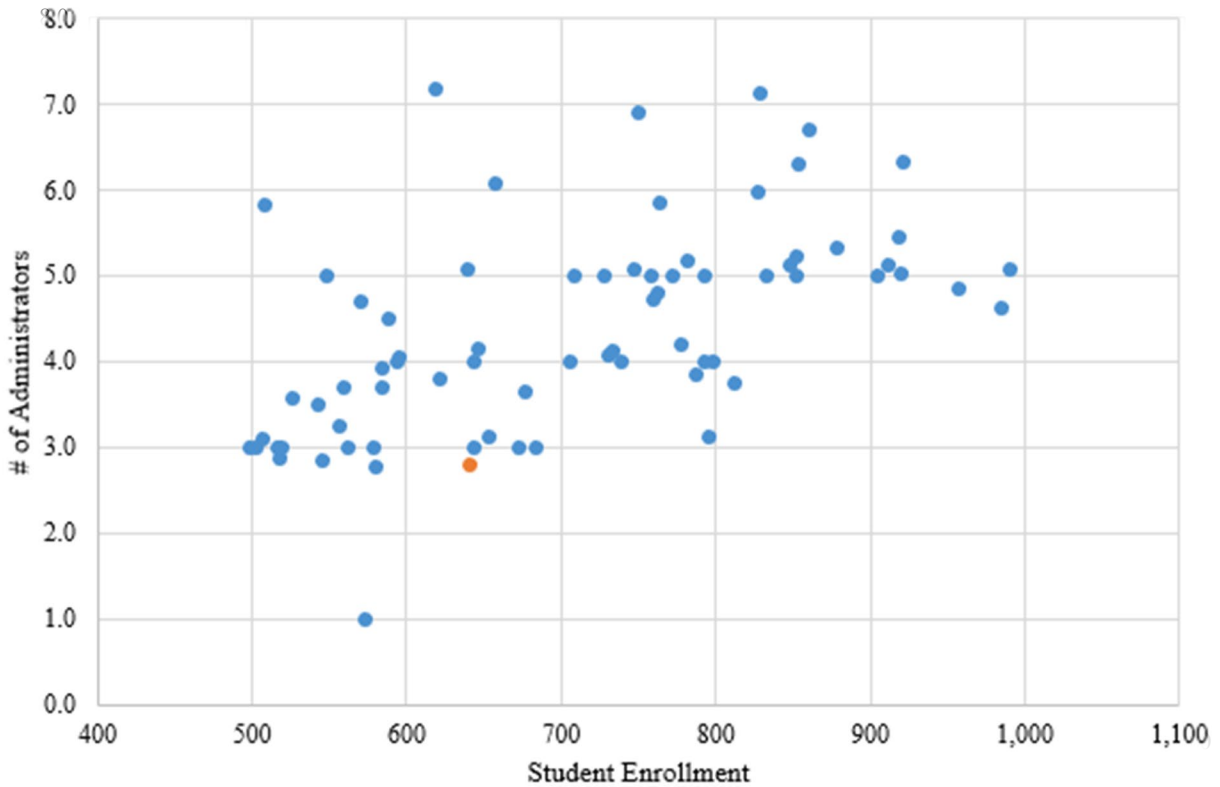
Exhibit 1-15
Parent Survey Responses Regarding Superintendent as a Respected and Effective Leader

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The superintendent is a respected and effective leader.	37%	39%	24%	0%	0%

Source: Prismatic Survey Results, March 2023

Considering all districts in the F2 Community Group and the district’s current enrollment, having two administrative positions is below similarly-sized Oklahoma districts. **Exhibit 1-16** compares the number of administrative positions with student enrollment for all 73 of the F2 districts. The MPS data point is shown in orange. As shown, MPS’ 2019-20 administrative staffing was lower than nearly all F2 peers.

Exhibit 1-16
Administrative Staffing as a Function of Enrollment
F2 Oklahoma School Districts, 2019-20



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-17 compares the MPS ratio of administrators to teaching staff with the five comparison districts. With the current 2.8 MPS administrators, MPS has a ratio of 19 teachers per administrator, which is among the highest of its peers.

Exhibit 1-17
Comparison of Teacher and Administrator Staffing, 2019-20

Entity	ADM	Number of Administrators (FTE)	Number of Classroom Teachers (FTE)	Ratio of Teachers to Administrators
Maryetta	641	2.8	52.0	19:1
Bishop	573	1.0	28.9	29:1
Colcord	619	7.2	42.2	6:1
Grand View	588	4.5	40.9	9:1
Keys	676	3.7	49.6	14:1
Oktaha	672	3.0	43.1	14:1
Peer Average	626	3.9	41.0	11:1

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

Exhibit 1-18 compares MPS' per-student spending on administrator salaries with that of its peer districts. As shown, MPS' administrator cost per student was among the lowest of its peers and well below the peer average.

Exhibit 1-18
Administrative Expenditures Comparison, 2019-20

Entity	ADM	Number of Administrators (FTE)	Average Salary	Administrator Cost per Student
Maryetta	641	2.8	\$89,950	\$393
Bishop	573	1.0	\$161,706	\$282
Colcord	619	7.2	\$66,271	\$771
Grand View	588	4.5	\$100,084	\$766
Keys	676	3.7	108,518	\$594
Oktaha	672	3.0	\$86,637	\$387
Peer Average	626	3.9	\$104,643	\$649

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

FINDING 1-3

The board of education and superintendent have a clear understanding of their roles and responsibilities and honor the chain of command. The school board members reflected a strong respect and trust for the Superintendent and administration.

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. Every school leader, whether at the school site or the district office, has an opportunity to leverage trust to support the complex work of educating students. Determining how to best leverage this trust remains a challenge. According to Battle (2007), leadership is much more than the complex work of educating students; it also includes meeting the needs of those who work to set the vision of the district.⁴

COMMENDATION

The board and superintendent relationship is built on trust and respect.

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.

⁴ https://digitalcommons.umassglobal.edu/cgi/viewcontent.cgi?article=1327&context=edd_dissertations

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

FINDING 1-4

District teachers lack common planning time. As a result, they do not meet regularly to collaborate on curriculum and instruction.

Based on the focus group interviews, teachers had some time for professional learning communities at the beginning of the year and during staff development days; however, they did not have a consistent time to meet throughout the year. Each grade level did not have a common planning period that allowed them to meet regularly and collaborate on their curricula and instruction. If there were four teachers in a grade level, two of the teachers may have the same planning period and the other two would have another planning time.

Teachers and schools that engage in better quality collaboration have better achievement gains in math and reading. Moreover, teachers improve at greater rates when they work in schools with better collaboration quality. These results support policy efforts to improve student achievement by promoting teacher collaboration about instruction in teams.⁶ A study of 47 schools reported higher performance in math and reading for students who attended schools identified with higher quality teacher collaboration.⁷

RECOMMENDATION

Provide teachers with regular and frequent opportunities for collaboration and then work with the principal, grade-level, subject-area teacher teams, and the professional development committee to utilize this time for curricular and instructional purposes.

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

⁶ Ronfeldt, M., Farmer, S. O., McQueen, K., & Grissom, J. A. (2015). Teacher collaboration in instructional teams and student achievement. *American Educational Research Journal*, 52(3), 475–514. <https://doi.org/10.3102/0002831215585562>

⁷ Goddard, Y. L., Goddard, R. D., & Tschannen-Moran, M. (2007). A theoretical and empirical investigation of teacher collaboration for school improvement and student achievement in public elementary schools. *Teachers College Record*, 109(4), 877–896. <https://doi.org/10.1177/016146810710900401>

The Inclusive Schools Network provided a blog to help schools schedule common planning time. They noted that successful common planning times should be scheduled district-wide or school-wide. Their ideas include:

- Hire regular substitutes or ask volunteers to work with students during regularly scheduled blocks of time.
- Eliminate or reduce teacher administrative assignments so that co-teaching teams can be free during the same periods.
- Extend the lunch period by 15 minutes one or two times a week. Ask support staff or volunteers to supervise.
- Organize regularly scheduled large-group activities (lectures, music/art exhibits, etc.) that can be managed by support staff and specialists so that co-teaching teams can work together.
- Create a website/online file area where teams can share documents, such as unit outlines, lesson plans and resources can be shared among the team.
- Make sure that the school community understands the reasons for common planning time.
- Use a standard protocol during planning meetings to maximize time together.
- Use the time to focus on curriculum and instruction; avoid allowing discussions of anything else.⁸

FISCAL IMPACT

Depending on how the collaboration time is scheduled, this should have minimal costs. This recommendation can be implemented with existing resources.

FINDING 1-5

The district does not engage in ongoing strategic planning. Interviews with board members, superintendent, principal, and faculty indicated that MPS does not have a current strategic plan driving the decisions, budgeting, or resource allocation of the district.

Survey results of parents and staff showed minimal agreement in relation to input on budgeting and planning (**Exhibit 1-19**). A substantial portion of parents and staff had no opinion on various questions related to input opportunities, decision-making and budgeting, which are all components of strategic planning.

⁸ <https://inclusiveschools.org/scheduling-for-success-common-planning-time>

**Exhibit 1-19
Parent Survey Results Regarding Management and Planning**

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Parent	Parents/families play an active role in decision making in our schools.	9%	37%	32%	19%	3%
Parent	School board members listen to the opinions and desires of parents and community members.	18%	23%	54%	4%	2%
Parent	Parents play an active role in decision-making in our schools.	14%	32%	33%	17%	4%
Staff	The budgeting process effectively involves administrators and staff.	18%	26%	49%	6%	1%
Staff	Parents, citizens, students, faculty, and staff have opportunities to provide input into facility planning.	6%	25%	52%	10%	6%

Source: Prismatic Survey Results, March 2023

The consulting team found evidence that the district has successfully sought outside resources in the form of grants and public/private services to improve opportunities for MPS students. Based on interviews with the principal and teacher focus groups, the grants the district pursues are mainly identified by the principal. Although MPS teachers did not identify a lack of resources, they did reveal a lack of input and overall understanding of their available funding.

Effective strategic plans are designed to include stakeholder input and involve parents, citizens, students, faculty, and staff in budgeting resources and facility planning based on the vision and goals of the district. In 2007, Reeves summarized his analysis of 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.⁹

Reeves concluded 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 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.¹⁰

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

⁹ Reeves, D.B. (2007). Leading to change/making strategic planning work. *Educational Leadership*, 65(4).

¹⁰ <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

Include teachers and community stakeholders in development of long-term strategic goals to meet ongoing capital and instructional needs of the district.

This performance review may provide a basis for more long-term planning and an opportunity to broaden the range of people involved in planning which guides continued positive district growth. A strategic planning process can start with an annual superintendent's report to the school 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 of education approved strategic planning committee heavily weighted to include teachers, students, community members and parents. As many as two of the board members can serve if so desired. The committee should also represent the diversity of the community and district;
- collect survey data on perceived strengths and weaknesses of the district from the community, students, parents, and other community stakeholders;

- 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, the board and key administrative staff should communicate the goals of the plan and provide ongoing updates on the district’s progress. The board, superintendent, and key committee members should perform an annual review of 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 “SMARTIE”: Specific, Measurable, Achievable, Relevant, Time-bound, Inclusive, and Equitable. The recent challenges facing education with the pandemic and other factors require goals to address not only the “SMART” attributes but also equity and inclusion.

FISCAL IMPACT

To achieve authentic collaboration and stakeholder input the consulting team recommends this process be facilitated by outside services. The board can publish a request for proposals and enter into a contract for services. These services are commonly priced by district size and may range between \$15,000 to \$30,000.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Contract for strategic planning facilitation.	(\$20,000)	(\$10,000)	\$0	\$0	\$0

FINDING 1-6

The district has developed leadership opportunities for certified and support staff. Most staff serve on one or more committees in which they gain leadership skills for a variety of initiatives.

The district has identified 20 different committees on a variety of programs, activities, and initiatives. The committees include participants from both support staff and faculty. In addition to the committees, the district has opportunities for leadership roles within their grants. For the 21st Century Grant, one of the educator focus group participants interviewed by the consulting

team served as the administrator. These committees and grant opportunities offer exposure to early leadership practices.

Numerous education experts have pointed to the need to provide teachers with meaningful leadership roles in their schools. Barth stated, "...the most prevalent recommendations for improving our nation's schools was that teachers should take on and share more of the leadership of their schools".¹¹ Lowery-Moore stated, "There is a great need for teachers to take on leadership roles, informal and/or formal, for personal and professional growth and to improve schools".¹²

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 higher 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.¹³ 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

The district has leadership opportunities for staff and faculty.

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;

¹¹ Barth, R. (2007). The Teacher Leader. In R. H. Ackerman & S. V. Mackenzie (Eds.), *Uncovering teacher leadership: Essays and voices from the field* (9-36). Thousand Oaks, CA: Corwin Press.

¹² Lowery-Moore et al. (Spring 2016). Essence of teacher leadership. *International Journal of Teacher Leadership*. 7(1).

¹³ 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/.

- 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;
- 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.

On the staff survey conducted for this review, staff was asked to assign a letter grade to various MPS functional areas. **Exhibit 1-21** provides the results for personnel areas. Most (75 percent) of the staff gave personnel management an A or B grade.

**Exhibit 1-21
Staff Survey Results Regarding Personnel Management**

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Personnel management	42%	33%	9%	3%	3%	10%

Source: Prismatic Survey Results, March 2023

FINDING 1-7

Based on the focus group responses, the consulting team found that teacher assistants, paraprofessionals, and other support staff were covering classes when teachers were out. This practice negatively impacts classroom instruction and services by removing personnel from their intended responsibilities.

One paraprofessional stated that in prior years she kept a calendar and was out of her class more than she was in because of substituting. Responses from other support staff also reported that they had to cover classes. In addition, the focus group responses stated that the district filled almost all substitute positions with the staff already working. This means that staff is not attending to their primary duties while they are substituting.

There are multiple effects of not having enough qualified and available substitutes:

- Classroom aids and other supportive staff are pulled from their assignments, affecting their responsibilities. This may affect multiple classrooms.
- Poor instruction and, often poor conduct, are the results of poorly prepared substitutes.
- Teachers or principals are required to cover absences. This affects instruction.

RECOMMENDATION

Improve the availability and preparedness of substitutes.

To implement this recommendation the district should:

- Develop a substitute handbook that includes essential information about the district and the substitute’s responsibilities. The document should contain information such as the calendar, policies and procedures, substitute code of ethics, job requirements, and information on compensation. Oklahoma City Public Schools has a professionally prepared document that the district can use as an example.¹⁴
- Offer certified substitutes and those in certification programs a performance evaluation. These would be completed by the teacher for whom the substitute was obtained. They would be printed on MPS letterhead and signed, so that teachers looking for permanent positions

¹⁴ <https://www.okecps.org/cms/lib/OK01913268/Centricity/Domain/110/Substitute%20Teacher%20Handbook.pdf>

could use them in their application packages.

- Provide training on basic classroom management, essential procedures such as blood-borne pathogens, and professional development targeted to the special needs of the substitute. The basic trainings should be provided to new substitutes multiple times per year (semester, quarter, or monthly).
- Ensure that MPS is paying slightly higher for substitutes than neighboring districts.
- Implement a tiered salary schedule, offering an incremental increase in pay for attending training and/or completing a specified number of substituting days each year.
- Provide a substitute pay differential between certified and non-certified substitutes.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 1-8

MPS has one principal for approximately 640 students. In the past, they have had two. In addition, the principal is responsible for federal programs and grants.

Although the current principal is competent and efficient, it is too much responsibility for one person. The principal is responsible for managing approximately 640 students and 50 teachers. In addition, she is responsible for managing federal programs and other grants received by the district.

In focus groups, teachers indicated they did not have faculty meetings. On the staff survey, some reported that at the middle school they sometimes felt like they were not included and missed information. An additional administrator would reduce some of the responsibilities of the current principal and allow time for more interactions with the faculty.

Administrators play a vital role in the leadership of the school. Successful school leaders must engage in the development of effective teachers and the implementation of sound management and organizational practice. Based on findings from Davis, et al, research has converged on the importance of three aspects of the principal's job:

- developing a deep understanding of how to support teachers;
- managing the curriculum in ways that promote student learning; and
- developing the ability to transform schools into more effective organizations that foster powerful teaching and learning for all students.¹⁵

¹⁵ Davis, S.; Darling-Hammond, L.; LaPointe, M.; & Meyerson, D. (2005). *School leadership study: Developing successful principals*. Stanford, CA: Stanford University, Stanford Educational Leadership Institute.

RECOMMENDATION

Hire an additional full-time site administrator.

Nationwide school districts are struggling to attract and retain highly qualified school leaders. MPS should advertise the position for an additional administrator in the state and national job boards such as the Cooperative Council of School Administrators (CCOSA) or the Oklahoma State School Boards Association (OSSBA).

A second option is to grow a potential leader from within the district. Initially, the district could open an intern position for the candidate. In this position, the candidate could learn the leadership and organizational skills necessary for the position while also reducing some of the responsibilities of the current principal. The candidate should be allowed time for attending professional development to grow and ensure the success of this position.

FISCAL IMPACT

This recommendation requires an additional FTE. The cost will include salary and benefits for an additional administrative position. Minimal costs for professional development, increased supplies and insurance costs may also apply.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Hire an additional administrative FTE.	(\$80,000)	(\$80,000)	(\$80,000)	(\$80,000)	(\$80,000)

FINDING 1-9

The district lacks clear and clearly communicated information regarding personnel policies and procedures. Perhaps as a result, job descriptions are not regularly reviewed, support staff is not evaluated annually, and support staff salaries are inconsistent.

The consulting team found that MPS job descriptions have not been updated regularly or shared with personnel. A lack of job descriptions results in confusion about job expectations, potential duplication of effort, and lack of performance accountability. Tied with this, MPS does not complete any formal support staff evaluations. Evaluations support employee growth and improvement. This was a recommendation in the 2013 performance review but was not implemented. The district is limiting the growth and improvement of their personnel by not providing evaluations.

Staff survey results represented fairly low agreement regarding competitive pay (**Exhibit 1-22**). Only 58 percent of staff *agreed* or *strongly agreed* that their salary was adequate for their level of work and experience.

Exhibit 1-22
Staff Survey Results Regarding Salary Levels

Survey Question	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
My salary level is adequate for my level of work and experience	21%	37%	18%	21%	4%

Source: Prismatic Survey Results, March 2023

The district lacks a support staff salary schedule that is based on responsibilities, experience, or skill level. The district pays a flat rate or salary regardless of the number of years worked or the responsibility required. Hourly support salary scales do not have an annual step raise and it was not consistent on who was paid from what scale. This compensation system does not encourage employees to stay with the district or build their skill level. In addition, the district does not publish the support salary schedule on its website, which likely dampens interest in working for the district.

MPS does not have local unions for certified or support staff. Information on processes for salary scale placement and other personnel processes that are normally found in a negotiated agreement are therefore not present. There are no formal channels for staff to improve on their school environment as it relates to personnel policy and practices. Some of the personnel documents reviewed by the consulting team were outdated and did not contain the most current benefit information. Focus groups relayed a lack of control or understanding of policies and processes that affect their employment.

According to a recent survey conducted by the National Education Association, approximately 55 percent of educators are thinking of leaving the profession.¹⁶ This high turnover rate costs substantial amounts of money when a district must then recruit and train new teachers and ultimately hinders the district's success and bottom line. Research recommends focusing on teacher retention to overcome these challenges. A study on school district working conditions found that providing a supportive context in which teachers can work appears to contribute to improved retention and student achievement.¹⁷

An appropriate salary schedule for support staff can be an important management tool to a school district. It establishes minimum qualifications for placing an individual into a position and identifies relevant experience that can be considered when initially placing an individual on a particular pay step. It then provides a clear progression in salary that an employee can expect, provided his or her job performance is found to be satisfactory.

As an example, Wetumka Public Schools developed salary schedules for its nonexempt personnel (**Exhibit 1-23**). The salary schedules consist of 22 steps with a set amount assigned to

¹⁶ <https://www.nea.org/sites/default/files/2022-02/NEA%20Member%20COVID-19%20Survey%20Summary.pdf>

¹⁷ Johnson, S.M., Kraft, M. A., Papay, J.P.(2012) *How context matters in high-need schools: The effects of teachers' working conditions on their professional satisfaction and their students' achievement.* <http://www.tcrecord.org/content.asp?contentid=16685>

each step based on job title. Such a graduated pay schedule allows the district to compensate newly hired employees for the skills, knowledge, and experience that they bring to their position. When new support personnel are hired, they can request higher placement on the salary schedule based on valid proof of their expertise and experience, and these requests are approved by the school board on a case-by-case basis. Implementing this recommendation would also protect the superintendent from the appearance of a lack of equity and objectivity. While this guidance would not have to exist in terms of a traditional schedule that provides increases annually, the district could still adopt a uniform system for setting salaries and granting raises. Without such a system in place, support employees have no assurance of fair compensation and advancement, which can result in low employee morale and loss in productivity.

**Exhibit 1-23
Sample Public Schools Support Salary Schedule**

Years of Experience	Superintendent's Secretary (2000 hours)		Principal's Secretary (1840 hours)		Teacher Assistant/ Parapro (1440 hours)		Custodian (2000 hours)		Cook (1440 hours)		Child Nutrition Manager (1440 hours)		Bus Driver (540 hours)	
	\$/HR	\$/YEAR	\$/HR	\$/YEAR	\$/HR	\$/YEAR	\$/HR	\$/YEAR	\$/HR	\$/YEAR	\$/HR	\$/YEAR	\$/HR	\$/YEAR
0	\$8.25	\$16,500	\$7.75	\$14,260	\$7.25	\$10,440	\$7.50	\$15,000	\$7.25	\$10,440	\$7.75	\$11,160	\$12.50	\$6,750
1	8.50	17,000	8.00	14,720	7.50	10,800	7.75	15,500	7.50	10,800	8.00	11,520	12.50	6,750
2	8.75	17,500	8.25	15,180	7.75	11,160	8.00	16,000	7.75	11,160	8.25	11,880	12.50	6,750
3	9.00	18,000	8.50	15,640	8.00	11,520	8.25	16,500	8.00	11,520	8.50	12,240	12.50	6,750
4	9.25	18,500	8.75	16,100	9.00	18,000	8.50	17,000	8.25	11,880	8.75	12,600	12.50	6,750
5	9.50	19,000	9.00	16,560	8.50	12,240	8.75	17,500	8.50	12,240	9.00	12,960	12.50	6,750
6	9.75	19,500	9.25	17,020	8.75	12,600	9.00	18,000	8.75	12,600	9.25	13,320	12.50	6,750
7	10.00	20,000	9.50	17,480	9.00	12,960	9.25	18,500	9.00	12,960	9.50	13,680	12.50	6,750
8	10.25	20,500	9.75	17,940	9.25	13,320	9.50	19,000	9.25	13,320	9.75	14,040	12.50	6,750
9	10.50	21,000	10.00	18,400	9.50	13,680	9.75	19,500	9.50	13,680	10.00	14,400	12.50	6,750
10	10.75	21,500	10.25	18,860	9.75	14,040	10.00	20,000	9.75	14,040	10.25	14,760	12.50	6,750
11	11.00	22,000	10.50	19,320	10.00	14,400	10.25	20,500	10.00	14,400	10.50	15,120	12.50	6,750
12	11.25	22,500	10.75	19,780	10.25	14,760	10.50	21,000	10.25	14,760	10.75	15,480	12.50	6,750
13	11.50	23,000	10.00	20,240	10.50	15,120	10.75	21,500	10.50	15,120	11.00	15,840	12.50	6,750
14	11.75	23,500	11.25	20,700	10.75	15,480	11.00	22,000	10.75	15,480	11.25	16,200	12.50	6,750
15	12.00	24,000	11.50	21,160	11.00	15,840	11.25	22,500	11.00	15,840	11.50	16,580	12.50	6,750
16	12.25	24,500	11.75	21,620	11.25	16,200	11.50	23,000	11.25	16,200	11.75	16,920	12.50	6,750
17	12.50	25,000	12.00	22,080	11.50	16,560	11.75	23,500	11.50	16,560	12.00	17,280	12.50	6,750
18	12.75	25,500	12.25	22,540	11.75	16,920	12.00	24,000	11.75	16,920	12.25	17,640	12.50	6,750
19	13.00	26,000	12.50	23,000	12.00	17,280	12.25	24,500	12.00	17,280	12.50	18,000	12.50	6,750
20	13.25	26,500	12.75	23,460	12.25	17,640	12.50	25,000	12.25	17,640	12.75	18,360	12.50	6,750
21	13.50	27,000	13.00	23,920	12.50	18,000	12.75	25,500	12.50	18,000	13.00	18,720	12.50	6,750
22	13.75	27,500	13.25	24,380	12.75	18,360	13.00	26,000	12.75	18,360	13.25	19,080	12.50	6,750

Source: Wetumka Public Schools, October 2012

Exhibit 1-24 provides an evaluation tool used in another rural school district for its support staffing.

**Exhibit 1-24
Evaluation Tool for Non-Teaching Staff**

Performance Criteria	Appropriate Level of Performance	Room for Growth	Unsatisfactory
Attendance			
Job Knowledge			
Quality of Work			
Attitude			
Dependability			
Conduct			
Teamwork			
Neatness			
Do you recommend remediation?	Yes / No		
I agree with the above evaluation	Check		
I disagree with the above evaluation	Check		
I request a job targets report for the Needs to Improve ratings checked above	Check		
Two-week notice statement			
Signature lines			

Source: Blair Public Schools, 2013

Developing a consistent salary and personnel policy for all positions is necessary to provide transparency and ensure fair and consistent compensation practices. Effective policies and procedures are living documents that should grow and adapt with the district. Fostering open communication by developing a personnel committee will support a positive culture and increase the retention of staff. It will also help to protect the district from potential EEO or discrimination complaints.

RECOMMENDATION

Establish a committee of certified and support employees for the purpose of reviewing and communicating personnel policies, job descriptions, and extra-duty assignments.

The superintendent should encourage employee participation in decision-making for the district by creating a personnel policy committee. The personnel policies committee would organize itself in the first quarter of each school year. This committee should meet at a minimum quarterly but monthly is recommended to review the district’s personnel policies (including compensation) and determine if additional policies or amendments to existing policies are needed. The superintendent should consider selecting members of the committee to serve for a designated term. The process may look something like the following steps:

- Each school faculty will nominate candidates to represent the respective school.
- Upon granting permission, nominated candidates will be placed on the district ballot.
- During the first week of school, all teachers will have an opportunity to vote on all the candidates.
- Results will be tallied and the candidate with the majority or highest number of votes in each race will represent his or her school.

Members of the personnel policies committee should serve a two-year term. **Exhibit 1-25** provides an overview of a personnel policy committee from another Oklahoma district.

Exhibit 1-25
Sample Personnel Policy Committee for Van Buren Schools

<p>3.3 – PERSONNEL POLICY COMMITTEE</p> <p>General</p> <p>It shall be the policy of the Van Buren Board of Education to encourage employee participation in decision-making for the school district. The Superintendent is authorized to establish committees as necessary to recommend policies and rules for the proper functioning of the district.</p> <p>The classroom teachers of the Van Buren School District shall be represented by the Personnel Policies Committee. It shall be composed of the following equal voting members: the superintendent or designee, one teacher from each elementary school; two teachers from each middle school; one teacher from the Freshman Academy; two teachers from the senior high school; and one secondary administrator and one elementary administrator seated annually and appointed by the superintendent.</p> <p>Election of members of the Personnel Policies Committee shall be held during the first month of school. The teacher members of the Personnel Policies Committee shall be elected by a majority vote of the classroom teachers employed by the district. The election shall be conducted by the classroom teachers and shall be by secret ballot.</p> <p>The current Personnel Policies Committee will post in each building a Nomination Form listing open position(s) for the purpose of securing nominees for the Personnel Policy Committee. Any teacher may nominate himself/herself or his/her fellow teacher to serve on the Personnel Policies Committee by placing the teacher's name on the Nomination Form. The names of all consenting candidates will appear on the District ballot in the appropriate nominated position. All certified staff will vote in all candidate races. A member shall be elected to the committee when he/she receives a majority of the votes cast. If more than two candidates run for a given position and no candidate receives a majority of the votes cast, a run-off election will be held among the candidates receiving the greatest number of votes after the candidates receiving the lowest numbers of votes are dropped from the ballot. This process will continue until a simple majority is reached.</p> <p>Election Procedure</p> <ul style="list-style-type: none"> • Each school faculty will nominate candidates to represent the respective school. • Upon granting permission, nominated candidates will be placed on the District ballot. • During the first week of school, all teachers will have an opportunity to vote on all the candidates. • Results will be tallied and the candidate with majority or highest number of votes in each race will represent his or her school. <p>Members of the Personnel Policies Committee will serve two-year terms. If a member of the Committee is unable to complete his/her term of service, the Personnel Policies Committee will appoint a successor from that member's building to serve until the next</p>	<p>Personnel Policies Committee election. If the term of the elected member has not expired, a teacher from that member's building shall be elected to serve the remainder of the term.</p> <p>The Personnel Policies Committee shall organize itself in the first quarter of each school year; elect a chairperson, a co-chairperson (optional), and secretary (optional). The PPC shall also develop a calendar of meetings throughout the year to review the district's personnel policies and determine if additional policies or amendments to existing policies are needed. The Personnel Policy Committee shall review any proposed distribution of a salary underpayment from previous years. The review of the personnel policies and the resulting report shall be completed by the end of the year. The report shall be filed with the Superintendent of Schools and presented to the Board of Education by the chairman of the Personnel Policies Committee or his/her designee for consideration in accordance with the Arkansas law.</p> <p>Minutes of the committee meetings shall be promptly reported and distributed to members of the Board of Directors and posted in the building of the school district including the administrative offices.</p> <p>Approved by Board of Education 04/04/06 Amended by Board of Education 05/19/09 Amended by Board of Education 06/12/12 Amended by Board of Education 04/12/16 Amended by Board of Education 04/11/17</p>
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Source: <https://www.vbsd.us/assets/uploads/2017/04/20170421133013-33-personnel-policy-committeepdf.pdf>

Once the committee is established, the committee members should prioritize the review of job descriptions, policies, and processes. The committee should be charged with developing and publishing salary scales for support positions. The committee should develop an evaluation form and schedule for support staff. The evaluation form does not necessarily need to be tailored to each position (paraprofessional, bus driver, etc.), but it should include clear descriptors of expectations. It should also include a place that the employee can add comments, if desired. Most importantly, it should include a signature line so that each employee performance is officially documented. Any disciplinary action against an employee without this measure would be fairly easy to contest. Once the form and schedule have been determined, the district should designate who is responsible for evaluating each support staff member. The results of the evaluation process should be used to support improved and continued high performance of support staff.

FISCAL IMPACT

This can be implemented with existing resources.

FINDING 1-10

MPS has several employees with significant responsibilities close to retirement. The processes, procedures, and knowledge that they use to complete their responsibilities are “all in their head” as stated by one employee. There is no documentation for these responsibilities or how to complete them. In addition, there is not any cross training. If the payroll or encumbrance clerk was out for a significant amount of time, there is no other person trained in that area. The district does not have a formal succession plan.

Retention and succession planning is essential to ensure MPS has the right people with the skills and knowledge to perform their critical roles. Combining cross training initiatives with a succession plan allows personnel to simultaneously acquire new skills that help them in their current roles and prepare them for other challenging work in the district.

Students and staff benefit from smooth transitions when long-tenured staff and leaders retire. Typical succession planning includes several elements outlined below:¹⁸

- anticipate the district needs, considering growth factors, the economy, community, age of staff, likely retirements, financial resources, and timing;
- adopt the attitude that the district will search for viable new staff candidates proactively, before a vacancy happens;
- for specific positions, as existing staff departure approaches, provide for overlap of tenures to allow the new person to benefit from training next to the person that is leaving. The longer

¹⁸ Hanover Research. (2014). *Best practices in succession planning*. Retrieved from <https://www.hanoverresearch.com/media/Best-Practices-in-Succession-Planning.pdf>

the time they have together, the better the outcome. Practical experience is the best training; and

- annually evaluate the district’s planning for succession.

According to a 2008 study by Deloitte, “The potential gains from doing succession planning go far beyond the obvious result of having a steady pipeline of leaders ready to step into new roles.”¹⁹ Succession planning combined with cross-training results in well-rounded employees that will thrive in dynamic and challenging conditions. When succession planning and cross-training are done correctly, employees feel empowered and take on more ownership. This leads to higher engagement and less turnover.

RECOMMENDATION

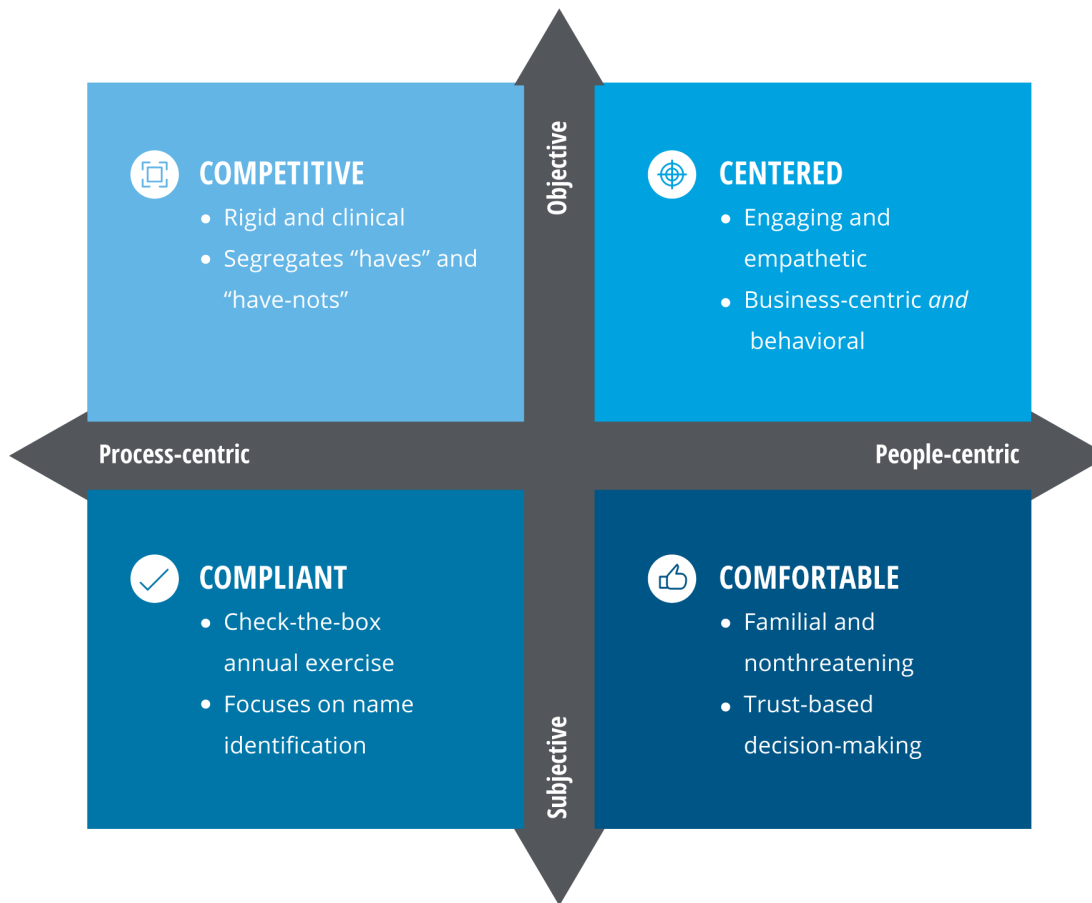
Cross-train staff members and develop written administrative procedures to begin succession planning for staff who may be promoted, dismissed, or close to retirement.

Succession planning and cross-training approaches should balance empathy, objectivity, and discipline. The consulting firm Deloitte and mapped four broad approaches to succession planning (**Exhibit 1-26**).²⁰ In the competitive, compliant, and comfortable approaches, Deloitte found that there were obstacles that minimized the effectiveness of the planning. The competitive approach can be threatening and make those involved feel dispensable. A comfortable or compliant approach may not clearly identify talents and lack objectivity. The centered approach balances sound process and personnel understanding. In this approach, the people involved are at the center (e.g., leaders managing the process and successors who are being considered) supported by processes that maintain objectivity.

¹⁹ <https://www2.deloitte.com/us/en/insights/topics/leadership/effective-leadership-succession-planning.html>

²⁰ Ibid.

Exhibit 1-26
Four Approaches to Succession Planning



Source: <https://www2.deloitte.com/us/en/insights/topics/leadership/effective-leadership-succession-planning.html>

Deloitte identified five key practices in the centered approach:

1. Make succession planning worthwhile for the people most affected by its results. Offer preferential opportunities to staff that encourage engagement.
2. Establish accountability and advocacy. Clearly identify who is responsible for the succession planning.
3. Orient toward the future. Understand future needs and dynamics.
4. Create short-term goals to sustain long-term focus. Succession planning is a long-term discipline with short term tasks or components.
5. Establish tools, processes, and messaging to cultivate transparency and trust. The plan should be transparent and simple to inspire trust.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 1-11

The payroll clerk reviews the first payroll individually with each employee to verify correct pay, deductions, and health insurance. This promotes employee confidence in and understanding of their pay.

Focus group responses noted that they understood their pay and benefits because the payroll clerk went through their first paycheck with each of them individually. The clerk reviews deductions, health insurance, and extra duties and trains them on how to read their paycheck. The individual training builds trust and confidence for employees and ensures transparency.

Errors are always a possibility. In small organizations, where there is not another set of eyes reviewing the processes and calculations, it is essential that employees understand their paycheck and have the ability to thoroughly review their payroll records.

COMMENDATION

MPS provides individual training for employees to verify and understand their compensation.

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.

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 communication.

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MPS functional areas. **Exhibit 1-27** provides the results for communications and community relations.

**Exhibit 1-27
Staff Survey Results Regarding Communications**

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Community relations and communication	64%	25%	6%	0%	1%	3%

Source: Prismatic Survey Results, March 2023

FINDING 1-12

The district hosts monthly parent engagement meetings on various community topics with an embedded literacy component. This provides families with great opportunities to engage with teachers and the school district.

Over the years, MPS has had high attendance rates for their parent teacher conferences (Exhibit 1-28). The district had a rate higher than the peer average rate from 2015-16 through 2019-20. MPS tends to have average conference attendance rates above 80 percent.

**Exhibit 1-28
Trend in Parent Conference Attendance**

Entity	2015-16	2016-17	2017-18	2018-19	2019-20
Maryetta	80%	80%	79%	86%	86%
Bishop	80%	75%	75%	75%	75%
Colcord	60%	64%	61%	59%	60%
Grand View	98%	89%	90%	91%	66%
Keys	76%	81%	85%	64%	73%
Oktaha	83%	80%	75%	70%	70%
Peer Average	79%	70%	71%	72%	72%

Source: Office of Educational Quality and Accountability, Profiles Database

Parent survey results reflect a strong sense of being welcomed and encouraged to be involved in MPS (**Exhibit 1-29**). Nearly all parents (86 percent) indicated they felt welcome in Maryetta schools and most (77 percent) stated they felt encouraged by the district to be involved.

**Exhibit 1-29
Parent Survey Results Regarding Parent Involvement**

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I feel welcome at my child’s school.	43%	43%	11%	1%	2%
My child’s school encourages parents to be involved in school and offers a variety of ways to do so.	33%	44%	12%	8%	2%

Source: Prismatic Survey Results, January 2022

Epstein (2001) at Johns Hopkins University²¹ and others have documented research showing the positive effect that strong parental involvement has on schools and on student achievement. Their findings include:

- 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

MPS is commended for having regular parent involvement opportunities.

FINDING 1-13

The district lacks a coordinated and explicit volunteer program. Currently, opportunities to volunteer are either limited or not widely known. The only volunteer program the consulting team found was the grandparent program.

MPS does not have a common parent teacher association or other volunteers that support the school. Although MPS is open to the community and families, it does not have any formal volunteer programs. Developing a volunteer program can provide additional resources for the district and promote parent and community involvement.

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

²¹ Epstein, J. L. (2001). *School, family and community partnerships: Preparing educators and improving schools*. Boulder, CO: Westview Press.

higher grades, attend school more regularly, stay in school longer, and enroll in higher level programs”.²²

There is a growing amount of evidence supporting the impact of volunteers on the success of schools and student achievement. Volunteers can help create a supportive and welcoming environment at schools. Their presence in the school shows students they value education and support their school. When families and community are involved in their school they have a better understanding, more trust, and further support for the school.²³

In addition, parent and community volunteers can assist staff who are stretched thin and fulfilling numerous responsibilities. Additionally, as volunteers become known to staff and comfortable in the school, they can provide a trusted pool for substituting in classrooms.

RECOMMENDATION

Develop a coordinated volunteer program that promotes parent and community involvement in the district’s academic efforts.

According to Campioni, in order to effectively create a volunteer program “school staff must value volunteers and learn how to recruit, train, nurture, and use them effectively.”²⁴ Initially the district will need to identify a lead person develop the volunteer program. This lead person will then recruit additional staff for the effort.

The National Parent Teacher Association’s *Seven Steps to a Successful Volunteer Program* provides useful information for creating and maintaining an active school volunteer program.²⁵ The steps are:

- assessing the volunteer needs each school has;
- working with and training principals, teachers, and school staff on using and supervising volunteers effectively;
- setting goals and objectives for volunteer assignments;
- recruiting volunteers;
- training and orienting volunteers;

²² http://www.nea.org/assets/docs/PB11_ParentInvolvement08.pdf

²³ Henderson, A. & Mapp, K. (2002). *A new wave of evidence: The impact of school, family, and community connections on student achievement*. Austin, TX: National Center for Family and Community. Connections with Schools, SEDL. <http://www.sedl.org/connections/resources/evidence.pdf>

²⁴

<https://www.smhp.psych.ucla.edu/pdfdocs/vols.pdf#:~:text=Henderson%20and%20Mapp%20%282002%29%20report%20evidence%20that%20volunteers,in%20school%2C%20graduating%2C%20and%20going%20on%20to%20college>

²⁵ <https://www.pta.org/home/run-your-pta/one-voice-blog/Seven-Steps-for-Organizing-Volunteers>

- training and recognizing volunteers; and
- evaluating volunteer performance and program success.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 2:
Instructional Delivery

Chapter 2

Instructional Delivery System

This chapter addresses the instructional delivery of Maryetta Public Schools (MPS) in the following sections:

- A. The Instructional Delivery System
- B. Management and Oversight of Instructional Programs
- C. Special Programs
- D. Student Services

The primary purpose of any school system is to educate 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 on student performance data are also essential.

A. THE INSTRUCTIONAL DELIVERY SYSTEM

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 workforce environments. **Exhibit 2-1** further explains the OAS standards.

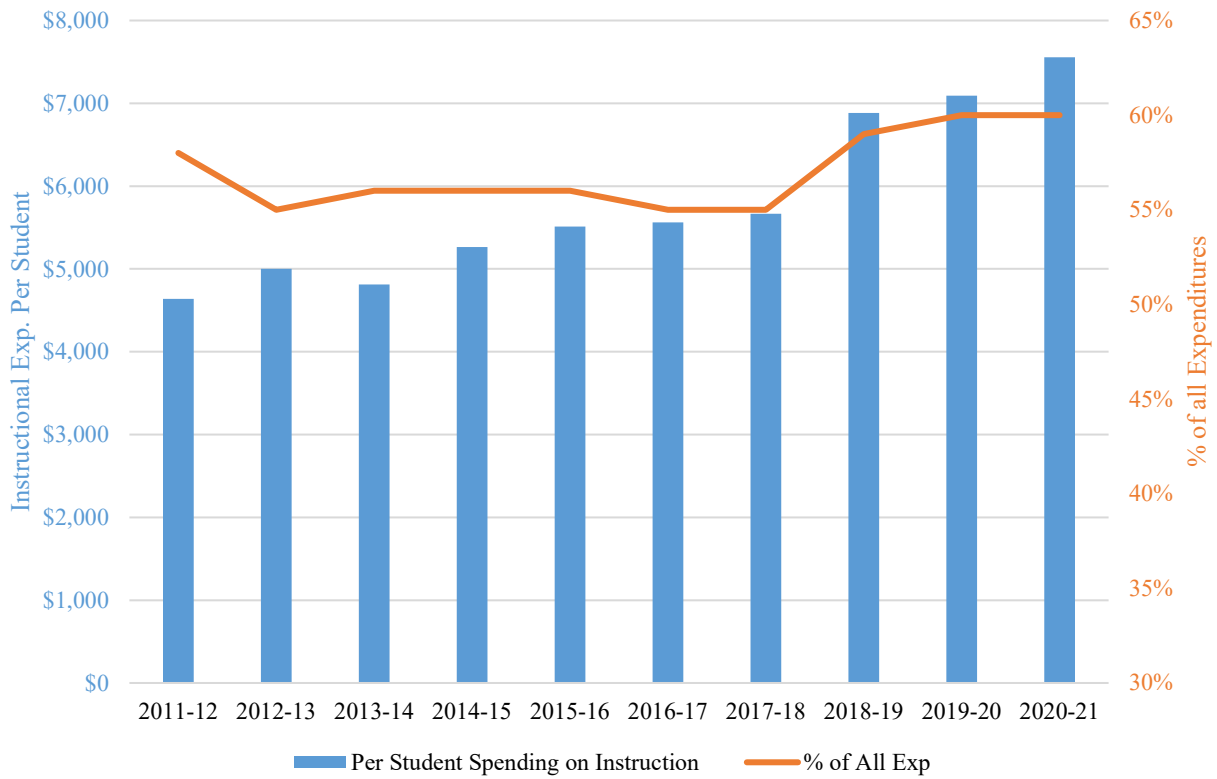
**Exhibit 2-1
Oklahoma Academic Standards**

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 MPS 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 55 percent to 60 percent of all expenditures. Instructional dollars per student have varied from \$4,639 in 2011-12 to \$7,556 in 2020-21.

Exhibit 2-2
Trend in MPS Instructional Spending



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

On the stakeholder survey conducted for this review, staff members were asked to assign a letter grade to various MPS functional areas. **Exhibit 2-3** provides the results for regular education programs and education generally in MPS, from district educators (administrators, classroom teachers, other certified, and instructional aides). Almost all, 92 percent, gave the overall quality of education at MPS an A or B, in comparison to other districts in Oklahoma. Nearly all, 91 percent, gave elementary education an A or B; likewise, 82 percent gave middle school education an A or B.

Exhibit 2-3
Educator Survey Results Regarding MPS Education

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Elementary Education	67%	24%	3%	0%	0%	6%
Middle School Education	49%	33%	7%	3%	0%	7%
Overall quality of education in this district, compared to other districts in Oklahoma	58%	34%	1%	0%	0%	0%

Source: Prismatic Survey Results, March 2023

FINDING 2-1

No district-wide process guides teachers in aligning or pacing core curricula and instruction. There is no standardized process for monitoring horizontal and vertical alignment and pacing. No procedures ensure that core curricula is taught and tested. Some teachers use curriculum frameworks provided by the State Department of Education (SDE), while others rely on textbook and teacher-made sources for guiding curriculum and pacing content. Horizontal curriculum alignment occurs only infrequently and not at all grade levels. There is no process in place to monitor student progress and ensure all MPS students have mastered the required OAS content.

Even though common planning periods provide teachers time together, the consulting team found no consistent, monitored, and focused practices to ensure horizontal alignment across all grade levels and content areas. Professional Learning Communities' (PLC) times are also designated as teacher planning time while students attend electives. Interviews indicated these times were not regularly used for teacher curriculum collaboration. Minimal vertical alignment was reported, as all grades are using the same curriculum in Math, Alpha Plus, and Journey. Minimal curriculum pacing practices were reported.

At the time of the onsite review, student assessment data indicated a decline rather than a consistent upward spiral for improvement. This was true in both math and reading. Without a common vertical and horizontal document to guide teacher decision-making and implementation of a standards-based curriculum, improved student academic performance is unlikely to occur. There is a need for vertical and horizontal pacing with regard to reteaching, remediation, mastery, and maintenance. There was no indication that the district's administrators and technology specialist worked with teachers to synchronize supplemental resources or to integrate digital frameworks or documents that sustain and support the district-wide core curriculum.

Long-standing research indicates that vertical and horizontal curriculum alignment is the first step to improved student performance. Standards-based horizontal curricula alignment details what content students learn at each grade level. For example, the standards and skills taught and learned in one fourth grade math class are mirrored in all other fourth grade math classes. Horizontal curriculum alignment takes place collaboratively among all teachers at each grade level and content area. Each classroom provides the same written, taught, and tested curricula standards. Content and instruction are equitable horizontally across each classroom. Horizontal alignment of curricula standards ensures students in each grade level and subject area classroom receive equitable OAS instruction. A written framework must guide and pace curricula at each grade level and in each content area.

Standards-based vertically aligned curricula detail what students must learn in one lesson, course, or grade level to prepare them for the next lesson, course, or grade level. Curricula and instruction are purposefully structured, sequenced, and paced so that students are learning the content and skills that prepare them for success with more challenging and higher-level work. Vertical curriculum alignment identifies which content and skills students are to master and maintain so they are successful in the next lesson, grade level, or course. Mastering and maintaining the content and skills in one lesson, course, or grade level enables students to experience a smooth upward spiral of curriculum.

As part of the curriculum alignment, the district lacks a common focus for leveraging the key components of digital learning. Effective technology integration includes “active engagement, participation in groups, frequent interaction and feedback, and connection to real-world experts.”¹

Content standards that are aligned with and support digital age learning are essential in today’s schools. Technology is best able to enhance learning when educators use it intentionally within the adopted curriculum. A curriculum framework pairs defined content standards with aligned digital curriculum resources. A curriculum framework guides both how and when technology is used for learning. It ensures that technology is applied:

- in ways that address real-world skills;
- to learn the right skills at the right times for the right reasons; and
- to meet specific learning objectives.

As noted by the International Society for Technology in Education, technology is all too often applied as a replacement or add-on to existing curriculum. To maximize its potential benefits – such as the development of higher-order thinking skills – educators must weave it into the curriculum in such a way that the tool matches the daily desired learning outcome. A standards-based curriculum framework bridges the gap between overall curriculum goals and the use of technology for supporting learning and teaching.²

Research citing the importance of vertical and horizontal frameworks emerged as schools moved to a standards-based education rather than textbook-driven education. A curriculum framework organizes standards into learning outcomes. At each grade level or content area, frameworks define and explain the content standards to learn. The framework clearly articulates what the students are to master at each respective grade level and subject area. Frameworks guide teachers in planning and delivering grade level curricula and instruction. They identify the essential standards, learning experiences, foundational and maintenance skills, and key learning concepts. The framework clearly details the curriculum standards in each subject area at each grade level that students are expected to learn, and teachers are expected to teach. The framework identifies supplemental and digital resources that correlate and provide support and/or remediation that leads students to mastery.

The state of Oklahoma has developed comprehensive curriculum frameworks. Available on the SDE website, there are frameworks in Mathematics, English Language Arts, and Science. A portion of the Learning Progression for the Algebra I curriculum framework is provided in **Exhibit 2-4**.

¹ <https://www.edutopia.org/video/introduction-technology-integration>

² <https://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.469.1189&rep=rep1&type=pdf>

Exhibit 2-4
Oklahoma Algebra 1 Curriculum Framework
Excerpt of Learning Progression

Unit	Overarching Question	Essential Questions	Big Ideas	Full Objectives
<p><u>Unit 0:</u> <u>Growth Mindset</u></p>	How does improving student attitudes toward math affect their learning?		<ol style="list-style-type: none"> 1. Math is about learning not performing. 2. Math is about making sense. 3. Math is filled with conjectures, creativity, and uncertainty. 4. Mistakes are beautiful things. 	<ol style="list-style-type: none"> 1. Students will understand the importance of a <u>growth mindset</u> (e.g., that math is not about talent or natural ability but is about thoughtful practice) and what it means to talk and listen. Students will also understand that class is where students practice thinking and doing math. 2. Students will learn the value of taking time to think about math and listen to how others make sense of their work to arrive at a common understanding. 3. Students will build the habits of using precise language, practicing, and sharing their thoughts.
<p><u>Unit 1:</u> <u>Expressions, Equations and Inequalities</u></p> <p>Timing ~4 weeks</p> <p>Objectives A1.A.3.2 A1.A.3.4 A1.A.3.3 A1.N.1.1 A1.N.1.2 A1.A.1.1 A1.A.1.2 A1.A.3.1 A1.A.2.2</p>	How can we manipulate information to help us solve real-world problems?	<ol style="list-style-type: none"> 1. How can we represent information symbolically? 2. How do we develop mathematical arguments/proofs for solving real-world situations? 3. How can we use related, but different representations to solve real-world problems? 	<ul style="list-style-type: none"> • Polynomial expressions can be simplified and evaluated. • Polynomial expressions can be written as factors. • Square and cube roots can be added, subtracted, multiplied, divided, and simplified • Equations and inequalities can be solved in both algebraic and real-world contexts 	<p>A1.A.3.2 Simplify polynomial expressions by adding, subtracting or multiplying.</p> <p>A1.A.3.4 Evaluate linear, absolute value, rational, and radical expressions. Include applying a nonstandard operation such as $a \odot b = 2a + b$.</p> <p>A1.A.3.3 Factor common monomial factors from polynomial expressions and factor quadratic expressions with a leading coefficient of 1.</p> <p>A1.N.1.1 Write square roots and cube roots of monomial algebraic expressions in simplest radical form.</p> <p>A1.N.1.2 Add, subtract, multiply, and simplify square roots of monomial algebraic expressions and divide square roots of whole numbers, rationalizing the denominator when necessary.</p> <p>A1.A.1.1 Use knowledge of solving equations with rational values to represent and solve mathematical and real-world problems (e.g., angle measures, geometric formulas, science, or statistics) and interpret the solutions in the original context.</p> <p>A1.A.1.2 Solve absolute value equations and interpret the solutions in the original context.</p> <p>A1.A.3.1 Solve equations involving several variables for one variable in terms of the others.</p> <p>A1.A.2.2 Represent relationships in various contexts with compound and absolute value inequalities and solve the resulting inequalities by graphing and interpreting the solutions on a number line.</p>
<p><u>Unit 2:</u> <u>Data</u></p>	How does data help us interpret real-world situations?	<ol style="list-style-type: none"> 1. How do we use evidence to support 	<ul style="list-style-type: none"> • Data sets can be described with various models, both 	<p>A1.D.1.1 Describe a data set using data displays, describe and compare data sets using summary statistics, including measures of central tendency, location and spread. Know how to use calculators.</p>

Source: [http://okmathframework.pbworks.com/w/page/118991895/Algebra%20%20Learning%20Progression%20\(v2\)](http://okmathframework.pbworks.com/w/page/118991895/Algebra%20%20Learning%20Progression%20(v2))

The consulting team found a recommendation related to this topic in the 2013 review; however, MPS did not comprehensively sustain implementation.

RECOMMENDATION

Develop and implement with fidelity core content area Pre-K-8 horizontal and vertical standards-based curriculum frameworks and pacing processes to align, pace, and monitor OAS.

District leaders should begin by introducing MPS teachers to various local, state, and national frameworks. With increased teacher awareness in place, the district should standardize the curriculum and adopt a Pre-K-8 grade district-wide curriculum framework. In adopting curriculum frameworks, there is no need to reinvent the wheel. The district should begin by reviewing the SDE frameworks along with frameworks from other Oklahoma districts.

Along with adopting the framework, teachers need an accountability system to ensure the framework is taught with fidelity. The district's leadership and select teachers must provide the leadership, support, and release time for teachers to adopt frameworks that provide consistent guidelines for shaping and managing their respective curriculum along with the integration of appropriate resources and technology. There is a need for regularly scheduled meetings with focused agendas where teachers use formative and summative student performance data to make needed curricula and pacing adjustments. Restructuring release time, refocusing the summer, and reordering the beginning of the year professional development days are possible venues for framework adoption.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 2-2

The district has no process for teachers to use formative and summative assessments across all grade levels. Across the district, daily formative and summative student performance data are not uniformly used to inform and adjust content, fine-tune instructional practices, or drive targeted remediation and interventions.

Overall, MPS teachers are not collecting ongoing formative and summative student performance data and using it to inform and adjust content, modify instructional practices, and drive targeted remediation and interventions. Several teachers reported using formative assessment, but use was limited, random, and sporadic. Beginning, middle, and end of year summative benchmarks are implemented to meet reading sufficiency requirements and make initial adjustments to tiered reading groups. However, the district has no standardized process for all teachers to continuously use formative and summative assessments to adjust and monitor curriculum alignment, pacing, and tiered remediation.

The consulting team found limited efforts and expectations demonstrated toward the systematic use of formative and summative student performance data to inform and adjust content, instructional practices, or drive targeted remediation and interventions. In accordance with the Reading Sufficiency Act, the district administers DIBELS and STARR benchmark tests three times a year. Teachers have access to the student results and are expected to plan instruction.

On the staff survey conducted for this review, 69 percent of educators (administrators, classroom teachers, other certified, and instructional support staff) feel that test data are used to improve instruction and another 77 percent agreed or strongly agreed that teachers effectively use student data (**Exhibit 2-5**). However, this is not translating to student performance improving and spiraling upward.

Exhibit 2-5
Educator 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.	12%	57%	27%	2%	2%
Teachers effectively use student data to improve instructional practices.	24%	53%	22%	0%	2%

Source: Prismatic Survey Results, March 2023

Research shows that effective teachers use both formative and summative data to identify patterns of student success and failure and then determine next steps in 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 in the original research on 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.³

More recently, effective schools research was conducted by the National Association of Elementary School Principals (NAESP). NAESP published best practices for schools, including that using 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;

³ <https://static1.squarespace.com/static/57c4731c893fc047731cea43/t/5946db3b2994cac227699178/1497815867695/Correlates+of+Effective+Schools.pdf>

- 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.⁴

RECOMMENDATION

Develop and implement district-wide processes and procedures for administering formative and summative assessments to monitor student progress and measure mastery of OAS, then use the data to pace and adjust curriculum, instructional practices, and inform targeted remediation and interventions.

MPS needs to improve instructional practices by expecting all teachers to monitor and adjust curriculum and instruction based on daily, formative student assessment data. This enables teachers to identify and address the learning gaps before the summative assessment. A similar recommendation was included in the 2013 report.

MPS administrators and teachers should analyze daily classroom data to determine what the students have learned, what they need help to learn, and how they should revise instruction to ensure that they all do learn. The use of student performance data identifies skill gaps in daily student learning. The day-to-day learning and skill gaps should be addressed through targeted re-teaching or remediation. The use of formative data also guides improvements in the rigor, pacing, and vertical articulation of curriculum and instruction. As MPS 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 gaps or mastery in learning.

Working with the teachers, the superintendent and principal should develop a timeline that details which student assessment data are required throughout the school year. Using this timeline, they should hold Professional Learning Communities (PLC) meetings to analyze data. Meetings should focus on determining the strengths and weaknesses of students and how the results impact the district's curricula and 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 routinely examine classroom data and ask key questions, such as:

- Which content standards are the teachers assessing?
- What percent of students demonstrated proficiency?

⁴ 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 on individual student performance, what do teachers need to do next to move the student to proficiency?
 - Based on 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 to address that?
 - Are there students who are not attaining proficiency across standards? If so, what diagnostic information do we have about them to inform instruction?
 - What interventions have we tried? What interventions do we plan to try next?⁵

For data to be used effectively, teachers should 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 should also center around, “What are you doing in your class that I’m not doing in my class?” MPS teachers should abandon teaching in isolation. They need to share and find quick, practical strategies for maximizing data analysis, including shared dialog for how to easily adjust instructional delivery practices.⁶

The administrators 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.⁷

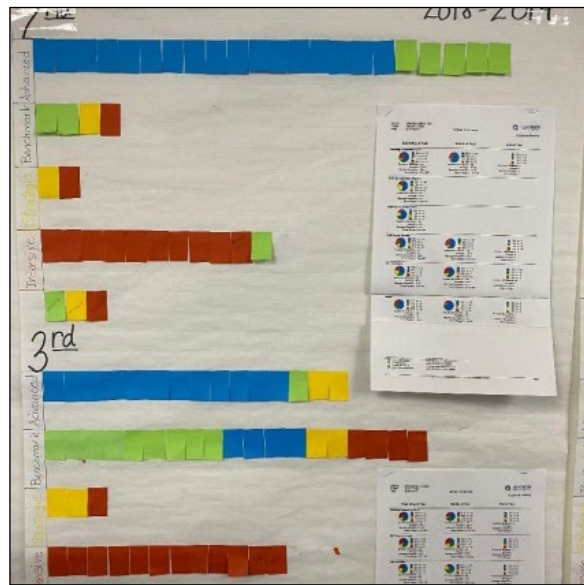
Exhibit 2-6 provides examples of dedicated data walls in other schools/districts. Data charts are color-coded and labeled for teachers to review as they work with students to make progress in reading skills.

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

⁶ <https://files.eric.ed.gov/fulltext/ED536742.pdf>

⁷ <https://www.edutopia.org/blog/new-teachers-how-use-data-inform-instruction-rebecca-alber>

Exhibit 2-6
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. The SDE Family Guides are resources aligned with the Oklahoma Academic Standards and developed specifically 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.⁸

FISCAL IMPACT

This recommendation can be implemented with existing resources using the instructional expertise of the superintendent and principal. 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 \$2,500.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Hire a consultant to teach use of formative and summative data, if needed.	(\$2,500)	\$0	\$0	\$0	\$0

B. MANAGEMENT AND OVERSIGHT OF INSTRUCTIONAL PROGRAMS

High-achieving districts have 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 leadership to implement the curriculum. Administrators and teachers, working collaboratively, are responsible for consistent implementation, quality instruction in the classroom, and student performance. District 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. The framework is not the sum total of the work of instructional leaders, but rather a description of the most important aspects of instructional leadership. **Exhibit 2-7** describes the five core beliefs that drive the work in school leadership at the Center and **Exhibit 2-8** describes the four dimensions of instructional leadership.

⁸ <https://sde.ok.gov/oklahoma-family-guides>

**Exhibit 2-7
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 on 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>

**Exhibit 2-8
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>

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 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 the consistency of implementation of an aligned curriculum, the quality

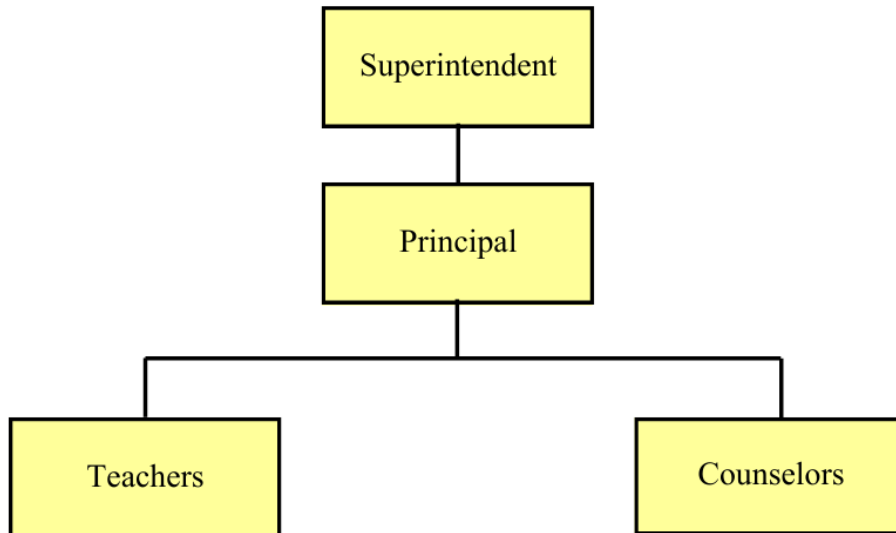
of instruction in the classroom, and student performance. Recent research contends that school leaders influence classroom teaching, and consequently student learning, by staffing schools with highly effective teachers and supporting those teachers with effective teaching and learning environments.⁹

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 2-9 provides the current organizational structure for instructional delivery at MPS.

Exhibit 2-9
MPS Organization Chart for Instructional Delivery



Source: Created by Prismatic, March 2023

⁹ <http://www.youblisher.com/p/110815-New-thinking-about-educational-leadership/>

Exhibit 2-10 provides illustrations of MPS classrooms.

**Exhibit 2-10
MPS Classrooms**



Source: Prismatic, March 2023

Oklahoma School Testing Program

Student assessment is an integral part of measuring student performance. The Oklahoma School Testing Program (OSTP) for students in 3rd and 8th grades 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. Also, test scores are reported in one of the following four categories:

- 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 2017.¹⁰

Exhibit 2-11 provides the results of the math OCCTs in 2020-21. Results at all grade levels were generally poor for MPS. Across the grades, MPS 4th graders demonstrated the best results within the district, but this was still below most peers and the state.

Exhibit 2-11
Percentage of MPS and Peer District
Full Academic Year Students Scoring Proficient or Above in Math
2020-21

Entity	3 rd Grade	4 th Grade	5 th Grade	6 th Grade	7 th Grade	8 th Grade
Maryetta	0%	21%	0%	7%	10%	0%
Bishop	43%	37%	35%	27%	DNS	DNS
Colchord	40%	18%	14%	21%	25%	0%
Grand View	38%	31%	19%	26%	23%	0%
Keys	40%	81%	12%	40%	36%	36%
Oktaha	0%	19%	13%	19%	29%	11%
State	29%	28%	23%	21%	20%	14%

Source: The Oklahoma Data Matrix

Exhibit 2-12 provides the results of the reading OCCTs in 2020-21. Results for MPS 4th and 8th graders were closest to those of the rest of the state. Results among the remaining grades were relatively poor.

¹⁰ <http://sde.ok.gov/sde/assessment-administrator-resources-administrators>

Exhibit 2-12
Percentage of MPS and Peer District
Full Academic Year Students Scoring Proficient or Above in Reading
2020-21

Entity	3 rd Grade	4 th Grade	5 th Grade	6 th Grade	7 th Grade	8 th Grade
Maryetta	17%	20%	14%	11%	10%	21%
Bishop	35%	42%	35%	36%	DNS	DNS
Colchord	31%	20%	19%	24%	19%	27%
Grand View	22%	25%	8%	32%	14%	15%
Keys	30%	54%	41%	53%	40%	39%
Oktaha	9%	10%	24%	24%	36%	21%
State	25%	22%	28%	26%	19%	24%

Source: The Oklahoma Data Matrix

Exhibit 2-13 shows the 2020-21 science scores. In 5th grade, MPS students scored the lowest among peers and below the state.

Exhibit 2-13
Percentage of MPS and Peer District
Full Academic Year Students Scoring Proficient or Above in Science
2020-21

Entity	5 th Grade	8 th Grade
Maryetta	12%	18%
Bishop	42%	DNS
Colchord	40%	24%
Grand View	25%	27%
Keys	59%	64%
Oktaha	19%	24%
State	32%	32%

Source: The Oklahoma Data Matrix

Exhibit 2-14 shows MPS math scores over a five-year period. From 2015-16 to 2020-21, MPS scores have generally declined in math. Scores from 2017-18 forward reflect Oklahoma’s higher performance standards adopted in 2017. OCCTs were not taken in 2019-20.

Exhibit 2-14
Five-year Data Trend in Math

Grade	2015-16		2016-17		2017-18		2018-19		2020-21	
	Maryetta	State	Maryetta	State	Maryetta	State	Maryetta	State	Maryetta	State
3 rd	74%	67%	46%	54%	53%	51%	30%	53%	17%	29%
4 th	74%	70%	54%	49%	36%	45%	36%	47%	20%	28%
5 th	68%	71%	29%	42%	44%	37%	35%	39%	14%	23%
6 th	72%	67%	47%	42%	26%	34%	46%	37%	11%	21%
7 th	75%	67%	32%	42%	38%	41%	45%	40%	10%	20%
8 th	51%	55%	29%	29%	10%	25%	19%	28%	21%	14%

Source: Office of Educational Quality and Accountability, Profiles Database, and Oklahoma Data Matrix Website

Exhibit 2-15 shows MPS reading scores over a five-year period. From 2015-16 to 2020-21, MPS scores generally declined in reading. Scores from 2017-18 forward reflect Oklahoma's higher performance standards adopted in 2017. OCCTs were not taken in 2019-20.

Exhibit 2-15
Five-year Data Trend in Reading

Grade	2015-16		2016-17		2017-18		2018-19		2020-21	
	Maryetta	State	Maryetta	State	Maryetta	State	Maryetta	State	Maryetta	State
3 rd	80%	72%	35%	49%	50%	43%	24%	49%	17%	25%
4 th	57%	68%	40%	46%	19%	46%	36%	39%	20%	22%
5 th	63%	73%	42%	49%	39%	46%	41%	45%	14%	28%
6 th	53c%	64%	47%	48%	35%	46%	37%	45%	11%	26%
7 th	68%	72%	24%	42%	34%	33%	23%	36%	10%	19%
8 th	70%	76%	38%	43%	25%	41%	28%	37%	21%	24%

Source: Office of Educational Quality and Accountability, Profiles Database, and Oklahoma Data Matrix Website

FINDING 2-3

MPS administrators are visionary instructional leaders. They set high expectations for learning and student achievement district-wide. They understand that instructional leadership is multifaceted and requires expertise in day-to-day logistical management along with routine leadership and hands-on immersion in classroom management, instructional delivery and curriculum pacing.

The MPS superintendent and principal strive to exhibit research-based best practice and behaviors on a daily basis. The leadership of the superintendent and principal was praised in multiple interviews and focus groups.

On the surveys conducted as part of this review, MPS educators gave the superintendent and principal high grades for this work as educational leaders of the district (**Exhibit 2-16**). On their survey, parents also gave the superintendent high marks, with 76 percent *agreeing* or *strongly agreeing* that the superintendent is a respected and effective leader.

Exhibit 2-16
Educator Survey Results Regarding MPS Education

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	65%	24%	2%	6%	0%	4%
Principal's work as an instructional leader	67%	22%	4%	2%	2%	4%

Source: Prismatic Survey Results, March 2023

Instructional leadership also involves support and retention of teachers. One study cites that administrative support for teachers, self-efficacy, school climate, school culture and collegiality are directly related to teacher retention.¹¹ Covey notes these as the most important motivating factors for teachers:

Teachers want to enjoy a sense of dignity and pride in their profession. They want to be treated with respect. They want good collegial relationships. They want to be organized and to feel some semblance of control over their time and what happens in their classroom. They want their talents utilized and developed.¹²

District instructional leadership is also connected to positive student achievement. The role of the superintendent and principal is critical. Marzano and Waters point to five research-based best practices for district level leadership responsibilities:

- ensuring collaborative goal setting;
- establishing non-negotiable goals for achievement and instruction;
- creating board alignment with and support of district goals;
- monitoring achievement and instruction goals; and
- allocating resources to support the goals for achievement and instruction.¹³

COMMENDATION

MPS administrators are visionary instructional leaders.

¹¹ <https://stars.library.ucf.edu/cgi/viewcontent.cgi?article=5944&context=etd>

¹² Covey, S.R. (2008). *The leader in me: how extraordinary, everyday schools are inspiring greatness, one child at a time*. New York, New York: Free Press.

¹³ Marzano, R.J. and Waters, T. (2009). *District leadership that works: Striking the right balance*. Bloomington, IN: Solution Tree.

FINDING 2-4

The district has no instructional plan that intentionally guides teachers to engage in delivering high impact instructional practices, strategies for engaging high poverty students, and instructional delivery procedures for pacing a horizontal and vertically aligned curriculum. This reduces the positive impact teachers can have on improved student learning. Even though the school culture has a strong, healthy, family history with teachers having generational ties to the school, low student achievement scores remain an issue.

The district lacks a written plan to guide teachers in effective classroom management, planning data-driven lessons, and delivering high impact instruction. No instructional parameters assist teachers in managing student-centered classrooms, setting high student expectations, daily implementing evidence-based instructional strategies, increasing student engagement and interest, and using formative data for improving student academic performance. There are no common Pre-K-12 lesson planning and instructional delivery guidelines to monitor mastery of OAS. No evidence was presented to show how TLE expectations are woven into daily planning and instruction.

Research indicates that student engagement makes learning take place and effective engagement is created by the teacher.¹⁴ It has been found that “little learning” occurs in disorganized and chaotic classrooms.¹⁵ Numerous studies have focused on the role of teacher in shaping effective instruction. Those studies have found student learning is mainly related to the class practices of the teacher with their students.¹⁶

Vital to an instructional plan is addressing rigor. **Exhibit 2-17** shows the Rigor Relevance Framework. This is a research-based example of what is typically incorporated into a sound instructional plan. The Rigor Relevance Framework is a tool developed to examine curriculum, instruction, and assessment along the two dimensions of higher standards and student achievement. In addition, levels of rigor are used to monitor teacher progress.¹⁷ Rigorous teaching strategies improve students’ higher level thinking skills by encouraging them to move from low-level to high-level thinking.

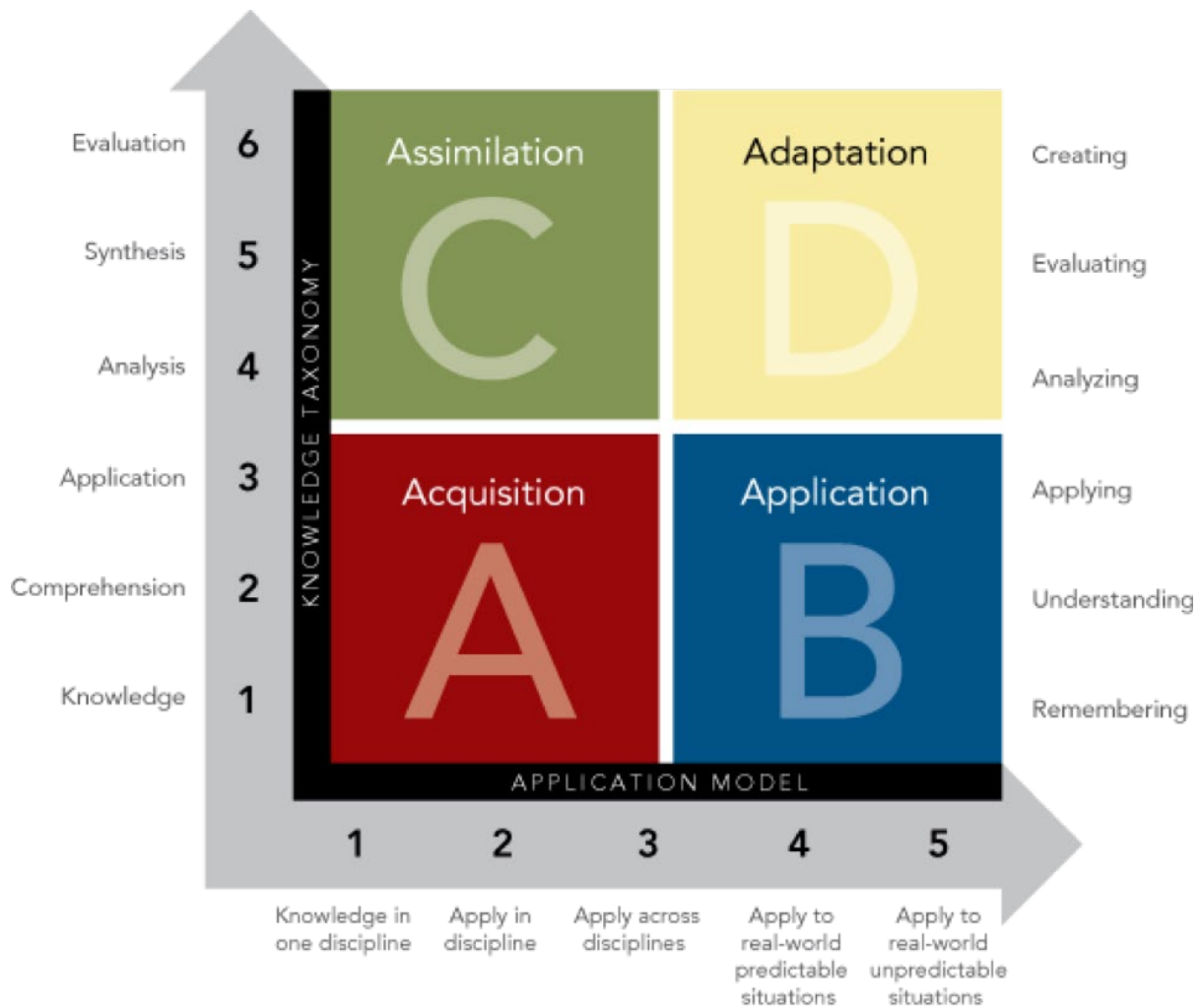
¹⁴ <https://www2.ed.gov/about/offices/list/oese/sst/evaluationmatters.pdf>

¹⁵ Elias, M.J., and Schwab, Y. (2006). *From compliance to responsibility: Social and emotional learning and classroom management*. New York: Lawrence Erlbaum Associates.

¹⁶ Hattie, J. (2009). *Visible learning: A synthesis of over 800 meta-analyses relating to achievement*. New York: Routledge.

¹⁷ <https://leadered.com/rigor-relevance-and-relationships-frameworks/>

Exhibit 2-17
Rigor Relevance Framework



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

Lesson plan design is also an important element in an instructional plan. Historically, the state of Oklahoma has used Madeline Hunter’s research. Her research showed that effective teachers follow a lesson plan. The elements of her lesson plan design withstood the test of time and are still highly effective today. The design and methodology of the plan works for any teaching style, grade level, subject area, or student demographic. Hunter’s research organized instructional delivery around seven components and was designed to guide thinking about what is necessary for teaching a particular concept. The plan design was not intended to be rigid as not all components need to be present in every lesson. Sometimes it takes several teaching segments to complete the lesson plan. Each component of the lesson has methods and techniques that can be incorporated into the plan. **(Exhibit 2-18).**

Exhibit 2-18 Sample Lesson Plan Format

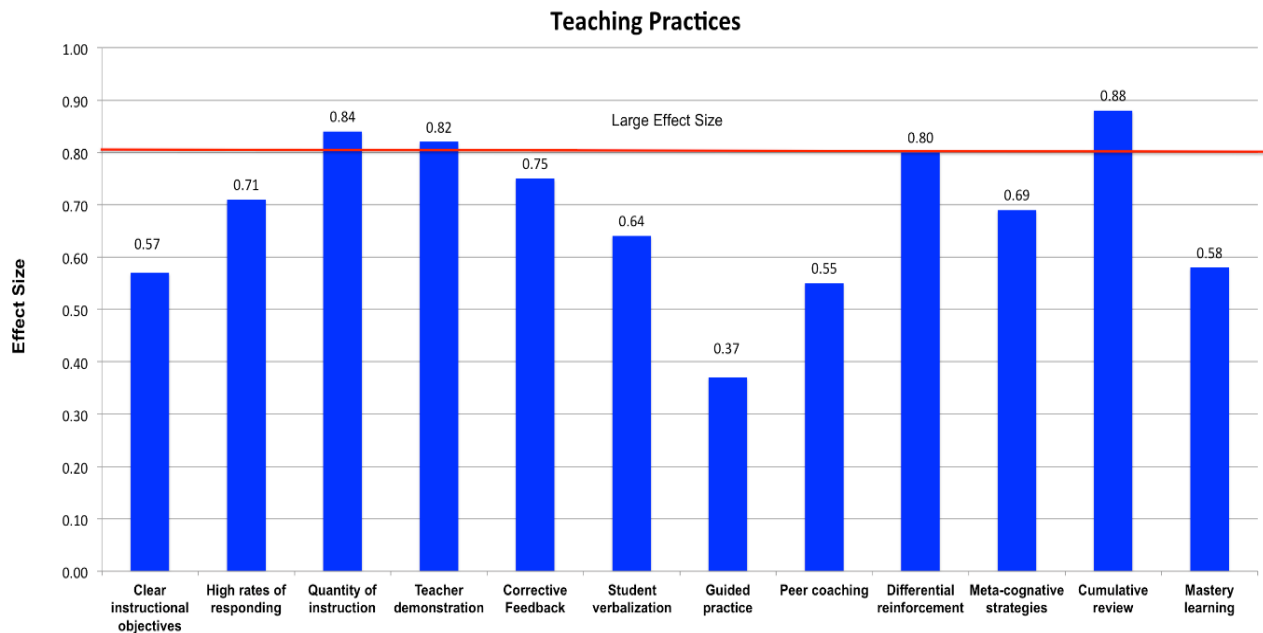
1. **Anticipatory Set** (In what way will you activate their prior knowledge and experience to help them relate to today's lesson.) Focus attention, brief practice on previous/related learning.
2. **Objective/Purpose** (The object is what students will be able to know/do by the end of this lesson. The overarching purpose/understanding is the broad goal/curriculum standard related to the discipline.)
3. **Instructional Input** (What knowledge will you communicate to the student-tell, lecture, stand up and deliver so that the student will understand the objective.) Disseminates new information and activities to achieve the stated objectives.
4. **Modeling** (How will you show/demonstrate the skill or competence so the student will also be able to do it?) Demonstration and/or example of the acceptable finished product or process.
5. **Checking for Understanding** (How will you check that the students have understood/learned the objectives?) Activities which examine the student's possession of central and essential information to achieve the stated.
6. **Guided Practice** (What activities will the students perform under your supervision to ensure that they are able to practice the material. If they make mistakes, you are able to show them how to do it correctly.) Close monitoring and direction of the students by the instructor as they practice the whole task for the first time independently of each other.
7. **Independent Practice** (List homework or seatwork assignments the students will be given to successfully practice the material/skill without teacher supervision.) Only after you know the students can proceed, the continued practice of the whole task by the students without the instructor's monitoring and guidance.

Source: <http://iicti-part1-fall2011.wikispaces.com/file/view/madeline+hunter%27s+lesson+plan+format.pdf>

Hattie's research describes what can be expected when a teacher implements instructional delivery strategies and practices proven to increase mastery of content into a well-planned lesson. Better learning happens in a dynamic classroom setting in which teachers guide and offer explicit instruction to learning and mastery of content. Less learning takes place in classrooms where teachers lecture and then turn control of learning and understanding content over to students.¹⁸ **Exhibit 2-19** displays the implicit high impact instructional strategies that teachers practice which enable greater student mastery of skills and content.

¹⁸ Hattie, J., (2009). *Visible learning: A synthesis of over 800 meta-analyses related to achievement*. New York, NY: Routledge

Exhibit 2-19
Teaching Practices Recommended by Hattie



Source: <https://www.winginstitute.org/effective-instruction-delivery>

Hattie also concluded that learning is enhanced when:

- teaching is focused on and responsive to students learning needs;
- teachers are clear about what they want their students to learn and select teaching approaches in response;
- teachers explicitly explain what students need to understand;
- teachers demonstrate what students need to be able to do;
- teachers get students to mentally engage with the material the students need to learn;
- teachers give meaningful feedback to their students¹⁹

Finally, research also 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.²⁰

¹⁹ <https://www.evidencebasedteaching.org.au/hattie-his-high-impact-strategies/>

²⁰ <https://www.readingrockets.org/article/role-principal-leadership-improving-student-achievement>

RECOMMENDATION

Adopt and implement with fidelity a district-wide instructional plan.

The district needs an instructional plan that clearly details instructional processes and procedures that lead to student centered classrooms and improved student achievement. Traditional textbooks and whole group lectures are no longer best practices as the primary tools for teaching content and delivery of instruction. As the instructional leaders, the superintendent and principal should facilitate the process to adopt and implement an instructional plan. The district should only include programs and resources in the instructional plan that have robust evidence of tight correlation to OAS and have a direct impact on improved student achievement. This information should be based on the results of an annual program/resource evaluation plan.

MPS teachers should follow an instructional plan that details strategies for classroom management and engaging students in the content by loading higher level questions, interactive small group discussions, and team projects. Effective student engagement encourages students to bring their personal experiences and opinions to the content and reinforces learning and retention. The district should have consistent classroom management expectations, dynamic lesson planning with active learning opportunities for students, and instructional delivery strategies that promote mastery of content and skills. MPS teachers need a multifaceted instructional plan that incorporates well-designed, vertical and horizontally aligned and paced, standards-based lesson plans, that are delivered through high impact evidence-based instructional strategies.

The school board, superintendent, and principal should establish district-wide expectations and accountability procedures for all teachers to follow an instructional plan that creates Pre-K-12 continuity and consistency in data-driven, student-centered classrooms. The plan should guide and support teachers to implement research-based best practice. The plan or framework should identify the practices and behaviors that exemplify TLE's *effective*, *highly effective*, and *superior* categories and give consistency and common practice across the district's administration and staff.

The MPS instructional plan should be implemented in the 2023-24 school year. Staff meetings, professional development days, PLC meetings, and grade level and content area meetings should be venues to set expectations for understanding and implementing the instructional plan. This should include pragmatic ideas and ways teachers can work together to integrate the plan into daily practice. If needed, the district can hire a consultant to help with the initial framework for the plan.

The next two exhibits provide additional research-based resources detailing classroom management procedures, effective lesson planning, and evidenced-based instructional strategies that can be included in the instructional plan. **Exhibit 2-20** defines effective classroom management procedures. **Exhibit 2-21** provides an explanation of well-designed lesson plans and instruction.

Exhibit 2-20

Effective Classroom Management Procedures

1. **Nonverbal Cues:** A teacher can use subtle body movements (like proximity) or more explicit hand signals to cue self-regulation. One popular cue involves moving to the front of the room and making eye contact with the high schooler who is acting out, then pausing until you have the individual's attention. Younger students are less familiar with social cues and might require a verbal signal to accompany the nonverbal cues. Example: "What should you be doing right now?"
2. **Nonverbal Transition Cues:** Kids can become so immersed in an activity that they might not notice your attempts to shift them into the next learning event. Ringing a bell or turning lights on and off are unmistakable signals that shift attention to the teacher or a new task. Asking a class to collectively decide what signal to use can be a community builder.
3. **Timeouts:** Many studies support the timeout strategy, which is now considered an indispensable component of many evidence-based behavior management systems. Unlike the dunce cap punishment, which intentionally shames and stigmatizes students, a timeout is now used in progressive classrooms to provide an emotional breather in a less socially charged area of the room. It's also a way for students to decompress, reflect on and enhance their self-awareness, and then return to their seats with improved self-regulation.
4. **Over-Correction:** Younger students may find classroom routines foreign or overwhelming. Take the time to model the appropriate procedure and then rehearse it three times or more until each step of the routine becomes second nature. After these rehearsals, my second graders took pride in executing the required actions quickly and perfectly for the rest of the year.
5. **Notes of Praise:** A private note left on a student's desk praising improved classroom effort is a powerful reinforcement, especially when the note is heartfelt. Studies also show that sending positive letters home improves kids' self-management and decision making.
6. **Private Reminders:** When partnered with discreet praise, private reminders to students about how to act responsibly increase on-task behaviors. Researchers recommend using short and unemotional reminders.
7. **Greetings:** It might seem like an insignificant gesture but greeting students by name and making a positive statement enhances their self-regulation and increases class participation. Example: "Hey, Marcus. How is my brilliant student today?"
8. **On-the-Spot Corrections:** During a lesson, don't leave behavioral missteps unaddressed. Immediately, briefly, and without drama, cue students about responsible conduct. Example: "What should you be doing right now? Right. Let's see that happen."
9. **Mindfulness Practice:** Citing numerous studies, Emily Campbell writes that teaching a student to meditate or practice nasal breathing (inhale through the nose, exhale through the mouth) enhances emotional regulation. This animated gif helps students (and teachers) learn the technique.
10. **Notice and Comment:** The Peacebuilders website shares several "Minute Recipes for Building Peace," such as recognizing changes in student behavior and showing interest. Example: "I really like how you're acting today. Did something happen to make you feel better about your group?" Noticing and commenting sends an unmistakable and powerful message: I care.
11. **When-Then:** Intervention published by Peacebuilders, "When-Then" helps students make responsible decisions—but also leaves the choice in the students' hands: "When you start talking to me with a lowered voice, then we'll problem-solve this situation."

Source: <https://www.edutopia.org/article/11-research-based-classroom-management-strategies>

Exhibit 2-21
Features of Effective Explicit Instruction Practices

1. **Well-designed and planned instruction:** Instruction that is well planned moves students from their current level of competency toward explicit criteria for success.
 - Instructional design with clear instructional objectives: The teacher should present these objectives to students for each lesson.
 - Scope and sequencing: The teacher should teach the range of related skills and the order in which they should be learned.
2. **Instruction that offers sufficient opportunities for successful acquisition:**
 - High rates of responding for each student to practice the skill: The teacher should provide sufficient opportunities for unpunished errors and ample reinforcement for success.
 - Sufficient quantity of instruction: The teacher should allocate enough time to teach a topic.
3. **Teaching to mastery:** Students need to learn the knowledge/skills to criteria that are verified by teachers or students' peers.
4. **Teaching foundation knowledge/skills that become the basis for teaching big ideas:** Current lessons should be built on past knowledge to increase fluency and maintain mastery of material. The teacher should relate lessons to complex issues and big ideas that provide deeper meaning and give students better understanding of the content.

Source: <https://www.winginstitute.org/uploads/docs/Teacher%20Competencies%20PDF%20final.pdf>

Hattie and Marzano ranked the teaching strategies by the contribution they make to student learning, which have shown to have a high impact on improving and evaluating learning outcomes. These reliable strategies should be incorporated into the district-wide instructional plan. An evidence-based approach to teaching and learning is supported by strong evidence, meta-analyses of extensive findings, crucial to maximizing student outcomes, and applicable and adaptable across subjects, students' abilities, and grade levels. **Exhibit 2-22** displays the top ten teaching strategies.

Exhibit 2-22
Top Ten Evidence-Based Teaching Strategies

<p>1 </p> <p>SETTING CLEAR GOALS <i>Lesson goals clearly explain what students need to understand, and what they must be able to do</i></p>	<p>2 </p> <p>WORKED EXAMPLES <i>Enable students to understand the process and strategy which leads to an answer, not the answer itself</i></p>	<p>3 </p> <p>EXPLICIT TEACHING <i>Provide instruction, demonstrate concepts and build student knowledge and skills</i></p>
<p>4 </p> <p>SUMMARIZE LEARNING <i>Summarize Learning in various formats like essays, graphs, mind maps</i></p>	<p>5 </p> <p>SPACED PRACTICE <i>Multiple and spaced opportunities to encounter, engage with, and practice on new knowledge and skills.</i></p>	
<p>6 </p> <p>QUESTIONING <i>Check student understanding and evaluate the effectiveness of teaching</i></p>	<p>7 </p> <p>COLLABORATIVE LEARNING <i>Students to participate in flexible groups that collaborate on meaningful tasks</i></p>	<p>8 </p> <p>FEEDBACK <i>Gather information about student learning and verify impact of teaching</i></p>
<p>9 </p> <p>DIFFERENTIATED TEACHING <i>Extend the knowledge and skills of every student in every class, regardless of their learning readiness</i></p>		<p>10 </p> <p>METACOGNITIVE STRATEGIES <i>Help students to be self aware and responsible for their learning</i></p>

Source: <https://blog.edsense.in/high-impact-evidence-based-teaching-strategies/>

Hattie discovered that teachers are far more likely to have a large and positive impact on learning and achievement if they:

- are passionate about helping their students learn;
- forge strong relationships with their students;
- are clear about what they want their students to learn;

- are not afraid to be the sage on the stage; and
- adopt evidence-based teaching strategies.²¹

FISCAL IMPACT

This recommendation can be implemented with existing resources using the instructional expertise of the superintendent and principal. However, if an external consultant is needed, there are consultants available to guide teachers through developing the framework for developing an instructional plan. A short-term consulting engagement would cost approximately \$2,500.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Hire a consultant to guide administrators in developing the framework for an instructional plan.	(\$2,500)	\$0	\$0	\$0	\$0

FINDING 2-5

Textbooks and/or teacher-selected resources drive MPS curricula. Focus group and interviews indicated math and reading textbooks were from the same publisher. However, teachers selected the supplemental resources without evidence of effectiveness or vertical/horizontal alignment. The district lacks processes and procedures to annually evaluate the quality, relevance, and alignment of instructional resources with OAS.

In the district, teachers are primarily responsible for selecting and implementing ancillary and supplemental instructional resources. The district lacks processes and procedures to annually evaluate and review whether the instructional resources are implemented with fidelity. They are also not reviewed for developmental appropriateness. There is no procedure in place to assess which programs and resources remain effective and directly improve achievement based on student performance data, or which are outdated, busy work, one more “add-on”, and need to be abandoned completely. No evaluation process filters how new grants or resources align vertically and horizontally with OAS, existing programs, software, and curricula, or support identified learning needs based on student performance data. The district lacks an evaluation process to determine how new programs, resources, and software interface with identified formative and OSTP summative student learning needs and address achievement gaps, especially those in the lower quartiles.

The district does not clearly define efforts to evaluate software, programs, texts, and supplemental resources to determine the direct impact they have on improving student achievement on a daily basis. The consulting team did not find evidence of an evaluation process to determine how core curriculum textbooks, software programs, supplemental and remedial interventions, instructional strategies, and enrichment activities are aligned with longitudinal OSTP data results. No evidence was presented to indicate how all teacher resources support the

²¹ <https://www.evidencebasedteaching.org.au/hattie-his-high-impact-strategies/>

taught and tested curriculum and align with state Blueprints, Test and Items Specifications, and Performance Level Descriptors (PLD). RSA and intervention resources have not been evaluated.

Most federal and state instructional resources/programs require individual instructional 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 instructional resources/programs work in concert and effectively teach state standards and support remediation/enrichment at each grade level and content area. An annual evaluation process ensures all instructional resources, programs, and software are not “busy work” but directly improve student achievement. Likewise, an annual evaluation process determines if instructional resource materials are addressing identified learning gaps or perpetuating redundant and repetitive overlaps.

Research shows that instructional resources must be relevant, support curricula rigor, and most importantly, seamlessly align with state standards in order to improve student performance. Without comprehensive instructional resource/program evaluations, schools risk getting into curricular and instructional traps. They continue doing what they have always done – using instructional resources without hard evidence they work.

Systematically collecting and analyzing quantitative and qualitative information regarding instructional resources provides district administrators and teachers with valuable assessment information. Ideally, evaluations 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 learning needs and aligned to state standards?
- Do the resources render 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?²²

High-performing districts use evaluations to make data-driven, informed decisions. Evaluation results guide decisions to keep or abandon instructional resources/programs. Based on data, modifications, additions, deletions, or revisions to instructional resources/programs are determined. The evaluation determines the instructional impact resources have on subgroups.

²² http://ies.ed.gov/ncee/edlabs/regions/pacific/pdf/REL_2014007.pdf

The district has no inclusive evaluation processes to measure whether the instructional materials used align closely with OAS. No evidence was presented to indicate that student OSTP data are routinely disaggregated to determine if the content and skills missed in the lower quartiles are appropriately covered in the implemented textbooks and instructional resource materials.

Without implementing an inclusive, regularly scheduled evaluation system of all instructional materials, MPS positions itself to fund instructional resources/programs/software that are misaligned, not teaching to identified formative and summative student needs, and are outdated and no longer effective. The evaluation process also needs to determine if the intent behind the implementation of said resource is done so with fidelity.

RECOMMENDATION

Implement a comprehensive evaluation process to ensure textbooks, software, and complementary instructional materials/resources are:

- **developmentally appropriate and relevant;**
- **consistent across grade levels and content areas;**
- **aligned with student performance data;**
- **implemented with fidelity; and**
- **aligned vertically and horizontally with the OAS or need to be selectively abandoned.**

The school board, superintendent, principal, and select teachers should develop and implement a plan to annually evaluate curricular and instructional resources, software, enrichment, and remediation materials. This includes all resources used to implement RTI, RSA, and the I Read Lab. Identified student learning needs in the lower quartiles need substantial focus. The evaluation process should provide evidence that the instructional resource/program positively:

- impacts improved student learning in all subgroups;
- contributes to the relevance and rigor of instruction and OAS curriculum;
- aligns with the district's instructional plan;
- meets the intended curricular and instructional purpose; and
- supports best instructional practices.

The MPS superintendent, principal, and all teachers should develop a list of all major curricular and instructional resources routinely implemented to supplement, remediate, or enrich their instruction, and support the curriculum. Proof or justification of how the resource aligns with teaching state standards and directly supports improved student test results must be included. The list should include a rank ordering of total dollars spent on each implemented resource. The

superintendent and principal should then direct evaluation efforts to those with the highest costs and the strongest correlation to improved student performance data in the bottom quartiles. The superintendent and principal should work with teachers to identify and abandon resources and materials that are no longer robust or relevant to the knowledge base students need for OAS and the next level of study. This evaluation and abandonment process should be simple, easily implemented, and directly focused on supporting improved student performance.

All materials should undergo a formative and summative evaluation. **Exhibit 2-23** presents examples of formative evaluation questions to explore.

Exhibit 2-23 **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 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 is implemented and routinely used. It is conducted at the end of each school year, or at another logical time, such as the end of instructional resource/programmatic intervention. **Exhibit 2-24** presents examples of summative evaluation questions to explore.

Exhibit 2-24
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 also important to make certain that the instructional resources/programs align and tightly support the OAS, Oklahoma School Testing Program (OSTP) student performance data Depth of Knowledge expectations, and Test and Item Specifications. The evaluation process should ensure MPS has instructional resources that teach and reinforce the identified skills and concepts that students in the lower quartiles routinely miss.²³

FISCAL IMPACT

This recommendation can be implemented with existing resources.

²³ There are many free resources available to gather additional information, including: Resources on designing and planning instructional resource/program evaluation;

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

A basic guide to instructional resource/program evaluation; <https://managementhelp.org/evaluation/program-evaluation.htm>

FINDING 2-6

The district's current PLC process has not impacted student performance to the desired degree. This is likely because the current MPS PLCs lack a number of items, including clearly defined expectations for the dedicated release time and an accountability process.

The master schedule indicates teachers have regularly scheduled PLC release time. Declining student performance data indicates a need to reverse the decline. The district-wide PLC process does not consistently include the principal, teachers, counselors, special education teachers, elective teachers, and paraprofessionals. Current PLC agendas do not strategically focus on grade level and core content horizontal/vertical alignment, pacing the curriculum, formative/summative student data, or high-impact instructional strategies.

Research shows that PLC teacher collaboration has positive implications for schools. In a high-performing school, every educator engages with colleagues in PLCs in the ongoing exploration of these crucial questions:

- What do we want each student to learn? (standards)
- How will we know when each student has learned it? (assessment)
- How will we respond when a student experiences difficulty in learning? (interventions)
- How will we respond when learning and mastery occur? (enrichment and reward)

The literature on collaboration and PLCs identifies five organizational competencies:

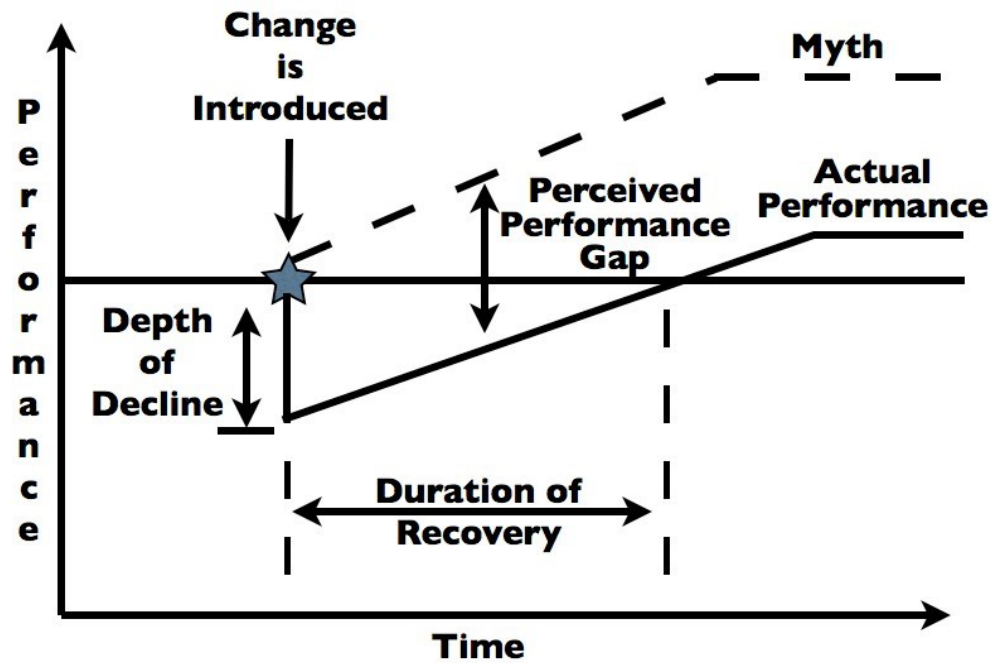
- supportive and shared leadership;
- collective creativity; shared values and vision;
- supportive conditions; and
- shared personal practice.²⁴

Establishing effective PLCs does not occur quickly or spontaneously. It requires dedicated and intentional effort on the part of the superintendent and principal as instructional leaders and the teaching staff. Moving to collaborative planning and learning creates organizational change. It takes teachers from teaching in isolation and moves them to corporate thinking and shared expertise. It takes seasoned teachers out of their isolated comfort zone and into shared learning.

Exhibit 2-25 articulates change 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.

²⁴ <http://www.sedl.org/change/issues/issues61.html>

Exhibit 2-25
Change Implementation



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

A district seeking to improve must be mindful that initial capacity building is more important than accountability because the former is the route to the latter, (i.e., building the capacity of teachers is the route to being held accountable for implementing new, best practices). Clearly, one needs both. Finding the right combination and integration of the two is the trick.²⁵ Being the change agent in successful schools means that growing and learning are ongoing phenomena.¹⁹ **Exhibit 2-26** Summarizes Fullan's insights regarding change.

²⁵ Fullan, M. (2008). *The six secrets of change*. San Francisco, CA: Jossey-Bass.

¹⁹ <http://www.seidl.org/change/issues/issues61.html>

Exhibit 2-26
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>

Learning by Doing: A Handbook for Professional Learning Communities at Work provides a road map to narrow the “knowing-doing gap” regarding PLC.²⁶ This book outlines the importance of common vocabulary and a common understanding of PLC concepts and characteristics. It provides the rationale for implementing PLCs that benefit students. DuFour, et al., lays out purposeful steps to guide leaders in assessing perceptual reality in their schools. It is a helpful guide to foundational information and the improved capacity for staff to function as a PLC.

McLaughlin and Talbert (1993) suggested that when teachers had opportunities for collaborative inquiry and the learning related to it, they were able to develop and share a body of wisdom gleaned from their experience.²⁷ Darling-Hammond (1996) cited shared decision-making as a factor in curriculum reform and the transformation of teaching roles in some schools.²⁸ In such schools, structured time is provided for teachers to work together in planning instruction, observing each other’s classrooms, and sharing feedback.

²⁶ DuFour, R., DuFour, R., Eaker, R., Many, T., & Mattos, M. (2006). *Learning by doing: A handbook for professional learning communities at work*. Bloomington, IN: Solution Tree.

²⁷ McLaughlin, M. W. & Talbert, J. E. (1993). *Contexts that matter for teaching and learning*. Stanford, CA: Center for Research on the Context of Secondary School Teaching, Stanford University.

²⁸ Darling-Hammond, L. (1996). The quiet revolution: Rethinking teacher development. *Educational Leadership*, 53(6), 4-10.

For administrators and teachers to build the kind of trust needed to not only talk candidly but also to observe one another teach is a major first step. This takes instructional leadership and teacher empowerment. Expecting teachers to have conversations is an instructional practice that takes instructional leadership. With the evolving trends and patterns of increased rigor for instruction, collaboration between and among teachers and district leadership is vital.

Teaming and pacing OAS with fidelity takes place through structured PLC opportunities for discussion and collaborative planning. Successful implementation of teaming and departmentalization requires cross-curricular and cross-grade level dialogue. Continuous school improvement evolves through PLC collaboration, corporate thinking, and shared decision-making.

RECOMMENDATION

Implement and hold teachers accountable for regularly scheduled, structured, PLC release time opportunities for administrators and teachers to collaborate horizontally and vertically regarding aligning and pacing core content, high impact instructional strategies, and practices and interventions that drive improved learning for all students.

MPS should incorporate research-based elements into their PLC process. This includes structured agendas and procedures, accountability, reflective dialogue, focus on student learning, interaction among teacher colleagues, collaboration, and shared values and norms.²⁹ The district should provide more structured PLC opportunities so that all staff can:

- collaborate horizontally and vertically regarding aligning and pacing core content;
- share high impact instructional strategies; and
- share best practices and robust interventions that drive improved learning for all students.

All MPS staff, including administrators, all teachers, counselors, instructional assistants, and paraprofessionals should participate in PLCs.

When implementing a PLC process, MPS administrators should find the balance between capacity building and accountability for improving instructional practice. This calls for freedom and self-direction that leads to improvement. At the same time, teachers also need support, direction, and expectations that help them develop expertise and grow the practice of professional dialogue with fellow teachers. Administrators should use the PLC process to guide teachers to move past blaming the parent or socioeconomic status to taking ownership for reaching the student through effective instruction and student-centered classrooms.

MPS teachers should evolve to talking about curriculum standards and developing effective lesson plans based upon student performance data. Teachers should no longer be tethered to textbook curriculum. PLCs should make MPS teachers aware that they have a wealth of

²⁹ <https://www.edutopia.org/article/creating-effective-professional-learning-communities/>, <https://www.ascd.org/el/articles/what-is-a-professional-learning-community>, <https://www.allthingsplc.info/about>

expertise and options for professional learning among themselves, next door, and across the hall.

The superintendent and principal should review the existing structures, schedules, and levels of teacher expertise in implementing a collaborative PLC process. With select staff, they should reflect on instructional trends and patterns that profile the district over one or two years. They should assess where teachers are functioning during the implementation of PLCs. The district should develop a profile of their journey to create, deepen, and sustain the collaborative process.

The National College for School Leadership has developed a rubric that MPS administrators should use to assess their PLC. A copy is included in **Appendix E**.

The school board, superintendent, principal, and select teachers should determine the initial process for revised PLC implementation. Then, together with teaching staff, they should transition to a “systematic process in which we work together, interdependently, to analyze and impact professional practice in order to improve our individual and collective results.”³⁰

Exhibit 2-27 is a resource for exploring additional scheduling options for teacher collaboration.

Exhibit 2-27 **Examples for Providing Collaboration Time**

- **Common Prep Time:** Build a master schedule to provide daily common prep time for teachers of the same course or department.
- **Parallel Scheduling:** Schedule common prep time by assigning elective and special teachers to provide lessons to students across an entire grade level at the same time each day.
- **Adjust Start and End Times:** Gain collaborative time by starting the workday early or extending the workday one day each week to gain time.
- **Shared Classes:** Combine students across two different grade levels or courses into one class for instruction.
- **Group Activities, Events, and Testing:** Teams of teachers and non-teaching staff coordinate activities that require supervision of students rather than instructional expertise.
- **Banking Time:** Over a period of days, extend the instructional minutes beyond the school day.
- **In-Service and Faculty Meeting Time:** Schedule extended time for teams to work together on staff development days and during faculty meeting times.

Source: Dufour, R. (2006). Learning by doing: A handbook for professional learning communities at work. Bloomington, IN: Solution Tree.

³⁰ Eaker, R., DuFour, R., & DuFour, R. (2002). *Getting started: Reculturing schools to become professional learning communities*. Bloomington, IN: Solution Tree Press.

FISCAL IMPACT

Initially, if an outsourced vendor is needed to provide training to instructional staff in PLCs, the consulting team estimates \$5,000 for one year.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Hire a firm to help with PLCs if needed.	(\$5,000)	\$0	\$0	\$0	\$0

FINDING 2-7

The Response to Intervention (RtI) and I Read programs are not currently optimally serving MPS students. The programs are negatively impacted by scheduling and inconsistent use.

The regular classroom, RtI time, I Read Lab, and reading resource teachers provide reading services to MPS students. At the time of the onsite visit, the morning RtI instructional time is compromised by tardy arrivals, students transitioning to and from breakfast, breakfast in classrooms, teachers reporting breakfast counts, and breakfast clean-up, along with the routine procedures for getting the school day started. These activities impact the quality of RtI instructional time.

In focus groups and interviews, the consulting team learned that reading instruction is teamed or departmentalized in grades three through eight. It is difficult for teachers to intentionally integrate cross-curricular reading skills into math, science, or social studies.

The district shared a document that outlined the elements and broad scale logistics of RtI Multi-Tiered Instruction. However, it was unclear how teachers collaborated to design tiered instruction and continuously adjust flex grouping. No document outlined or identified best practice intervention strategies for Tier I, II, and III. **Exhibit 2-28** explains selected RtI features expected in Oklahoma schools under each tier. Generally, the continuum between Tier I, Tier II, and Tier III, is a process of targeted interventions that intensify.

Exhibit 2-28
Selected Essential RtI Features

Essential Features	Tier I	Tier II	Tier III
Focus	All students receiving general education core practices.	Students failing to meet important benchmarks who have not responded to Tier I core practices.	Students failing to meet important benchmarks who have not responded to Tier I or Tier II efforts.
Interventions	Research-based, comprehensive core delivered with differentiation of instruction.	Supplemental short-term interventions, delivered to homogeneous groups (i.e., students with similar needs); teacher: student ratio up to 1:4 or 1:6.	Supplemental intensive short-term interventions; teacher: student ratio up to 1:3.
Assessments	Screening of all students at least three times per year.	Frequent progress monitoring (e.g., every one to two weeks).	Very frequent progress monitoring (e.g., at least once per week).
Data analysis and decision-making	District, school and grade/content area data-review teams analyze universal assessment data to establish the overall efficacy of Tier I, identify ways to improve and differentiate instruction within a grade or course, and identify individual students in need of Tier II support.	Data review teams match students with and monitor the effectiveness of appropriate Tier II interventions.	Data review teams decide how to choose, individualize, and intensify interventions for students receiving Tier III interventions.

Source: <http://ok.gov/sde/sites/ok.gov.sde/files/RtIGuidanceDoc.pdf>

The district lacks written guidelines and consistent procedures to determine how RtI, I Read Lab, and reading resource EC-reading Lab, along with the regular classroom teacher, monitor and use daily and weekly formative data to adjust the flexible, tiered grouping. It was not clear how student progress was formatively monitored and adjusted. Classroom and reading teachers do not appear to regularly meet to collaborate and plan student reading instruction. MPS gives summative benchmark tests at the beginning, middle, and end of each school year, satisfying the Reading Sufficiency Act (RSA) requirements. Beyond that, consistent district-wide guidelines and procedures for interim formative monitoring and adjustment of instruction for flexible grouping were unclear.

Reading scores over the past five years indicate that the majority of MPS students are not proficient readers. This indicates the need for Tier II (supplemental small group) and Tier III

(increased individualized, groups of three or less). Tier III students are the most at-risk and require more intense instruction via one-on-one or small group. The more individualized instruction is intensified by focusing on fewer high priority reading skills and providing multiple and extended instructional opportunities to respond and practice. One-on-one instruction includes giving students immediate feedback based on their individual responses, teaching students to mastery and planning instruction with materials and an instructional sequence that meets individual student needs.³¹

While research does not suggest a specific number of intervention sessions or duration of instructional intervention (such as weeks, months, or years) for Tier III, studies do suggest that students needing Tier III intervention require more reading instructional time than their peers without reading difficulties.

RECOMMENDATION

Improve implementation of the RtI, resource, and I Read programs to maximize supplemental reading support for all learners.

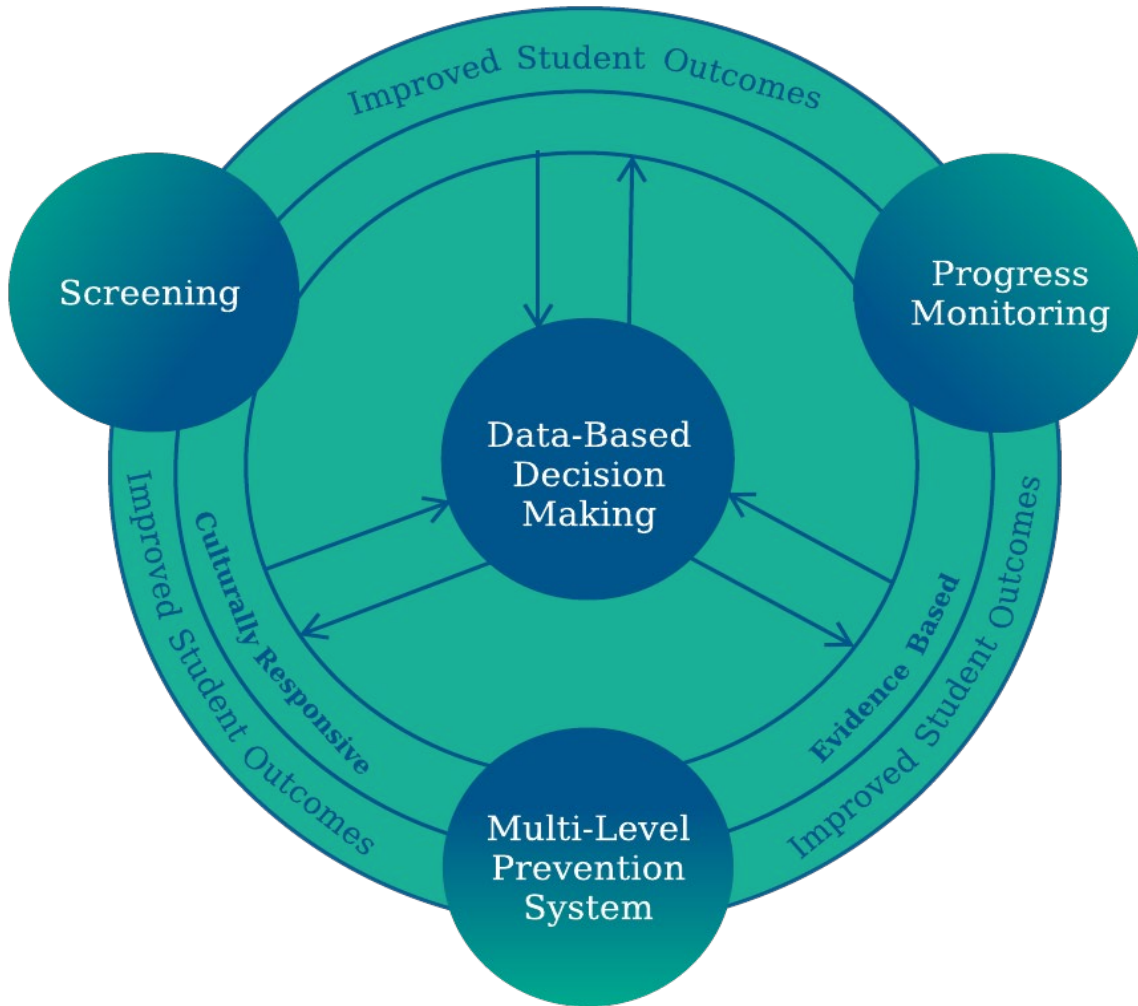
MPS student progress needs weekly assessment using consistent progress monitoring measures to determine whether the instruction is specifically targeting student needs. The interventions need input from the entire team of professionals. Together the team can make decisions on how to refine the instructional practices to enhance improved achievement and growth.

The superintendent, principal, and teachers should begin the improvement process by reviewing the foundational tenants of the RtI. RtI calls for early identification of student learning and behavioral problems and then individualized interventions. **Exhibit 2-29** cites the four research-based essential components of RtI.³²

³¹ <https://www.understood.org/en/articles/3-tiers-of-rti-support>

³² <https://files.eric.ed.gov/fulltext/ED526859.pdf>

Exhibit 2-29
Four Components of RtI



Source: National Center on Response to Intervention

Exhibit 2-30 outlines the essential practices of each component. MPS should examine how existing practices align and then determine where changes and improvements should occur.

Exhibit 2-30
Essential Components of RTI

Screening

- Purpose: Identify students who are at-risk of poor learning outcomes
- Focus: All students
- Tools: Brief assessments that are valid, reliable, and demonstrate diagnostic accuracy for predicting learning or behavioral problems
- Timeframe: Administered more than one time per year (e.g., fall, winter, and spring)

Progress Monitoring

- Purpose: Monitor student's response to primary, secondary, or tertiary instruction in order to estimate rates of improvement, identify students who are not demonstrating adequate progress, and compare the efficacy of different forms of instruction
- Focus: Students identified through screening as at-risk for poor learning outcomes
- Tools: Brief assessments that are valid, reliable, and evidence-based
- Timeframe: Students are assessed at regular intervals (e.g., weekly, biweekly, or monthly)

Data-Based Decision Making

- Data analysis is at all levels of RtI implementation (e.g., state, district, school, grade level) as well as all levels of prevention (e.g., primary, secondary, tertiary)
- Establish routines and procedures for making decisions
- Explicit decision rules for assessing student progress (e.g., state and district benchmarks, level and/or rate)
- Data are used to compare and contrast the adequacy of the core curriculum and the effectiveness of different instructional and behavioral strategies

Implementing the RtI Framework

- Select and implement evidence-based practices and procedures
- Implement essential components and identified framework with integrity
- Ensure that cultural, linguistic, and socioeconomic factors are reflected in the RtI framework and its components

Source: National Center on Response to Intervention

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:

- 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 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 refer a student 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 the 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 2-31 shows comparison data on the percentage of special education students and the number of full-time equivalent (FTE) teachers in special education for 2019-20. MPS's identification rate, at 28.7 percent, was the highest among the peers and was higher than the community group average and the state. Staff noted that many of the identified MPS students are identified for speech impairments.

**Exhibit 2-31
Students and Teachers in Special Education Programs, 2019-20**

Entity	ADM	Special Education Percentage of All Students	Special Education Teachers FTEs	# of Special Education Students per FTE
Maryetta	641	28.7%	2.0	91.9
Bishop	573	8.5%	2.0	24.4
Colchord	619	23.7%	4.1	35.8
Grand View	588	19.7%	2.9	39.9
Keys	676	21.5%	2.9	50.1
Oktaha	672	20.0%	4.0	33.6
Community Group	706	19.9%	4.1	34.3
State	1,304	16.5%	8.5	25.3

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-32 compares district special education revenues and expenditures for 2021-22. At 54.2 percent, MPS had a revenue-expenditure ratio that was lower than but similar to most peers. Of the peers, Bishop was an outlier, receiving more than twice what it spent on special education. Any special education needs not addressed with special education revenues must be met with general funds, so it is important to try to keep special education spending in line with resources, when possible.

**Exhibit 2-32
Comparison of Special Education Revenues and Expenditures, 2021-22**

Entity	Total Revenues for Special Education	Total Expenditures for Special Education	Revenues as Percent of Expenditures
Maryetta	\$204,560	\$377,263	54.2%
Bishop	\$248,567	\$120,547	206.0%
Colchord	\$275,557	\$492,641	55.9%
Grand View	\$203,294	\$308,894	65.8%
Keys	\$196,418	\$296,826	66.2%
Oktaha	\$191,682	\$355,053	54.0%
Peer Average	\$220,013	\$325,204	83.7%

Source: OCAS School District Financial Information

Exhibit 2-33 shows the trend in special education revenues and expenditures over time in MPS. As shown, MPS' special education expenditures exceeded revenues every year. Overall, the

district has doubled its spending on special education while its revenues have increased only slightly.

**Exhibit 2-33
Trend in MPS Special Education Revenues and Expenditures**

Year	Total Revenues for Special Education	Total Expenditures for Special Education	Revenues as Percent of Expenditures
2016-17	\$162,276	\$178,779	90.8%
2017-18	\$163,557	\$200,567	81.5%
2018-19	\$176,720	\$267,520	66.1%
2019-20	\$162,925	\$508,292	32.1%
2020-21	\$168,520	\$491,859	34.3%
2021-22	\$204,560	\$377,263	54.2%
Percent Change	26%	111%	

Source: OCAS School District Financial Information

On the stakeholder survey conducted for this review, staff members were asked to assign a letter grade to various MPS functional areas. **Exhibit 2-34** provides the results for special education. As shown, most district educators (80 percent) gave special education an A or B.

**Exhibit 2-34
Educator Survey Results Regarding MPS Education**

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Special Education	52%	28%	10%	3%	0%	0%

Source: Prismatic Survey Results, March 2023

FINDING 2-8

The MPS special education program faces a number of challenges. The program director is new. Procedures for identification and instructional delivery processes have not been recently reviewed to assure consistent implementation and compliance with the law and the IEP needs of individual students. It was unclear how the district monitors uniformity in its local identification process and whether its initial screening processes are consistent. It was not evident how special education and RtI consistently coordinate services to ensure targeted interventions provide a safety net for struggling readers or help identify students who may have learning disabilities.

The MPS special education director is in her first year in the role. She is participating in the SDE new director’s program, which provides training on best practices and compliance requirements. Interview and focus group discussions revealed it is difficult for teachers to coordinate and monitor the daily learning needs of students. Teachers lack dedicated time for meaningful collaboration to ensure all IEP accommodations are provided in both the regular classroom and resource room.

In MPS, IEP students go to the resource room, which provides additional time for students to process content at a slower pace. However, teachers are not intentionally coordinating these instructional accommodations and supports.

All school districts want to improve outcomes for special needs students. Some best practices for improving outcomes for special education students are outlined in **Exhibit 2-35**.

Exhibit 2-35
Ten Best Practices to Improve Outcomes for Special Education Students

1. Focus on student outcomes, not inputs.
2. Effective general education is key.
3. Ensure all students can read.
4. Provide extra instructional time every day for students who struggle.
5. Ensure that content-strong staff provide interventions and support.
6. Allow special educators to play to their strengths.
7. Focus paraprofessional support on health, safety, and behavior needs, rather than academic needs.
8. Expand the reach and impact of social, emotional, and behavioral supports.
9. Provide high-quality in-district programs for students with more severe needs.
10. Know how staff spend their time and provide guidance on the effective use of time.

Source: <https://www.dmgroupl2.com/blog/10-best-practices-for-improving-special-education>

RECOMMENDATION

Adjust the special education program to ensure compliance and improve all aspects of student services.

MPS needs standardized, written documents, and instructional delivery adjustments in order to improve, maintain, and sustain compliance regarding student services. The district should require accountability for implementing compliance procedures with fidelity. District documents should include clearly defined procedures for referral, identification, placement, instructional delivery, and documentation processes and procedures. This includes ongoing coordination with RtI services to maximize tiered interventions.

General education, special education, reading, and RtI teachers, paraprofessionals, and counselors need time to cooperatively plan instruction, and monitor and adjust efforts to maximize least restrictive environment practices for all IEP students. Weekly planning times

work best. Purposeful collaborative planning combines the expertise of both teachers in helping students master OAS based on IEP requirements. The time should be spent developing lessons, reviewing resource materials and digital programs, and planning one-to-one remediation and instruction of OAS. Continuity among the rules and expectations in all classrooms should be clearly understood and enforced consistently.

The district should have written procedures to ensure all IEP students receive the OAS taught and tested curricula and are supported by IEP modifications/accommodations. Administration and the special education director should continue to provide all teachers with guidelines, expectations, processes, and procedures for sustaining and maintaining compliance and instructional improvements for students.

There should be cohesiveness for students transitioning back and forth between resource and regular classrooms. The student should clearly understand that the skills and content taught in the regular classroom are the same as those reinforced and studied in the resource room. Teachers should work together to identify the student's strengths and then equip the student with strategies to help them grow as independent learners.

The superintendent, principal, special education director, all teachers, and paraprofessionals should view continuous improvement as a priority and implement practices and procedures with fidelity. There should be a coordinated effort to seamlessly teach students with IEPs and maximize learning opportunities in the inclusionary classroom and the resource room.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

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 1st to 12th grade;

- 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 2-36 shows the trend in the gifted and talented identification rates over time. From 2015-16 to 2019-20, MPS’ identification rate decreased. The district’s 2019-20 rate, 12.7 percent, was in line with most peers, the community group, and the state. In 2020-21, Oklahoma overall identified 12.4 percent of its students as gifted and talented.³³

**Exhibit 2-36
Trend in Percentage of Gifted and Talented Education Students**

Entity	2015-16	2016-17	2017-18	2018-19	2019-20
Maryetta	27.8%	20.9%	18.7%	14.0%	12.7%
Bishop	11.8%	11.7%	12.5%	12.2%	12.3%
Colchord	9.2%	8.2%	9.4%	9.8%	10.4%
Grand View	10.0%	16.4%	16.0%	16.7%	13.4%
Keys	10.7%	13.7%	9.1%	12.6%	11.3%
Oktaha	11.8%	10.9%	11.2%	11.0%	11.1%
Community Group	12.9%	13.4%	13.0%	13.4%	13.0%
State	14.2%	14.5%	13.9%	13.6%	13.4%

Source: Office of Educational Quality and Accountability, Profiles Database

According to the National Association for Gifted Children,³⁴ between six and ten percent of students are gifted.³⁵ Contrary to some common misconceptions, gifted students often need a different educational approach in order to be engaged and succeed in the classroom.³⁶ In 2020-21, Oklahoma allocated \$53.1 million to support gifted education.³⁷

FINDING 2-9

The MPS gifted program is not effectively meeting the needs of gifted students. The district does

³³ https://cdn.ymaws.com/nagc.org/resource/resmgr/2020-21_state_of_the_states_.pdf

³⁴ www.nagc.org

³⁵ <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>

³⁶ <https://www.nagc.org/myths-about-gifted-students>

³⁷ https://cdn.ymaws.com/nagc.org/resource/resmgr/2020-21_state_of_the_states_.pdf

have a vision for its gifted program and there are expectations for improving the program. However, it lacks accountability for how enrichment takes place in the classroom and continuity for district-wide enrichment opportunities.

The consulting team found that MPS gifted students are primarily served in the regular classroom. The MPS elementary librarian also serves as the gifted coordinator. This school year, gifted students have entered writing contests and participated in field trips. A total of 44 students entered the Johnson O'Malley writing contest and seven were contest winners.

Research supports the importance of gifted programs. 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 enable them to make continuous progress in school. According to one report on high-achieving students, more than seven in ten teachers of these students surveyed noted that their brightest students were not challenged or given a chance to “thrive” in their classrooms.³⁸ Additionally, gifted students need tailored programming in many cases because the “general education program is not yet ready to meet the needs of gifted students” due to a lack teacher training in gifted education and the pressure classroom teachers face to raise the performance of their struggling students.³⁹

Gifted programs have many benefits. 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.⁴⁰

RECOMMENDATION

Strengthen all aspects of the gifted program.

The superintendent, principal, gifted coordinator, parent committee, and teachers need to assess the existing Gifted and Talented program. This should include reviewing the identification process and all the services offered. It is important to examine how classroom teachers provide enrichment opportunities along with those provided by the gifted coordinator. The district should provide options for assisting all teachers with enrichment opportunities. A review of the Gifted Plan submitted to the SDE should meet compliance criteria for the state statutes and also detail how the MPS program provides services to gifted and talented students. The updated plan should provide an appropriately challenging academic environment that includes enrichment, acceleration, and advanced learning opportunities.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

³⁸ Loveless, T., Farkas, S., & Duffett, A. (2008). *High-achieving students in the era of NCLB*. Washington, DC: Thomas B. Fordham Institute.

³⁹ Hertberg-Davis, H. L., & Callahan, C. M. (2013). Introduction. In H. L. Hertberg-Davis & C. M. Callahan (Eds.), *Fundamentals of gifted education* (pp. 1–10). New York, NY: Routledge.

⁴⁰ Westberg, K. L. (1999, Summer). What happens to young, creative producers? *NAGC: Creativity and Curriculum Division Newsletter*, 3, 13–16.

Library Programming

The American Association of School Librarians believes that today’s school librarians should be “leading the way in digital learning and literacies.” Research has shown that when school librarians are involved in instruction, student learning improves.⁴¹ The American Library Association (ALA) has compiled a number of studies demonstrating a positive correlation between certified librarian staffing and student achievement, including a 2012 study that correlated higher Colorado reading scores in grades 3 to 10 with greater certified librarian staffing. Other organizations have also documented the positive impact of libraries and librarians on student learning.⁴²

As noted by SDE, an effective school library:

- offers a wide variety of materials – reference, fiction, and nonfiction – in a broad range of reading levels;
- provides access to current information by integrating new technologies into the curriculum;
- is cost-effective, allowing many readers access to one book; and
- allows the school librarians to team with teachers to create and present lessons.⁴³

Research suggests that school library programs staffed with qualified faculty members have a positive impact on students’ academic success. This research shows education officials that librarians can, in fact, help students do better academically. Qualified school librarians can impact their schools in a number of ways that normally include the following:

- They are essential partners for teachers and can help students discover topics that interest them.
- They can help faculty members find current trends and resources to bring to their classrooms.
- Librarians can provide students with the information needed to improve their reading, writing, and academic growth as well.⁴⁴

⁴¹ Will, M. (2016). As information landscape changes, school librarians take on new roles. *The Changing Face of Literacy*, 36(12), pp. 25-28. Below are a number of websites CPS can use to provide guidance to the staff for ensuring the library is and integral part of the curriculum.

<https://www.ebsco.com/blog/article/promoting-school-library-resources-and-services-with-todays-digital-tools>; <https://www.edutopia.org/blog/21st-century-libraries-learning-commons-beth-holland> The following links are examples of the new ideas for libraries of the 21st Century. https://www.huffpost.com/entry/8-awesome-ways-libraries-_b_7157462 <https://bookriot.com/2016/10/10/five-ways-to-have-fun-in-the-library-besides-reading/>

⁴² https://www.scholastic.com/SLW2016/resources/documents/SLW_Booklet_Final_Lo.pdf

⁴³ <http://sde.ok.gov/sde/library-media>

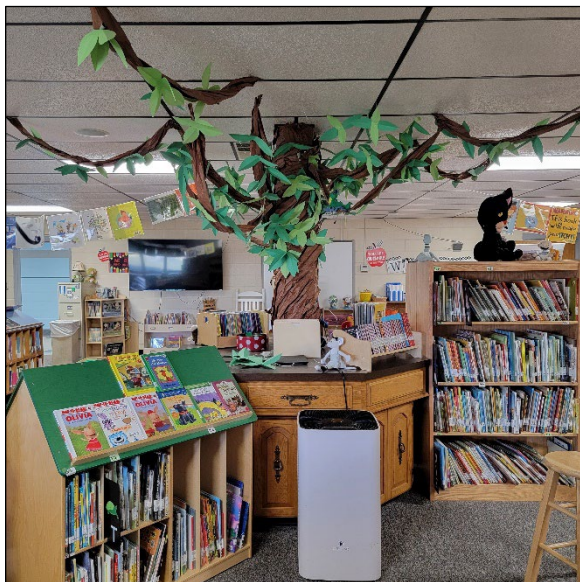
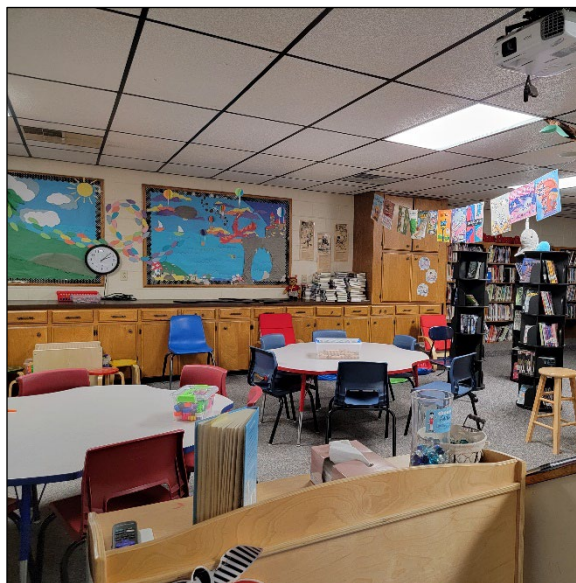
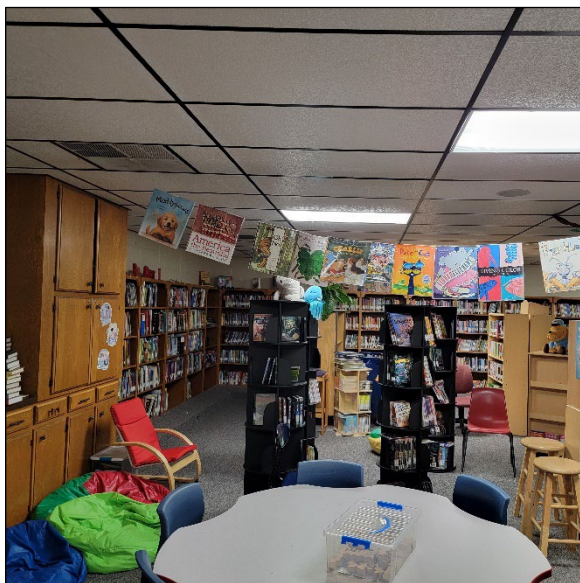
⁴⁴ <http://teacherhabits.com/why-schools-still-need-libraries/>

FINDING 2-10

The middle school library is not an integral part of the MPS curriculum. At the time of the onsite review, the district had only one librarian, who also serves as the gifted coordinator.

The MPS elementary library provides an inviting and welcoming environment to explore books (**Exhibit 2-37**). It was reported to the consulting team that the elementary library endeavors to foster a love for reading among students. The MPS librarian is new to her job this year. At the time of the onsite review, she was beginning to collaborate with students and teachers to find reading level-appropriate material for the elementary students. Since MPS elementary students have multiple learning opportunities that incorporate technology, the library's primary focus is on hard copy reading materials. Interviews indicated the librarian wants students to develop a love for reading and also grasp the value of reading paper books in lieu of digital material. The librarian works closely with students and teachers to supply hard-copy, hands-on reading materials that cultivate a love for reading at their reading level.

Exhibit 2-37
MPS Elementary Library



Source: Prismatic, March 2023

In contrast, MPS middle school students do not have an active library space with dedicated staffing. This leaves them at a disadvantage in reading for pleasure. Reading for pleasure helps students with decoding, word attack skills, and comprehension.

On the student survey conducted as part of this review, students in grades 6-8 gave MPS library programming a rather lukewarm review (**Exhibit 2-38**). Only 14 percent strongly agreed that the library meets their needs. A substantial portion (39 percent) had no opinion, which may indicate that they are not using library services at all.

**Exhibit 2-38
Student Survey Results Regarding Libraries**

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The school library meets my needs for books and other resources.	14%	35%	39%	7%	6%

Source: Prismatic Survey Results, March 2023

Libraries are essential partners for all teachers, providing print and resource materials that meet the diverse needs of students and helping to develop curricula that meet the learning needs of all students and teachers. Students in high poverty schools need the library to provide print materials not available in their home environments. School libraries give students a unique opportunity for self-directed learning.⁴⁵

Research published in 2012 found that reading for pleasure had educational benefits, supported personal development, and had a positive impact on reading, including:

- reading attainment and writing ability;
- text comprehension and grammar;
- breadth of vocabulary;
- positive reading attitudes;
- self-confidence as a reader; and
- pleasure in reading in later life.⁴⁶

RECOMMENDATION

Explore options for reactivating the middle school library so that all MPS students nurture a love for reading.

The superintendent, principal, teachers, and librarian need to ensure library resources are integrated into the MPS curriculum through the 8th grade. The teachers and librarian should look for ways to implement flexible scheduling and always keep the library open to all students. The library staff should seek ways to intentionally connect the library with classroom curricula and use the American Association of School Librarians Framework as an initial resource to look for innovative learning opportunities to share with classroom teachers.⁴⁷

⁴⁵ <https://ilovelibraries.org/school-libraries/#:~:text=They%20teach%20students%20how%20to,beyond%2C%20and%20nurturing%20their%20creativity>

⁴⁶ <https://www.gov.uk/government/publications/research-evidence-on-reading-for-pleasure>

⁴⁷ <http://sde.ok.gov/sde/sites/ok.gov.sde/files/webform/180205-AASL-frameworks-spreads-libraries.pdf>

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:

- 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.”⁴⁸

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.

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 2-39 provides the trend in counselor staffing over time. MPS has decreased its counselor staffing over the last five years, while other districts have remained the same or increased. However, given that the district currently has two staff members who are counselors, another who is a behavior management specialist, and a fourth who is a caseworker, it is possible that the 2020-21 reporting for MPS was incorrectly understated.

⁴⁸ <http://www.ascanationalmodel.org/>

Exhibit 2-39
Trend in Counselor Staffing Over Time

Entity	2015-16	2016-17	2017-18	2018-19	2020-21	Percent Change
Maryetta	2.4	1.2	1.1	1.0	1.0	(58.3%) ▼
Bishop	0.8	1.0	1.0	1.0	2.0	150.0% ▲
Colchord	1.0	1.0	1.0	0.7	1.0	0.0% ●
Grand View	0.5	0.5	0.4	0.5	0.6	20.0% ▲
Keys	2.0	2.0	2.0	2.0	2.0	0.0% ●
Oktaha	1.0	1.0	1.0	1.0	1.0	0.0% ●
Community Group	1.6	1.5	1.6	1.6	1.7	6.3% ▲
State	3.1	2.9	2.9	3.0	3.1	0.0% ●

Source: Office of Educational Quality and Accountability, Profiles Database

FINDING 2-10

The district provides an extensive level of counseling and student support services. This supports a positive, caring environment for students.

MPS counseling services are provided by a team that includes:

- an MPS counselor who also teaches in the district;
- an MPS counselor who also tutors;
- an MPS assistant counselor who leads the district's Second Step program;
- an MPS behavior management specialist who was previously a district teacher and is working on her counseling certification;
- an MPS caseworker who works with middle school students; and
- an in-house Department of Human Services (DHS) employee.

The team has a teacher referral process and interfaces and coordinates services with the Social Emotional Learning (SEL) Second Step. Counseling services include small group interventions, in-class instruction, and one-on-one counseling. A group of sixth through eighth grade students meet with counselors once a week. In the recent past, multiple mental health grants have provided a plethora of curricula, interactive manipulatives, workbooks, and multimedia resources.

The consulting team learned of innovative programs purchased through grants, that, as implemented, will make a positive difference for MPS students. The school has a therapy dog. The sixth through eighth grade student group provides relevant and up-to-date information regarding the positive activities in which students are involved. They identify specific needs and bring awareness of issues that interfere with learning and a positive student culture. Under the

guidance and direction of the counselor, and approval of the superintendent, the student group is conducting a student survey asking students for input on school-related issues. The group will deliver a PowerPoint presentation detailing the survey results to the administration and school board.

The Second Step Curriculum is implemented as one venue to address some of the Social Emotional Learning. The CARE Team routinely present lessons in the classrooms. The curricula offer age-appropriate lessons that teach students about school and family communications, appropriate response and behaviors, and life skills needed to succeed and function in the real world.

Both district staff and middle school students offered positive opinions of student services and the caring school culture (**Exhibit 2-40**). Nearly all staff feel that the district offers sufficient student services, including counseling. A majority of middle school students identify caring adults as being part of MPS school culture.

Exhibit 2-40
Staff and Student Survey Responses Regarding Student Services and School Culture

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	Sufficient student services are provided in this district (e.g., counseling, speech therapy, health)	45%	52%	3%	0%	0%
Student	There is at least one adult at school to whom I can go when I have a problem.	42%	35%	10%	8%	6%
Student	I have at least one adult in this school who cares about me.	37%	38%	18%	2%	5%

Source: Prismatic Survey Results, March 2023

At the time of the onsite review, district counselors were working to further improve MPS counseling and student support services. They had begun discussions to advance and build an even more comprehensive counseling program, including exploring options for expanded and consistent ways to address poverty, apathy, and absenteeism.

Interview and focus group dialog indicated that counselors make a focused effort to target the academic and social-emotional well-being of all students. It was noted that the counseling staff also have responsibilities for testing. Balancing the testing coordinator responsibilities remains a time constraint issue for counselors. Teachers, as well as counselors, reported the need to explore training that intentionally addresses the academic, social, and behavioral needs of MPS high poverty students. Their exhibited lack of care and motivation for learning is concerning. Apathy, absenteeism, bullying, drugs, alcohol, family dysfunction are issues many MPS students face.

Research indicates school counseling programs have considerable influence on discipline problems. Baker and Gerler reported that students who participated in a school counseling program had substantially less inappropriate behaviors and more positive attitudes toward school than those students who did not participate in a program. Counseling programs are effective when all teachers are intricately involved in implementation and consistently supported district-wide. Another study reported that group counseling provided by school counselors considerably decreased participants' aggressive and hostile behaviors.⁴⁹ Two other studies found that elementary guidance activities have a positive influence on elementary students' academic achievement.⁵⁰

COMMENDATION

MPS has a committed, visionary, and comprehensive counseling program.

Moving forward, the district should consider using the American School Counselor Association (ASCA) guidelines as it designs and implements a comprehensive district-wide program that promotes student achievement and personnel well-being. 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 secondary readiness and success;
- close achievement and opportunity gaps; and
- result in improved student achievement, attendance, and discipline.

⁴⁹ Baker, S. B., & Gerler, E. R. (2001). Counseling in schools. In D. C. Locke, J. E. Myers, and E. L. Herr (Eds.), *The handbook of counseling*, Thousand Oaks, CA: Sage Publications. Omizo, M.M., Hershberger, J.M., & Omizo, S.A. (1988). Teaching children to cope with anger. *Elementary School Guidance & Counseling*, 22, 241-245. 37 Hadley, H.R. (1988).

⁵⁰ Hadley, H.R. (1988). Improving reading scores through a self-esteem prevention program. *Elementary School Guidance & Counseling*, 22, 248-252. Lee, R.S. (1993). Effects of classroom guidance on student achievement. *Elementary School Guidance & Counseling*, 27, 163-171.

Chapter 3:
Business Operations

Chapter 3

Business Operations

This chapter addresses the business operations of Maryetta Public Schools (MPS) and is divided into the following sections:

- A. Organization, Management, and Staffing
- B. Planning and Budgeting
- C. Accounting/Internal Control and Payroll
- D. Cash Management
- E. Fixed Asset Management
- F. Bond Issuance and Indebtedness
- G. Purchasing

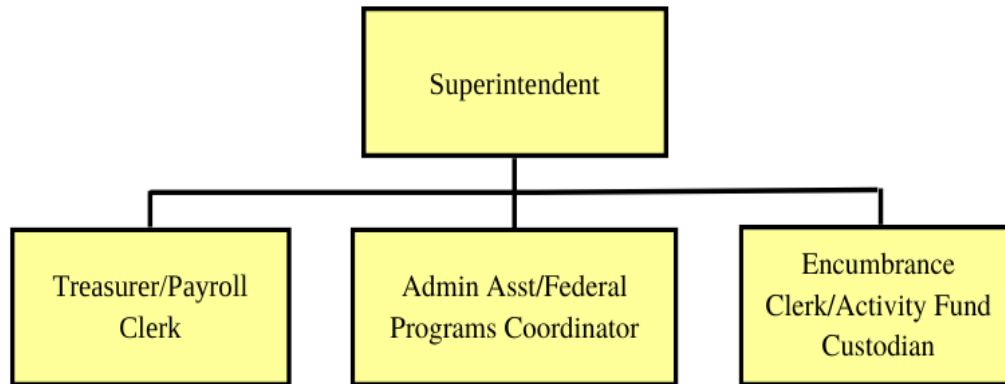
Financial, asset, and risk management in school districts require thoughtful planning and decision-making. Public school districts must meet or exceed increasingly rigorous academic standards without exceeding their budgetary resources. The superintendent and board of education must ensure that the district 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 school board is allowed to contract with the county treasurer for the management of its accounts, or it may choose to appoint a treasurer.

Exhibit 3-1 shows the organization of MPS business operations. The MPS superintendent oversees business services and is assisted by three employees who perform various business operations. The treasurer is responsible for the general accounting and financial reporting of the district, ensuring adherence to state and federal financial regulations from the Oklahoma Cost Accounting System (OCAS). While also assisting the superintendent in a variety of duties, the administrative assistant is responsible for business functions around grants and federal programs. The encumbrance clerk is responsible for processing purchasing orders and manages the district's activity funds.

**Exhibit 3-1
MPS Business Operations Organization**



Source: Created by Prismatic, February 2023

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MPS departments and functional areas. **Exhibit 3-2** provides the results for the business operations areas of Maryetta.

**Exhibit 3-2
Staff Survey Results Regarding Business Operations Functions**

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Budgeting	48%	25%	0%	1%	0%	25%
Financial management	49%	21%	1%	1%	0%	27%

Source: Prismatic Survey Results, March 2023

Financial Statements

Financial statements for MPS 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. MPS prepares financial statements that include the fund types illustrated in **Exhibit 3-3**.

Exhibit 3-3
Funds Contained in the MPS 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: MPS Annual Financial Report, 2022

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 MPS district boundary had a net valuation of \$5,005,574 in 2022 and \$4,659,751 in 2020. The millage rate levied in 2021 and 2022 was 73.42.

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 2015-16 and 2019-20, the average assessed property value per student in MPS increased by 19.3 percent as shown in **Exhibit 3-4**. This was the second-smallest increase among all the comparison groups, but more than that of the state.

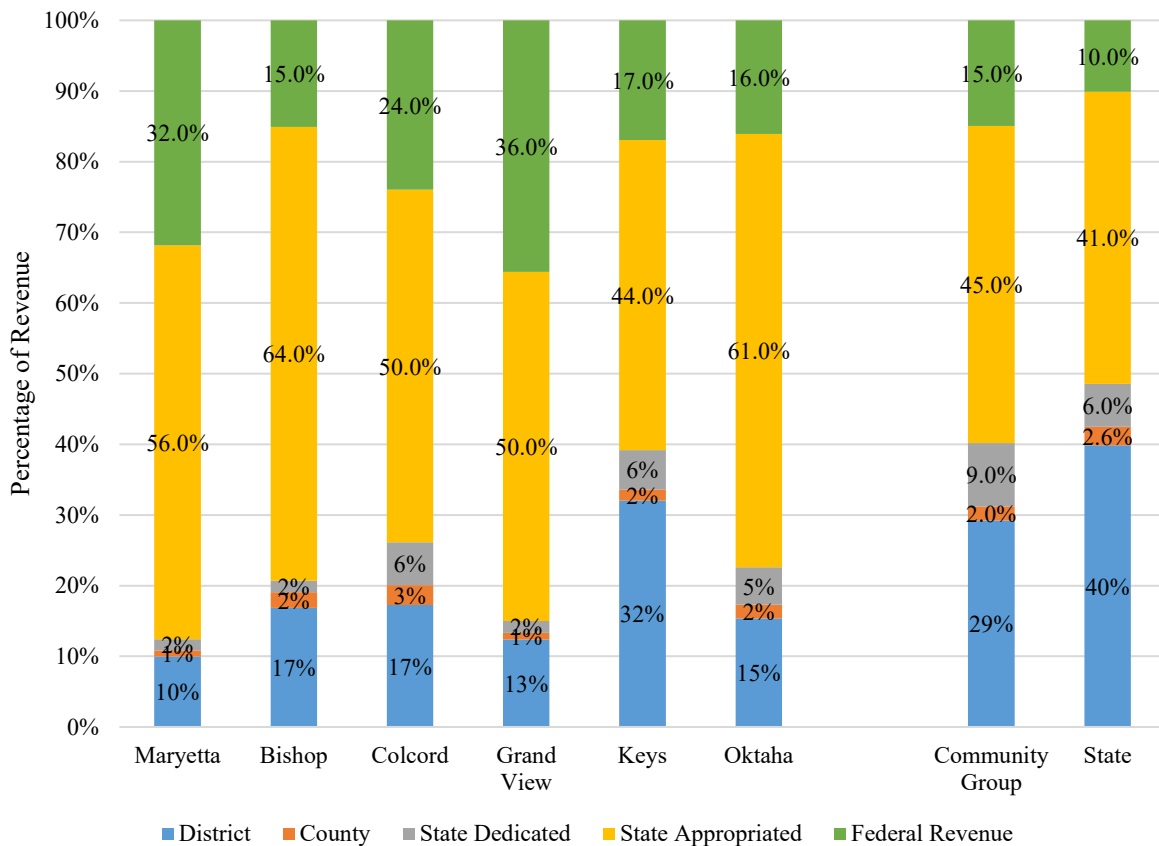
Exhibit 3-4
Trend in Assessed Property Value per Student

Entity	2015-16	2016-17	2017-18	2018-19	2019-20	Percent Change
Maryetta	\$5,490	\$5,646	\$5,999	\$6,652	\$6,549	19.3% ▲
Bishop	\$26,850	\$25,532	\$25,744	\$26,115	\$25,994	(3.2%) ▼
Colcord	\$15,584	\$15,981	\$17,895	\$18,723	\$22,047	41.5% ▲
Grand View	\$21,028	\$21,964	\$24,049	\$23,613	\$25,398	20.7% ▲
Keys	\$38,129	\$40,120	\$41,241	\$45,990	\$51,905	36.1% ▲
Oktaha	\$12,512	\$12,082	\$12,235	\$14,098	\$16,924	35.2% ▲
State	\$49,623	\$49,471	\$52,219	\$55,097	\$57,746	16.4% ▲

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3-5 shows the percentages of district, county, state, and federal revenues for MPS and its peers. Maryetta had 32 percent of its Revenue from federal revenue, the second highest in its peer group.

Exhibit 3-5
Breakdown of Revenues by Source, All Funds, 2019-20



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3-6 shows the trend in revenue sources for MPS, the community group, and state. The MPS district and county revenue percentage was less than both the community group and the state every year. The state dedicated and appropriated percentage of revenue was higher than the community group and the state all years. The percentage of federal funding was higher than the community group and the state every year.

Exhibit 3-6
Sources of Revenue as a Percentage of Total Revenue, All Funds
Maryetta, Community Group, and State

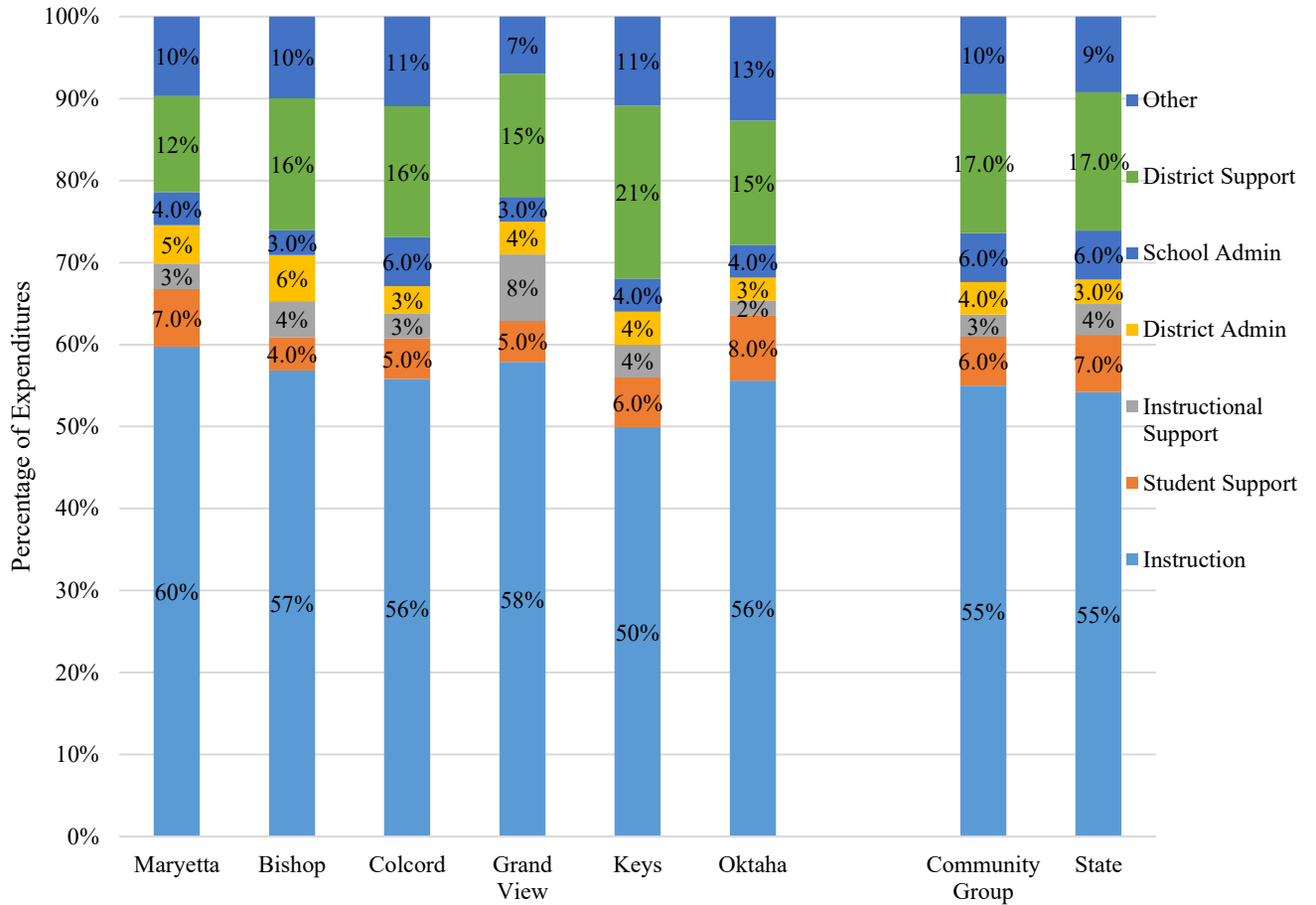
Source of Revenue	Entity	2015-16	2016-17	2017-18	2018-19	2019-20
District & County	Maryetta	10.7%	10.1%	10.0%	11.2%	10.9%
	Community Group	31.4%	33.2%	30.0%	29.0%	49.2%
	State	42.1%	43.2%	41.5%	39.4%	39.5%
State Dedicated & Appropriated	Maryetta	58.2%	53.1%	53.9%	56.2%	57.3%
	Community Group	52.9%	51.7%	52.6%	54.3%	53.8%
	State	46.3%	45.5%	45.1%	47.5%	47.5%
Federal	Maryetta	31.1%	36.9%	36.10%	32.50%	31.70%
	Community Group	15.7%	15.1%	15.2%	14.6%	14.6%
	State	11.6%	11.3%	10.7%	10.6%	10.4%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3-7 compares 2019-20 expenditures as a percentage of total expenditures. As shown:

- MPS spent the highest percentage among comparison groups for instruction.
- MPS spent more and had a higher percentage than the community group and state on district expenditures.
- MPS spent the lowest percentage of all comparison groups for district support.

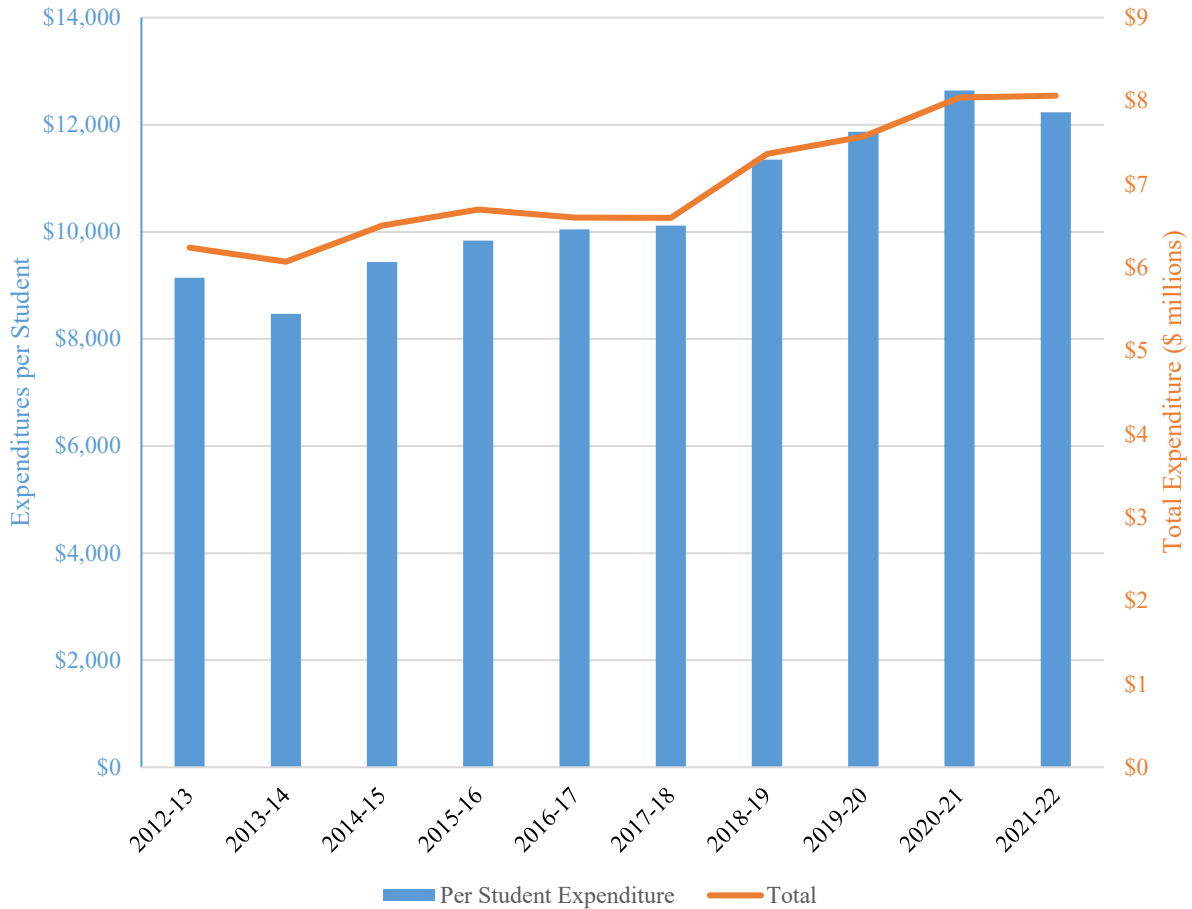
Exhibit 3-7
Percentage Breakdown of 2019-20 Expenditures by Type, All Funds



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3-8 shows the trend in MPS expenditures per student and overall for the past ten years. While the total expenditures have fluctuated between \$5.1 million and \$7.4 million, the per student expenditures reached a maximum of \$12,355 in 2020-21.

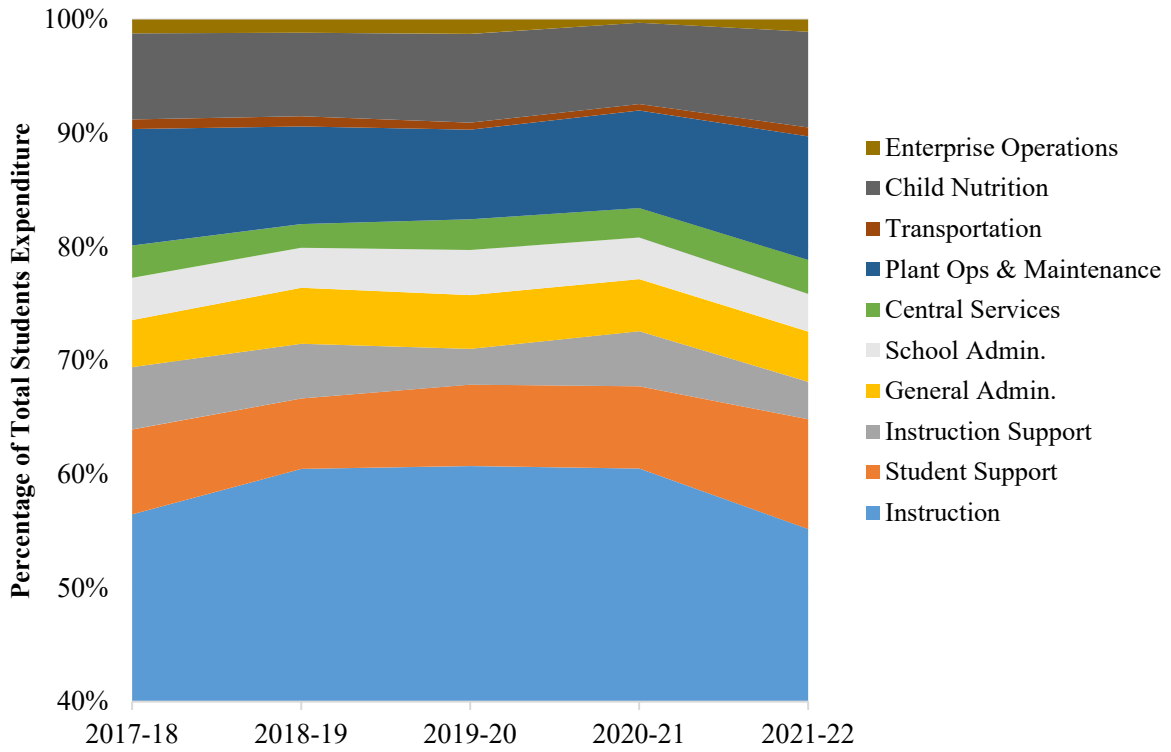
Exhibit 3-8
Trend in MPS Expenditures per Student, All Funds



Source: Oklahoma Cost Accounting System and Prismatic calculations

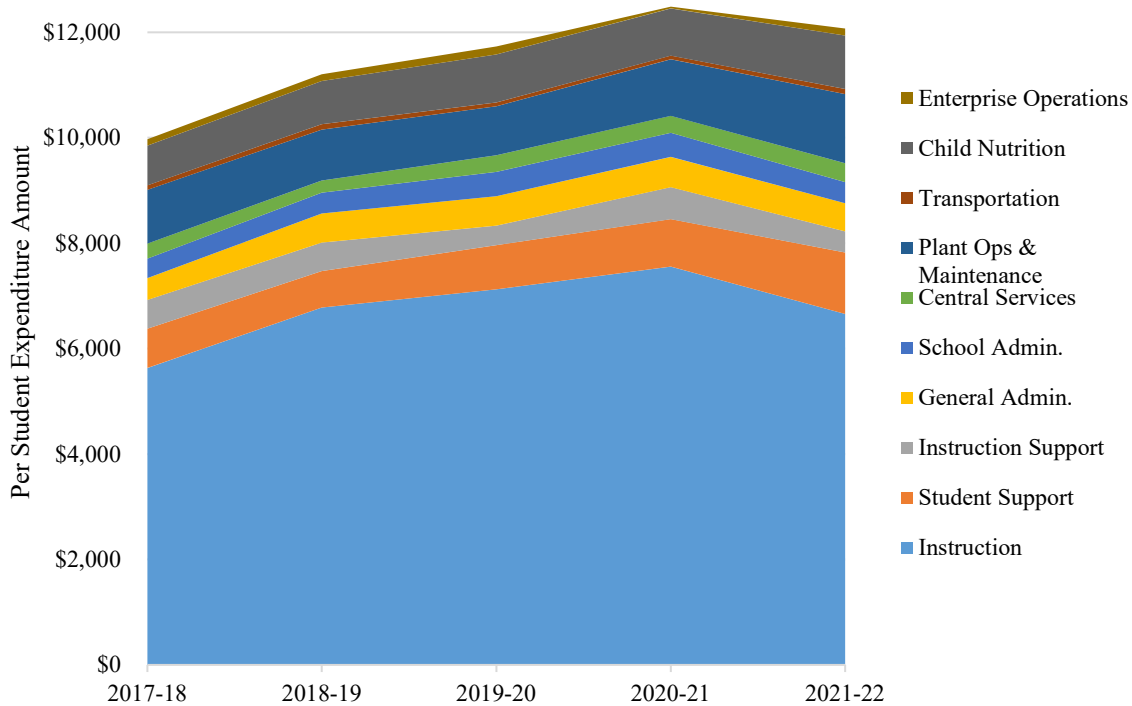
Exhibit 3-9 shows MPS expenditures per student for the past five years, disaggregated by function code as a proportion of the total expenditures per student. **Exhibit 3-10** shows the same expenditures in dollars, also per student by function code. The function code is a dimension used to describe the service or commodity obtained as a result of the expenditure. As shown, as a proportion of total per student expenditure, spending for all categories increased. Across the time period shown, the total dollars spent per student increased in every category.

Exhibit 3-9
Proportional Trend in MPS Expenditures per Student, All Funds



Source: Oklahoma Cost Accounting System and Prismatic calculations, January 2022

Exhibit 3-10
Trend in MPS Expenditures per Student, All Funds



Source: Oklahoma Cost Accounting System and Prismatic calculations, January 2022

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 3-11** shows the table of maximum allowable balances expressed as a percentage of their general fund collections.

**Exhibit 3-11
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 Assistant Document, July 2009

Based upon general fund collections of \$7.8 million for 2020-21, MPS would be able to reserve up to 18 percent as a fund balance. **Exhibit 3-12** provides the MPS fund balances for the last five years. Over that time, the fund balance has decreased by 51.6 percent.

**Exhibit 3-12
Trend in MPS General Fund Balances**

	2016-17 Actual	2017-18 Actual	2018-19 Actual	2019-20 Actual	2020-21 Actual
General Fund Collections	\$6,215,204	\$6,369,416	\$6,796,216	\$7,114,302	\$7,752,282
Fund Balance	\$1,593,630	\$1,546,671	\$1,105,704	\$869,078	\$772,014
Percentage of General Fund Collections	25.6%	24.3%	16.3%	12.2%	10.0%
Fund Balance Year-Over-Year Change		(3.0%)	(28.5%)	(21.4%)	(11.2%) ▼
Fund Balance Five-Year Change					(51.6%) ▼

Source: OSDE Financial Reports, MPS, 2016-17 through 2020-21, and Prismatic calculations

A. ORGANIZATION, MANAGEMENT, AND STAFFING

School districts must practice sound financial management in order to maximize the effectiveness of limited resources and 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.

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. On the stakeholder survey conducted for this review, staff members were asked to assign a letter grade to various MPS functional areas. **Exhibit 3-13** provides the results for financial process areas. A majority of staff gave each area an A or B.

Exhibit 3-13
Survey Results Regarding MPS Financial Processes

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Budgeting	48%	25%	0%	1%	0%	25%
Financial management	49%	21%	1%	1%	0%	27%
Purchasing	49%	22%	1%	1%	0%	25%

Source: Prismatic Survey Results, March 2023

FINDING 3-1

The employees who perform key functions in the business operations area are well-trained and regularly attend SDE-approved professional development sessions. The employees are knowledgeable about school policies and have a good understanding of school business laws.

The district encourages employees to regularly attend training sessions that apply to their job functions. Many of these trainings are now available virtually, which lowers the cost for the district and requires less of a time commitment since there is no travel required. The three employees completing district business functions serve in multiple roles. All three employees are committed to ensuring the district maintains compliance with school finance regulations. All have served in their roles for several years and the district has always supported their professional growth. District stakeholders have confidence in Maryetta's business operations according to results from surveys and the community focus group.

Bob Nelson, author of *1,001 Ways to Engage Employees*, reports that learning and development are among the top factors in employee engagement. Employee training and development programs are essential to the success of businesses worldwide. Not only does training offer opportunities for staff to improve their skills, but also for employers to enhance employee productivity, improve culture, and reduce turnover.

COMMENDATION

MPS has prioritized professional development for employees that work in business operations.

FINDING 3-2

There are no written desk procedures for the key functions within the business operations area. The personnel working in these functions have many years of experience and institutional knowledge but lack written procedures that would be needed during personnel changes or unexpected absences. There is also a lack of cross-training, although all staff members seem to be willing to assist each other as needed.

The department relies on long-term employees who possess years of experience. Although they may share this knowledge verbally at times with other staff members, there are no written procedures other than the purchasing process. The absence of written procedures can lead to employees not understanding job functions completely and creating their own processes, which may not align with the department's mission. This weakens internal controls.

Written procedures are especially important for succession purposes. One employee shared that she will be retiring within a few years. Although the current employees are well trained, it is important to document processes for each function within the business operations area.

The lack of cross training is also a concern. The district is not prepared should one of these long-term employees end their employment with the district or take a long leave of absence.

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 of performing certain tasks. 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, which fields need what information, etc.

For internal controls to operate effectively, all employees need a documented reference source detailing how to 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 in the office have access

to the shared files. 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 at the end of the year.
11. Enter the amount the individual paid next to the less amount paid.
12. The 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 hidden 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 the letter. Once copy goes to XXX, once copy goes in individual's file, and the original is mailed.

Cross-training of staff is mutually beneficial to the employer and employees. According to the Government Finance Officers Association (GFOA), there are several benefits from having a cross-trained work force:

- employees from other areas can pitch in when unexpected situations occur;
- employees learn where their role fits in an organization;
- employees have a better understanding of an organization;
- 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 employer turnover is lower.

RECOMMENDATION

Develop desk procedures for the important duties performed by key personnel and cross-train other office staff members to prepare for succession purposes or emergency situations.

A similar recommendation was included in the 2013 report. The superintendent and business office employees should collaborate and develop a list of critical duties in the department. A standard format for creating desk procedure manuals should be developed and each employee

trained in the use of the format. The superintendent 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 superintendent should review and approve the draft and determine which staff members will 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.

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

Only the treasurer, superintendent, and the auditing firm are involved in creating the budget. There is no public and limited, if any, staff involvement in the budget development process.

Interviews with staff indicate little input into the budget from MPS employees or community members. The budget is developed by the auditing firm after receiving information from the district's treasurer. The information is reviewed by the superintendent and then the auditing firm creates the MPS Estimate of Needs. The public is not provided with any means to be involved in the budget development process, nor are meetings held to obtain staff involvement. A calendar is not produced for the budget development process, identifying dates that would facilitate stakeholder participation.

MPS lacks a formal process for involving community members and district employees in the budget development process. The staff survey results, **Exhibit 3-14**, show 56 percent of staff

either had no opinion or disagreed with the statement that the budget process effectively involves employees. This likely indicates a low level of awareness of the budgetary process.

Exhibit 3-14
Survey Results Regarding District Budgeting

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	Funds are managed wisely to support education in this district.	35%	43%	19%	1%	1%
	The budgeting process effectively involves administrators and staff.	18%	26%	49%	6%	1%
	My school/department allocates financial resources equitably and fairly.	21%	35%	40%	1%	3%

Source: Prismatic Survey Results, March 2023

There are no community meetings and there is no hearing for the budget. The Estimate of Needs is approved at a regular board meeting. 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 all stakeholders in budget development helps to ensure an understanding of and support for the adopted budget.

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 the materials and other related information of their websites to ensure that all stakeholders are informed of the budget processes and decisions that are being made.

Clinton Public Schools in Oklahoma has a transparent budget development process that has a commendable level of public input. The normal process for budget development in Clinton involves these steps:

1. Preliminary Budget – Prior to the end of the current fiscal year, the superintendent and other key administrators prioritize items for the following fiscal year. Many contributions for this process come from school employees and the public.
2. Preparation of Proposed Budget – After the school board approves the estimate of needs, proposed budgets are devised within the approved revenues and expenditures for the budget year.
3. Receipt of Public Comments – The school board conducts a public hearing to take all comments on financial matters, both past and future, in the district.
4. Adoption of the Final Budget – This included any revisions due to public comment and potential program allocations received prior to this date.
5. Amending of Final Budget – Changes are made throughout the year to ensure that all expenditures have an appropriate amount of budgeted funds available and to adapt the current budget to reflect midterm allocation changes.

RECOMMENDATION

Develop a budget process that is timely, easily understood, and involves a variety of stakeholders.

A similar recommendation was included in the 2013 report. Involving stakeholders in budget development would help ensure an understanding of and support for the adopted budget. Better involvement of more staff and community members will ensure continued support and commitment to the district.

The superintendent and school board should adopt and publish an annual budget calendar and create a budget advisory committee. The budgetary process and timeline should be communicated throughout the district to foster transparency. Budget discussions for the upcoming school year should begin early in the spring semester at the latest. Budget discussions should include opportunities for input from district and community stakeholders. Posting the budgetary process, timeline, and documents in public places and online will also facilitate better communication, understanding, and support of the adopted budget. A sample budget calendar from one in use by a district of similar size as MPS, is provided in **Exhibit 3-15**. Each year, the district adjusts these dates by one or two days to match the new work calendar, but the process typically follows this schedule.

Exhibit 3-15
Sample Budget Calendar

Date	Budget Activity
October 3	Introduction of budget process to principals and administrative staff
October 16	Submission of budget calendar to board of education (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 board of education 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 board of education on preliminary budget priorities (regular meeting)
	Invitation for board of education 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 board of education work session
January 22	Presentation of projected state revenues based on state proposed budget
	Invitation for further board of education 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 board of education approval of budget (regular meeting)
May TBD	Called meeting for board of education 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 a similarly sized district to MPS, January 2022

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-4

Currently, the district has an adequate general fund balance, but there is not a targeted fund balance range to protect the district from future revenue fluctuations. The state allows districts that have general funds revenues of \$8,000,000 to \$9,999,999 to maintain a fund balance that does not exceed 16 percent.

Exhibit 3-16 shows a summary of the financial activity in the MPS general fund since 2012-13. As shown, the district's general fund balance has generally decreased over the past decade. The general fund ending balance at the end of 2021-22 was the first increase in eight years. All other years but one, the district's general fund operated at a deficit and the fund balance decreased.

Exhibit 3-16
Trend in MPS General Fund Balances

Year	Beginning Fund Balance	Revenues	Expenditures	Ending Fund Balance	Fund Balance Percentage
2012-13	\$1,841,569	\$5,485,950	\$5,537,843	\$1,789,676	32.7%
2013-14	\$1,789,676	\$5,881,398	\$5,784,904	\$1,886,170	32.1%
2014-15	\$1,886,170	\$6,199,207	\$6,226,170	\$1,859,207	30.0%
2015-16	\$1,859,207	\$6,360,837	\$6,459,015	\$1,761,029	27.7%
2016-17	\$1,761,029	\$6,215,204	\$6,382,603	\$1,593,630	25.7%
2017-18	\$1,593,630	\$6,369,416	\$6,416,375	\$1,546,671	24.3%
2018-19	\$1,546,671	\$6,796,216	\$7,237,183	\$1,105,704	16.3%
2019-20	\$1,105,704	\$7,114,302	\$7,350,928	\$869,078	12.3%
2020-21	\$869,078	\$7,752,282	\$7,849,346	\$772,014	10.0%
2021-22	\$772,014	\$8,687,075	\$7,993,487	\$1,465,602	16.9%
Percent Change	(58.1%)	58.4%	44.4%	(18.1%)	(48.3%)

Source: OSDE financial reports 2012-13 through 2021-22 and Prismatic calculations, March 2023

The district has not aligned expenditures with the available new revenue. MPS has not followed best practices in budgeting and instead has been using the fund balances to pay for recurring expenditures. Most of the increases in state funding have been tied to mandatory expenditure increases, such as the large teacher salary increase that went into effect in 2018-19. Without a targeted fund balance, it is difficult to make expenditure decisions and create a budget.

A formal policy on general fund balance provides specific guidance to district management regarding what the district's fund balance goal should be and what steps, within statutory limits, should be taken to reach and maintain that goal. A general fund balance policy outlines what the board considers to be an adequate balance to maintain sufficient cash flow, cover emergency expenditures, adjust for revenue shortfalls, and avoid excess balance penalties or paying interest on non-payable warrants. Fund balance is a measure of the financial stability of a district and is an integral part of the budgeting process. Districts that are fortunate enough to achieve a substantial fund balance should also consider policy guidance as to what priority needs should be funded.

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 is 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 in Oklahoma 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. 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 3-17** shows a sample of the data included in that report. This report is shared with the superintendent and school board.

Exhibit 3-17
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

Adopt a formal policy for the district's general fund balance that establishes a fund balance target range, provides guidance on how to maintain the minimum balance, and requires reports of fund balance status to the school board.

A similar recommendation was included in the 2013 report. The board of education should provide guidance through the fund balance policy that establishes a minimum balance, how to maintain the balance, and the use of the district's fund balance that exceeds the target amount. This should help ensure that the funds are only used for critical priority items and the district is not assessed an excess balance penalty. Reports to the board of education will help the members monitor the fund balance and better understand the impact of actions that impact the balance.

The superintendent and the board of education should create a fund balance target maintaining at least two months of regular general fund operating expenditures as recommended by GFOA. In 2021-22, the district general fund expenditures totaled \$7,993,487. The two months of expenditures would have totaled \$1,332,248. This district would have met this goal last year if a policy had been in place.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-5

The district actively applies for competitive state and federal grants. Competition for grants is high between school districts and must be pursued diligently if a district hopes to win additional funding.

During the five-year period of 2018-19 through 2022-23, the district applied for and was awarded \$8,814,409 in competitive grants (**Exhibit 3-18**). District staff authored the grant applications. In interviews, staff noted several times that the district receives several grants to help with programs.

**Exhibit 3-18
Major Competitive Grants Awarded to Maryetta Public Schools**

Years	Grant	Total Award	Duration
2019-2023	21 st Century	\$1,378,347	5 years
2020-2023	Department of Justice	\$735,157	3 years
2020-2023	Department of Justice	\$732,549	3 years
2021-2024	Department of Justice	\$278,970	3 years
2021-2026	Innovative Approaches to Literacy	\$2,235,826	5 years
2022-2026	SAMHSAS AWARE	\$3,453,560	4 years

Source: Maryetta Public Schools, March 2023

Despite the rigorous application and reporting requirements, competitive grants can be a great source of funding for organizations and individuals. They provide an opportunity to pursue new and innovative projects and programs and can help organizations achieve their goals and make a real impact in their communities.

COMMENDATION

MPS is commended for its dedication to pursuing competitive grant funds.

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 3-6

The district does not have a written procedures guide for the activity fund. The activity fund custodian communicates with staff verbally regarding the rules for activity funds.

School district activity funds usually have the most potential for risk due to the amount of cash transactions and the number of different people handing money for each activity fund. Without written procedures, the potential increases for sponsors to violate board policies and state statutes.

Purchasing procedures are in written format, but there is no manual in place for staff to use to ensure activity funds are administered appropriately. Forms are available for staff members to use to reconcile fundraisers or tickets after a game. Funds are deposited in a timely manner and verified by the sponsor and activity fund custodian. The absence of written procedures for activity funds creates unnecessary risks. An activity funds manual normally includes written guidance on how funds may be expended, how receipt and disbursement transactions are to be documented, how to reconcile gate receipts, who is required to approve various transactions, and when cash has to be submitted to the activity account custodian.

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;
- activity fund custodian procedures for receipting money;
- important points to remember for the sponsor;
- important points to remember for the 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.

A similar recommendation was included in the 2013 report. 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.

FINDING 3-7

The district uses a timekeeping system (TimeClock Plus) for hourly employees but still manually enters the time worked into the district's financial software (Wengage) to run payroll. This is an inefficient and outdated practice.

The district still completes a large portion of its monthly payroll work via manual data entry, despite having a technology-based system for timekeeping. TimeClock Plus is the district's time-keeping system for non-exempt employees. After each payroll period, time sheets are printed out from TimeClock Plus for hourly-paid employees. The payroll clerk then manually enters the information into Wengage. With as many as 18 employee each month, manual entry of this time into the payroll system can lead to errors.

Moreover, it is an inefficient practice. 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 TimeClock Plus. 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 with an electronic timekeeping system 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 an electronic process to import hours worked after each payroll period from the timekeeping system into Wengage.

The payroll clerk should work with TimeClock Plus to develop a seamless process of exporting data from the timekeeping system by the creation of an electronic file format compatible with Wengage. 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 clerk should ensure that she is trained in how to export and import the data.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-8

Employee leave for 12-month salaried staff is still submitted on a paper leave form and is based on the 'honor system'. There are no formal written procedures for submitting leave requests.

There are no written procedures regarding employee leave requests. A 12-month salaried staff member submits their vacation schedule to the payroll clerk on the form shown in **Exhibit 3-19**. There is no supervisory approval required. During the interview with the payroll clerk, she stated

that employees were on the “honor system” and that employees eventually turned in the forms. Leave balances are tracked in Wengage, but leave is manually entered into the payroll system. The payroll clerk sends out notices to employees on how much leave they need to use before the end of the year.

Exhibit 3-19 Vacation Leave Request Form

NAME _____

FROM: SANDY SPARKMAN RE: VACATION SCHEDULES

HOURLY STAFF NEEDS TO MAKE A COPY OF THEIR VACATION FORM AND SUBMIT TO PAYROLL FOR VACATION PAY. ALSO, IF YOU MAKE CHANGES PLEASE LET ME KNOW. AFTER EACH VACATION DAY(S) FILL OUT AN ABSENT FORM.

ELIGIBLE VACATION TIME IS 20

HIRE DATE: July 12, 1993

VACATION PAY

Paid Vacation – 12 month Employee

1-4 yrs experience	5 days
5-9 yrs experience	10 days
10-14 yrs experience	15 days
15 yrs & above	20 days

2021-22
(CIRCLE OR HIGHLIGHT THE DAYS REQUESTED)

MAY

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30	31			

5

JUNE

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
		1	2	3
6	7	8	9	10
13	14	15	16	17
20	21	22	23	24
27	28	29	30	

5

JULY

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
				1
4	5	6	7	8
11	12	13	14	15
18	19	20	EOA	22
25	26	27	28	29

4
5

Source: Maryetta Public Schools, 2023

Wenage has an employee portal for employees, but the software doesn't have the ability to request leave yet through a workflow module. TimeClock Plus does have a module that can be used to request leave and may be available for the district to purchase. It is a separate module from the timekeeping module. Operating using the "honor system" without supervisor approval opens the door for individuals to take advantage of the lack of accountability measures in place.

The best employee leave policies are clear. The policy should define the amount of leave earned by the employee, the process to submit for leave for approval, and the timeline for which leave can be submitted. It is the supervisor's responsibility to ensure that there are no overlapping requests that will cause a burden for the employer. Implementing an electronic leave request system will help eliminate clerical errors that can occur from manually entering leave requests and will also add accountability by using a workflow that requires supervisor approval.

RECOMMENDATION

Create an electronic process for employees to submit leave for accountability and tracking purposes.

The district should consider purchasing a leave request module using the existing TimeClock timekeeping vendor or look for other alternatives to import the leave electronically into the district's payroll software. Before a system is purchased, clear procedures should be written regarding the leave submission process. The superintendent and the payroll clerk should create steps for employees to use that include the submission process, accountability measures, and timelines for requests.

FISCAL IMPACT

The recommendation to create a written leave request and processing procedures can be implemented with existing resources. Any cost to purchase an electronic leave module should be offset with savings from the efficiency and accountability that system will bring to the process.

D. 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 3-9

The district has invested surplus funds in certificates of deposit with the local bank, but those instruments are earning well below current market rates. Rates have increased dramatically over the past year and by not seeking higher rates, the district is earning less on its surplus cash than it otherwise might.

The district has three certificates of deposits (CD) in place. Two CDs were purchased with a 36-month term and the other was renewed for 12 months. All three CDs are earning well below current market rates, with the highest currently earning a yield of 2.0 percent. The other two are well below 1.0 percent. Current market rates for CDs at the time of the review were 3.0-4.5 percent, depending on the amount of the investment or length of maturities. All CDs are on deposit with Armstrong Community Bank.

The remaining balances for the district remain on deposit in the district’s checking account, earning a rate below other available instruments. Although the banking arrangement with Armstrong Community Bank provides for interest to be paid on the monthly bank account balances, a sweep account is not used. Sweep accounts are arrangements where excess funds are automatically moved into overnight investments, which typically earn a higher rate of return than paid to a regular checking account. The investment mechanisms for unused balances also make it easier for the district and bank personnel to maintain and monitor collateral needs to secure bank balances on deposit.

Jenks Public Schools utilizes this type of banking service at First Oklahoma Bank, which includes a sweep account where amounts in excess of \$20,000 are automatically moved from the district’s regular checking accounts into overnight investment accounts. While the district earns interest on its regular checking accounts, the rate earned on the overnight sweep account is at a higher rate. Also, Jenks works with several banks for quotes on investments so that the district’s idle funds are earning current market rates.

RECOMMENDATION

Develop a process for local banks to compete for district’s idle funds so that the district increases its return on investment.

The district should negotiate with the district’s designated bank to terminate the existing CDs without penalty and reinvest those funds into CDs paying current market rates. The district should create a quote sheet for investments and send it to the local banks to ensure that the district is earning the highest rate available.

The district should also negotiate an agreement to sweep an agreement with a minimum fee structure to sweep all available account balances into an overnight investment option in order to earn a higher rate on district funds while still maintaining the liquidity requirements for the district’s cash flow.

FISCAL IMPACT

Renegotiation of the current \$1.4 million in CDs to earn current market rates would earn a minimum return of an additional \$20,000 in interest earnings per year. The district should also be able to earn an underdetermined amount of additional interest by establishing a sweep account.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Renegotiate CDs.	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000

E. FIXED ASSET MANAGEMENT

Fixed asset management involves managing the district's physical assets in a cost effective and efficient manner. Effective fixed asset 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 3-10

The district does not track fixed assets other than equipment, mostly technology, purchased from federal grant funds. There is no formal fixed asset policy.

The district does not have a policy or system to track its investment in fixed assets. Staff uses an Excel spreadsheet to track technology equipment purchased using federal funds, but no other fixed assets are tracked. Fixed asset transactions are not identified and tracked during the year. MPS does not have a complete listing of its fixed assets where additions and deletions are made as they occur, or a policy that directs a physical inventory to be conducted.

There are also no district guidelines that require reimbursements for items lost due to negligence or what documentation is required for lost or stolen items, such as a police report or employee affidavit. Without a comprehensive listing and physical inventories, the district has no way to know if items are stolen or lost. This leaves the district without recourse if an employee loses costly equipment or alleges theft.

Policies normally address many issues pertaining to an entity's investment in fixed assets. Policies include guidelines for all fixed assets and regularly address the following:

- responsibility for accounting for the district's investment in fixed assets and the system that is used for that accounting;
- responsibility and accountability for the property and equipment owned;
- a requirement for annual physical inventories;
- capitalization thresholds for property, equipment, land, and infrastructure;
- depreciation methods, salvage value, and a schedule of estimated useful lives;
- capitalized improvements versus maintenance expenses;
- reporting junked, stolen or missing property, and what approvals are required to delete these items from the inventory;
- receiving donated property; and
- transferring assets between schools and departments.

To protect its 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 and 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.

RECOMMENDATION

Develop and adopt fixed asset policies and procedures, such as capitalization thresholds, surplus procedures, and lost asset recovery; then inventory fixed assets using a consolidated inventory listing.

A similar recommendation was included in the 2013 report. The school board should adopt a detailed fixed asset policy to provide guidance on how district fixed assets are to be managed. The Oklahoma Cost Accounting System (OCAS) procedures manual differentiates coding for equipment at \$5,000. Therefore, the district should consider adopting a threshold of \$5,000 to remain in compliance with the OCAS requirements. Once the school board approves the policy, the superintendent should communicate the new policy to staff and begin implementation. A physical inventory should be performed, and the results used to create a computerized inventory listing of all items over the established value threshold.

A system to track fixed assets and a set of fixed asset polices should help ensure that the district’s investment in fixed assets is being managed as desired by the school board. The system should protect investments by assigning accountability and holding staff accountable for the proper care and protection of district assets.

FISCAL IMPACT

The consulting team recommends allocating \$7,000 for a one-time purchase of a fixed asset inventory system. The cost would include the tracking software, two scanners, and supplies such as asset stickers with barcodes.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Develop and adopt fixed asset policies, then inventory and track fixed assets acquired with district funds.	(\$7,000)	\$0	\$0	\$0	\$0

F. 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 3-20** compares the district’s average daily membership (ADM), assessed property value, and bonding capacity for the last seven years. As shown, ADM has decreased since 2015-16 by 4.8 percent while property value and bonding capacity have increased by 33.3 percent.

Exhibit 3-20
MPS Trends in ADM, Assessed Values, and Bonding Capacity

School Year	ADM	Assessed Property Valuation	Bonding Capacity
2015-16	681	\$3,495,140	\$349,514
2016-17	657	\$3,739,656	\$373,965
2017-18	652	\$3,888,045	\$388,804
2018-19	649	\$4,250,378	\$425,037
2019-20	638	\$4,195,497	\$419,549
2020-21	630	\$4,471,047	\$447,104
2021-22	648	\$4,659,751	\$465,975
Percent Change	(4.8%) ▼	33.3% ▲	

Source: OSDE, OSAI, OQEA 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 2019-20, MPS and Bishop had the lowest debt service expenditure per student of its peer districts (**Exhibit 3-21**).

Exhibit 3-21
Debt Service Expenditures per Student, 2019-20

Entity	Debt Service per Student
Maryetta	\$0
Bishop	\$0
Colcord	\$325
Grand View	\$229
Keys	\$23
Oktaha	\$408
Community Group	\$668
State	\$1,152

Source: Office of Educational Quality and Accountability, Profiles Database

FINDING 3-11

The district has not asked the community to support a bond issue. This limits the district's ability to maintain facilities or do additional capital improvement projects.

The district has aging facilities and has been resourceful over the years in maintaining existing structures. While the buildings are clean, the district facilities are showing their wear. The district does not have a long-term capital improvement plan. Without soliciting the local community to support a bond initiative for improvements and equipment, this puts additional financial pressure on the district's general and building funds. While technology needs seem to be met with grant funds, other equipment needs are purchased with general funds.

Currently, there are no debt service requirements since the district has not issued bonds. The district has not considered a bond initiative. While the district's Net Assessed Valuation is much lower when compared to peer districts, the district is not using any of its bonding capacity. The community has strong ties to the school district and there is a strong sense of school pride in the community.

Voting for or against local school bonds or levies represents one of the most direct ways voters can impact the local community. According to the website *K12 Insight*, school leaders who have successfully passed bond measures in their districts gave insight into what tips they used to communicate their vision:

1. Listen to stakeholders.
2. Build the bond proposal around community needs.
3. Personalize the message for different audiences.
4. Use multiple channels of communication.
5. Engage the community in a "two-way" conversation.¹

Districts who are proactive in building or maintaining their facilities have long-term project plans in place that identify funding sources for needed projects.

RECOMMENDATION

Create a long-range capital improvement plan involving community stakeholders and partners as well as identify necessary funding sources to complete projects.

The board of education and superintendent should develop a long-range facilities improvement plan involving community stakeholders and business partners. The plan should list identified construction, renovation, and maintenance projects. The plan should include estimated project costs, estimated timelines for projects, and sources of funding to complete each project. If a bond

¹ <https://www.k12insight.com/news/school-bond-campaigns/>

issue is considered as a source of funding, the district should work with the community to build support for the plan and illustrate how the bond issue will improve the community.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

G. 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.

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MPS functional areas. **Exhibit 3-21** provides the results for purchasing. A majority of the staff (71 percent) gave purchasing an A or B, but one-fourth (25 percent) had no opinion.

**Exhibit 3-22
Staff Survey Results Regarding Purchasing Functions**

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Purchasing	49%	22%	1%	1%	0%	25%

Source: Prismatic Survey Results, March 2023

FINDING 3-12

The district has written policies and procedures in place regarding purchasing. The policy document is clear and easily understood and operates in accordance with Oklahoma state statutes.

In staff interviews, it was evident that people were knowledgeable about the purchasing process. All staff seem to know the process. The encumbrance clerk is knowledgeable and works well to help staff understand the procedures.

Districts that have efficient and effective purchasing programs have written guidelines that include instructions how to submit requisitions, district policy requirements, step-by-step instructions, and the types of items allowed for purchase within different funds. Effective procedures guides are written in an easy to understandable format. A district website usually includes resources such as required forms and an electronic copy of the written procedures.

Exhibit 3-22 shows MPS purchasing policies and procedures.

Exhibit 3-23 Excerpt of MPS Purchasing Procedures

MARYETTA SCHOOL BOARD PURCHASING POLICIES/PROCEDURES

The following **Purchasing Policies/Procedures** will be *strictly* followed during the school year. Please read and observe them carefully. They apply to **all** financial transactions **including** School Activity Funds. These procedures are necessary to comply with all existing state laws, auditing requirements and the SDE regulations.

There are seven (7) basic steps involved in all legal school district transactions.

1. **Request for Purchase:** (Also known as a purchase requisition). This form, when properly completed, initiates the purchasing approval process. **It does not authorize an order.** These forms are available from the Encumbrance Clerk and/or Activity Fund Custodian or on the shelf outside their office. Then they are submitted to the **Purchasing Officer/Activity Fund Custodian** for approval. If the Request for Purchase is approved, step 2 begins.

The District Purchasing Officer is the Superintendent. She/He must sign all purchase orders **before** the Encumbrance Clerk can issue a number for that Purchase Order.

2. **Encumbrance/Purchase Order:** If funds are available for the approved Request for Purchase then the order is entered in to the computer and funds to pay for the order are encumbered. (The encumbering process reserves those funds for that purchase and removes them from the spendable balance.) The encumbrance clerk issues a purchase order number which is delivered to the requesting employee, in turn the employee can then place their order with the vendor. The Encumbrance Clerk will assign proper classification from the OCAS (Oklahoma Cost Accounting) manual.
3. **Order Materials or Series:** The order is normally mailed, faxed, or phoned to the vendor, but in some cases may be hand-carried. When an order is placed by phone or faxed this should be written on the purchase order. A fax transmittal sheet should be attached to your copy of the purchase order for your record. For hand-carried purchases (Example: Wal-Mart or Sam's Club) an authorization document will be needed before a school employee will be able to charge or pick up materials directly from the vendor. The assigned purchase order number should be given to the vendor. The assigned purchase order number should be given to the vendor when placing your order also for future reference.

NOTE: Several local vendors do not provide delivery of materials. You should make certain that the vendor you place an order with provides for delivery, or you need to make arrangements to pick up your order. Remember to use approved local and catalog vendors.

Please follow steps 4 & 5 carefully.

Source: Maryetta Public Schools, March 2023

COMMENDATION

MPS has effective written purchasing procedures.

FINDING 3-13

The district encumbrance process still uses paper requisitions, manual approval signatures, and manual entries into the district's Wengage financial software system to create purchase orders. The use of paper purpose requisitions is an outdated and inefficient practice.

The paper requisition shown **Exhibit 3-23** is used for MPS purchases. Using a manual paper form can lead to a lengthy purchasing process. Staff members complete the paper requisition. The form is given to the encumbrance clerk. The encumbrance clerk reviews coding, items being ordered, and ensures the purchase is within the budget. The form is then given to the superintendent to sign for approval. Once approved, the requested purchase is presented to the board of education for approval at the next meeting.

Exhibit 3-24 Purchase Requisition Form

MARYETTA SCHOOL

**470819 E. 810 ROAD
100 MARYETTA ROAD
STILWELL, OK 74960
PHONE: (918) 696-2285
FAX: (918) 696-6746**

**STATEMENT TO VENDORS:
OUR PURCHASE ORDER NUMBER MUST
BE ON ALL INVOICES.**

Fed. I.D. 73-113-6342

P.O. NUMBER _____
DATE _____
COMPANY NAME — VENDOR _____
STREET _____
CITY, STATE, ZIP _____
PHONE _____
PROG./GRADE _____

ORDERED BY _____ SHIP TO ATTN: _____

WHEN COMPLETING REQUISITION — Attach a Copy of Order Form (if available)

(keep copy for your records)

MARYETTA PURCHASE REQUISITION

Qty.	Catalog No.	Items Description	Unit Cost	Total Cost

Encumbrance Clerk _____ Date _____ AUTHORIZED BY: _____
Receiving Agent _____ Date _____ Purchasing Officer _____ Date _____

**WHEN THE TOTAL AMOUNT OF THIS PURCHASE ORDER IS \$25,000 OR MORE
FILL OUT THE AFFIDAVIT BELOW AND RETURN WITH INVOICE**

**NON-KICKBACK AFFIDAVIT
FOR PAYMENT IN EXCESS OF \$ 25,000.**

STATE OF OKLAHOMA)
COUNTY OF _____) SS

The undersigned (architect, contractor, supplier or engineer), of lawful age, being first duly sworn, on oath says that this invoice or claim is true and correct. Affiant further states that the (work, services or materials) as shown by this invoice or claim have been (completed or supplied) in accordance with the laws, specifications, orders or requests furnished the affiant. Affiant further states that (s)he has made no payment directly or indirectly to any elected official, officer or employee of the State of Oklahoma, any county or local subdivision of the state, of money or any other thing of value to obtain payment.

Subscribed and sworn to before me
this _____ day of _____, 20_____. _____
(Contractor, supplier or engineer)

Notary Public _____
Commission Expires _____

ALLOW 45 DAYS FROM PURCHASE DATE FOR PROCESSING PAYMENT

Source: Maryetta Public Schools, March 2023



Most financial software packages, including Wengage, have purchasing requisition workflow modules. In interviews, MPS staff indicated that the only reason the Wengage module has not already been implemented was a perceived challenge in training on it.

RECOMMENDATION

Implement the electronic purchase requisition workflow module available in Wengage.

While there would be an investment in training and some growing pains with a new change, the long-term benefits outweigh the negative aspects of the current process. This would lead to a quicker and more efficient method of encumbering the district's funds.

The superintendent and encumbrance clerk should modify the purchasing process by working with Wengage to implement the electronic requisition module. The project plan for this upgrade should include responsibilities of implementing individuals, technology needs, target completion dates for each step of the implementation, and staff training requirements.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 4:
Facilities Use and Management

Chapter 4

Facilities Use and Management

This chapter addresses the facilities use and management of Maryetta Public Schools (MPS) in the following sections:

- A. Facilities Planning and Construction
- B. Maintenance and Custodial Operations
- C. Energy Management
- D. Safety and Security

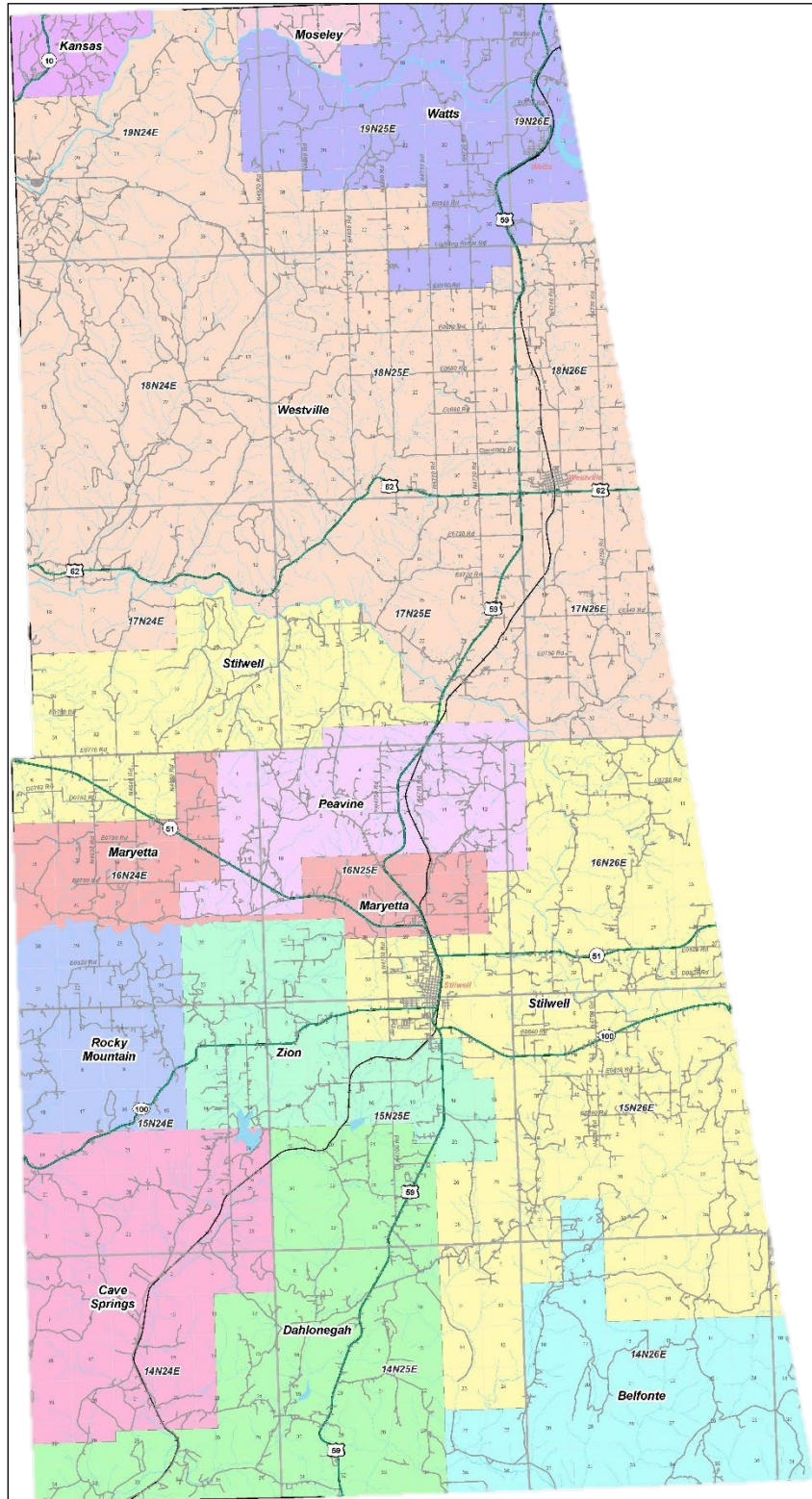
Facilities use and management includes the planning, construction, and maintenance of buildings, the safety of students, visitors and staff using those buildings, and the security of facilities before, during, and after school hours. This includes the following:

- 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;
- providing regulated access to individuals and groups, and school and community organizations for use of the facilities after hours and on weekends;
- operating the facilities in a manner that uses all forms of energy in the most frugal manner possible;
- 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

Oklahoma became a state in 1907. Maryetta Public Schools preceded this date by five or six years. MPS is located about one mile north of the center of Stilwell, Oklahoma. It is one of 12 school districts located inside Adair County (**Exhibit 4-1**).

Exhibit 4-1
Location of Maryetta Public Schools in Adair County



Source: Center for Spatial Analysis, University of Oklahoma

The district covers 22 square miles and has one campus area. This Pre-K through 8th grade district is comprised of an early childhood center, an elementary school, and a junior high building, the Eagleton Activity Center (gym), a wrestling building, a football/track field complex with outbuildings, a softball field complex with outbuildings, and bus barns. **Exhibit 4-2** provides an aerial map of the campus in 2013 and a current map. Not shown on either map is the current construction of a cafeteria extension that was underway during the onsite visit.

Exhibit 4-2
Aerial Maps of MPS Buildings and Grounds, 2013 and 2023



Source: OSRHE, January 2013, edited by Prismatic, May 2013



Source: Google Maps, March 2023

Exhibit 4-3 tabulates major MPS facilities with their approximate areas in square feet. The current kitchen expansion is not included in the total for the elementary school building.

**Exhibit 4-3
MPS Facilities**

Building	Year Built	Year of Remodel/Addition	Square Footage
Elementary School (original building plus additions)	1956	1970, 1972, 1974, 1973, 1984, 1991, 1987	103,000
Junior High Building	2006	2008	16,960
Eagleton Activity Center	2002		18,348
Wrestling/Gymnastic Building	2003		4,640
Bus Barn/Shop	1986	2009	7,200
Tractor Garage	1980	2010	1,920
Press Box and Restrooms at Football Field	2012		865
Concession Stand Football	1977		792
Total			153,725

Source: MPS Insurance documents, March 2023

Exhibit 4-4 provides a look at some of the exteriors of the district’s primary buildings. The last photo shows the cafeteria addition under construction at the time of the onsite visit.

**Exhibit 4-4
MPS Building Stock**



Source: Prismatic, March 2023

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 all stakeholders, including administrators, teachers, security specialists, parents, students, community leaders, 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 dissatisfaction and facility concerns.

Having a long-range facilities master plan provides a studied, developed, and logical process for prioritizing, beginning, and completing building projects. As district leaders 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).¹ 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 number 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*.² The guidelines were developed to assist the local board of education, 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.³

- **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.

¹ Council of Educational Facility Planners International. (2004). *Creating connections: The CEFPI guide for educational facility planning*. Can be purchased at <http://creatingconnections.a4le.org/>

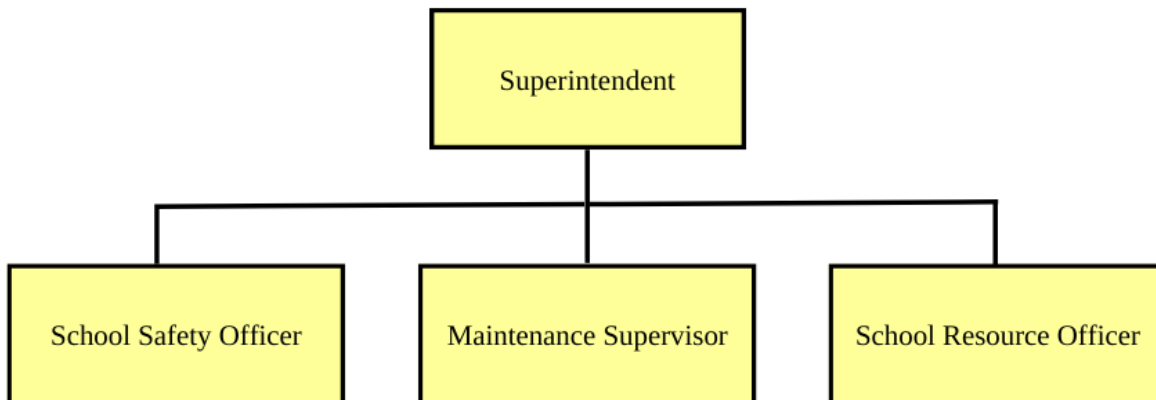
² <http://digitalprairie.ok.gov/cdm/singleitem/collection/stgovpub/id/9456/rec/4>

³ <http://sde.ok.gov/sde/sites/ok.gov.sde/files/CI-AdministratorsGuide.pdf>

- **Enrollment Projections:** Effective planning requires accurate enrollment projections at least five years into the future. 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 effective planning process involves the community at large, identifies district goals and objectives, and prioritizes projects based on those goals and objectives.
- **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.

Exhibit 4-5 reflects the organizational chart at MPS for maintenance, security, and safety functions.

Exhibit 4-5
Organization Chart of MPS Maintenance, Security, and Safety Functions



Source: Created by Prismatic, March 2023

FINDING 4-1

The superintendent creates short-term and long-term lists of capital projects and programs and includes them in budgets for current and future years as necessary. This information is shared with the MPS Board of Education and is adjusted and modified based on discussion outcomes with board members, cognizant staff, design professionals, financiers, community leaders, and others.

During the past ten years, MPS planning activities have been steady but low-key and of a small nature. There have been no new construction initiatives, although a high school and performing

arts center have been under discussion. These major initiatives are on the back burner and will be revived when a clear path to financing presents itself. The only current construction project is the expansion of the cafeteria. Occupancy of the expanded cafeteria is expected at the beginning of 2023-24. Other successful projects include:

- the installation of programmable thermostats to control heating and cooling settings;
- replacement via a grant of all incandescent and fluorescent lamps with light emitting diode lamps, thus saving both energy operating and maintenance costs; and
- replacement of keys with electronic key cards (currently in progress).

By scaling facilities planning and budgeting to the low-intensity activity described, district administrators and staff have saved time, money, and effort while making steady progress in upgrading the buildings and grounds. The use of outside managers has been mostly avoided, and other outsourcing has been minimized because two in-house technicians have been able to perform the majority of the plumbing, electrical, and electronic installations. In addition, in-house and outsourced grant-writing expertise has led to supplemental funding for many of these initiatives.

COMMENDATION

MPS has saved time, money, and effort by concentrating facilities planning and budgeting efforts for small facilities projects largely completed with in-house expertise.

Moving forward, when it is time to start a feasibility study and write educational specifications for a high school and performing arts center, it will also be time to hire the outside expertise of a facilities planner, architects and engineers, and a construction manager. Many reliable firms with excellent track records are available for this more intensive purpose.

FINDING 4-2

At MPS, two major construction materials and installation method selection decisions have been responsible for significant savings in maintenance and repair costs for decades. It is unclear who was responsible for making and implementing these decisions. In both cases, the selection choices were among the most expensive, but the payback from the resultant energy, maintenance, and repair cost savings has long ago been reached.

The first material choice was roofing. In the early part of this millennium, all school buildings at MPS had standing seams and sloped metal roofs installed (**Exhibit 4-6**). These roofs hold a promise of long-term, reliable protection from rainwater intrusion and resistance to storm damage from winds up to 120 mph. Metal is highly energy efficient and can last up to 50 years, especially in the standing seam configuration that keeps all fasteners hidden and protected. With a minimal need for maintenance, such roofs have almost insignificant maintenance and repair

costs.⁴ Many of the MPS roofs were installed 15-20 years ago and have a projected lifespan of an additional 40+ years.

Exhibit 4-6 Examples of Standing Seam Metal Roofs at MPS



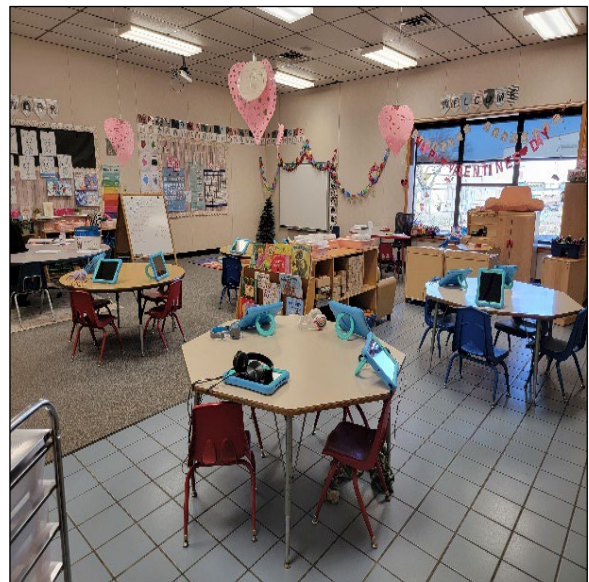
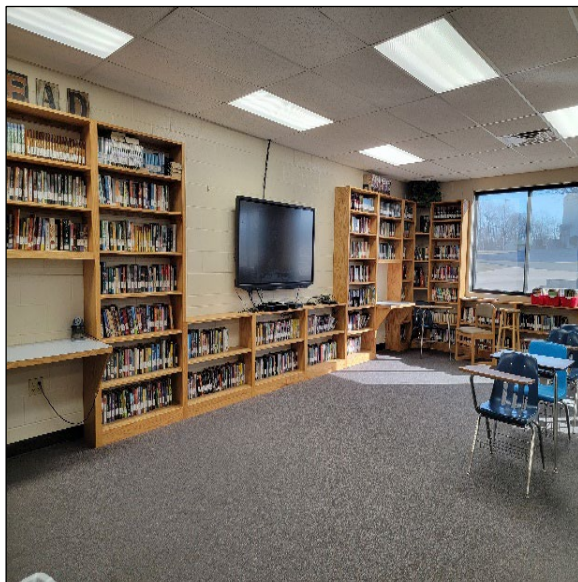
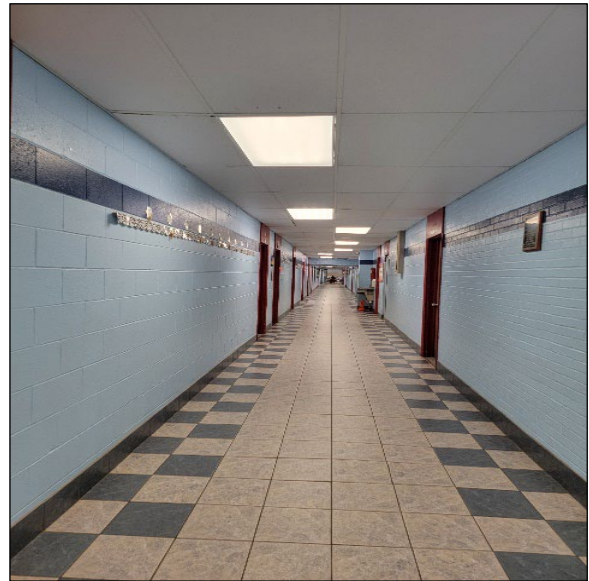
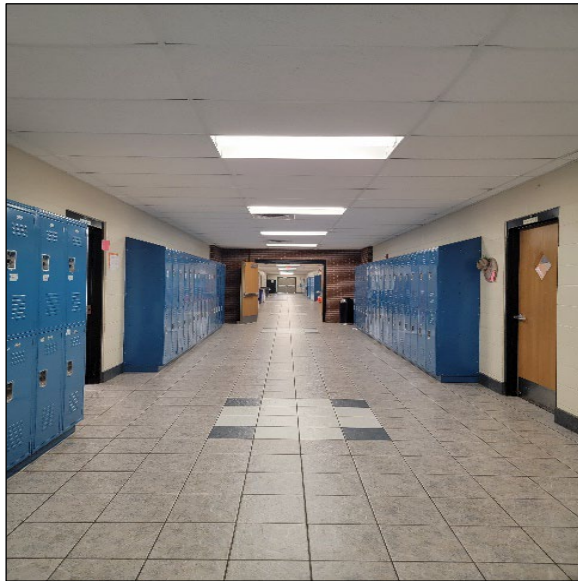
Source: Prismatic Services, March 2023

The second material choice was flooring. Nearly all corridors and some classrooms at MPS have ceramic tile floors installed (**Exhibit 4-7**). These floors require cleaning with standard floor cleaning machines, but little polishing or waxing - if at all. In addition, they do not require wax stripping twice a year, followed by a new cover of multiple layers of wax, as needed for most vinyl composition tiles. In the rare event that a tile is cracked, or the glaze has spalled off, individual tiles can be replaced as needed. The tile floors are more expensive than vinyl composition tile, but they need not be replaced for 50+ years and require little or no chemical cleaners or polish. Examples exist of numerous historic structures where mosaic tile and similar stone or man-made hard floors are hundreds and even thousands of years old.

Many of the MPS classrooms have floors made from carpet tiles. Such floors are more acoustically absorptive. When stains or other damage occur on carpet tiles, only individual tiles require replacement.

⁴ <https://www.roofingproclub.com/is-a-standing-seam-metal-roof-worth-the-cost/#:~:text=Standing%20seam%20metal%20roofs%2>

**Exhibit 4-7
Corridor and Classroom Floors at MPS**



Source: Prismatic Services, March 2023

The metal roofs and ceramic tile floors have saved MPS significant amounts of maintenance and repair costs and will continue to do so for decades to come. In all cases, the higher initial cost has been paid back while savings continue to accrue.

COMMENDATION

MPS is commended for the astute selection of materials of high initial cost that have yielded savings for decades and reached an early return on investment.

FINDING 4-3

The district currently processes work orders and purchase orders in a manual fashion. It had an online system previously, but its use has fallen off. The availability of software for purchase order and work order processing allows for more accurate recordkeeping, data storage and retrieval, data analysis, and performance assessments. A lack of sufficient training and poor access to user support may be the reasons why many staff members retreated to their respective comfort zones.

A well-functioning work order system is effective in assigning work orders, assessing time to complete the work, developing workload data, providing feedback to the source of the request, analyzing maintenance trends, and planning for equipment replacement. These are all activities that are vital to a robust corrective maintenance program.

RECOMMENDATION

Select a digital work order and purchase order software that can be employed district-wide.

The work order system should require the prompt forwarding and receipt of work requests, an accounting of time and materials used for a repair, a feedback system to the maintenance supervisor, work request initiator and principal, and a historical filing system so that trends may be analyzed and reported.

The consulting team has found that Dude Solutions products and procedures are generally well-regarded by school districts. Dude Solutions offers a fully integrated system for school districts, with modules for other departments besides facilities. Other software is also available and due diligence should be employed during selection. Easily accessible user support and customer service should be a prerequisite to serious consideration.

FISCAL IMPACT

This recommendation can be implemented with existing resources. ⁵

FINDING 4-4

The district is unaware of and therefore does not use, the “2-4 percent test” as a guideline for budgeting maintenance expenditures. As a result, it is not budgeting with any reference guides for annual maintenance cost allowances. Nevertheless, MPS has been an outstanding steward of public funds allocated for maintenance and repair.

The 2-4 percent of the building replacement cost budget for maintenance and repair costs comes from the Building Research Board of the National Research Council. As stated by the Council:

Underfunding is a widespread and persistent problem that undermines maintenance and repair (M&R) of public buildings. To overcome this problem, M&R budgets should be

⁵<https://www.brightlysoftware.com/resource/dude-solutions-rebrands-brightly-software>

structured to identify explicitly the expenditures associated with routine M&R. An appropriate budget allocation for routine M&R for a substantial inventory of facilities will typically be in the range of 2 to 4 percent of the aggregate current replacement value of those facilities (excluding land and major associated infrastructure). In the absence of specific information upon which to base the M&R budget, this funding level should be used as an absolute minimum value. Where neglect of maintenance has caused a backlog of needed repairs to accumulate, spending must exceed this minimum level until the backlog has been eliminated.⁶

Exhibit 4-8 shows how the money spent by MPS on facilities maintenance and operations has ranged in the 2-4 percent window over the past five years. These results further reinforce that there exists no burdensome deferred maintenance backlog at MPS. If such a backlog existed, the annual maintenance expenditures would have been likely too low and then too high, but not within the 2-4 percent guideline. As shown in the exhibit, MPS is allocating for maintenance as a best practices level.

Exhibit 4-8
MPS Current Replacement Value (CRV) for Maintenance and Operations Expenditures

Entity	2016-17	2017-18	2018-19	2019-20	2020-21
Maintenance Expenditure	\$594,221	\$731,255	\$661,577	\$590,014	\$681,663
CRV Value	\$23,795,324				
CRV Percentage	3.1%	3.1%	2.8%	2.5%	2.9%

Source: SDE, Insurance Papers, School District Expenditure Reports 2015-2020, and Prismatic calculations

As further noted by the Council:

Decisions to neglect maintenance, whether made intentionally or through ignorance, violate the public trust and constitute a mismanagement of public funds. In those cases where political expediency motivates the decision, it is not too harsh to term neglect of maintenance a form of embezzlement of public funds, a wasting of the nation's assets.⁷

RECOMMENDATION

Consciously and purposefully allocate 2-4 percent of MPS building replacement value as the annual maintenance and repair budget.

By not knowing, and yet holding maintenance and repair expenditures within 2-4 percent of current replacement value of its building stock, the MPS experience has served to validate the 2-4 percent rule. The result has been facilities that can be expected to serve the district for many more years. To ensure the district continues to adhere to this best practice, the superintendent should annually review the maintenance budget, keeping it between 2-4 percent of CRV at a minimum, and increasing it when extraordinary circumstances arise.

⁶ National Research Council. (1990). *Committing to the cost of ownership: Maintenance and repair of public buildings*. Washington, DC: The National Academies Press. <https://doi.org/10.17226/9807>

⁷ Ibid.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

B. Maintenance and Custodial Operations

The objective of 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 to provide a safe and secure environment that supports the educational program and reflects proper stewardship of 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 MPS functional areas. **Exhibit 4-9** provides the results for facilities maintenance and custodial functional areas. As shown, nearly all staff gave the areas an A or B.

**Exhibit 4-9
Staff Survey Results Regarding Maintenance and Custodial Functions**

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Facilities maintenance	69%	27%	1%	0%	1%	1%
Custodial services	67%	24%	7%	0%	0%	1%

Source: Prismatic Survey Results, March 2023

Maintenance

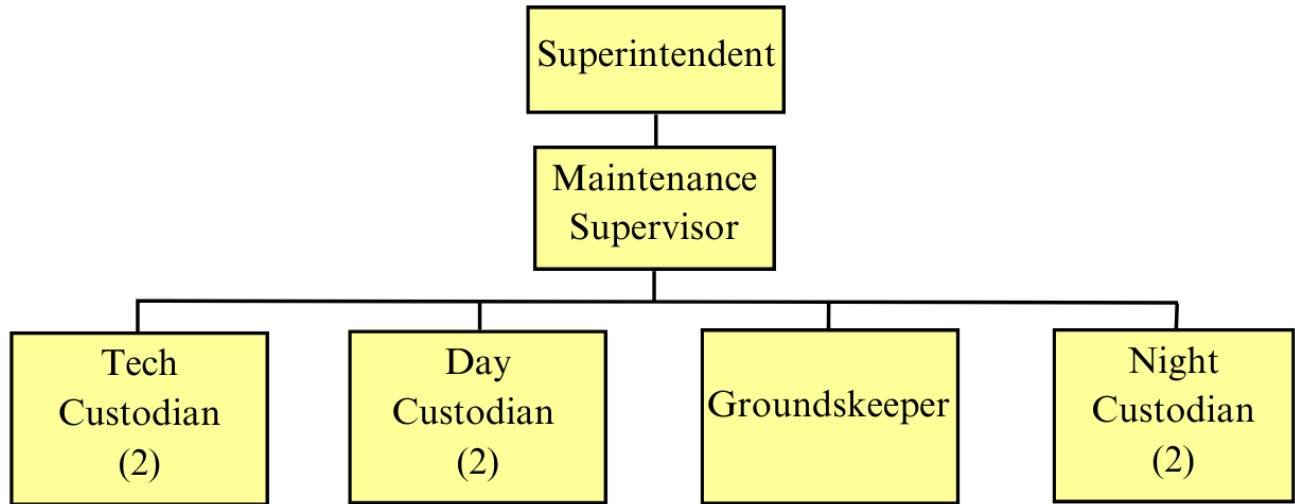
The proper maintenance of facilities is critical to ensuring support for an effective instructional program. Research has shown that appropriate heating and cooling levels, building and room appearances, the condition of restrooms and other facilities, as well as occupant safety, all impact how students 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.

The MPS maintenance staff consists of a maintenance supervisor, two technician/custodians, two day custodians, two night custodians, and one groundskeeper (**Exhibit 4-10**). All are full-time.

This is the organization developed in response to recommendations from the 2013 performance assessment report.

**Exhibit 4-10
MPS Maintenance and Custodial Staff Organization**



Source: Created by Prismatic, March 2023

This integrated team of technicians and custodians is cohesive, collaborative, and highly effective. One of the technicians/custodians is a skilled plumber who performs most plumbing repairs and installations without assistance from outsourced contractors. The estimate is approximately 90 percent in-house. A similar estimate is given for the technician/custodian who works with electrical and digital control systems. A full-time groundskeeper was hired in response to recommendations in the 2013 report. Two daytime and two nighttime custodians round out the team. As seen in the beginning of the chapter, survey ratings by staff, parents, and students, as well as comments from community stakeholders, all give the statements “the school is clean” and “the school is well-maintained” high marks and accolades. Observations by the consulting team confirm these ratings.

Exhibit 4-11 shows the trend of MPS maintenance expenses over the past five years compared to the peer districts. We have already confirmed that these MPS expenditure figures show that they are near the center of the “2-4 percent” of current replacement value (CRV) best practice guideline. We do not have sufficient data to calculate these percentage values for the peer school districts. However, a look at the “Percent Change” column suggests that the likelihood of equal stability and “2-4 percent conformance” is also present at Bishop, Grand View, and Keys. On the other hand, the high percentage changes experienced by Colcord and Oktaha may have brought new building inventories online, performed major renovations or additions, or spent funds to eradicate large, deferred maintenance backlogs.

Exhibit 4-11
Trend in Maintenance and Operations Expenditures

Entity	2017-18	2018-19	2019-20	2020-21	2021-22	Percent Change
Maryetta	\$731,255	\$661,576	\$590,014	\$681,662	\$864,915	18.3% ▲
Bishop	\$423,515	\$519,491	\$373,929	\$670,928	\$454,705	7.3% ▲
Colcord	\$546,767	\$664,532	\$715,048	\$853,701	\$1,094,441	100.0% ▲
Grand View	\$142,768	\$155,664	\$355,807	\$125,598	\$170,139	19.1% ▲
Keys	\$977,027	\$897,446	\$1,581,787	\$992,452	\$1,190,132	21.8% ▲
Oktaha	\$523,124	\$782,187	\$628,134	\$800,572	\$2,016,467	285.6% ▲
Peer Average	\$557,409	\$613,482	\$540,786	\$687,485	\$965,299	73.1% ▲

Source: SDE, School District Expenditure Reports 2015-2020, and Prismatic calculations

Breaking down the past five years of maintenance spending by category (**Exhibit 4-12**), one sees that the bulk of the MPS budget has been spent on salaries and benefits, followed closely by purchased services. The nearly \$100,000 jump in the latter in 2021-22 was likely due to the unexpected need to extract a roter device lodged in a sewer pipe six feet below ground and under the building.

Exhibit 4-12
Trend in MPS Maintenance and Operations Expenditures, All Funds

Expenditure by Category	2017-18	2018-19	2019-20	2020-21	2021-22	Percent Change
Salaries	\$211,752	\$224,975	\$224,918	\$234,543	\$245,569	16.0% ▲
Benefits	\$80,573	\$81,222	\$78,827	\$79,737	\$93,404	15.9% ▲
Purchased Services	\$135,721	\$144,102	\$126,432	\$140,026	\$224,847	65.7% ▲
Supplies	\$236,344	\$173,999	\$159,761	\$227,280	\$299,994	26.9% ▲
Property	\$66,719	\$37,201	\$0	\$0	\$0	(100.0%) ▼
Other	\$143	\$75	\$75	\$75	\$1,101	669.9% ▲
Total	\$731,255	\$661,576	\$590,014	\$681,662	\$864,915	18.3%

Source: SDE, School District Expenditure Reports 2015-2020, and Prismatic calculations

As shown in **Exhibit 4-13**, 92 percent of staff and parents responded *agree* and *strongly agree* to the “well maintained” survey question. The student response to the same question, while slightly more subdued, substantiates the overall agreement at 77 percent.

**Exhibit 4-13
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.	32%	60%	4%	1%	1%
Parent	My child’s school is well maintained.	42%	50%	6%	2%	0%
Student	My school building is well maintained.	25%	52%	16%	6%	2%
Student	My school building needs a lot of repairs.	6%	11%	34%	38%	12%

Source: Prismatic Survey Results, March 2023

FINDING 4-5

The district has a custodial staff of two, who also complete a wide range of maintenance tasks. This has resulted in cost savings for the district. However, the current staff members are within retirement age.

One of the custodians/technicians has performed maintenance and repairs on the district’s plumbing, resulting in claims by district staff of only approximately ten percent of plumbing repair work needing to be outsourced. The other custodian/technician performs maintenance and repair work on electrical and HVAC installations, including the digital controls. This has also resulted in only about ten percent of HVAC maintenance and repair work needing to be outsourced.

The availability of skilled plumbing and electrical/HVAC technicians who are also willing to perform custodial work on an as-available basis is rare. The current maintenance success is likely due in large measure to the presence of these two people on the staff. In small districts, the full panoply of maintenance best practices is usually difficult to assemble. However, MPS has created a cohesive, dedicated, and effective team that is consistently achieving best-practice results.

Unfortunately, nothing good lasts forever. The two custodians/technicians are currently able to retire without penalty. In addition, the maintenance supervisor will be in a similar no-penalty retirement position in approximately five years. As a result, the acknowledged team leader must now accept the task of rebuilding his team to permit it to function with the same or even better outcomes as the most desirable goal.

Succession planning is not often found in school districts, but it is a management best practice. Succession planning is especially valuable in circumstances where the district is rural and the

pool of available applicants for jobs is small. Typical succession planning includes several elements:⁸

- anticipate the district needs, considering growth factors, the economy, community, age of staff, likely retirements, financial resources, and timing. Determine both the district's short and long-range goals as an organization. Chart the district's vision for the future (strategically plan). Identify the type of leaders needed to get the district there and develop a profile of what the district is looking for in the position that will be open;
- adopt the attitude that the district will search for candidates proactively before a vacancy happens. Establish recruiting practices that help with this. These recruiting practices can range from seeking interns, partnerships with other organizations, sharing staff with another district, and outsourcing;
- provide for distributed leadership throughout the district's organization which recognizes and allows motivated individuals, no matter their position, to lead. Deepen the district's leadership pool by creating a deep bench of experienced staff who assume leadership;
- once potential leaders are identified, mentor/coach them and continue to give them opportunities to experience leadership;
- for specific positions, as existing staff departure approaches, provide for overlap of tenures to allow the new person to benefit from training next to the person that is leaving. The longer the time they have together, the better the outcome. Practical experience is the best training; and
- annually evaluate the district's planning for succession.

RECOMMENDATION

Develop and implement a succession plan for key facilities positions in the district.

The consulting team recommends that the superintendent initiate this process by asking for a special session of the MPS Board of Education. Such a meeting could be devoted to an initial discussion of the need for a succession plan and its successful implementation. The two custodians/technicians and the maintenance supervisor should be invited participants. The meeting's goal should be to propose and discuss alternative succession planning strategies. The goal of succession planning should be a continuation of the successful maintenance team efforts at MPS.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

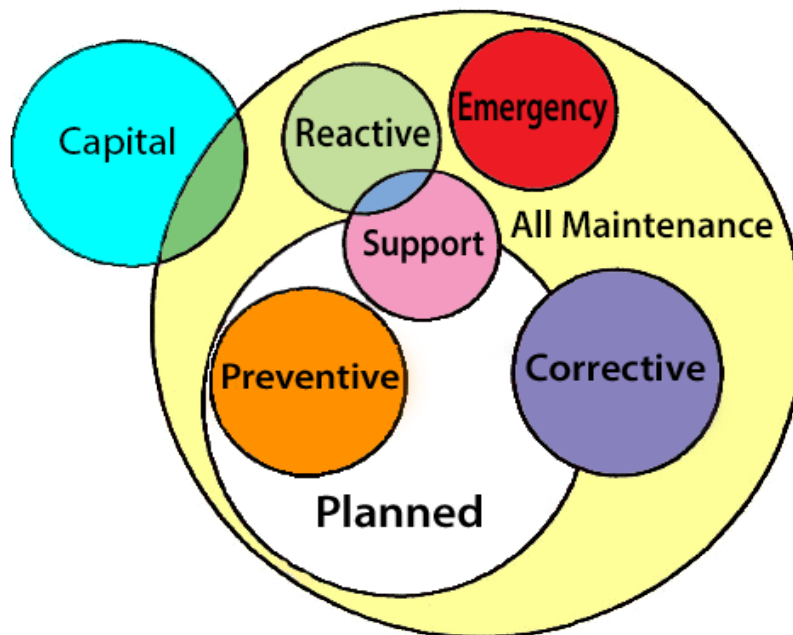
⁸ Hanover Research. (2014). *Best practices in succession planning*. Retrieved from <https://www.hanoverresearch.com/media/Best-Practices-in-Succession-Planning.pdf>

FINDING 4-6

The use of preventive maintenance (PM) in MPS is limited but not completely and deliberately absent. This limited use of PM might put the district at greater risk for more costly reactive maintenance work.

Maintenance in a school is not merely repairing or 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 types can be depicted using a Venn diagram (**Exhibit 4-14**).

Exhibit 4-14
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.⁹

⁹ Becker, T. J., (2011) What constitutes maintenance? *Operational Guidelines for Educational Facilities: Maintenance*, second edition (July/August), pp.14-15.

RECOMMENDATION

Expand the number of PM tasks routinely completed by district staff.

District staff already acknowledges the importance of completing PM tasks. The consulting team recommends that the maintenance team consider adding to its list of tasks those listed in **Exhibit 4-15**, as well as other PM actions described by the manufacturers of specific products or devices used or installed at MPS.

**Exhibit 4-15
Sample Preventive Maintenance Program Schedule**

Preventive Maintenance Activity	Activity Frequency
Clean A/C unit filters	Bi-monthly
Change A/C unit filters	3 to 12 week intervals
Clean chiller condenser coils	Bi-annually
Clean fan coil and air handler evaporator coils	Annually
Clean ice machine condenser coils	Every 4 months
Inspect and capacity test chillers	Annually
Change chiller compressor oil and cores	Every 2 years
Check chemical levels in closed-loop chilled and hot water piping	Monthly
Clean grease traps	Every 3 months
Inspect and test boilers	Annually
Check roofs, downspouts, and gutters	Monthly, repair as needed – 20 year roof warranty
Inspect exterior lighting	Semi-annually
Inspect elementary play gym lighting	Annually
Inspect and clean gym gas heaters	Annually
Inspect playground equipment	Monthly, repair as needed
Clean fire alarm system smoke detectors	Semi-annually
Inspect all interior and exterior bleachers	Annually, repair as needed
Clean, tighten, and lubricate roll-out bleachers	Annually
Check exterior building and concrete caulking	Annually – 8 year replacement
Stripe exterior parking lots	Annually
Check condition of asphalt parking lots	Annually – 12 year replacement
Check carpet	15 year replacement
Check vinyl composition tile floors	20 year replacement
Spray wash exterior soffits and building	Every 2 years or as needed
Replace glass and Plexiglas	As needed
Paint interior of facilities	Every 5 years
Paint exterior of facilities	Every 8 years
Perform general facility inspections	Annually

Source: Prismatic Services, 2023

FISCAL IMPACT

This recommendation can be implemented with existing resources.

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 or 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 board of education.

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 two or level three standard of cleanliness, respectively. The levels of cleanliness in the APPA standard are shown in **Exhibit 4-16**.

Exhibit 4-16 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 4-7

Although MPS facilities are generally clean, their custodial staffing levels are below best practices. This could potentially lead to overworking custodial staff.

Stakeholder responses to the survey indicate that MPS facilities are generally clean (**Exhibit 4-17**). Nearly all staff and parents agreed that the facilities are clean. Students were less enthusiastic, but 77 percent concurred that their school is clean. In observations during the onsite work, the consulting team largely found the spaces to be at acceptable levels of cleanliness. Moreover, the cafeteria addition, scheduled to open Fall 2023 will add square footage to be cleaned.

Exhibit 4-17
Staff, Parent, and Student Survey Responses Regarding Facilities Cleanliness

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	Our facilities are clean.	32%	63%	3%	0%	1%
Parent	My child's school is clean.	42%	49%	7%	2%	0%
Student	My school is clean.	30%	47%	10%	9%	5%

Source: Prismatic Survey Results, March 2023

MPS has available five FTE custodians, plus a groundskeeper and the maintenance supervisor. The current staff members are able to achieve consistent Level 2 to 3 cleaning results. The total floor area of MPS enclosed space amounts to 153,725 square feet. Of this total, the buildings requiring daily intensive cleaning are:

- the main building with 103,000 square feet;
- the junior high building with 16,960 square feet; and
- the Eagleton Activity Center with 18,348 square feet.

Level 3 cleanliness requires one full-time custodian per 30,000 square feet or 4.6 full-time custodians. Level 2 cleanliness requires one full-time custodian per 20,000 square feet or 6.9 FTE custodians. Considering just the full-time custodians, MPS is currently operating at one FTE per 30,745 square feet.

RECOMMENDATION

Add a 0.5 FTE custodial position once the cafeteria addition is opened.

Once the cafeteria addition is opened, the ratio of custodians to square footage will be too high. The superintendent should seek to hire a part-time custodian to ensure that MPS can continue its high level of facilities cleanliness.

FISCAL IMPACT

Based on existing salary and benefits data for custodians at MPS, the additional cost of hiring a one-half FTE custodian in 2023-24 is approximately \$15.00 per hour at 20 hours per week for 52 weeks, for a total of \$15,600, without benefits.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Hire an additional 0.5 FTE custodian.	(\$15,600)	(\$15,600)	(\$15,600)	(\$15,600)	(\$15,600)

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, in their publication *Planning Guide for Maintaining School Facilities*,¹⁰ 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 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.

Additional information about energy management can be found on the National Clearinghouse for Educational Facilities' Energy Page¹¹ 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.

FINDING 4-8

Energy consumption at MPS was found to be exceptionally low when compared to industry metrics during the 2013 performance review. This excellent result was achieved primarily because of wholesale window replacement and the installation of sloped, standing seam metal roofs on all major structures. The district has continued to reap the savings from facilities improvements.

Furthermore, MPS has continued to pursue energy conservation opportunities. The most recent upgrades were:

¹⁰ <http://nces.ed.gov/pubs2003/2003347.pdf>

¹¹ <http://www.ncef.org/search/node/energy%20management>

- The district replaced all fluorescent and incandescent lamps with LED illumination. This has reduced electric energy consumption by indoor and outdoor lighting by over 75 percent and yielded an ROI of 229 percent over the life of the LED lamps.¹²
- The district replaced all thermostats with programmable thermostats. This can result in energy savings of up to \$500 per year per thermostat, depending on the restrictions programmed.¹³

Exhibits 4-18 and **4-19** show the district’s consumption of water, sewer, garbage removal, electricity, and natural gas for 2021-22, followed by a calculation of the energy cost per square foot for 2021-22.

**Exhibit 4-18
Energy/Utility Expenses by MPS During 2021-22 School Year**

Category	Cost
Sewer, Water, Garbage, Hazardous Waste	\$15,901
Electricity	\$80,603
Natural Gas	\$39,426
Total	\$135,930

Source: MPS Utility Invoices verified via OCAS Reports for 2021-22 and Prismatic Calculations, March 2023

**Exhibit 4-19
MPS Energy Cost per Square Foot**

Unit	Cost
MPS Energy/Utility Costs for 2021-22	\$135,390
Floor area of all facilities	153,755 square feet
Total price per square feet over all facilities	\$0.88/square foot

Source: Prismatic Calculations, March 2023

One source of comparative benchmarking data comes from the Council of the Great City Schools (CGCS), which annually compiles data on a variety of school district functional areas from its 75+ school district members. Among those districts, the median energy cost per square foot was \$1.12 in 2020-21. The CGCS districts in the lowest quartile had energy costs of \$0.88 per square foot. MPS has achieved a similar level of low energy costs.

The consulting team estimates that the district may have saved as much as \$100,000 annually from its energy efficiencies. These funds were available each year to spend on other MPS priorities.

¹² <https://www.thecalculatorsite.com/energy/led-savings-calculator.php>

¹³ <https://www.bing.com/search?q=savings+from+replacement+of+thermostats+with+programmable+thermostats>

COMMENDATION

MPS has achieved excellent energy efficiency results, equaling the best results of \$0.88 per square foot per year reported by member districts of the Council of Great City Schools.

FINDING 4-9

MPS has a record of persistently pursuing energy conservation opportunities and saving large sums on energy expenses when compared to most other school districts in the United States. Opportunities for further improvements remain, as new energy technologies become available.

The consulting team has worked with a number of school districts that have operated wind generator towers, one with thermal heat pump installations, and another with a solar panel installation in their parking lot. Solar and wind installations turn renters into generator-owners who can engage in net-metering with their electric utility companies. Groundwater heat pumps offer the most efficient heating and cooling because groundwater remains at the same caloric content throughout the year, whereas outdoor air temperature fluctuates drastically in most parts of the globe.

In California, Eastside Union High School District operates potentially the largest school district solar energy project in the nation. Most of the solar panels are in the form of carport-type roofs in the school parking lots (**Exhibit 4-20**). Its annual savings are calculated to be the equivalent of planting 726 acres of pine forest.¹⁴

¹⁴ <https://www.esuhd.org/Community/Facilities/Environment/Energy/index.html>

Exhibit 4-20
Solar Panels as Parking Lot Shade



Source: <https://engieservices.us/success-stories/success-story-east-side-union-high-school-district/>

In Oklahoma, Drummond Public Schools operates a wind farm that generates supplemental electricity. Rather than the large-paddled windmill style, this wind farm has small propellers attached to equally small generators (**Exhibit 4-21**). DPS essentially sells the excess electricity back to the utility company and receives a billing credit. Based on data from the utility company, over the course of a year, Drummond saves approximately 22 percent in electricity.

Exhibit 4-21
The Wind Farm Installation at DPS



Source: Prismatic Services, August 2018

Employing energy sources that are not provided in metered fashion by a utility company (e.g., solar, wind, or hydro) is almost always a best practice. It is cost-effective and efficient.

RECOMMENDATION

Pursue new and improved energy conservation opportunities.

MPS should remain committed to its pursuit of new and improved energy conservation opportunities. Wind, solar, and groundwater heat pumps are perhaps the most prominent avenues MPS has not yet pursued. For many school districts, it is now the time to look at alternatives to renting electricity.

FISCAL IMPACT

This recommendation can be implemented with existing resources. Tax credits and other incentives may reduce the installation costs substantially, and possibly eliminate them.¹⁵

D. SAFETY AND SECURITY

School districts are expected to provide a safe and secure environment for their students, visitors, 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 the Federal Emergency Management Agency, 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**, 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 4-22**).

¹⁵ <https://www.solar-electric.com/learning-center/solar-energy-tax-incentives.html>

Exhibit 4-22
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 (OSSI) 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. The number of earthquake incidents often has exceeded the number in California, but Oklahoma earthquakes have been generally less severe. 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.¹⁶

As shown in **Exhibit 4-23**, 92 percent of staff feel prepared to appropriately respond in a crisis or emergency. Likewise, 92 percent of parents report that their child feels safe and secure at school and 88 percent of students reported they feel safe and secure in school.

¹⁶ [https://www.ok.gov/OEM/Programs & Services/Preparedness/Preparedness - Earthquakes.html](https://www.ok.gov/OEM/Programs%20&%20Services/Preparedness/Preparedness%20-%20Earthquakes.html)

Exhibit 4-23
MPS 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.	19%	73%	3%	4%	0%
Parent	My child feels safe and secure at school.	40%	52%	5%	2%	0%
Student	I feel safe and secure at school.	36%	52%	5%	6%	1%

Source: Prismatic Survey Results, March 2023

While being generally highly complimentary, the community input focus group survey raised some concerns about security and safety:

- “There are lots of unlocked doors remaining. If you want to get in, you can. And the kids can get out. Some would prefer to always have to be buzzed in”.
- “Why isn’t there a fence along the highway by the gym? The track is close to that”.
- “Mowing shouldn’t be happening when there are children on the playground”.

FINDING 4-10

The district has demonstrated its commitment to safety by employing multiple personnel focused on safety and security. Both staff members are highly qualified and committed to their work.

MPS employs a full-time School Resource Officer (SRO). In addition to leading all security initiatives, the SRO also does home visits to troubled students and their families. The SRO has been full-time at MPS for over ten years, with many additional years of prior experience at other schools. He is also a member of the local police department with the rank of Lieutenant. He is currently spearheading the conversion of all MPS locks from conventional keys to electronic key cards. He has overseen the addition of over 100 high-resolution cameras to an already existing camera inventory of 48.

MPS also employs a part-time School Safety Officer (SSO) who also serves as a coach, specializing in archery. He is also a Sheriff’s Deputy, an Emergency Medical Responder (EMR), and a lifeguard. He has three additional EMRs in the district working with him. His main assignments consist of surveillance and elimination of safety concerns, including bullying. The SRO and SSO collaborate whenever the occasion is appropriate. The SRO’s and SSO’s salaries are paid entirely by MPS.

COMMENDATION

MPS shows its commitment to security and safety by employing one full-time SRO and one part-time SSO, to address directly concerns about school security, safety, and student behavior.

FINDING 4-11

The district has recently embarked on several new safety initiatives. This demonstrates the commitment of leadership to ongoing safety/security improvements.

At the time of the onsite visit, MPS has recently completed or was in the process of several safety improvements. This includes:

- increasing the number of campus cameras from 48 to 130. The newer cameras are high-resolution devices;
- installing sensor devices in all toilets to sound an alarm when smoking or vaping occurs; and
- converting conventional door locks to electronic key cards.

Cameras and lavatory sensors are monitored by the SRO/SSO. These security and safety improvements continue the steady progress achieved by MPS in making the school experience more secure and safe for students, visitors, and staff.

COMMENDATION

MPS is commended for its continuing commitment to improving the security and safety of the school campus.

FINDING 4-12

The district has had a consultant from Oregon to assess security and safety. However, MPS has not yet received services from Oklahoma School Security Institute (OSSI).

The work of the Oregon consultant focused chiefly on processes and not physical features. The consultant's advice has resulted in the recent implementation of the previously described initiatives.

The OSSI has not yet done an evaluation of MPS. OSSI assessments cost the district nothing. The Institute has specialists who can recommend the placement of "hardening" features and other physical configurations to make campus boundaries more secure and improve the security and safety of student delivery and pick-up traffic.

RECOMMENDATION

Request that OSSI complete a comprehensive security and safety review.

Based on comments received during the consulting team's site visit, the following items should be included in the OSSI review:

1. Total perimeter fencing to restrict community access during school hours.

2. Re-routing of cars for drop off and pick up for better traffic flow and security/safety.
3. Closing of 100 Maryetta Way during school hours or permanently.
4. Scheduling mowing only when students are not nearby.
5. Locking all exterior school doors and making them accessible only via electronic key cards. The main entry should be the only location accessible to visitors but only after screening.
6. Installation of a fence along the highway by the activity center.
7. Any other topics/issues that have been under discussion.

The OSSI report should be presented to a task force formed by the MPS superintendent, and a workshop should be arranged with OSSI and the task force to discuss implementation measures and recommendation options and alternatives. The superintendent should request the OSSI information on grant opportunities to support the cost of implementing the recommended actions

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 Maryetta Public Schools (MPS). 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 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 childcare institutions.

MPS participates in the NSLP, the SBP, the After School Dinner Program, 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.

In typical school meal programs, 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. MPS has been approved to serve all student meals for free under the Community Eligibility Provision (CEP). School districts do not receive federal reimbursement support for teacher or guest meals. **Exhibit 5-1** shows the applicable 2021-22 and 2022-23 federal reimbursement rates for meals served under the CEP program. MPS also receives an additional \$0.08 per meal for meeting the meal pattern requirements.

Exhibit 5-1
School Meals: Federal per Meal CEP Reimbursement Rates
Over Time

Meal Type	Reimbursement Rates	
	2021-22	2022-23
Breakfast	\$2.35	\$2.67
Lunch ¹	\$3.68	\$4.35
Supper	\$3.66	\$3.93

Source: <https://www.fns.usda.gov/school-meals/rates-reimbursement>

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 campus 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 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. In the last year, 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.

Effective in February 2022, USDA issued temporary standards for three items which will supersede the *HHFKA* requirements for 2022-23 and 2023-24. They are:

- Milk – can offer flavored low-fat one percent milk in addition to non-fat flavored and non-fat or low-fat unflavored;
- Grains – items must be at least 80 percent whole grain-rich; and,
- Sodium – will remain at Target 1 for 2022-23 and will be reduced by 10 percent for lunch in 2023-24.

Meeting nutritional requirements continues to be challenging for school meal program operators while the USDA responds to changing viewpoints on optimal nutritional targets for meals in schools.

¹ Includes Performance Incentive of \$0.07 in 2020-21 and \$0.08 in 2022-23

Exhibit 5-2
Summary of Nutritional Requirements for Breakfast and Lunch

	Breakfast		Lunch	
Fruits 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 is granted.		All must be whole grain-rich unless exemption is 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*

Exhibit 5-3 provides photos of a sampling of MPS trays selected by students during the onsite period. Trays for breakfast, lunch, and supper are shown.

Exhibit 5-3
Breakfast, Lunch, and Supper Sample Trays

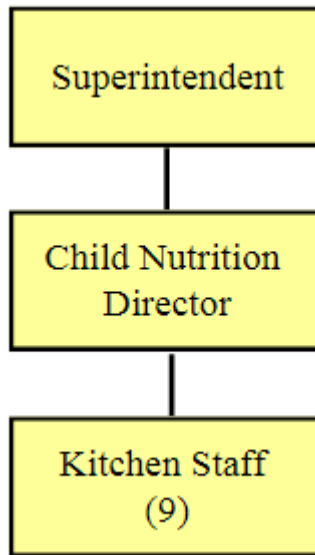




Source: Prismatic, March 2023

Exhibit 5-4 shows the organization of staff within the MPS child nutrition department. All employees report to the director who reports to the superintendent.

**Exhibit 5-4
MPS Child Nutrition Organization**



Source: Created by Prismatic, March 2023

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MPS functional areas. **Exhibit 5-5** provides the results for child nutrition. The majority, 85 percent, gave child nutrition an A or B.

Exhibit 5-5
Staff Survey Results Regarding Child Nutrition

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Child Nutrition	43%	42%	10%	1%	0%	3%

Source: Prismatic Survey Results, March 2023

FINDING 5-1

The child nutrition program is not adequately managing its staff. It has not established standards to guide the allocation of labor hours. The current meals per labor hour (MPLH) are below industry standards and OK SDE guidelines. The cafeteria manager does not calculate MPLH and therefore does not know the MPLH for the MPS child nutrition operation.

The district is not using the Oklahoma State Department of Education (SDE) recommended staffing guidelines 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 cafeteria 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 and supper equate to one meal equivalent;
- two breakfasts equate to one meal equivalent;
- three snacks equate to one meal equivalent; and
- à la carte sales of \$4.75 (2022-23 rates) equate to one meal equivalent.

The most common means of measuring employee productivity in child nutrition is the meals per labor hour (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 meal equivalents. 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 Maryetta to be using largely a conventional system of food preparation.

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: OK SDE Child Nutrition Manual Compliance Section, July 2021

Exhibit 5-7 shows the 2021-22 monthly MPLH for the Maryetta cafeteria. Productivity (MPLH) was lower than the recommended standards, and labor hours were in excess of SDE recommendations.

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.

Exhibit 5-7
Maryetta Cafeteria Meals per Labor Hour
2021-22

Month	Lunches Served	Breakfasts Served	Meal Equivalents per Month	School Days Per Month	Daily Meal Equiv.	Daily Labor Hours	MPLH
August	11,863	11,716	20,155	19	1,062	73.5	14.4
September	12,884	12,272	21,226	20	1,061	73.5	14.4
October	11,214	10,224	18,532	18	1,029	73.5	14.0
November	10,238	9,941	17,939	17	1,055	73.5	14.4
December	7,187	7,026	12,713	12	1,059	73.5	14.4
January	10,401	10,074	18,386	19	968	73.5	13.1
February	7,628	7,507	13,259	13	1,020	73.5	13.9
March	10,495	10,359	18,200	17	1,071	73.5	14.6
April	12,263	12,178	21,241	20	1,062	73.5	14.4
May	2,369	2,321	3,769	4	942	73.5	12.8
Total	96,542	93,618	165,420	159	10,329	735	140.4
Average	9,654	9,362	16,542	26	1,032	73.5	14.0

Source: MPS and Prismatic calculations, March 2023

Costs for labor and benefits are a major expenditure for child nutrition programs. To maintain a sound financial position, goals for staffing are established based upon industry standards. SDE has established guidelines for districts to calculate meal equivalents and assign labor hours. MPLH is calculated and evaluated on a regular basis to ensure that a kitchen has adequate labor hours but is not overstaffed.

RECOMMENDATION

Staff the kitchen using industry staffing standards based upon MPLH calculations.

There are two ways to increase the productivity rate and produce more meals per hour of paid labor:

1. decrease the number of labor hours – the number of staff hours worked daily can be reduced by adjusting work schedules; or
2. increase the number of meal equivalents – implement measures to increase participation and à la carte sales. MPS offers all meals at no cost to students and staff so daily participation is high. At 88 percent there is little opportunity to increase lunch participation. Breakfast participation is 79 percent, so there is some opportunity to increase breakfast participation. Since Maryetta does not have an à la carte program available to students or staff, offering à la carte choices is another approach that can help increase meal equivalents.

The cafeteria supervisor should reduce the labor hours for some cooks so that productivity is in line with SDE staffing standards. This recommendation was also noted in the 2013 report. This

measure provides an opportunity to establish two tiers of staff based upon duties such as cook/baker at 8.0 hours and other staff at 6-7 hours. This would eliminate the current practice of staff rotating monthly between all positions.

FISCAL IMPACT

There is an excess of approximately four labor hours per day at MPS. The consulting team recommends that labor hours for four cooks be reduced by one hour per day, resulting in each of them working seven hours a day. This will result in a savings of \$10,168 per year. (\$15.50/hour (salary + fringe) x 4 x 164 days).

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Reduce kitchen staffing hours.	\$10,168	\$10,168	\$10,168	\$10,168	\$10,168

FINDING 5-2

MPS is not claiming all possible sources of revenue for the child nutrition program. A snack of fresh fruit is offered daily but is not claimed for reimbursement.

MPS serves a snack of fresh fruit daily at 2:00 p.m. to 270 students for three-year-olds through 1st grade. The consulting team observed these snacks are not included in the monthly claim for reimbursement. The supervisor stated in her interview that she does not claim this program for reimbursement. The average daily cost for the fruit is approximately \$40.00 or \$0.15 per student. Annually, this program costs approximately \$7,200 per school year.

The Fresh Fruit and Vegetable Program (FFVP) is a federally-assisted program providing free fresh fruits and vegetables to children during the school day. The goal of FFVP is to introduce children to fresh fruits and vegetables, to include new and different varieties, and to increase overall acceptance and consumption of fresh, unprocessed produce among children. Eligible schools must submit an FFVP application. Schools receive \$50-\$75 per student for each school year. The exact amount is determined by the state agency and is based on the total funds allocated to the state.

RECOMMENDATION

Ensure that all food/meals served are claimed for reimbursement.

The program supervisor should request an FFVP application for the 2023-24 school year. With the assistance of the treasurer, the application should be completed and submitted for approval prior to the new school year. The supervisor should prepare a menu that will provide a wide variety of fresh fruit and vegetables.

FISCAL IMPACT

Based on historical data of schools receiving \$50-\$75 per student per school year MPS would receive \$13,500-\$20,250 for 270 students. The fiscal impact of receiving this reimbursement

after subtracting the current food cost of \$7,200 would be a gain of \$6,300-\$13,050. The consulting team has estimated that MPS will have a net revenue of \$6,300 per school year.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Submit claim for reimbursement for fresh fruit snacks.	\$6,300	\$6,300	\$6,300	\$6,300	\$6,300

FINDING 5-3

The child nutrition supervisor does not receive any financial data about the program and lacks knowledge about its financial status. The treasurer prepares some expenditure and revenue reports, but they are not shared with the supervisor. There are no reports showing participation, MPLH, or menu costing. Lacking these, the supervisor does not have the necessary tools to monitor the program and achieve optimal financial performance. Claims for reimbursement are prepared and submitted by the treasurer. Traditionally, the child nutrition director performs this task.

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*, 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.”⁴ 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 subsidies, which means reduced funds for other areas. The only way to ensure a fiscally solvent program is to prepare reports and then use this information for making decisions.

Exhibit 5-8 shows a listing of reports typically used in school districts to monitor child nutrition operations. 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*⁵ and *Financial Management Information System*⁶ both from the ICN.

⁴ Martin, J. (2008). *Managing child nutrition programs: Leadership for excellence* (2nd ed.). Sudbury, Mass.: Jones and Bartlett.

⁵ Institute of Child Nutrition. (2017). *Financial management: A course for school nutrition directors* (2nd Ed). University, MS: Author

⁶ Institute of Child Nutrition (20145). *ICN financial management information system* (2nd ed). University, MS: Author.

Exhibit 5-8
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

ICN recommends preparing and distributing site-level performance reports in their class *Financial Management: A Course for School Nutrition Directors*.⁷ 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.⁸

One cafeteria-level report distributed by another school district is shown in **Exhibit 5-9**. 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.

⁷ Institute of Child Nutrition. (2017). *Financial management: A course for school nutrition directors* (2nd Ed). University, MS: Author.

⁸ http://schoolnutrition.org/uploadedFiles/4_Certification_Education_and_Professional_development/3_Keys_to_Excellence/Keys%20to%20Excellence%20Standards%202015-2016.pdf

**Exhibit 5-9
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	
<i>Total Food Usage:</i>		\$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	
<i>Total Supply Usage:</i>		\$913.00	\$6,618.00
<i>Labor Costs</i>			
School Staff		\$8,186.19	
Temporary Labor		\$0.00	
<i>Total Labor:</i>		\$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	\$1.13
Labor	\$8,186.19	\$1.38	\$1.08
Overhead	(\$108.37)	(\$0.02)	\$1.19
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	\$1.13
Labor	\$67,638.24	\$1.37	\$1.08
Overhead	\$6,207.11	\$0.12	\$1.19
Total Cost	\$132,149.35	\$2.67	\$2.48

Source: Prismatic files, December 2013

RECOMMENDATION**Improve management of the child nutrition program by:**

- **preparing child nutrition financial reports that will provide meaningful data in a format that can be used for analysis and decision-making;**
- **providing the reports to the child nutrition supervisor and train her on how to interpret and analyze;**
- **training her on the preparation and submittal of claims; and**
- **assigning preparation of the reimbursement claim to the supervisor.**

The child nutrition supervisor should work with the treasurer to determine what data are needed to assess how well the program is doing. The department's software provider, Heartland School Solutions (Nutrikids) 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 and distributed. The supervisor and treasurer should meet monthly to evaluate the data and determine if changes are needed for program improvement. This process should be completed for use in the 2023-24 school year.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-4

The financial status of the child nutrition program is currently positive. However, historical data shows several recent years when the program operated at a loss.

Exhibit 5-10 shows the MPS child nutrition program revenues and expenditures for the past five years as well as the current year to date. The treasurer did not know the reason for the substantial increase in federal reimbursement in 2021-22. The OK SDE area consultant for MPS stated it was due to a USDA waiver during COVID-19 allowing all students to be claimed as free and reimbursed at the higher summer feeding rate. The area consultant also stated current reimbursement has returned to the normal rate. The consulting team surmises the additional reimbursement from several years might have been received and recorded during 2021-22.

Exhibit 5-10
MPS Child Nutrition Revenues and Expenditures Over Time

	2017-18	2018-19	2019-20	2020-21	2021-22	YTD ⁹ 2022-23
Revenues						
District Sources	\$27,668	\$58,066	\$44,662	\$51,628	\$49,268	\$4619
State Sources	\$4,602	\$4,187	\$4,832	\$5,079	\$6,158	\$2477
Federal Sources	\$434,719	\$418,305	\$523,169	\$533,846	\$846,699	\$485,724
Total Revenues	\$466,989	\$480,558	\$572,663	\$590,553	\$902,125	\$492,819
Expenses						
Salaries and Benefits	\$215,840	\$223,880	\$272,711	\$232,371	\$232,097	\$175,525
Food and Supplies	\$261,921	\$297,252	\$290,665	\$317,694	\$402,519	\$278,279
Other Expenses	\$31,959	\$13,403	\$21,149	\$18,371	\$36,127	\$13,422
Total Expenses	\$509,720	\$534,535	\$584,525	\$568,436	\$670,743	\$467,226
Revenues - Expenses	(\$42,731)	(\$53,977)	(\$11,862)	\$22,117	\$231,382	\$25,593

Source: SDE, School District Revenue and Expenditure Reports 2018-23

Note: Totals may not reconcile completely due to rounding

When a child nutrition program loses money every year, in addition to requiring support from the general fund, it does not build up a fund balance. Ending the year with a fund balance makes it possible to pay for beginning of year expenses before federal reimbursement is received and ensures it can pay cost increases in categories such as food and labor/benefits. Industry experts advise maintaining a two- to three-month operating balance. USDA regulations limit net cash resources to an amount that does not exceed three months' average expenditures.

COMMENDATION

The MPS child nutrition program is currently operating in a financially net positive manner.

Moving forward, the district should continue to closely monitor the financial status to ensure the program maintains a positive position.

FINDING 5-5

The district is participating in the Community Eligibility Program (CEP). This USDA initiative was established as a part of the *HHFKA* and streamlines school meal operations by allowing schools in high-poverty areas to offer breakfast and lunch to all students at no charge. As a result, meal participation rates are higher than industry standards.

One of the key simplifications of the initiative is that schools no longer collect meal applications on an annual basis. This reduces paperwork for parents, and schools do not have the administrative burden of processing applications. Another benefit is that programs no longer

⁹ 7/1/2022-3/22/2023

need to 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. MPS has seen similar results with breakfast participation at 79 percent and lunch at 88 percent.

COMMENDATION

Maryetta has implemented the Community Eligibility Program (CEP), resulting in high participation levels for breakfast and lunch, and eliminating the need for program applications and costs to parents for student meals.

FINDING 5-6

The MPS lunch menus are not optimal. There are no choices other than on the fruit/vegetable bar. Menus and portion sizes are not customized by age group. There is no self-serve except at the fruit/vegetable bar. There is no student involvement used to help develop these menus.

Exhibit 5-11 shows best practice rates for lunch. These benchmarks are the recommended percentage of participation of student enrollment. In addition to the HUSSC goals, another expert in the industry recommends goals for lunch participation as noted.

Exhibit 5-11
Best Practice Lunch Participation Rates

School Level	Best Practice HUSSC	Best Practice Pannell-Martin
Elementary	75%	70%
Middle	75%	60%
High	65%	50%

Source: HealthierUS School Challenge Criteria, 2014; Pannell-Martin, School Foodservice Management, 4th Edition, 2000¹⁰

At 88 percent, MPS lunch participation is higher than industry best practices. There are two factors contributing to this success. First, all students receive meals at no cost as a result of MPS participating in the CEP. Second, the district requires participation. The 2022-23 Student Handbook states, “Since we do not have facilities for students to bring their own food, all students must eat meals provided by the school cafeteria.”

Student perceptions about the food served in the cafeteria are shown in **Exhibit 5-12**. As noted, only 35 percent agree that they like the food. Another one-third have no opinion, and the remaining one-third do not like the food served. These responses indicate there is room to

¹⁰ Pannell-Martin, D. (2000). *School food and nutrition management for the 21st century* (4th ed.). School Nutrition Association.

improve the program and strive to better meet student tastes and expectations.

Exhibit 5-12
Student Survey Results Regarding Child Nutrition

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I like the food served in the cafeteria.	5%	30%	35%	18%	12%

Source: Prismatic Survey Results, March 2023

The consulting team found several practices that are contributing to the low response of students who like the food:

- The same menu is used for all grade levels. Different age groups have different food preferences. Successful menus accommodate the more developed palates of older students. After eating the same menu in elementary school, older students are more prone to menu burnout.
- Menus are the same each month. If changes are made, they are based on inventory to be used.
- There is only one entrée offered each day.
- Some entrees are served in nontraditional ways. On one day of observations, tacos were served deconstructed (**Exhibit 5-13**). Students are accustomed to receiving them assembled as presented in restaurants and at home.

Exhibit 5-13
Example of Unusual Entrée Presentation



Source: Prismatic, March 2023

- There is no ability for students to select what items they want on the line through a self-serve process. Servers ask every student, for each item offered, whether they would like it to be put on their trays. When a student selects from several options, they feel a sense of control and are more inclined to consume what they have selected. **Exhibit 5-14** shows an example of how proportioned items can be presented.

Exhibit 5-14
Example of Pre-Portioned Vegetable Servings at Another School



Source: Prismatic, January 2022

- There are no à la carte items available for sale. An à la carte program has the potential of increased revenue and higher student satisfaction and participation especially among the older students.
- There are no pre-wrapped grab-and-go items such as hot and cold sandwiches, wraps, burritos, prepackaged meal salads, and pizza in boxes which are popular with secondary students.
- Students are not being asked to provide input on menus and the overall meals program.

The School Nutrition Association (SNA)¹¹ recommends several best practices regarding student feedback in its self-assessment tool, *Keys to Excellence*:

- Student preferences are considered when planning menus.
- School nutrition personnel solicit feedback from students about meal choices and report feedback to the manager.
- Students are included in panels and/or committees used to select products and/or plan menus.
- 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).

¹¹ <http://www.schoolnutrition.org/Content.aspx?id=20206>

SNA's 2015 *School Nutrition Trends Report* discussed several programs or initiatives to promote healthier school food choices. They stated the most prevalent program implemented is student taste tests and sampling, as cited by nearly 75 percent of districts overall.

In *School Food & Nutrition Service Management*,¹² Pannell-Martin recommends getting feedback from students, as it is more definite than using production records to determine student preferences. She goes on to indicate the following as good techniques for gathering feedback from students:

- formal questionnaires and surveys;
- informal interviews;
- small-group discussions;
- suggestion boxes;
- asking for immediate feedback using texts from mobile devices; and
- tasting parties and sampling.

RECOMMENDATION

Improve lunch menus by:

- **developing lunch menus by age groups utilizing student advisory groups;**
- **offering a variety of choices and incorporating self-serve for these options; and**
- **adjusting portions to follow USDA meal pattern guidelines.**

The director should organize an elementary and a secondary student advisory group to provide input on the menus currently being used and to taste new food items and recipes. Feedback from these meetings should be used to revamp menus. The director should then develop two menus, one elementary and one secondary. Menu planning should include multiple entrée and side choices at all grade levels as well as pre-wrapped grab-and-go items at the secondary level.

In addition, the director should:

- develop cycle menus that account for seasonal variety;
- develop menu choices that can be pre-portioned on the serving line so students can self-select items for their meals. Staff should be used to supply the lines instead of asking students what

¹² Pannell-Martin, D., & Boettger, J. (2014). *School Food and Nutrition Management for the 21st Century* (6th ed.). School Nutrition Association

items they want. Meal service lines will need to be reorganized to accommodate pre-portioned items and à la carte items;

- make à la carte items available for purchase by secondary students; and
- develop marketing and communication materials outlining the changes for students, teachers, and parents. The manager should assess the results of changes on a regular basis and make improvements as needed.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-7

The breakfast menus lack choices other than those available on the fruit/vegetable bar. There is no self-serve except at the fruit/vegetable bar.

Exhibit 5-15 shows best practice rates for breakfast. These benchmarks are the recommended percentage of participation of student enrollment.

**Exhibit 5-15
Best Practice Breakfast Participation Rates**

School Level	Best Practice
Elementary	35%
Middle	35%
High	25%

Source: Healthier US School Challenge Criteria, 2014

As with lunch, MPS breakfast participation at 79 percent is higher than industry best practices. However, students’ perceptions about the food served in the cafeteria are not highly positive. As shown in **Exhibit 5-16**, only 35 percent of middle school students indicated they like food served in the cafeteria. Another 59 percent of middle school students either have no opinion or disagree the cafeteria serves a good variety of food at breakfast.

**Exhibit 5-16
Student Survey Results Regarding Child Nutrition**

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I like the food served in the cafeteria.	5%	30%	35%	18%	12%
The cafeteria serves a good variety of food for breakfast.	7%	34%	30%	17%	12%

Source: Prismatic Survey Results, March 2023

The consulting team found several practices in MPS that are likely contributing to the low level of student satisfaction with breakfast:

- Only one entrée is offered daily - no choices.
- Cold cereal is offered only once per month. Observations in other districts noted this is a favorite among elementary students and what they traditionally eat at home.
- Yogurt, another student favorite, is offered only once in the 4-week cycle.
- Only one flavor of juice is offered per day.
- Eggs are on the menu six times in one month – three times as scrambled and three times as hard boiled. This item is not traditionally a student favorite.

A standard menu is a no-choice menu and was the most common until the 1980s when menus with choices were introduced in many school districts. It is impossible to plan one menu that all students will like. Today's students have more exposure to food options and have high expectations about food quality and menu variety. Older students particularly object to having someone else decide what they will eat. Providing variety keeps students satisfied and interested.

A choice menu takes careful planning and is more difficult to produce. However, it has several advantages:

- the number of meals served usually increases;
- plate waste decreases;
- students complain less;
- there is greater opportunity to meet student's nutritional requirements; and
- more variety can be offered.

RECOMMENDATION

Develop breakfast menus that include a variety of choices and incorporate self-serve for these options.

The child nutrition director should adjust breakfast menus to provide a choice of fresh as well as canned fruit daily along with assorted juices. These items can be positioned on the existing fruit bar, which is currently only half full at breakfast (**Exhibit 5-17**).

Exhibit 5-17
Example Current Breakfast Offerings on the Fruit Bar



Source: Prismatic, March 2023

The revised breakfast menus should also offer yogurt, a variety of cold cereal, and a hot entrée on the line as daily choices. Finally, MPS should implement self-serve for all breakfast items.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-8

The district has implemented fruit/vegetable bars, which is commendable. However, they are not being properly used. This finding was also noted in the 2013 Review.

Fruit and vegetable components are put on the plate at the serving line. Students then self-serve additional fruits and vegetables, as extras, from the bar. The bar also contains protein items.

Exhibit 5-18 shows the options on the bar at two different lunch meals.

Exhibit 5-18
Options on the Fruit/Vegetable Bar



Source: Prismatic, March 2023

When students come through the serving line, they are each asked if they would like the various food components offered. They can refuse an item but must take the required number of components for the meal to qualify as reimbursable. A kitchen staff person monitors each tray to ensure it contains the required components. The student then leaves the serving line and enters the cafeteria where they can select items from the fruit/vegetable bar. Since they already have a tray that contains the required number of components, any items selected from the bar are an extra item. Only 3- and 4-year-olds are not allowed to select from the bars.

On the first day the consulting team observed, at breakfast students were offered grapes and orange juice on the serving line. The bar contained strawberries, cantaloupe, watermelon, and oranges. On the second day, the breakfast line had bananas and apple juice and the bar offerings were watermelon, strawberries, and oranges. All fruit and juice choices offered on the line could have been placed on the bar for students to self-select.

On the first day of lunch observations, students were offered cooked broccoli and peaches. The bar contained cottage cheese, diced ham, scallions, diced bell peppers, cucumber, tomatoes, and lettuce. On the second day, the line had cooked corn and strawberries. The bar choices were oranges, bananas, diced ham, black olives, jalapenos, diced onions, tomatoes, and lettuce. With the exception of the cooked broccoli and corn, all other fruit items could have been placed on the bar.

Across both days, the consulting team observed approximately 75 percent of students making selections from the bars. The consulting team also observed a considerable amount of fresh fruit and vegetables in the plate waste containers (**Exhibit 5-19**). Putting items on the tray on the serving line frequently results in increased plate waste. When students self-select from choices at a bar, they are less likely to take items they will not eat, reducing plate waste.

Exhibit 5-19 Breakfast Plate Waste on Two Days



Source: Prismatic, March 2023

The district's current practice of allowing students to select extra fruit and vegetables as well as additional protein items results in unnecessary and excessive food costs. Additional labor costs are also incurred with by serving fruits and vegetables in two places. Positioning fruit, juice, and vegetables on the serving line as well as on the bars results in decreased efficiency. Staff labor could be reduced if the bar is the sole source of cold fruit and vegetable components. Fewer staff would be required on the serving line and preparation of additional food items could be reduced. Furthermore, staff on the line would not be tasked with monitoring whether each tray contains the required number of components.

The USDA encourages the use of salad bars in the breakfast and lunch program because they are effective at increasing access to and consumption of a variety of fruits and vegetables. In addition to the nutritional benefits, fruit and vegetable bars may lower plate waste by allowing students to take only items they will eat.

In a discussion about food and beverage trends, the School Nutrition Association (SNA) 2014 *Operations Report* noted that 63 percent of all schools were using salad or produce bars. The SNA's *Keys to Excellence* recommends concepts such as self-service and food bars as a best practice.

RECOMMENDATION

Incorporate the fruit/vegetable bar as part of the reimbursable meal.

To do this, the district should discontinue the practice of serving fresh fruit and vegetables on the serving line and instead offer these items on the fruit and vegetable bars. The bars should be positioned so students choose items after the serving line and prior to the POS. MPS could post visual reminders such as posters to help students determine how to select food from the bar using appropriately sized serving utensils. The cashier at the POS will be responsible for ensuring all plates contain the required components.

This recommendation will require several changes to current practices. Daily menus will no longer state a specific fresh fruit, fresh vegetable, or juice at breakfast. Instead, the menu would note the availability of a fruit and vegetable bar. Only hot vegetables would be listed on the lunch menu. As with breakfast, the lunch menu will state the availability of a fruit and vegetable bar. Serving lines will contain the protein, grain, and milk components. No protein items will be available on the bars.

FISCAL IMPACT

It is difficult to estimate food and labor cost savings. Most likely, staff would not be reduced as a result of this recommendation. If each student selected one less fruit or vegetable item, the consulting team estimates an average net savings of \$0.15 per serving per day. With an average of 1,115 breakfasts and lunches served daily, the district will save \$27,429 over the course of a school year ($\$0.15 \times 1,115 \text{ meals} \times 164 \text{ serving days}$).

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Discontinue the offering of fresh fruit and vegetables on the serving line.	\$27,429	\$27,429	\$27,429	\$27,429	\$27,429

FINDING 5-9

The district has implemented Breakfast in the Classroom (BIC) for several grades. While this is commendable, improvements could be made for efficiency and cost-effectiveness.

MPS began using the BIC serving model during COVID-19. Currently, MPS serves BIC to 3- and 4-year-olds and middle school students. Before COVID-19, middle school students were able to get breakfast after the bell (commonly known as Second Chance Breakfast). The BIC containers are left at the middle school for a period of time after school starts, effectively offering them as a Second Chance Breakfast. This practice results in food not being served at optimal temperatures and is not a good food sanitation practice.

The menu for BIC is the same as the regular breakfast menu. All items except for milk are put in green plastic, reusable, hinged clamshells. These are packed into wagons and delivered to the classrooms (**Exhibit 5-20**). After meal service, the containers are returned to the lunchroom where unopened ones are available for sharing. Opened containers are taken to the dish room where they are washed and then placed on lunchroom tables to dry. The consulting team observed many containers were unopened and there is a considerable amount of plate waste. Mixing hot, cold, and room temperature items in one container results in optimal food temperatures not being maintained.

Exhibit 5-20 Maryetta BIC Meals



Source: Prismatic, March 2023

Offering BIC where meals are delivered to the classroom and students eat at their desks during the first 10–15 minutes of the school day, has proven to be one of the most effective strategies for increasing participation in the school breakfast program. FRAC (Food Research and Action Center) lists numerous benefits of this type of meal service: improved classroom performance and learning, improved concentration and alertness, increased meal participation, improved student nutrition, and a heightened sense of community. Reductions in tardiness, behavioral issues, absenteeism, and stigma are additional benefits.

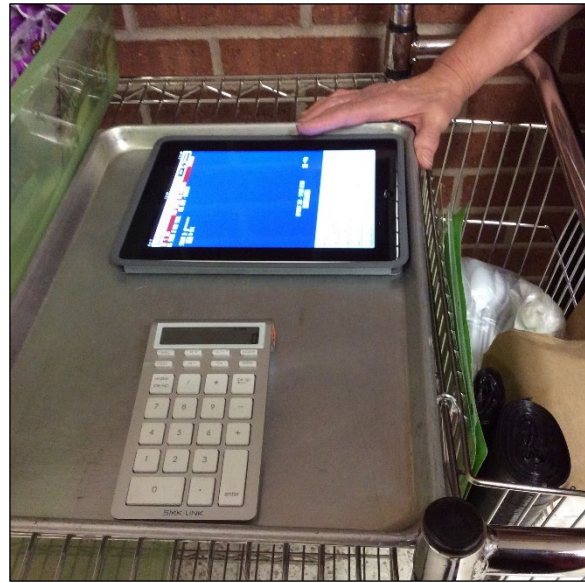
RECOMMENDATION

Improve the Breakfast in the Classroom program by creating a different menu and revamping the service process for middle school students.

The supervisor should research breakfast items that are prewrapped or have the capability to be prewrapped by staff. Insulated containers should be purchased to separately hold hot and cold items if the decision is made to serve hot items. The supervisor, teachers, and principal should discuss the most efficient service model for the 3- and 4-year-old students – whether self-serve or

a continuation of the current service model using the clam shells. Items for middle school students should be delivered to a hallway outside the classrooms. Service should be staffed by a cafeteria person who monitors the process and ensures students select the correct number of components (**Exhibit 5-21**). The POS should contain a pin pad and a tablet. Breakfast for middle school students should be served after the first bell.

Exhibit 5-21
Example of Breakfast in Hallway Self-Serve and POS



Source: Prismatic files, January 2015

FINDING 5-10

The program is not maximizing the use of available technology at the Point of Service (POS). Teachers use a paper roster at both breakfast and lunch to record students from their class that eat the meal.

After each meal service, the director tallies the total meals served and manually inputs this data onto the daily production record as well as on another form that records totals by day. At the end of the month, the director gives the form to the treasurer who completes and submits the claim for reimbursement to the SDE. The process could be simplified by having a cashier record the student into an automated POS at the moment they come through the line. The POS program would then total all meals at the end of meal service.

The consulting team observed inconsistencies in the process of recording names to the rosters. There is a roster for each class that is put on a table in the lunchroom near the exit from the kitchen. Teachers do not stand at the table during the entire time their class is served. They go back and forth between the serving line, the recording table, and the lunchroom. In contrast, in a

typical cafeteria, the cashier stands at the POS and records each student’s name as they exit the serving area. This procedure ensures accuracy that all students are recorded.

Food service programs must meet strict standards of accountability. Child nutrition staff members are more appropriate to ensure this accountability than teachers. Federal and state requirements dictate a great number of data reports be prepared to demonstrate accountability and fiscal responsibility. Some of the benefits of automation in a food service program are increased efficiency, better speed of data handling, and more timely report processing. POS terminals for school meal programs have been in use since the mid-80s and were one of the first areas to be automated. A wise use of technology and automated processes ensures that a district is meeting regulations and requirements and doing so in a cost-effective and efficient manner.

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 survey undertaken as part of this review, 75 percent of MPS students indicated on the student survey that they regularly use computers or other technology at school. Most school meal programs use an electronic meal counting system with direct student involvement at the secondary level as well as at the upper elementary level.

RECOMMENDATION

Implement a Point of Sale (POS) system in the cafeteria.

The child nutrition director, treasurer, and technology coordinator should determine the best software program to use at the POS so it will synchronize with the claim processing program and meal production records. The director and Technology coordinator should research appropriate pin pads and purchase them. The consulting team recommends the use of two, one on each side of the cashier station, to speed up the cashier process. The technology coordinator should set up the laptop and pin pads in the cafeteria and load them with the appropriate software.

Then, the director, principal, and superintendent should determine the appropriate grades to use the pin pads and what numbers the students will use to input on the pin pad. Options for the lower grades, such as student tickets or the cashier pulling up students by class on the POS, should be examined as to which is most appropriate and efficient. Training for teachers and students should be developed. The process and setup should be completed in time for the start of 2023-24.

FISCAL IMPACT

The district can use the existing laptop already assigned to child nutrition, so it will only have to purchase two pin pads. The consulting team estimates these can be purchased for approximately \$200 each. This would be a one-time purchase.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Purchase two pin pads for use at the POS.	(\$400)	\$0	\$0	\$0	\$0

FINDING 5-11

MPS has invested in Nutrikids software but is not maximizing that investment. The child nutrition director is not aware of all the available components of the software program or how to use them.

The director is not familiar with the various elements of the menu planning part of Nutrikids. She inputs her menus into Nutrikids and makes adjustments as needed to comply with USDA nutritional requirements, then prints them out. As part of menuing, Nutrikids has forecasting and costing modules; the director is not using those. The director would like to receive additional training on Nutrikids but does not know how to access that training.

Other available products in the Nutrikids suite of products include POS, ordering, inventory, and meal viewer, which enables menu sharing through a mobile app. This latter module would be beneficial to parents, students, and teachers who regularly participate in the meals program. The regular use of these modules would enable district staff to stop doing a number of current operations. Some of the benefits of automation in a child nutrition program are increased efficiency and speed of data handling, more timely report processing, more reliable information, and better services for parents.

Nutrikids offers an extensive online training program that is available to districts that pay the annual fee. MPS pays \$465 per year. There are extensive blogs discussing various issues a school meals program might experience with suggested solutions and resources.

RECOMMENDATION

Ensure the child nutrition director and at least one subordinate receive training on the available components of the Nutrikids program and implement applicable elements.

The treasurer and the director should contact Nutrikids to determine what services are included in their annual fee. They should determine if additional services would be valuable and upgrade their annual contract if necessary. The director should work with the technology coordinator to download the various products that would be beneficial to the CN program. The director and subordinate should then be trained on how to use these products. All these steps should be completed prior to the 2023-24 school year.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-12

The current MPS food purchasing process is inefficient. To place orders, vendors come to the kitchen or staff calls them on the phone. The process is not automated for the majority of items.

The process begins with MPS developing bids for food on a biannual basis. She prints them out, gives them to vendors by hand, and vendors return a handwritten copy with their price quotes.

There are two vendors who respond to the bids. Food price quotes have not been updated since the director began one year ago.

Food and supplies vary in the order and delivery process:

- At the beginning of the school year, staff estimates daily milk usage and provides it to the delivery person. The delivery person comes to the school on Mondays and Thursdays and leaves the amount of product he thinks the kitchen will need.
- Supplies and chemicals are ordered from another company that visits on Wednesdays. The director tells them what is needed, they input these items into a program on their laptop, and items are delivered on Fridays.
- The director develops a list of required food items based on menus and determines which of the two vendors has the lowest price. Each vendor comes to the kitchen on a weekly basis, gets the list of items to be ordered, and inputs the order into a program on their laptops. One vendor comes on Tuesdays for delivery on Thursdays and the other comes on Wednesdays for delivery on Fridays.
- Produce from the Department of Defense (DoD) is the only item ordered online by MPS, via the DoD website.

Placing orders via direct vendor contact is inefficient for both the district and the vendor. If the director placed orders online, the process could be completed at her convenience and could be completed in less time. The existing process also provides an opportunity for error as the actual order is input into the vendor's system by the vendor rather than the director.

RECOMMENDATION

Work with the various vendors to set up an automated order system for all cafeteria purchases.

The director and technology coordinator should meet with all the vendors on an individual basis to discuss how to set up online ordering. Ordering programs will need to be uploaded to the kitchen computer and the director and a subordinate will need to be trained on how to use these programs. Orders for milk should be determined by the director and given to the driver to ensure accuracy and prevent excessive inventory. An automated order system for purchases should be implemented for the 2023-24 school year.

FISCAL IMPACT

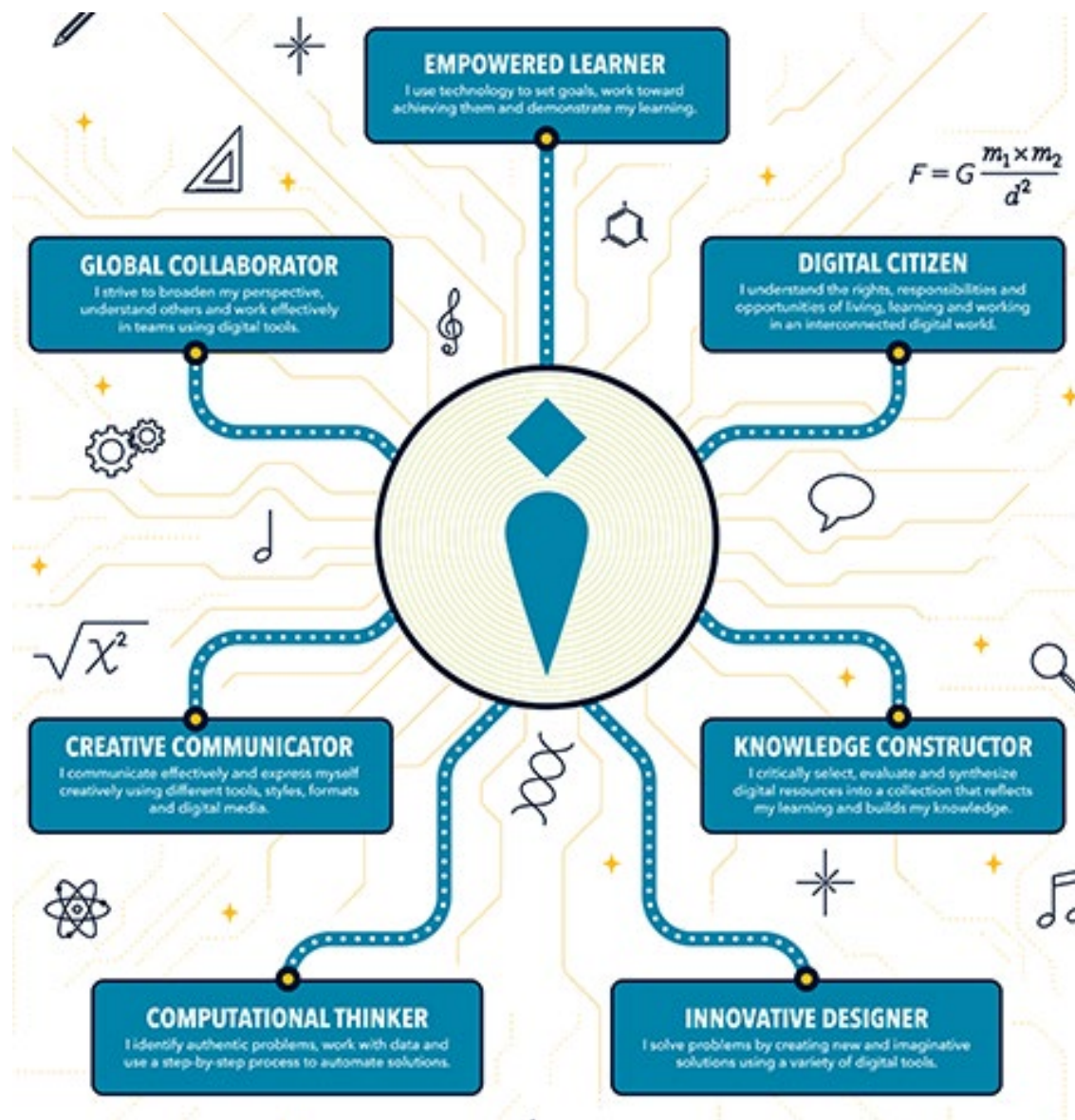
This recommendation can be implemented with existing resources.

B. TECHNOLOGY

The International Society for Technology in Education (ISTE) 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 to learn to transformative learning with technology. **Exhibit 5-22** displays the seven key standards for students to follow.

Exhibit 5-22
ISTE Standards for Students



Source: <https://www.iste.org/standards/for-students>

¹³ <https://www.iste.org/standards/for-students>

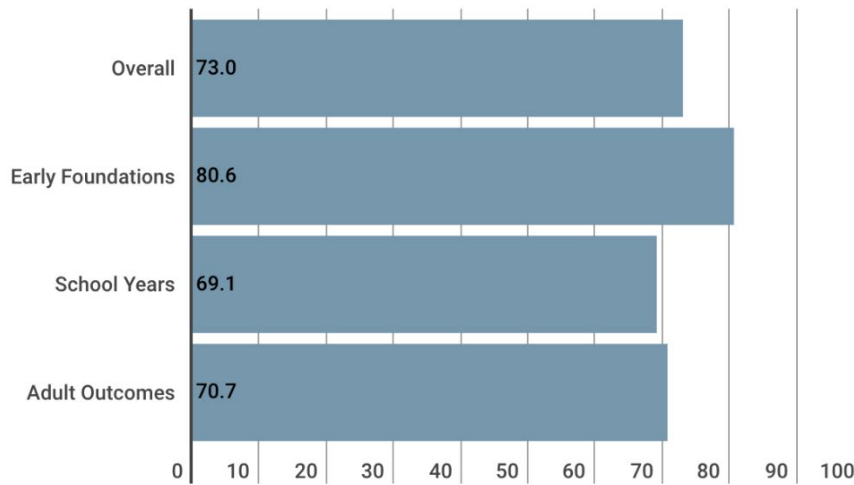
The implementation of technology in schools follows a broader societal trend – teens’ technology use is creeping up. In 2015, 29 percent of teens said they used a computer for homework, but by 2019, 59 percent of teens said the same, according to a media census from Common Sense Media.¹⁴ Since the 2010 report card, on which Oklahoma earned a C+, Oklahoma has worked to develop various aspects of education to improve these areas of concern and to emphasize the role of technology in digital citizenship. In 2019, there were 163 districts with a one-to-one program in which at least one grade at one school has 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 C¹⁶ (**Exhibit 5-23**). The purpose of this report card is to rank states on educational opportunities and performance.

¹⁴ https://www.common Sense Media.org/sites/default/files/uploads/research/census_researchreport.pdf

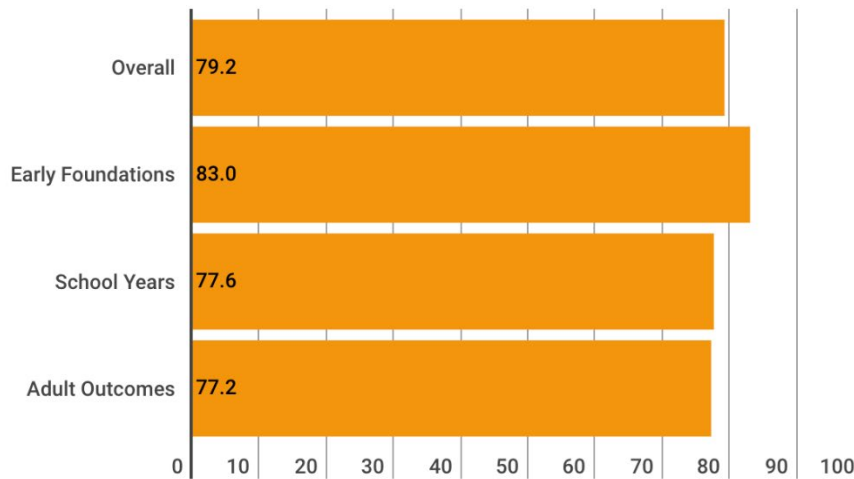
¹⁵ <https://sde.ok.gov/sites/default/files/documents/files/Fast%20Facts%20July%202019.pdf>

¹⁶ <https://www.edweek.org/ew/collections/quality-counts-2020/state-grades-on-chance-for-success-2020.html>

**Exhibit 5-23
Chance-for-Success Results by State**



U.S. Score



Source: <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

¹⁷ <http://www.parcconline.org/>

Cognia assessments for schools so they will be properly equipped and ready to administer the tests.¹⁸

Exhibit 5-24 illustrates the most current assessment technology specifications that districts in Oklahoma must meet as they administer assessments from 2019-20 forward. Unlike specifications provided in previous years, these technology guidelines are required. These specifications provide the levels of computer and network capacity that are required to provide a smooth testing experience for students. The Oklahoma 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.

¹⁸ <https://oklahoma.onlinehelp.cognia.org/>

Exhibit 5-24
Oklahoma Spring 2020 Assessment Technology Specifications

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 ^{19,20} (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) ²¹

Source : <https://oklahoma.onlinehelp.cognia.org/guides/>

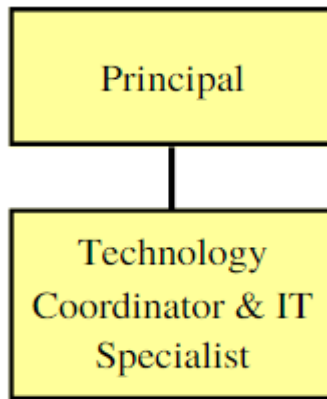
MPS has an Internet Use Policy in place, as well as backup system servers. The district has a full-time technology coordinator to handle maintenance and troubleshooting. MPS utilized E-rate funding for wireless and server updates. The district has electronic whiteboards or Smart TVs in place. Staff has received initial training on the whiteboards and Google Docs. The current technology organization for MPS is shown in **Exhibit 5-25**.

¹⁹ Text-to-speech on browsers is partially supported.

²⁰ As new operating system and browser versions are released, eMetric will update technology guidelines following successful compatibility testing.

²¹ Windows 10 S is not supported.

**Exhibit 5-25
Maryetta Technology Services Organizational Chart**



Source: Created by Prismatic, February 2023

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MPS functional areas. **Exhibit 5-26** provides the results for technology. More than half gave each technology area an A or B.

**Exhibit 5-26
Staff Survey Results Regarding Technology**

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Administrative technology	63%	22%	1%	0%	0%	13%
Instructional technology	69%	22%	1%	0%	0%	7%
Technology management and support	77%	18%	2%	0%	0%	3%

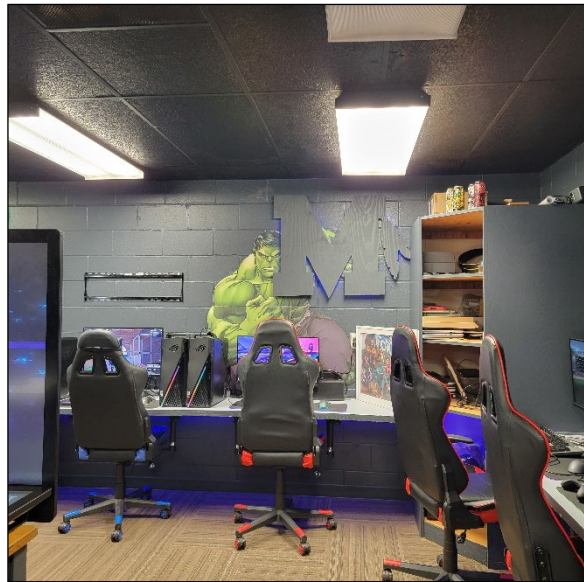
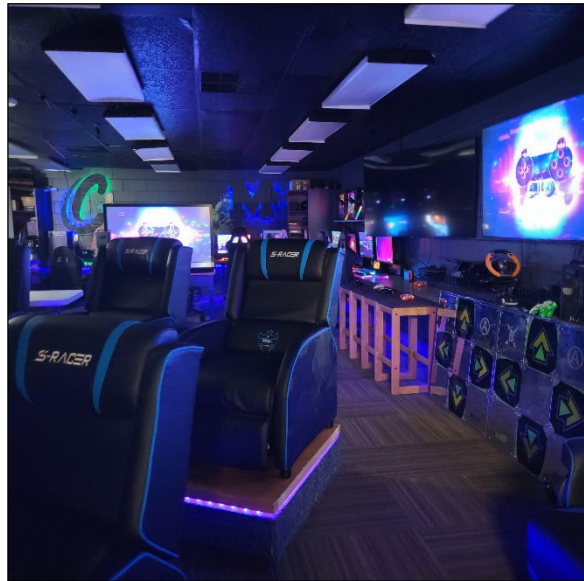
Source: Prismatic Survey Results, March 2023

FINDING 5-15

MPS has a full-time technology coordinator to manage the district’s technology resources and service needs. The technology coordinator serves as the technology department for Maryetta PS.

The technology coordinator reports to the MPS principal. The coordinator is responsible for technology implementation throughout the district, oversees the maintenance and repair of all equipment, manages the district network, provides leadership to identify strategic technology direction, evaluates new and emerging technologies, and leads the technology planning for the district. Additionally, he teaches an esports/gaming course for students. **(Exhibit 5-27)**

**Exhibit 5-27
Esports Classroom**



Source: Prismatic, March 2023

COMMENDATION

MPS employs a full-time staff member to manage and support the district's technology resources.

FINDING 5-13

MPS lacks an explicit technology budget. There is no clear information on the total amount spent on technology or from which various sources components of technology are funded. Moreover, the district lacks a replacement cycle plan.

Currently, the district has approximately 170 student Chromebooks, 210 iPads, and 77 MacBooks for teachers or administrators. A large amount of this equipment has been purchased over the last couple of years due to E-Rate funding and successful grant applications. While this currently provides a positive technology environment, no plan exists for replacing the equipment once its usefulness lifespan has ended. Additionally, old equipment is not being prepared for surplus, which is not a best practice.

In staff surveys, when asked about the lifespan of district technology equipment, 28 percent *agreed* or *strongly agreed* that equipment was operated past its useful lifespan (**Exhibit 5-28**). In onsite interviews, staff indicated computers are deleted from inventory at 5-7 years. No inventory documentation exists to show equipment other than a Federal Programs acquisition list. According to research from The Gartner Group, an independent technology research and consulting firm, the useful life of computers in public education is four to five years.

Exhibit 5-28
Staff Survey Results on Technology Equipment Lifespan

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The district's technology equipment is often used past its useful lifespan.	13%	15%	38%	29%	4%

Source: Prismatic Survey, March 2023

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.

Technology can no longer be an afterthought or add-on in today's classrooms. It must be purposely integrated into instructional strategies and practices. For that to happen, funding must be available to ensure that classroom technology is up-to-date and usable. Several studies, including research by the Gartner Group, report that organizations should be budgeting between four and six percent of their overall budgets for technology. There are no established best practices or standards in this area for preK-8 schools.

RECOMMENDATION

Establish a district technology budget that is realistic, supportive of classroom needs, and includes a replacement cycle.

The superintendent should work with a technology committee and the technology coordinator to develop guidelines for an annual technology budget. The technology budget should be closely tied to the district's strategic and technology plans.

According to MPS documentation, there are currently 636 students, 57 certified and 24 teacher assistants, and 30 support staff, including eight office staff. The cost of iPads and/or Chromebooks is estimated at \$300 each. Given the budgetary constraints, the consulting team recommends MPS initially budget \$50,000 per year. A suggested breakdown is shown in **Exhibit 5-29**.

Exhibit 5-29
Example Technology Budget

Topic	Notes	Cost
Student Replacement Cycle	Replace iPads and Chromebooks with 4-5+ years	\$30,000
Teacher Replacement Cycle	Replace classroom computers, equipment with 5+ years	\$13,000
Staff Replacement Cycle	Replace staff computers, equipment with 5+ years	\$7,000

Source: Prismatic Services Consulting Team, 2022

Using updated inventory information, the technology coordinator should establish a priority list of which type of computers are to be replaced first (e.g., student use and then in what order others will be replaced) and with what type of device. The technology coordinator should also establish an initial expected life and replacement target for each computer category.

Once the district has established these replacement cycles, the superintendent should annually link district general funds or grant 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, servers, etc.

FISCAL IMPACT

The recommendation to budget for technology can be implemented with existing resources. There is no fiscal impact because the money for technology is currently being spent. However, no documentation exists to show the complete inventory. The MPS Federal Program Inventory List shows all items, including technology equipment, purchased through federal grants, cost and location of the item, beginning in 2019-20. This document can serve as the beginning of an updated and complete technology inventory, which is needed to establish and maintain the recommended replacement cycle.

The fiscal impact of adopting and adhering to a replacement cycle as part of the designated technology budget will depend upon the replacement schedule adopted. The consulting team recommends a four- to five-year replacement cycle. Given that the oldest Chromebooks listed on the MPS Federal Program Inventory list were purchased in 2021 and iPads in 2022, a small number will need replacement in 2025-26, as students graduate or move from the district. The replacement cycle focus should be placed on student devices, particularly Chromebooks and iPads. Equipment should continue to be acquired through grant funding, but budget estimates should be established. The projected cost of Chromebooks and iPads is \$250-\$300 each.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Budget for technology replacement.	\$0	\$0	(\$15,000)	(\$17,500)	(\$20,000)

FINDING 5-14

Although the district has a staff member dedicated to technology areas, no job description exists for the technology coordinator. As a result, the technology coordinator's responsibilities and priorities are unclear.

Maryetta Public Schools has purchased a large amount of technology equipment and software over the past several years through grant funding. While having a full-time technology coordinator responsible for the district's technology is commendable, a lack of clear expectations impedes the success of the coordinator. The coordinator is posed daily with a number of needs and requests without any guidelines on what takes precedence.

Without a proper job description, the MPS technology coordinator is forced to rely upon verbal instructions. His efforts can be torn between any number of administrative and instructional staff that place demands upon his time. Also, without a job description, the superintendent and principal have nothing in writing on which to base an employee evaluation.

Job descriptions clarify work situations for both leadership and employees.²² Specific to Maryetta's technology coordinator position, a job description would clarify what is expected and demanded of them. Not only would a job description aid the current technology coordinator but would provide a framework for filling technology positions in the future.

RECOMMENDATION

Develop job descriptions for technology staff and create procedures to regularly update them, provide them to employees, and link them to performance evaluations.

The superintendent, principal, and technology coordinator should develop a job description that lists required skills and characteristics, major duties and responsibilities, and education requirements as well as priorities for the technology coordinator position. They should discuss the role of the coordinator in developing new technologies, choosing hardware and software, and developing technology strategies. They may also elect to include responsibilities around developing technology budgets and schedules, providing network support, and working with vendors to choose or implement new systems. The lines of responsibility should be clearly identified in the job description.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-15

The district has not emphasized cross-training in critical technology functions. Currently, only the technology coordinator handles support and troubleshooting. MPS staff operates in silos and

²² Castillo, M.K. (2014, July 16). *Five reasons why you need job descriptions*.
<http://www.linkedin.com/pulse/20140716135928-202466285-5-reasons-why-you-need-job-descriptions>

lacks processes for knowledge sharing. Plans or procedures for cross-training do not exist. This leaves the district without backup for technology support.

ISTE developed a Technology Support Index rubric in 2008 to assist school districts in determining their needs in a variety of technology support areas. According to ISTE, “the Technology Support Index is designed to provide school districts with models for an efficient and effective technology support system based upon best practices in nationally recognized school districts.”²³ In one version of the ISTE Index, four domains are assessed: equipment standards, staffing and processes, professional development, and enterprise management. School districts are ranked into one of four categories for various aspects of technology use and support. The assessment levels of efficiency are:

- low efficiency -- a strategy or domain that needs attention and improvement;
- moderate efficiency -- these strategies address major technical support issues but with incomplete implementation or inadequate resources;
- satisfactory efficiency -- these strategies are generally effective in sustaining the technology infrastructure and promoting the integration of technology in teaching and learning; and
- high efficiency -- these strategies make the most of available technology support resources, emergent problems are rapidly detected, solutions are quickly implemented, and problem sources are identified and corrected.

Exhibit 5-30 shows the ISTE Technology Support Index for technician staffing. With its current technology staffing of one and approximately 450 devices, CPS falls into the low category.

Exhibit 5-30
ISTE Technology Support Index

Index Area	Efficiency of Technology			
	Low	Moderate	Satisfactory	High
Computer to Technician Staffing Ratio (# of computers: technician).	250:1	150:1 to 250:1	75:1 to 150:1	Less than 75:1

Source: www.iste.org, 2008

An article in Edutopia Magazine points to the most common complaints teachers make about technology integration. Specifically cited was a lack of adequate support, “hardware is purchased in bulk but then left to gather dust, or software is mandated but there is no tech support to make sure it runs smoothly.”²⁴

²³ <https://www.iste.org/standards/essential-conditions/assessment-and-evaluation>

²⁴ <https://www.edutopia.org/technology-integration-research-avoiding-pitfalls>

RECOMMENDATION

Develop teacher leaders to provide instructional support to teachers as they utilize a variety of technology in their classrooms.

Maintaining district equipment and troubleshooting assistance should be primarily handled through a technology department. However, given current budget constraints, hiring additional support staff is likely not feasible. To assist with basic troubleshooting at the sites, the district should implement a cross-training program for teacher technicians.

The district should consider a teacher technician program with staff members cross-training for password and system management, as well as helping support instructional practices through technology integration. Having sufficient technical support is critical to successful technology use, both in classrooms and in administrative offices.

FISCAL IMPACT

The fiscal impact of this recommendation depends on the number of teacher technicians in the program. The consulting team recommends three teacher technicians. That would allow for assignments to early childhood, elementary and middle school. The consulting team recommends a \$500 stipend for each teacher technician.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Develop a teacher technician program.	(\$1,500)	(\$1,500)	(\$1,500)	(\$1,500)	(\$1,500)

FINDING 5-16

The current technology plan and planning process is incomplete. Only network configuration and improvements are currently addressed. Planning has been conducted by the superintendent and technology coordinator. However, no actual technology plan exists.

MPS has not formalized a process for including multiple stakeholders on a technology committee or the development of a current technology plan. From the district’s document, *Maryetta Public Schools Technology Plan 2021-2025*, there is no evidence of committee participation by parents or community members, and currently no such committee exists. Typical stakeholders include parents, students, community members, and businesses. Community and business partnerships could provide additional perspective in planning, implementation, and evaluation.

The National Center for Technology Planning²⁵ 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

²⁵ <http://www.nctp.com/downloads/guidebook.pdf>

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.
- **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 MPS has a working technology plan. 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.

RECOMMENDATION

Expand 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 the 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 MPS 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 5-17

Teachers lack guidance on how much technology to use in the classroom and when to use other methodologies. As a result, teachers could depend too much on technology when other guided learning methods could better serve students' needs.

Staff focus groups and interviews 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 and when technology should be used.

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. ISTE has recently revised its Standards for Educators. The revised standards define the fundamental concepts, knowledge, skills, and attributes for applying technology in educational settings that all teachers should be able to demonstrate. The revised standards 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.²⁶

RECOMMENDATION

Develop a plan to balance digital instructional time with teacher guided instruction.

Maryetta’s instructional leaders, the technology coordinator, and technology committee members should develop guidelines for classroom technology use. The committee should consider developing an assessment to gather, analyze, and report information about how and when technology is used for teaching and learning in their classrooms. The ISTE Standards for Educators can serve as a guideline for staff development to assist teachers in the appropriate integration of technology.

The next step should be to discuss and define technology integration for MPS classrooms. Based upon this definition and interview results, the program should seek to increase teacher competencies and levels of technology integration. The plan should also identify software and hardware needs necessary for successful integration. The plan should be submitted to the superintendent and school board for approval.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-18

The district has a technology committee, comprised of two teachers and the technology coordinator. MPS plans to expand the committee to include additional staff.

Maryetta’s technology committee is newly formed and at the beginning stages of serving the district. Given limited technology staff, the committee members assist teachers with technology instruction and troubleshooting. The district plans to expand the committee to include six teachers next school year. The committee is charged with helping determine instructional

²⁶ <https://www.learning.com/blog/what-you-need-to-know-about-iste-standards/>

technology needs and professional development, as well as addressing staff concerns with technology integration.

According to a website dedicated to successful use of technology in schools:

There are a lot of benefits to a smoothly running committee. For the CTO/ IT director, and the institutional administrators, the committee is a useful way to help channel the many demands for IT products and resources. A well-run technology committee is an effective liaison between the user community and the IT department. The technology committee can explain and define the user community's requirements to the IT staff. A good technology committee understands the role of the IT staff and can effectively explain IT potential and issues to the institution. Finally, the technology committee can see to it that the IT department receives the credit it deserves for a job well done. ²⁷

COMMENDATION

An instructional technology committee has been created and MPS plans to expand it.

FINDING 5-19

MPS lacks a 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. 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 written plans are in place for documenting 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 5-31** defines the process of developing an effective disaster recovery plan.

²⁷ (Brooks, What Makes an Effective Technology Committee in Education (v.2), 2012)

Exhibit 5-31
Key Elements of a Disaster Recovery Plan

Step	Details
Build the disaster recovery team.	Identify a disaster recovery team that includes key policymakers, 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.
Perform and/or delegate key duties.	Develop a list of key personnel and their responsibilities.
	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.
Specify details within the plan.	Arrange with vendors to provide priority delivery for emergency orders.
	Identify data recovery specialists and establish emergency agreements.
	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.
Test the plan.	Identify actions to be taken to restore critical functions.
	Define actions to be taken to re-establish normal operations.
Deal with damage appropriately.	Test the plan frequently and completely.
	Analyze the results to improve the plan and identify further needs.
Give consideration to other substantial issues.	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.
	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 implement a disaster recovery plan that includes the district's critical data, systems, and programs.

A similar recommendation was made in the 2013 report. The district should address this problem immediately. The district should develop and test a disaster recovery plan that includes critical data, systems, and programs through cloud-based storage. The district technology coordinator can lead the process of developing an adequate plan to meet the needs of MPS. 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 5-20

The district has extensive technology available for student and teacher use but lacks processes to determine whether it is being fully used. The district is not ensuring that it is spending dollars wisely by regularly assessing the use of available technology. As a result, the district is not maximizing its technology use or expenditures.

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. MPS has made a significant 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 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 these strategies result in student achievement gains.

RECOMMENDATION

Assess technology placement, use, and effectiveness to ensure the district is maximizing its technology investments.

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 support, such as training or improved infrastructure, is 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,²⁸ 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 Panel,²⁹ 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 usage 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 5-21

MPS lacks a staff development plan that addresses technology skills and use. There have been efforts to provide technology-related professional development, but they have not been coordinated, with follow-up support. No document exists that states what teachers are expected to know and use.

During the onsite interviews and focus groups, MPS instructors, staff, and administrators indicated a need for additional professional development or training focused on the use of existing technology, applications, and software packages. Specifically, a need for follow-up training was noted. Requests for follow-up training include Google Docs and other applications. Staff development sessions are held at the start of school and focus on state requirements such as school security, and classroom management. Additionally, some software-specific training has been offered on an as-needed basis. A preference for person-to-person staff development was voiced, rather than Zoom or online training. Staff indicated that teachers were surveyed on staff development needs and requests, but the consulting team was unable to obtain documentation on this survey.

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 their integration into curriculum and classroom instruction is necessary in MPS.

Exhibit 5-32 shows staff survey results on technology. While staff members indicate an understanding of technology and its utilization, the consulting team found in focus groups and interviews that staff want a deeper understanding and utilization of current technologies. Implementing technology effectively into classroom instruction requires teachers to have a higher level of understanding, redirected teaching methodology, much practice, and continuous

²⁸ <http://www.wufoo.com/gallery/>

²⁹ <https://ISTE19 - EdTech Conference | Philadelphia, June 23-26>

training. This is compounded by the continued purchase of new and varied equipment, applications, and software.

**Exhibit 5-32
Staff Survey Results Regarding Technology**

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Our district provides adequate technology training.	37%	46%	9%	9%	0%
Our district provides adequate technical support.	45%	52%	1%	1%	0%
I have adequate equipment and computer support to conduct my work.	43%	54%	1%	1%	0%
Administrative computer systems are easy to use.	25%	53%	22%	0%	0%
Instructional computer systems are easy to use.	28%	54%	18%	0%	0%

Source: Prismatic Survey Results, March 2023

The ISTE Standards (2019) is a framework for innovation and excellence in learning, teaching, and leading. The standards have evolved from the National Education Technology Standards (NETS) and include four sections: Students, Educators, Educational Leaders, and Coaches.

ISTE Standards for Educators include:

Empowered Professional

- 2.1 Learner – Teachers continually improve their practice by learning from and with others and exploring proven and promising practices that leverage technology to improve student learning.
- 2.2 Leader – Teachers seek out opportunities for leadership to support student empowerment and success and to improve teaching and learning.
- 2.3 Citizen – Teachers inspire students to positively contribute and responsibly participate in the digital world.

Learning Catalyst

- 2.4 Collaborator – Teachers dedicate time to collaborate with both colleagues and students to improve practice, discover and share resources and ideas, and solve problems.
- 2.5 Designer – Teachers design authentic, learner-driven activities and environments that recognize and accommodate learner variability.

- 2.6 Facilitator – Teachers facilitate learning with technology to support student achievement of the 2016 ISTE Standards for Students.
- 2.7 Analyst – Teachers understand and use data to drive their instruction and support students in achieving their learning goals.

ISTE Standards for Educator Leaders include:

- 3.1 Equity and Citizenship Advocate – Leaders use technology to increase equity, inclusion, and digital citizenship practice.
- 3.2 Visionary Planner – Leaders engage others in establishing a vision, strategic plan, and ongoing evaluation cycle for transforming learning with technology.
- 3.3 Empowering Leader – Leaders create a creating and supporting effective digital-age learning environments to maximize the learning of all students.
- 3.4 Systems Designer – Leaders build teams and systems to implement, sustain, and continually improve the use of technology to support learning.
- 3.5 Connected Learner – Leaders model and promote continuous professional learning for themselves and others.

Data from the National Science Foundation (NSF)³⁰ indicate 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 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 MPS and is aligned with data-driven goals supported by long-term professional development activities.

RECOMMENDATION

Adopt expectations for teacher and administrator competencies in technology and provide additional professional development focused on increasing staff technology skills and understanding.

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

³⁰ <http://www.nsf.gov/statistics/seind06/c1/c1s3.htm - c1s3l2>

development levels. A positive step already planned is the district's strategy to send five staff members to ISTE this summer.

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. The first step should be for each staff member to complete a needs assessment. The committee might consider Taking a Good Look at Instructional Technology,³¹ which is a suite of assessment tools designed to help principals and other school leaders gather, analyze, and report information about how technology is used for teaching and learning in their schools. If administered more than once, it provides measurements of progress over time.

A second step should be to discuss and define technology integration for MPS 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.

Several online professional development resources should be considered including:

- TED: Ideas Worth Spreading,³²
- Classroom 2.0 Live,³³
- the K12 Online Conference,³⁴
- the Global Education Conference,³⁵ and
- Simple K12 Webinars.³⁶

The district should also consider tapping into additional resources offered through the Oklahoma State Department of Education, the Oklahoma Department of Career and Technology Education, or partnering with Indian Capital Technology Center. Additionally, area colleges and universities and vendors provide customized training, continuing education, professional development, and other resources for preK-8 teachers and administrators.³⁷ MPS should also continue forming partnerships with neighboring school districts and implement shared professional development.

³¹ <http://www.testkids.com/taglit/>

³² <http://www.ted.com/>

³³ <http://live.classroom20.com/index.html>

³⁴ <http://k12onlineconference.org/>

³⁵ <http://globaleducation.ning.com/>

³⁶ <http://simplek12.com/tlc/webinars/>

³⁷ <http://www.okhighered.org/econ-dev/business-services/>

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-22

MPS does not have a work order system for reporting problems with technology. In 2013, the review team noted that MPS had a work order system; its use apparently fell off. Currently, staff text, email, or call the technology coordinator with problems or issues.

The district would benefit from developing and implementing procedures for submitting and tracking technology issues and resolutions. Currently, no formal process or procedure exists. There is no observance or follow-through of a formal, documented process for addressing computer issues such as set-up, configuration, software installation, and repair. As a result, teachers, support staff, and administrators call, text, or email the technology director to report support issues and request assistance. This lack of documentation and procedure leads to unresolved or incomplete repairs; plus, there is no supporting information available to consult when purchasing equipment or accounting for man-hours on task.

The time and manpower needed to provide appropriate responses to technology-based problems at MPS are limited. Additionally, the absence of support procedures and criteria, incident requests and completion data, communication, and follow-up make the existing staff members less effective in supporting technology.

With an online work order system and written procedures, staff will be able to access it from the district network to report issues or dilemmas with technology. If fully implemented and utilized, the system could speed response times and provide a database for identifying and analyzing systemic problems.

RECOMMENDATION**Implement an online work order system and procedure to track technology issues and increase issue resolution efficiency.**

MPS should implement procedures and documentation processes to track district technology issues. Detailed support data provides staff with needed information when considering new equipment purchases, retiring existing equipment, or accounting for man-hours on a task.

One solution that MPS should consider is Zoho Desk, a cloud-based help desk ticketing software.³⁸ Zoho Desk allows the technician to document and track technology incidents, provide work queues, reminders, and prioritization, as well as self-help troubleshooting for users. Detailed reports are available to determine the average resolution time, as well as the number of tickets opened and closed. A free version is available that allows for three technicians or agents. Another free solution is Spiceworks, a cloud-based help desk and ticket management system.³⁹

³⁸ <https://www.zoho.com/desk/>

³⁹ <https://www.spiceworks.com/free-help-desk-software/#features>

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-23

Teachers are using a variety of resources to share and communicate with no support, oversight, or standards. No consistency was found in what technologies teachers are using, causing breakdowns in communication with parents and inefficiency in collaborating with other instructors.

In focus groups and interviews, teachers discussed using a variety of resources for instructional collaboration and parent communication. For communicating with parents, resources include Facebook, Remind, Google Classroom, Google Voice, Class Dojo, and the district website. Parent survey and community focus group comments highlighted a lack of communication with teachers. Some parents are getting text messages; others are not. Some teachers are regularly updating grades through the district website; others are not.

Groups further expressed an inconsistency in collaborative communication mechanisms. When asked about a collective space to share instructional resources, teachers pointed to Google Docs and See-Saw Library. However, they stated that most sharing with other instructors is word-of-mouth or one-to-one.

Studies indicate that parental involvement can result in academic gains for students, higher test scores and grades, increased time on task, an improvement in participation and attendance, and a decrease in behavioral problems.⁴⁰ Central to developing and sustaining parental involvement is teacher-parent communication. A consistent communication mechanism ensures parents are engaged and informed with minimum technical knowledge on their part.

A standardized collaborative space allows teachers to focus on collaboration and share instructional resources with others. Torgerson suggests there are five essential reasons for teacher-to-teacher collaboration:

- It helps teachers brainstorm creative ideas and lesson plans.
- It provides an avenue for professional growth.
- It leads to improved student outcomes.
- It aids in the success of school and district initiatives.
- It decreases teacher turnover.

The goal of a collaborative space is to allow teachers to focus on sharing and creating instructional materials and methods. Standardizing a space provides access for all instructional

⁴⁰ <https://www.edutopia.org/article/teacher-parent-communication-strategies-start-year-right>

staff without the responsibility of troubleshooting the technology.

RECOMMENDATION

Create technology resource standards for teachers to share instructional resources and communicate with each other and parents.

Communication in schools, whether teacher-to-parent or teacher-to-teacher, should center around improving student success. MPS has the resources needed to increase communication with each other and with parents. First, the superintendent, principal, and a group of teacher leaders should determine what needs exist and what resources are available. Next, they should develop structure and guidelines for teacher collaboration. The collaborative space should serve as a vehicle for PLCs and the development of grade-level resources aligned to academic standards.

The team should also develop standards and guidelines for parent communication. These guidelines should include what information is communicated, and how often, as well as what communication resource is used. The team should determine disparities in parent communication, select a resource that meets the needs, and create an implementation and training plan. Consistent communication should be emphasized.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-24

Wireless internet access is available in every classroom and is accessible to students or staff. MPS has implemented a district-wide wireless access system to increase Internet access.

Access points are positioned in all buildings. MPS has made wireless access available throughout the district. Students and staff access the network and Internet by utilizing district-owned technology including laptops, iPads, Chromebooks, Smartphones, etc. Students were observed utilizing the network in classrooms (**Exhibit 5-33**). Additional access points and increased infrastructure have been added as needed.

Exhibit 5-33 Students Using Wireless Access



Source: Prismatic, March 2023

The question of how to provide hands-on access with limited resources continues to plague schools. One solution is to use students' personal technology on the district network through wireless access or incorporate the use of inexpensive tablets. Schools reap benefits through the use of wireless networks in addition to increased student access. Those benefits include limitless connectivity. Everyone with a wireless device and password permission can access email, the Internet, and district servers through a high-speed connection. The cost of setting up a wireless network is much less expensive than wired. Additionally, the maintenance costs are minimal. Security is built in because the network resides within the school networking system.

COMMENDATION

Wireless Internet access is available in every MPS classroom and is accessible to students or staff.

Moving forward, numerous publications on the use of mobile devices are available and should be considered for incorporation into students' learning. Teachers should learn how to maximize the flexibility inherent in mobile devices.

FINDING 5-25

The district lacks written documentation regarding technology practices and procedures. Many processes are still paper-based.

A large percentage of staff indicated they were unsure about the status of administrative processes (**Exhibit 5-34**). However, some indicated that many administrative processes are still paper-based and some disagreed.

Exhibit 5-34
Staff Survey Results Regarding Technology

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Many administrative processes are still paper-based.	1%	13%	57%	26%	1%

Source: Prismatic Survey Results, March 2023

MPS lacks standards, procedures, and processes for most administrative technology areas. There is currently no district standard for hardware or software and no system for tracking data. Because no standard exists, obsolete equipment remains in use. No framework for equipment replacement or lifecycle exists, resulting in equipment in classrooms that is past its usefulness, kept in storage, or repurposed. A partial inventory of existing technology in the district listed equipment purchased through grants beginning in FY20. However, additional technology devices exist throughout the district but are not documented.

In the district, there are no minimum technology (network, hardware, or software) standards or protocols in place. A lack of coordination and guidelines results in equipment and software that no longer meets user needs or are obsolete and unusable for the designated purpose. While the initial tendency may be to hold onto technology if it has any functionality or repurposing old equipment. That practice typically leads to more user frustration than high-quality learning experiences and substantial troubleshooting time for technology staff. This absence of processes and procedures leads to additional costs and an increased backlog of support issues.

RECOMMENDATION

Develop formal written technology standards, procedures, and processes for inventory, administrative tasks, equipment and software purchases, implementation, and upgrades.

The responsibility and technical expertise needed to meet user demands can no longer be performed in a fragmented fashion. All district technology needs should 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.

The next step is to use the current inventory. Using the existing partial inventory, the technology coordinator or other designated staff member should establish a priority list of which types of computers/devices are to be replaced first and with what type of device. The technology coordinator should also establish the expected longevity and scheduled replacement for each computer category.

Once these replacement schedules have been established, the superintendent should link district general 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. MPS may

consider selling surplus equipment in an online auction and utilizing a complete surplus management system. One option to consider is Public Surplus.⁴¹ 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

This recommendation can be implemented with existing resources.

FINDING 5-26

Technology components are included in most MPS grant proposals. In the past several years, the district has developed a grant-seeking environment. Because of this effort, the district has a plethora of technology devices.

The MPS Federal Programs Inventory List includes technology that was purchased through grants from September 2020 to February 2023. This practice provides technology devices for students, teachers, administrators, and other staff members. The district has successfully identified and secured funding for a variety of technology purchases and upgrades (**Exhibit 5-35**).

Exhibit 5-35 Technology Equipment in MPS Classroom



Source: Prismatic, March 2023

⁴¹ <http://www.publicsurplus.com/sms/browse/home>

Given the current needs in technology, professional development, and the impact of decreasing school funding, Maryetta schools need to continue to 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. 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.

COMMENDATION

MPS routinely includes technology components in grant proposals, which has resulted in an abundance of technology.

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 the districts provide regular school transportation services.

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 1983. In the 2015-16 school year, the ADH number for MPS increased substantially to near its current number, resulting in a near tripling of state transportation aid to MPS.

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. In the case of MPS, state transportation aid is a much higher percentage of transportation expenses, ranging from approximately 42 percent to nearly 57 percent, depending upon the year's expenses for property – primarily school buses or other expensive equipment – and how completely MPS counts all transportation related expenditures. State transportation aid for MPS is a large percentage of their total transportation expenses because their claimed transportation expenses are low, especially in years when a school bus is not purchased. MPS transportation expenses are regularly less than one percent of their total district expenditures. Every dollar saved in a school district's transportation program can instead be spent on other district programs, including classroom instruction.

The Oklahoma Department of Public Safety (ODPS) requires bus drivers to obtain a specialized bus driver's license, a Commercial Driver's License (CDL) B class (for large bus) or C class (for a school van) with P (passenger) and S (school) endorsements. The SDE requires bus drivers to obtain bus driver certification and training and to pass a license history review. MPS conducts criminal background checks on all new employees and annually evaluates the motor vehicle records (MVR) of the personnel who drive school vehicles. New bus drivers also must pass a pre-employment alcohol and drug test and submit to random drug and alcohol tests that are administered to all drivers throughout the year, as defined by the Federal Motor Carrier Safety Administration's regulation § 382.305. MPS maintains a three-ring notebook of accreditation materials to document their compliance with the many federal and state bus driver testing and training requirements, along with school district requirements. An auditor from SDE annually reviews this notebook. The only shortcomings noted by the auditor was the lack of an annual review of bus routes and bus stops for safety/efficiency and the use of medical personnel to complete the bus drivers' annual physicals who are not included in the National Registry of Certified Medical Examiners. In 2014, US DOT began requiring use of certified examiners who were trained in the physical exam given to school bus drivers. The closest certified examiners to MPS are at the NEO Health Center in Westville, Oklahoma.

The MPS transportation department provides home to school and extracurricular transportation for its students. With approximately 22 square miles to cover, the district uses three regular bus routes. Any students with disabilities who require transportation are included on the three regular routes. The district owns all vehicles in its fleet and does not lease any. MPS has two spare buses and an activity "spirit" wheelchair van. It also operates a "white fleet" of seven vehicles, four SUVs, two pickup trucks, and a sedan.

The MPS school bus fleet has an average age of 7.3 years. The buses are kept clean by regular power washing, blowing out debris and dirt with a leaf blower, and by parking the buses in the MPS bus garage. **Exhibit 5-37** provides an aerial view of the bus barn.

Exhibit 5-36
MPS Aerial View Bus Barn



Source: Google Maps, April 2023

Its three route buses are equipped with electronic “child find” systems that remind drivers to look for sleeping children after each bus run (**Exhibit 5-37**). It is best practice for the daily route drivers to check for sleeping children after what they believe is the last student drop off, rather than waiting until the bus has returned to the garage, only to find a sleeping child many miles away from his/her home. Installation of the Child Find systems corrected a shortcoming that was noted in the 2013 review.

Exhibit 5-37
Bus Reset Button



Source: Prismatic, March 2023

MPS places a heavy emphasis on school site safety. It operates several, separate parent pick-up and drop-off areas for children of different grade levels. MPS has posted many traffic control signs and devices on campus to govern the flow of traffic. The three route buses have their own separate drop-off and pick-up area in a parking lot on the east side of the new lunchroom extension construction. The bus pick-up and drop-off area for students is a narrow strip of the parking lot, bordered by a construction fence (**Exhibit 5-38**).

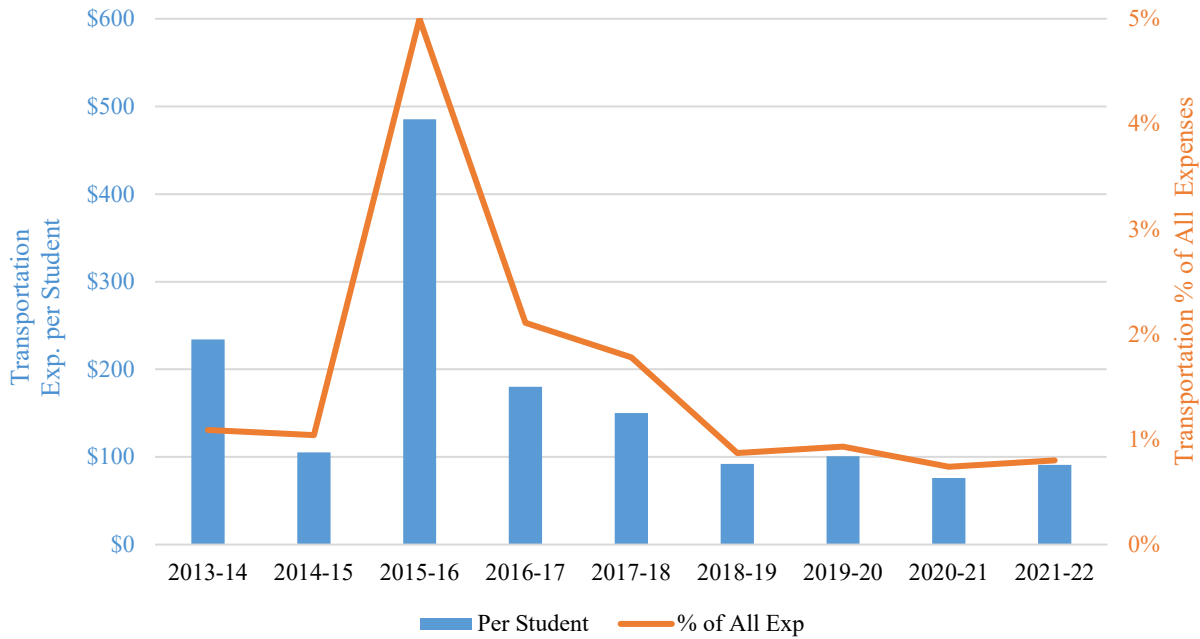
Exhibit 5-38
MPS Pick Up Areas

Source: Prismatic, March 2023

Currently, the district has 13 Oklahoma Commercial Driver's License (CDL) certified drivers to operate school buses. Of the 13, three are regular route drivers while the other 10 are utilized on an as-needed basis, primarily to drive field and sports trips. Drivers maintain a current Oklahoma CDL with the proper endorsements. Before the start of each school year and before any drivers are permitted to drive a school bus MPS drivers must submit to a full license review. All MPS bus drivers undergo an annual medical exam to ensure their fitness for work. The district maintains and files driving records that comply with state requirements. MPS bus drivers undergo four hours of annual retraining, using a training curriculum provided by SDE. Two emergency evacuation, bus safety drills are required each year for all bus riders.

Exhibit 5-39 provides a nine-year comparison of MPS transportation expenditures as a percent of total expenditures as well as the annual transportation expenditures per student. In recent years, transportation expenditures have been less than one percent of all district expenditures.

Exhibit 5-39
Trend in MPS Transportation Expenses



Exhibits 5-40 and 5-41 compare the change in MPS and the peer districts’ transportation costs over time, with and without property expenses, respectively. The second exhibit provides a better ongoing expenditure comparison due to the removal of large, single-year expenses (typically school buses). As shown in the second exhibit, the increase in MPS transportation expenses has been lower than all the peers.

Exhibit 5-40
Comparison of Transportation Costs Over Time (Including Property Expenses)

Entity	2017-18	2018-19	2019-20	2020-21	2021-22	Percent Change
Maryetta	\$55,468	\$131,814	\$46,354	\$45,656	\$62,753	13.1%▲
Bishop	\$55,954	\$232,993	\$45,969	\$34,066	\$67,189	20.1%▲
Colcord	\$209,382	\$241,169	\$213,548	\$261,066	\$282,395	34.9%▲
Grand View	\$167,269	\$292,047	\$105,594	\$99,297	\$153,756	(8.1%)▼
Keys	\$345,587	\$297,727	\$210,239	\$210,865	\$280,013	(19.0%)▼
Oktaha	\$327,580	\$346,225	\$231,623	\$315,219	\$424,144	29.5%▲
Peer Average	\$221,154	\$282,032	\$161,395	\$184,103	\$241,499	9.2%▲

Source: SDE, OCAS, School District Expenditures, All Funds, 2017 through 2021, and Prismatic calculations

Exhibit 5-41
Comparison of Transportation Over Time (Excluding Property Expenses)

Entity	2017-18	2018-19	2019-20	2020-21	2021-22	Percent Change
Maryetta	\$55,468	\$66,495	\$46,354	\$45,656	\$62,753	13.1% ▲
Bishop	\$55,954	\$69,993	\$45,969	\$34,066	\$67,189	20.1% ▲
Colcord	\$209,382	\$238,623	\$213,548	\$261,066	\$282,395	34.9% ▲
Grand View	\$124,888	\$141,019	\$105,594	\$99,297	\$153,756	23.1% ▲
Keys	\$208,414	\$241,682	\$210,236	\$210,865	\$280,013	34.4% ▲
Oktaha	\$310,491	\$331,225	\$231,625	\$315,218	\$424,144	36.6% ▲
Peer Average	\$181,826	\$204,508	\$161,394	\$184,102	\$241,499	32.8% ▲

Source: SDE, OCAS, School District Expenditures, All Funds, 2017 through 2021, and Prismatic calculations

Exhibit 5-42 provides a comparison of the cost per rider per day in MPS and the peers for 2021-22. As shown, MPS had one of the lowest daily costs per student and a cost substantially below the peer average.

Exhibit 5-42
Comparison of Cost per Rider per Day, 2021-22⁴²

Entity	Total Annual Operating Cost ⁴³	ADH	Overall Cost per Rider per Day
Maryetta	\$62,753	588	\$0.64
Bishop	\$67,189	492	\$0.82
Colcord	\$272,395	497	\$3.32
Grand View	\$153,756	436	\$2.14
Keys	\$280,013	657	\$2.58
Oktaha	\$424,144	554	\$4.64
Peer Average	\$210,042	537	\$2.36

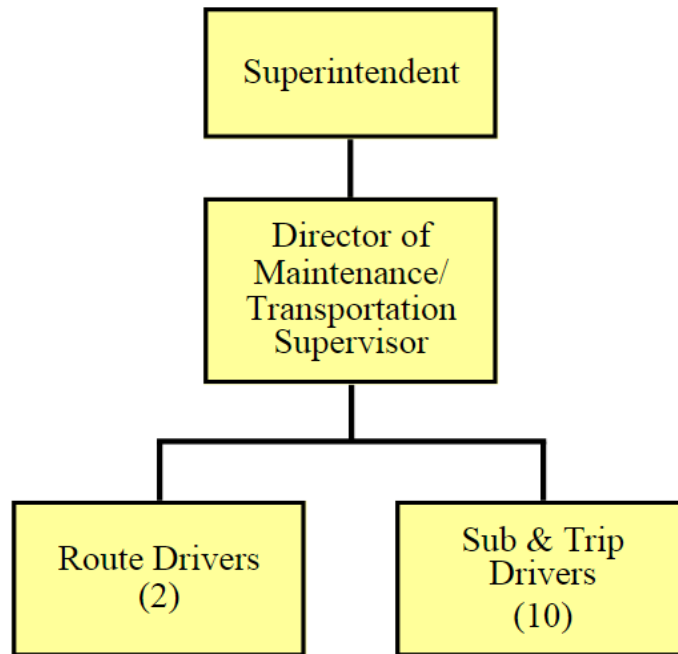
Source: SDE, OCAS, School District Expenditures, All Funds, 2021-22, and Prismatic calculations

The organization of the MPS transportation function is shown in **Exhibit 5-43**.

⁴² The consulting team was unable to obtain the number of school days of each district and has therefore assumed them to be an equal 165 days.

⁴³ Excluding property expenses.

**Exhibit 5-43
MPS Transportation Organization**



Source: Prismatic, March 2023

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various MPS functional areas. **Exhibit 5-44** provides the results for transportation. Nearly all staff, 97 percent, gave transportation an *A* or a *B*.

**Exhibit 5-44
Staff Survey Results Regarding Transportation**

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Transportation	76%	21%	0%	0%	0%	3%

Source: Prismatic Survey Results, February 2023

FINDING 5-27

The MPS transportation department lacks an employee handbook to guide its bus drivers and administration through procedural and operational questions. This leaves the district at risk of drivers not adhering to expected standards.

Each school district has its own particular set of procedures to ensure safety and efficiency. Having procedures, duties, and expectations in writing affords the employee the opportunity to become fully aware of them and affords the employer the reasonable expectation that drivers know what is expected of them and a basis for holding drivers accountable for completing their duties and meeting expectations.

All employees benefit from clearly written duties and expectations. Written expectations and duties inform employees of what they should do, how and when they should do it, and in some cases why they should do it. 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 5-46 provides the table of contents for the Edmond Handbook.

**Exhibit 5-45
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 a transportation department handbook.

As a small district, MPS may be able to add a portion to their general district employees' handbook that speaks specifically of bus driver duties and expectations, rather than creating a

separate handbook for transportation employees. This makes sense in that most, if not all, current MPS bus drivers perform other duties for MPS. Professional development time should be spent with drivers reviewing Table of Contents topics, gathering input, and noting differences in operations and expectations in MPS. SDE requires four hours of professional development each year for bus drivers. Notes from this meeting of transportation personnel could readily be turned into a draft transportation handbook.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-28

MPS transports approximately 60-70 students each day from home to school on three buses. Given the capacity of the buses, another 60-70 students could be accommodated.

Only approximately 25 percent (160) MPS students are residents of the district and therefore eligible for transportation if they live more than 1.5 miles from school. The majority of MPS students are transfers from outside MPS and are not eligible for transport under current SDE regulations (this regulation is under re-consideration). Meanwhile, between one-third and one-half of the eligible 160 MPS students ride the bus.

MPS does not use bus routing software or other distance measurement programs such as Google Maps to determine which students live at or beyond 1.5 miles from school. MPS transportation staff instead rely upon their knowledge of the district and past practice.

Because there is ample space on the buses, MPS could provide transportation services to students who live less than 1.5 miles from school (commonly termed “courtesy transportation”). This would potentially increase student attendance and help alleviate parent traffic around the school each morning and afternoon.

RECOMMENDATION

Extend bus transportation service to more students who live less than 1.5 miles from school.

Additional students who live less than 1.5 miles from school could be picked up at bus stops that are along or very near the existing bus routes so that little time is added to routes and there is little or no expense added to bus operations. A new transportation eligibility standard of perhaps 1.2 miles should be established by the school board. The decision about the new eligibility distance should be made after carefully examining where MPS resident students live, how far they are from school, and how close they are to existing bus routes. Allowing more MPS students to ride the bus should not negatively affect transportation aid to the district.

MPS should identify as precisely as possible, using a paper map or mapping software, where its resident students live, the distance between each student’s home and school, and the student’s location relative to existing bus routes and bus stops as preliminary steps in setting a new, lower transportation eligibility distance and offering bus service to more students. The goal should be

to add more student bus riders to the existing three bus routes without negatively affecting operating costs or significantly lengthening the amount of time it currently takes to complete the MPS bus runs (30-45 minutes). This mapping and revised routing process should begin in the spring to allow plenty of time for careful consideration about safety and efficiency issues and time to implement the new bus schedules in August at the opening of a new school year.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-29

MPS conducts short, emergency evacuation bus drills twice each year with those students who ride a bus between home and school. This process leaves out those students who only ride buses for field and athletic trips, and students who only rarely ride the bus between home and school.

A check of the School Bus Emergency Evacuation Drill forms showed that drills were only conducted on the three, daily route buses and for students riding the bus at the time of the drill. Although MPS meets the requirement that the bus drills are to be completed twice each year for bus riders, both daily riders and those who ride “occasionally” are supposed to be included in the bus drills. Furthermore, it was noted on the bus drill forms that the drills in January 2023 only lasted one to four minutes per the bus driver’s recorded times. In two out of three instances, the bus drills were conducted just prior to departure before the afternoon bus runs.

Bus drills that are conducted in the afternoon when students are tired and eager to get home are probably not as effective as drills conducted in the morning when students are more alert. Bus drills are commonly conducted in the morning after buses arrive, but before students unload. Although it is not stipulated on the SDE emergency evacuation drill form, a good, thorough, and valuable bus drill includes much more than just having students evacuate out of the back of the bus. It could include items such as:

- reviewing safe street crossing procedures at a bus stop;
- the safety features of a school bus including roof hatch, first aid kit, radio, emergency exit window operation; and,
- safe bus riding rules of conduct.

Research from the Kansas State Department of Education School Bus Safety Unit (<http://ksde.org>) and the Pupil Transportation Safety Institute (<http://ptsi.org>) shows that over the past decades, increasing training for bus riders and bus drivers has contributed to reductions in school bus fatalities and accidents. Thorough bus drills for all students, geared appropriately to each grade level, are a pupil transportation industry “best practice.”

RECOMMENDATION

Include all students in bus drills and lengthen the amount of time spent on them.

A “best practice” bus drill might be expected to last 10-15 minutes. Because it is likely that most students will ride at some point during the year on a field or sports bus, these students too, who do not otherwise ride a bus daily, should receive much the same bus safety instruction as those students who ride daily. MPS might put together a short video on school bus safety to show all students. Some schools arrange for their gym classes or health class to one day go to the buses for their bus safety instruction. MPS should arrange a school meeting for all students where they can watch videos and have discussions about school bus safety and the drills required to keep children safe in case of an emergency.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-30

MPS pays stipends to its teachers who drive a daily route bus, but the stipend amount has not risen sufficiently over the past ten years to keep up with inflation. This leaves the district at risk of not having sufficient bus drivers.

The 2013 review noted that the two teachers who drove daily bus routes were paid a stipend of approximately \$6,500 and \$6,700 a year. In the ten years since the 2013 study, the stipends for the two teacher/bus drivers have increased little, to \$6,680 per year. Adjusting the teacher/driver rates from 2013 for inflation would result in a stipend of \$7,540.⁴⁴

The maintenance director who drives the third daily route was paid a stipend of \$6,700 for his driving duties and assorted busing supervision duties. The maintenance director is now paid a stipend of \$8,000 for his bus driving, supervision, and maintenance duties. This stipend has kept pace with inflation overall, but the maintenance director has the longest bus route (45 minutes as compared with 30-35 minutes for the teacher/drivers) and performs transportation supervisory and maintenance duties in addition to driving a route. The current stipend paid to the maintenance director results in an estimated hourly wage of \$15.68.

RECOMMENDATION

Raise bus driver stipends to remain competitive.

MPS should increase the stipends of the teacher/drivers to catch up to the inflation-adjusted value of the 2013 stipends. Likewise, the stipend for the maintenance director to complete all of his transportation responsibilities, not just bus driving, should be adjusted so that he at least makes as much on an hourly basis as the stipended teachers/drivers. The pay rates to the many spare drivers who cover field and athletic trips, and sometimes a daily, home-to-school route, should be similarly reviewed and adjusted.

⁴⁴ <http://minneapolisfed.org/inflation-calculator>

FISCAL IMPACT

The consulting team estimates a fiscal impact of \$1,884 annually on this basis:

- The inflation-adjusted value of the 2013 \$6,500 stipend for teacher/drivers is \$7,540. The difference between \$7,540 and \$6,500 is \$1,040. This would be paid to each of the two teacher/drivers, resulting in an annual cost of \$2,080.
- For the maintenance director, the calculation starts with the current \$8,000 stipend. A stipend based on \$27 per hour, if the director works 170 days and three hours each day, results in an overall stipend of \$13,770, an increase of \$5,770 over the current level.
- The net annual increase would be \$7,850 (\$2,080 + \$5,770).

The consulting team has assumed that the adjustments would be all at once, but the district could consider an incremental increase each year to achieve the same end result.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Increase transportation stipends.	(\$7,850)	(\$7,850)	(\$7,850)	(\$7,850)	(\$7,850)

FINDING 5-31

MPS lacks a written policy on how far students of different ages can be expected to walk to their bus stop. Having students walk to a bus stop that is a short, reasonable distance from their home could improve the efficiency and the safety of the current bus routes.

Currently, nearly all of the bus stops on the MPS routes could be regarded as “home stops,” at the end of the student’s driveway. When there are safety concerns, such as a lack of sidewalks, this is a prudent procedure. When there are no safety concerns, this contributes to inefficiency. The district does not maintain detailed route maps or use routing software, so the true extent of the issue could not be quantified by the consulting team.

RECOMMENDATION

Develop guidelines for how far students of different grade levels might be expected to travel to their bus stop.

Having some students travel farther to their bus stop can improve bus route efficiency and eliminate some backing up, turnarounds, and use of dirt roads. The district’s current expectation that some parents and students will have to travel almost 1.5 miles to school can reasonably be extended to parents and students who live more than 1.5 miles from school as an expected distance they might have to travel to their bus stop.

Depending upon age and grade level, MPS could set bus stop travel distance expectations. These travel distances might range from 100 yards for grades K-1, 200 yards for grades 2-3, 400 yards or one-quarter mile for grades 4-5, and up to one-half mile for grades 6-8. The district can set its

own travel standards and regard them as guidelines, not inflexible rules. The bus stop travel distances should be measured from the end of the student's driveway to the proposed bus stop, not from the front porch. Because MPS is a small district and well known by its three bus drivers, decisions about bus stop placements can be made on a personal, well-informed basis.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-32

Although MPS offers busing for students in its pre-kindergarten program, it lacks child safety seats on the buses for 3- and 4-year-olds. This may be contributing to low bus ridership among the youngest students.

MPS offers busing to and from school for all students who live 1.5 miles or more from school. However, during the onsite review, no pre-K or Kindergarten students rode on a bus. This might have been because child safety seats are not available on the MPS buses. Parents of pre-K children have accepted for years the importance of child safety seats for their young ones in their own passenger vehicles. Parents of the youngest students may well feel the safety needs of their children are neglected when they do not see comparable child safety seats on the school bus.

Oklahoma and federal regulations do not require child safety seats on school buses, although federal safety agencies such as the CDC and NHTSA recommend them. If MPS provided child seats for pre-K children, parents may opt to use MPS transportation instead of transporting them in personal vehicles. This would help alleviate parent car traffic around the school. Moreover, starting students as bus riders earlier in their school careers may help turn them into long-term users of the school bus, improving ridership.

RECOMMENDATION

Explore options for installation of a few child safety seats on each MPS bus.

The district should contact bus manufacturers regarding the purchase and installation of "integrated" school bus seats that have two or three child safety seats built into what otherwise appears to be a standard school bus seat. No standard seat belts are required. Oklahoma school buses are not equipped with seat belts. A second option for child safety seats are seats that strap onto a standard school bus seat. These seats are available from school bus parts vendors such as Bus Parts Warehouse (Buspartwarehouse.com) and Besi (Besi-inc.com). Other child seat vendors advertise in the trade magazines *School Bus Fleet* and *School Transportation News*.

Drivers would have to be trained in the installation and use of child safety seats. They would likely be installed in the front rows of the bus for quick access.

FISCAL IMPACT

Child safety seats for school bus use generally cost about \$300 each. An "integrated" bus seat that has two or three safety seats built it costs about \$1,000. It would replace the standard bus

seat and must be installed per the manufacturer’s instructions. Child safety seats that strap around a bus seat are more portable but may require that the seat behind the seat with child safety seats remain empty.

If two portable child safety seats were installed on each of the three route buses, then the initial cost would be about \$1,800 (6 seats x \$300/seat).

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Explore options for child safety seats on buses.	(\$1,800)	\$0	\$0	\$0	\$0

FINDING 5-33

Some MPS spare bus drivers go many weeks or months without any bus driving assignments. This could lead to a loss of driving skills. MPS employs three daily home-to-school route drivers plus 10 spare drivers who help with field and sports trips, and home-to-school route coverage when needed. It was reported during the observation visit that some spare drivers drive infrequently. One spare driver was reported to have not driven yet this year. Driving a school bus well and safely takes practice. Backing up and turning a bus left and right through traffic are especially challenging skills that can erode without regular use.

MPS also has a secondary need for spare driver practice, namely, a need for some spare drivers to become familiar with one or more of the daily, home-to-school routes in case a spare driver is needed for coverage. Spare drivers ought to be provided the opportunity to practice their skills on a regular, perhaps monthly basis, or whenever they feel a need to gain added experience. MPS could schedule spare drivers who need the practice to help with the weekly fueling trips to the local gas station or have a spare driver drive a bus that needs repairs at an out-of-district shop whenever such a need arises. Having a spare driver take small, local trips whenever short trips are called for will help to elevate a spare driver’s skills more quickly from a rookie’s level to veteran driver status.

RECOMMENDATION

Provide spare bus drivers with more frequent opportunities to practice their bus driving skills.

In order to keep drivers up to par with their driving skills, MPS would benefit from allowing drivers to have frequent opportunities to practice with their vehicles. Without regular practice of common bus driver techniques, these drivers could lose the ability to perform these skills. By allowing spare drivers to take up small routes, you allow them to keep their skills honed and drive safely when they are eventually needed for backup coverage on a route.

FISCAL IMPACT

The projected cost of \$500 per year for additional practice driving sessions for some spare drivers who otherwise drive very little is based upon assumptions that there might be five spares, half of the crew of 10 spare drivers, who are paid \$10 for each half hour driving session (\$20/hr)

for taking a half hour trip once a month for ten months (5 drivers x \$10/half hr. x 10 months). If the spare drivers are paid under terms of a fixed amount stipend and the stipend contract includes regular practice sessions, then the annual cost to the district will be less.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Provide practice driving sessions for spare drivers who otherwise drive very little	(\$500)	(\$500)	(\$500)	(\$500)	(\$500)

FINDING 5-34

MPS lacks written thorough bus route sheets. Bus route sheets are a vital resource for substitute drivers and a valuable reference when questions arise about transportation.

MPS has a small busing program, just three home-to-school routes, driven by drivers who have done the routes for years. In the case of the most senior driver, he has driven MPS bus routes for decades and in some cases has driven the parents, and perhaps even grandparents of his current passengers. With such a high level of familiarity, the current drivers routinely know students’ addresses and the local street network. However, substitute and new bus drivers do not have a resource to help them efficiently and effectively drive the routes. When asked about the lack of written bus route sheets, one MPS driver responded, “You can always ask one of the older kids. They know where to go.” While likely true, a school district should operate with a higher level of preparedness and professionalism than asking a middle schooler for directions.

The district does not currently use mapping or routing software. It also does not have manually developed route maps. In the annual SDE audit of transportation records, one of two deficiencies noted was the lack of an annual review of bus routes and bus stops for safety/efficiency. The SDE provides guidance for evaluating bus routes (**Exhibit 5-46**).

**Exhibit 5-46
Oklahoma School Bus Route Evaluation Form (Excerpt)**

Revised August 2016

Oklahoma State Department of Education --- 2500 North Lincoln Boulevard --- Oklahoma City, Oklahoma 73105---4599

EVALUATION: School Bus Stop Areas for Student Pickup/Discharge

School district personnel may use this form for evaluating local school bus route service to assure all conditions are the safest possible for student school bus transportation. *(Do not submit to the SDE.)*

Date: _____ City: _____ District Name: _____

Person Conducting Evaluation: _____ Bus Number: _____

Route: _____ Bus Stop Location: _____

Use the answers to the following questions to guide you in determining the best bus stop location for your students. Very few school bus stops will comply with all of the ideal characteristics listed below. In spite of that, attempt to balance the conditions of each stop to provide the optimum level of safety.

Ideally the following answers will be yes;

1. Does this bus stop location allow all approaching drivers a **clear vision area** of at least 500 feet, about 1 ½ blocks, to allow traffic to stop safely? _____
2. Is there a **vehicle pull---out** area at this bus stop location? _____
3. Is the designated student waiting area a **safe distance from traffic**? _____
4. Is this bus stop area **w e l l---lighted**? _____
5. Are **signs** posted to advise motorists of a school bus stop area? _____
6. Is the **speed limit posted** at/near this bus stop area? _____

Ideally the following answers will be no;

7. Is this bus stop area at/near a busy **intersection**? How close? _____
8. Does the bus stop area have a **registered sex---offender** living within 2000 feet of a school bus stop area? _____
9. Do the students have to **cross a street** to board or exit the bus at this location? _____
10. Do students have to cross **multiple---lane streets** to get to the bus stop area? _____
11. Is there evidence of **illegal drug or gang activity** near this school bus stop? _____

Source: SDE, Page 1 of 5, August 2018

The successful evaluation of bus routes begins with an accurate bus route sheet. Moreover, detailed, written route sheets would be a valuable resource for a spare/new driver.

RECOMMENDATION

Develop written bus route sheets.

The bus route sheets should include:

- all bus stops;

-
- stop times;
 - names and grades of students at each stop;
 - student/parent phone numbers; and
 - complete driving directions.

Given the deep experience of the current drivers, it would not take much to get that knowledge on paper. The drivers should be directed to write out their bus routes, showing departure time, times at each bus stop, the students and their grades at each bus stop, the expected return time to school or the bus garage, and the turn-by-turn driving directions from stop to stop. The location of driving hazards, such as railroad crossings, risky intersections, and low, flood-prone areas should be noted as well. Once completed, the route sheets should be stored electronically.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-35

The MPS website contains little or no information about its transportation program, other than passages from the student handbook which describe school bus behavior rules. This likely leaves parents and older students with questions about transportation. Prior to visiting MPS, information about its school busing program was sought out on the MPS website, but without success. It was hoped that a brief description of the MPS busing program would be provided that included basic facts such as the busing eligibility rule (resident student who lives 1.5 miles or more from school). The number of home-to-school routes and the neighborhoods they serve could also be described, although the Transportation Security Agency (TSA) recommends not publicizing the exact route of a school bus for security reasons.

Equally, if not more valuable for the school community to know are the federal and state testing and training requirements for school bus drivers and the safety features engineered into every school bus. Knowing more about the requirements put upon buses, drivers, and school districts ought to build confidence in the busing program and increase bus ridership. A simple way to provide this busing information to parents is to provide links from the MPS website to the Oklahoma State Department of Education website pages on transportation,⁴⁵ the Oklahoma Association for Pupil Transportation,⁴⁶ and perhaps even the National Association for Pupil Transportation.⁴⁷ From these websites, an interested parent could explore additional website links deeper into the subject of school busing.

⁴⁵ sde.ok.gov/transportation

⁴⁶ oaptonline.net

⁴⁷ NAPT.org

RECOMMENDATION

Update the MPS website to include information on the transportation program.

The transportation supervisor should work with the technology coordinator to update the district website to include:

- bus schedules;
- bus eligibility rules; and
- a link to the Oklahoma State Department of Education website pages on transportation for additional information about school busing.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-36

The MPS transportation supervisor does not participate in Oklahoma Association for Pupil Transportation (OAPT) activities. He has been on the job for over three decades and knows the district and its busing program inside out, but perhaps not as well as he could and should.

The school bus world is changing, and it is important to keep up with the changes, especially those that affect student safety and the district's liability. In just the past decade, there have been changes in the medical exams of bus drivers (must now be made by certified medical personnel on the National Registry of Certified Medical Examiners under the auspices of the Federal Motor Carrier Safety Administration), to how new bus drivers must be trained (Entry Level Driver Training, aka ELDT), and pre-kindergarten busing.

The list of new developments in school busing gets longer if you reach back a little further in history. It's vital for a professional transportation supervisor to keep up with the changes, and the best means of doing so is to join and participate in your state's Association for Pupil Transportation. OAPT is active in northeastern Oklahoma. Erich Anderson is the northeast region OAPT contact (Anderson.Erich@unionps.org). OAPT provides "mutual aid" - a mentor to members who request assistance. There is not a professional out there in any field who does not benefit from joining his/her professional development and support group. OAPT conducts annual summer conferences, provides updates on Oklahoma SDE requirements, and links to school bus vendors who can provide vital parts and supplies. On the local level, OAPT members commonly meet monthly in person or via a Zoom meeting and stay in touch with one another as needs arise. Besides the growth in knowledge and professional development, the support from colleagues who are also in the trenches of school transportation is just as important and valuable. In the course of studying other school districts' busing programs, the common denominator that separates well-run, safe, and efficient busing programs from "fly by the seat of your pants" operations is active membership in the state's Association for Pupil Transportation.

RECOMMENDATION

Encourage and enable the transportation supervisor to join and participate in OAPT activities regularly.

The superintendent should require the transportation supervisor to join OAPT and then provide time for the supervisor to attend OAPT activities. The supervisor should bring back to the district resources and lessons learned to share with drivers and maintenance staff.

FISCAL IMPACT

The annual membership fee in OAPT is \$100.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Join and participate in OAPT.	(\$100)	(\$100)	(\$100)	(\$100)	(\$100)

FINDING 5-37

MPS bus drivers have a good rapport with their student riders. This contributes to a positive bus environment.

During the onsite visit, the consulting team rode on each of the three home-to-school bus routes and got a firsthand look at the relations between the students and the bus drivers. In each instance, the bus drivers exhibited a high level of familiarity with the students and care for their welfare. Drivers knew and called the students by name. In many cases, the drivers demonstrated familiarity and respect for the student's parents and other family members.

For example, drivers would commonly wait at the afternoon bus stop for an adult to appear at the house door, indicating they were present to receive their child. In the morning, a driver was observed waiting at a bus stop, despite the absence of any sign that the student was coming to the bus. The driver was confident that the student would appear. She did. Drivers have evidently trained students well in crossing, when necessary, in front of the bus while its red lights are flashing, and the side stop arm is out. Students cooperate with this rule. The MPS drivers faithfully follow the railroad track crossing rule to "stop, look, and listen" before proceeding across the tracks. One reminder to students and drivers that could help avert an accident is to remind students to remain seated until the bus stops at their afternoon bus stop. A few students were observed getting up prematurely and standing by the "white line" behind the driver in anticipation of unloading.

COMMENDATION

MPS bus drivers are commended for their safe driving habits and their contributions to the students' positive school experiences.

The only area where safety habits could be improved is to remind students to remain seated until the bus stops at their afternoon bus stop. The consulting team observed a few students getting up prematurely and standing by the "white line" behind the driver in anticipation of unloading.

FINDING 5-38

MPS has a large bus garage that can store all of its school buses and “white fleet” vehicles. However, the space is cluttered with many non-transportation and old school supply items.

The district is fortunate to have such a large garage for storage. Unfortunately, it is so large that it is capable of storing more than just school bus supplies and parts. The district actually stores few bus supplies in the garage since it operates on a “just in time, as needed basis,” acquiring supplies such as oil and oil filters from the local auto parts supply store when it is time for servicing.

In the garage, the consulting team observed one extra school bus seat on a shelf, but the preponderance of shelf space was taken up with old school supplies that are not likely to be used again, including:

- an old sewing machine;
- old wooden index card filing boxes;
- several old record players;
- an old desktop computer
- boxed paper files from years back;
- a half dozen old peddle cars; and
- a few children’s bicycles.

Exhibit 5-47 shows some of the clutter in the garage area.

Exhibit 5-47
MPS Garage Clutter



Source: Prismatic, March 2023

Every school needs storage space. When all these stored items become a problem though, is when the entry and exit ways to the garage become narrowed by all the loose supplies, making it riskier for buses to depart and return. Problems also arise when hoses and electric cords are left uncoiled, laying on the ground where people are likely to walk and likely to trip. The work desk near the garage doors was cluttered with non-essential items, making repair work more difficult than it has to be.

RECOMMENDATION

Clean the garage area.

A similar recommendation was made in the 2013 study. Maintaining a neat, orderly garage that efficiently stores parts and supplies can be regarded much like pothole repairs. The job is never totally done, but there are payoffs to steadily addressing the issue. Clearing out the unwanted and unneeded items from the garage will create more space for increased, on-site bus repair work.

While tackling the extra materials laying about the inside of the garage, some time might be spent also on cleaning up the outside of the garage. The outside of the garage is visible to the school's neighbors. Good neighbors keep their yards picked up. One of the items to remove from outside the garage and place inside is the 55-gallon drum that holds used motor oil for recycling. It currently sits on the ground next to the garage doors (**Exhibit 5-48**). It would be better if it sat indoors on a containment ring with a two- or three-inch lip that can catch and hold a small spill before it spreads. It would be expensive for MPS to have to clean up an oil spill from the ground outside the garage.

Exhibit 5-48
MPS Old Drum Stored Outside Garage



Source: Prismatic, March 2023

The district should inspect the garage and remove items that are no longer in use. It should also eliminate trip hazards and move items closer to the garage walls so that buses can enter and exit more easily.

By taking the time to remove extra clutter MPS can prevent future injury and help improve the image of the garage to its neighbors. MPS can prevent potential oil spills that would end up costing them extra money in the future.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-39

MPS lacks a formal fleet replacement schedule, but it generally likes to replace buses after about 10 years and with 60-70,000 miles. This finding was also made in the 2013 study of the district.

While the district has replaced some buses since 2013, it still lacks a written policy regarding fleet replacement. The transportation supervisor acknowledged that he likes to replace buses after about 10 years or 60-70,000 miles. The supervisor felt that once buses start to suffer from a wave or cluster of problems, it is best to sell them rather than invest further in their preventive maintenance and repair. This approach though, is contrary to advice from the National Association of State Directors of Pupil Transportation Services (nasdpts.org) who recommended in their position paper, "School Bus Replacement Considerations," that full-sized, 65-72 passenger buses be kept for 12-15 years. The 20- to 24-seat passenger vans like the Maryetta

“spirit” wheelchair van have shorter life expectancies (seven to ten years), because they usually accumulate more miles more quickly on out-of-district routes.

RECOMMENDATION

Extend use of full-sized buses to 12-15 years, or approximately 100,000 miles.

By creating a schedule for fleet replacement MPS can allow its fleet to be pushed safely for more mileage while still safely transporting students. Even with higher maintenance costs in the later years of the buses, MPS will save a considerable amount of money.

The board should develop a bus replacement policy. The policy should have a goal of balancing new bus purchases and repair costs, so as to minimize the total cost of ownership. In establishing a bus replacement policy, the school board should take into consideration the recommendations of staff, available funds, safety, bus maintenance costs, bus condition, age, and mileage in determining which buses need replacing.

The district should also begin to carefully track the preventive maintenance and reactive repair costs of each bus (currently it does not do so) so as to know better when it is paying too much for annual repairs. When annual repairs start to reach 7-9 percent of the purchase price of the bus, the district should consider a replacement.

FISCAL IMPACT

If MPS moves away from a 10-year replacement cycle and towards a 12- to 15-year cycle, it can expect to save 20 percent or more on its bus purchase costs. These savings will be offset by higher maintenance and repair costs in the last years of the life of the oldest buses. A new full-sized bus can cost \$120,000 or more, depending on the options. This cost be deferred for two to five years, creating savings. A conservative estimate of the savings would be 20 percent of \$120,000, or \$24,000. Because MPS buses only travel about 6-7,000 miles each year, they may well live to be 15 years old before they reach the 100,000-mile threshold, which is not considered to be excessive mileage for a diesel bus, especially in an area without much snow or road salt. Being able to park the buses in a garage also extends the life of MPS buses. MPS may find that 15 years becomes the norm for bus life expectancy, further reducing their bus purchase costs.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Adopt a 12- to 15-year replacement schedule for buses.	\$24,000	\$24,000	\$24,000	\$24,000	\$24,000

FINDING 5-40

MPS staff are able to complete oil and fluid changes, air and oil filter changes, tire inflation, light bulb installation, and other simple bus maintenance tasks. These tasks are important parts of a preventive maintenance program that lengthens the life of a school bus and reduces reactive repair costs. Currently, these are the only repairs MPS staff completes on its fleet.

For example, the consulting team found that several MPS bus seats have small tears in them. These tears can quickly turn into large rips if mischievous, young hands get into them. Bus seat repair tape, much like duct tape but in colors that match bus seats, is widely available, but not evidently known to MPS. One bus seat tear was repaired by sewing it closed with blue thread, which can encourage students to pick at the repair work. Bus seat repair is an easy task for in-house staff to complete.

The consulting team found that MPS maintenance staff could likely add to their existing skill set and acquire additional repair skills in brake work, body and paint work, suspension and exhaust systems, and electronic engine diagnostics. Brake work in particular is an important preventive maintenance chore. Assistance in acquiring brake repair skills and other bus repair skills can often be gained from the bus manufacturer, either through in-person instructional sessions or video instruction.

Two bus repair tasks that MPS may not want to undertake are windshield repair and tire replacement, for these reasons:

- Glass repair work is commonly contracted out, but the glass repairman usually comes to the school site. Star cracks, which the consulting team observed on at least one bus, should be repaired as soon as possible before it expands into a larger crack. Larger cracks require the more expensive replacement of the whole windshield.
- Replacing tires requires a large, expensive tire-changing machine and special skills to complete the task safely. If there is a tire replacement shop near the MPS bus garage that has done this work in the past for MPS, it may be best to continue to use their services.

Not only can in-house repairs of the buses be less expensive than contracting out the work to others, but in-house repairs can usually be done more quickly and without the need to take a bus that needs repair offsite. The MPS garage has ample space to provide for the storage of more bus supplies and repair equipment, especially if the garage is cleared of unneeded materials.

RECOMMENDATION

Expand the capabilities of the bus maintenance crew to include brake work, steering and suspension, exhaust repair, tire installation, and body work so that there are fewer instances when MPS buses must be sent out of district for repairs and preventive maintenance.

If MPS were to train staff to make more of these repairs in-house it would reduce the costs involved in hiring outside sources. By doing so MPS would initially see a rise in costs but would over time develop a more knowledgeable staff that could ultimately reduce external costs for repairs.

The superintendent should work with the maintenance crew to identify training goals. She should then ensure that staff has sufficient time to attend training sessions.

FISCAL IMPACT

Part of the cost of expanding bus repair skills will be in acquiring training. There may be opportunities for free training from bus parts vendors and OAPT. The only cost then becomes releasing a person for a day or half-day to attend training. The consulting team has estimated these as \$500 in annual costs. The cost of purchasing additional bus repair equipment and supplies should be regarded as an investment that should pay for itself over the years and be offset by lower, offsite, contracted repair costs. Further investment in preventive maintenance should also reduce reactive repair costs. MPS can start to raise its repair capabilities modestly, and then continue to grow as the investment proves to be worthwhile.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Expand bus repair capabilities.	(\$500)	(\$500)	(\$500)	(\$500)	(\$500)

Appendix A:
Staff Survey Results

Staff Survey

Surveys Completed: 68

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	31%
6 – 10 years	22%
11 – 15 years	12%
16 – 20 years	18%
21 years or more	18%
What is your role in the school district?	
School Administrator	1%
Classroom Teacher	53%
Other Certified (Librarian, Guidance Counselor)	13%
School Aide/Nurse	3%
Instructional Aide	7%
Other Support Staff (Cafeteria, Office, Custodial)	22%

Survey Questions

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
1	Administrative decisions are made promptly and decisively.	18%	72%	7%	1%	1%
2	Administrators are easily accessible and open to input.	26%	58%	12%	5%	0%
3	The district ensures adequate input from teachers and staff on most important decisions.	10%	51%	19%	15%	4%
4	The district gives student needs a high priority when making major decisions.	22%	68%	9%	1%	0%
5	Most district administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient.	40%	49%	10%	0%	0%

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
6	School-based personnel play an important role in making decisions that affect schools in our district.	12%	51%	28%	6%	3%
7	Parents/families play an active role in decision making in our schools.	9%	37%	32%	19%	3%
8	School-based personnel value parent/family input and engagement.	21%	62%	10%	4%	3%
9	Parents/families participate in school activities and organizations.	25%	57%	15%	1%	1%
10	Parents/families receive regular communications from the district.	46%	51%	3%	0%	0%
11	The curriculum is broad and appropriately challenging for most students.	21%	63%	16%	0%	0%
12	The district's curriculum is aligned from grade to grade and from class to class.	18%	58%	21%	3%	0%
13	Teachers in our schools know the material they teach.	22%	71%	7%	0%	0%
14	Teachers have adequate supplies and equipment needed to perform their jobs effectively.	40%	51%	4%	4%	0%
15	Teachers know how to use the technology they have for teaching.	25%	63%	9%	3%	0%
16	The district lacks sufficient instructional technology.	4%	7%	22%	44%	22%
17	Test data from district-adopted benchmarks and mandated end-of-year tests are used to improve the district's curriculum.	9%	53%	34%	3%	1%
18	Teachers effectively use student data to improve instructional practices.	18%	49%	29%	3%	1%

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
19	Sufficient student services are provided in this district (e.g., counseling, speech therapy, health).	45%	52%	3%	0%	0%
20	The district adequately implements policies and procedures for the administration and coordination of special education.	22%	54%	18%	4%	1%
21	There is generally cooperation and collaboration regarding special education issues in our district.	21%	54%	18%	7%	0%
22	Most staff in our school/department are intentional in honoring the cultural differences within our student body.	25%	58%	13%	3%	0%
23	Most staff in our school/department treat student diversity as an asset and not a deficit.	24%	60%	13%	3%	0%
24	Most staff in our school/department have high expectations for all students regardless of their race, ethnicity, or language.	35%	54%	9%	1%	0%
25	Salary levels in this district are competitive.	25%	38%	29%	6%	1%
26	This district values diversity in its employees.	22%	65%	13%	0%	0%
27	My supervisor evaluates my job performance annually.	32%	53%	13%	1%	0%
28	My salary level is adequate for my level of work and experience.	21%	37%	18%	21%	4%
29	I am actively looking for a job outside of this district.	4%	4%	16%	47%	28%
30	District leaders enforce high work standards.	19%	60%	16%	4%	0%
31	I feel that my work is appreciated by my supervisor.	26%	57%	6%	7%	3%

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
32	Teachers who do not meet expected work standards are reprimanded.	4%	25%	51%	12%	7%
33	Staff (excluding teachers) who do not meet expected work standards are reprimanded.	1%	29%	53%	12%	4%
34	I feel that I am an integral part of the team here.	21%	54%	18%	4%	3%
35	The work standards and expectations in this district are equal to or above those of most other school districts.	28%	51%	15%	6%	0%
36	There is adequate high quality professional development for principals and teachers.	37%	50%	13%	0%	0%
37	Non-teaching staff has opportunities for professional development relevant to their responsibilities.	28%	53%	16%	3%	0%
38	Funds are managed wisely to support education in this district.	35%	43%	19%	1%	1%
39	The budgeting process effectively involves administrators and staff.	18%	26%	49%	6%	1%
40	My school/department allocates financial resources equitably and fairly.	21%	35%	40%	1%	3%
41	The purchasing process takes too long.	1%	0%	43%	43%	13%
42	Our schools have sufficient space and facilities to support the instructional programs.	16%	47%	13%	18%	6%
43	Our facilities are clean.	32%	63%	3%	0%	1%
44	Our facilities are well maintained.	32%	60%	4%	1%	1%
45	Parents, citizens, students, faculty, and staff have opportunities to provide input into facility planning.	6%	25%	52%	10%	6%
46	There are facility concerns throughout the campus.	2%	14%	53%	23%	9%

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
47	I know what to do during a crisis or an emergency on campus.	19%	73%	3%	4%	0%
48	Students in this district are accepting of other students who are different.	15%	60%	18%	7%	0%
49	Adult bullying is a problem in this district.	0%	4%	28%	49%	19%
50	Poor student behavior is a problem in this district.	3%	31%	22%	44%	0%
51	The food services department provides nutritious and appealing meals.	10%	56%	21%	10%	3%
52	Cafeteria staff are helpful and friendly.	29%	57%	7%	6%	0%
53	The school cafeterias is calm environments in which to eat.	15%	54%	12%	16%	3%
54	Buses arrive and depart on time each day.	40%	51%	9%	0%	0%
55	There are enough working buses to meet the needs of the district.	40%	46%	15%	0%	0%
56	Bus drivers maintain adequate discipline on the buses.	24%	35%	41%	0%	0%
57	Buses arrive early enough for students to eat breakfast at school.	40%	53%	7%	0%	0%
58	Our district provides adequate technology training.	37%	46%	9%	9%	0%
59	Our district provides adequate technical support.	45%	52%	1%	1%	0%
60	I have adequate equipment and computer support to conduct my work.	43%	54%	1%	1%	0%
61	Administrative computer systems are easy to use.	25%	53%	22%	0%	0%
62	Instructional computer systems are easy to use.	28%	54%	18%	0%	0%
63	The district's technology equipment is often used past its useful lifespan.	13%	15%	38%	29%	4%

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
64	Many administrative processes are still paper-based.	1%	13%	57%	26%	1%

Department/Topic	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Strategic planning	39%	33%	12%	2%	0%	14%
Community relations and communication	64%	25%	6%	0%	1%	3%
Internal communications	45%	36%	7%	1%	6%	4%
Budgeting	48%	25%	0%	1%	0%	25%
Financial management	49%	21%	1%	1%	0%	27%
Purchasing	49%	22%	1%	1%	0%	25%
Personnel management	42%	33%	9%	3%	3%	10%
Staff development	72%	18%	6%	0%	0%	4%
Special education	52%	28%	10%	3%	0%	6%
Elementary education	67%	24%	3%	0%	0%	6%
Middle school education	49%	33%	7%	3%	0%	7%
Facilities maintenance	69%	27%	1%	0%	1%	1%
Custodial services	67%	24%	7%	0%	0%	1%
Food services	43%	42%	10%	1%	0%	3%
Administrative technology	63%	22%	1%	0%	0%	13%
Instructional technology	69%	22%	1%	0%	0%	7%
Technology management and support	77%	18%	2%	0%	0%	3%
Transportation	76%	21%	0%	0%	0%	3%
School Board members' knowledge of educational needs of students	45%	24%	7%	3%	3%	18%
School Board members' knowledge of operational needs in the district	46%	21%	6%	3%	1%	22%
Superintendent's work as the educational leader of the district	63%	24%	3%	4%	0%	6%
Superintendent's work as the chief administrator of the district	69%	16%	4%	3%	0%	7%
Principal's work as an instructional leader	67%	22%	3%	1%	1%	4%
Principal's work as a manager of the staff and teachers	61%	25%	4%	0%	3%	6%
Overall quality of education in this district, compared to other districts in Oklahoma	58%	34%	1%	0%	0%	6%

Written Responses

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?

- I think one thing that can be improved is when someone new is hired the admin send out an email, so everyone knows it's not just a random person walking around the school.
- I work in the Middle School and sometimes I feel like we are left out based on the fact that we are a separate building. There are also times that decisions are made without asking us/middle school teachers our thoughts or input.

- This district has top quality, up to date technology, but could use more rooms dedicated to this technology so it can be utilized on a daily basis.
- I believe one thing that could be changed is limiting students time outside of the classroom. Instead of having young students games during the school day where they miss key instructional time, games should be moved after school.
- The junior high could use an expansion and a few more classrooms. This school is growing, and we need the space to accommodate.
- Staff are generally unhappy.

Appendix B:
Parent Survey Results

Parent Survey

Surveys Completed: 85

Totals may not add to 100 percent due to rounding.

Grades of Students

Grade	Percentage
Kindergarten	17%
1	26%
2	13%
3	15%
4	8%
5	10%
6	13%
7	4%
8	13%
Other	30%

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.	18%	23%	54%	4%	2%
2	School board members know and understand the educational needs of students in the district.	24%	26%	45%	2%	2%
3	The superintendent is a respected and effective leader.	37%	39%	24%	0%	0%
4	District and school staffs are accessible to parents.	35%	52%	10%	2%	1%
5	Parents play an active role in decision-making in our schools.	14%	32%	33%	17%	4%
6	Education is the main priority in our school district.	38%	46%	8%	4%	4%

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
7	In this district, students learn the necessary material to be prepared for the next grade.	40%	51%	4%	2%	2%
8	Teachers are held accountable for ensuring that students learn.	38%	30%	23%	7%	2%
9	Students are treated equitably in this district.	33%	31%	17%	16%	4%
10	Our school can be described as a “good place to learn.”	41%	49%	7%	0%	2%
11	Students in this district are accepting of other students who are different.	27%	38%	25%	5%	5%
12	Poor student behavior is a problem in this district.	5%	17%	36%	36%	7%
13	The school buildings and grounds are safe and secure.	36%	52%	5%	6%	1%
14	I regularly use technology to keep up-to-date on my child’s education (emailing teachers, online gradebook, etc.).	32%	51%	7%	8%	1%
15	Teachers know how to use technology in the classroom.	39%	43%	18%	0%	0%
16	I feel welcome at my child’s school.	43%	43%	11%	1%	2%
17	My child feels welcome and accepted at school.	43%	48%	5%	4%	1%
18	I receive timely communications from my child’s teachers regarding his/her progress in school.	39%	45%	6%	6%	4%
19	My child’s school encourages parents to be involved in the school and offers a variety of ways to do so.	33%	44%	12%	8%	2%
20	Teachers have high expectations for my child.	37%	46%	12%	2%	2%
21	My child is appropriately challenged by his/her schoolwork.	31%	53%	12%	1%	2%

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
22	I am satisfied with the education my child is receiving.	39%	51%	5%	1%	4%
23	My child's school is clean.	42%	49%	7%	2%	0%
24	My child's school is attractive and welcoming.	44%	44%	8%	2%	1%
25	My child's school is well maintained.	42%	50%	6%	2%	0%
26	My child feels safe and secure at school.	40%	52%	5%	2%	0%
27	Discipline is fairly and equitably administered in my child's school.	24%	37%	25%	11%	4%
28	My child regularly uses technology at school.	31%	56%	13%	0%	0%
29	My child has regular internet access at home.	62%	30%	4%	5%	0%
30	The school lunch period is long enough for my child to eat.	23%	46%	18%	11%	2%
31	My child often waits longer than five minutes in the lunch line.	2%	8%	74%	12%	4%
32	My child likes the food served in the cafeteria.	19%	42%	18%	12%	10%

Survey Question		Yes	No
43	Does your oldest child regularly ride the bus?	8%	92%

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.	57%	7%	0%	0%	0%
45	My oldest child feels safe riding the bus.	43%	57%	0%	0%	0%
45	Bus drivers effectively handle discipline issues on the bus.	44%	43%	14%	0%	0%

Written Responses

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?

- Stop the bullying make sure the Jr high building is safe for all students and staff because anyone can just walk right into the building there is no lock on the doors.
- I believe that not every student needs counseling and not every child's attitude is a reflection of something happening at home. Some students have problems with a teacher or classmate, and I feel like the answer to that is to overlook it or offer counseling to the child while nothing is really done to the teacher/staff member or other student making a child feel uncomfortable.
- Everything. Better sports involvement, as in not having favorites. To me tryouts are for upper classes, (5-8th grade.) More equal opportunity for the lower classes.
- Need more parents involved in their child's education.
- Both my children feel like discipline is not handled correctly and get frustrated when trying to do the right thing. Many times, things are shrugged off as no big deal or not taken care of, so they get to where they don't even try and just try to deal with situations on their own.
- I think the education is horrible. The education standards are very low. No after school education. My kid does not eat school lunch, so he starves all day at school. I'd like to make his own lunch.
- I finally put my oldest in virtual through epic because they couldn't handle my child who is autistic.
- Swimming should not be a requirement above grade school, and if it is, basics should be taught.
- The food is awful!!!! My kids are starving when I pick them up from school. The food needs to go back to the 70s n 80s when the food was good.
- The thing that worries me the most is when I go to pick up my son in the Jr high, I can just walk in through the doors. The doors are never locked like the front office in the other building. Several times I'm had to pick my son up for Dr. appointments, in the Jr high, there was nobody in the office.
- I think the school is doing well.
- Appreciate the opportunity my kids being able to go to Maryetta.
- Why are Students who fail assignments not given the opportunity to retake or re try the assignment after additional teaching, is this something you could look into. Also, maybe the grading scales for lower grades be reevaluated?
- Y'all are doing great! Look forward to our future together!
- I feel like they are comparative to other schools in the area. I feel that their disciplinary actions are lacking but I understand that their hands are tied so to speak by restriction from the government compared to years past.
- Maryetta works hard for our kids, and we appreciate every single person that works for the district.

- I would like to know if there is any kind of school bullying going on or if teachers see or notice when kids are being bullied. I don't have a clue if the school has anybody the kids can talk to about being bullied.... I would like to think that it doesn't happen, but if it does, what does the school do about it?
- I would like to see more opportunities and activities for my children that do not want to be in sports. I would like to see robotics or something engaging that is not sports.
- Really the only issue I have is the lunch period. Students who play instruments at high school often do not have any time for lunch and upper grades have very little time to eat before they are rushed out for the next group of students to eat. I know the lunchroom is being extended, but that is not addressing the current issue. The students cannot go 7+ hours without eating. They cannot do well in class when they are starving.
- The school needs a tutoring program.
- Maryetta has been a great school for my kids they learned a lot and the transition to high was no problem they were very well prepared for the high school curriculum.
- The teachers are good.
- Communication to parents from the school for junior high is very weak. The dependability of the kids to bring home the information may be too high at the school level. There are many ways of communication, and the school is not good at communicating the information timely with parents. Even teachers that teach there often times don't have the answers.
- Parent/Teacher communication could be better.
- Better and more inclusive learning for children with learning disabilities. Better education for the teachers, on topics such as neurodivergent children.
- I'm very pleased with my child's school. I have nothing but good to say about the school and staff.
- Would love to have a high school!

Appendix C:
Students Survey Results

Student Survey

Surveys Completed: 104

Totals may not add to 100 percent due to rounding.

Grades

<i>Grade</i>	<i>Percentage</i>
Grade 6	50%
Grade 7	34%
Grade 8	17%

Survey Questions

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1	Education is the main priority in our school district.	26%	57%	13%	3%	2%
2	Students learn the necessary material to be prepared for the next grade.	30%	50%	18%	0%	2%
3	I have plenty of choices when selecting academic and elective courses.	15%	38%	30%	13%	4%
4	My school can be described as a “good place to learn.”	25%	46%	21%	5%	3%
5	I feel that I am challenged in my classes.	21%	34%	31%	13%	2%
6	My teachers have high expectations for me.	35%	34%	25%	3%	3%
7	Most staff in our school have high expectations for all students regardless of their race, ethnicity, or language.	39%	37%	20%	1%	3%
8	All students have equitable access to courses offered at my school.	19%	44%	28%	5%	4%
9	Most adults in my school treat student diversity as a good thing, not a bad thing.	17%	39%	38%	3%	3%
10	I knew what to expect on the state tests.	26%	29%	31%	9%	6%

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
11	There is at least one adult at school to whom I can go when I have a problem.	42%	35%	10%	8%	6%
12	I have at least one adult in this school who cares about me.	37%	38%	18%	2%	5%
13	I have at least one adult in this school who mentors me.	19%	25%	43%	6%	7%
14	I feel welcomed and accepted by other students in this school.	19%	47%	19%	11%	4%
15	I feel welcomed and accepted by the adults in this school.	25%	46%	23%	3%	4%
16	The school library meets my needs for books and other resources.	14%	35%	39%	7%	6%
17	I have access to good college counseling at this school.	12%	29%	46%	8%	6%
18	I have access to good career counseling at this school.	13%	36%	38%	9%	5%
19	My school connects me to real-world issues and experiences.	13%	45%	31%	7%	5%
20	My teachers communicate regularly with me about my academic progress.	14%	42%	34%	6%	5%
21	My school is clean.	30%	47%	10%	9%	5%
22	My school is attractive and welcoming.	23%	45%	23%	7%	2%
23	My school building is well maintained.	25%	52%	16%	6%	2%
24	My school building needs a lot of repairs.	6%	11%	34%	38%	12%
25	I feel safe and secure at school.	18%	46%	19%	9%	8%
26	Student bullying is a problem in this school.	11%	17%	32%	24%	17%
27	Students in this school accept each other's differences.	20%	38%	22%	11%	9%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
28	The school buildings and grounds are safe and secure.	20%	51%	22%	3%	4%
29	Discipline is fairly and equitably administered in this school.	17%	34%	35%	9%	5%
30	Teachers and staff respect students in this school.	26%	45%	19%	7%	3%
31	Drugs are a problem in this school.	10%	16%	19%	24%	32%
32	Discipline and order are maintained in the school cafeteria.	19%	31%	42%	5%	3%
33	I have enough time to eat my lunch each day.	16%	45%	17%	16%	6%
34	I usually have to wait in line longer than five minutes to get a school lunch.	8%	7%	32%	37%	16%
35	I like the food served in the cafeteria.	5%	30%	35%	18%	12%
36	The cafeteria serves a good variety of food for breakfast.	7%	34%	30%	17%	12%
37	The cafeteria serves a good variety of food for lunch.	12%	43%	25%	10%	11%
38	I regularly use technology to keep up-to-date on schoolwork (emailing teachers, using online gradebook, etc.).	19%	39%	28%	9%	6%
39	I regularly use computers or other technology at school.	22%	52%	16%	6%	4%
40	The technology available to me at my school is new enough to be useful.	27%	54%	13%	3%	3%
41	Teachers know how to use the technology they have for teaching.	29%	57%	11%	2%	2%
42	I have regular Internet access at home.	43%	40%	10%	5%	3%

Survey Question		Yes	No
43	Do you regularly ride the bus?	14%	86%

If student rides the bus

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
44	My bus runs on time nearly every day.	33%	53%	13%	0%	0%
45	Students feel safe riding the bus.	33%	33%	27%	0%	7%
46	Bus drivers effectively handle discipline issues on the bus.	47%	33%	20%	0%	0%

Written Responses

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?

- I feel like this is an amazing school but there are little repairs needed here and there other than that it is an amazing school.
- The school district needs more security just in case of a school shooter. If something like that happened, we would just be sitting ducks and wouldn't have much protection.
- They could improve the housing.
- Put more funds into fine arts programs. Not everyone wants to do sports or agriculture, they hardly ever win anything. I promise you it would benefit those who are already in those programs, and attract more people because of it.
- The cafeteria needs some adjustments. The food for lunch a breakfast could be improved.
- Cut us some slack, we are trying man.
- We need better choices for food.
- No, everything here is perfect.
- It is being improved a little bit but not really but sometimes the bathroom gets shut down because of problems.
- The Soccer field could be better so soccer players can practice on them during soccer practice
- You're doing well keep it up but there has been bullying going on.
- Get Apple MacBook pros for learning.
- I think my school is doing very well.
- When it rains water gets all over the sidewalk and we step in it and get our shoes wet.
- My district is doing well by educating us really good and our teachers are doing a great job.
- People here are very loud and most of them say slurs.

- The school district is fine for how it is in the school property... And the thing that is well is the teachers keeping us safe at school.
- I think we have good coaches.
- Get more soccer balls.
- It is a good place to be, and it does not need to be improved besides finishing the school cafeteria
- There are definitely problems with students doing their best and staff taking their best effort and putting it down saying they need to do better. The district does well with trying to solve issues as far as bullying goes but despite their best efforts it doesn't ever end.
- The district is doing good, but I wish that people who play sports have more time to eat from getting released late or have to change before going to lunch.
- The school is fine with me. But sometimes other people discourage other people and that is not okay. And maybe mix up the breakfast sometimes instead of mostly the same thing. and that would be all.
- It is keeping the kids safe and having fun at the same time and learning.
- I feel like the people here are AMAZING!! I have 3 people I can talk to when I have a problem. This school I feel safe at. I have a very wonderful homeroom teacher. She is very funny. This school can definitely improve on pushing kids so hard. Because sometimes I feel discouraged. Other than that, this school is amazing!! Thank you for that!!
- P.E our PE coach is strict and don't treat kids fairly with the cramps and women problems male coaches don't understand.

Appendix D:
Community Input Focus Group

Community Input Focus Group

The Community Input Focus Group was held on March 7, 2023. There were six 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

School Board

- Don't know much about it.
- Most have never been to a board meeting.

Superintendent

- Doing a good job. The school has grown a lot over the last few years.
- Administration handles things brought to them promptly.
- The positive things mentioned in the 2013 focus group are still evident today: can come and visit with superintendent and principals (open door policy); people in charge and people brought in are very qualified; school has not gone downhill with change to Lori Means as superintendent; looks out for the school, not themselves; all administrators live in close proximity to the school; very visible; they do not just sit in their office; always on the edge of new things.
- Administration shows up to events.
- Administration is responsive.

Communications

- There is a lack of communication. When the kids go somewhere, we don't know when they are going, when they are coming back. Who should be informing us of these things? Are the coaches supposed to be putting out the information?
- For extracurriculars, they rely on the kids to communicate information too much.
- There was a basketball game this and the parents were told to go to a different place than where the games were. Once the problem was discovered, the district communicated the correction pretty quickly.
- Just found out that the 8th grade parents are supposed to do the 8th grade graduation party. This should have been communicated earlier. The district should communicate at the beginning of the year all the things that the parents should expect to do during the year.

- There is no PTA/PTO.
- There is a system to get messages from the school. Some are getting text messages about some events, but not all events. Several have regular contacts with teachers. Teachers are fine with being contacted and are very responsive.
- Athletics is not as communicative as the school and teachers. Things seem to be last minute. Parents have to coaches instead of coaches reaching out.
- Maryetta is all about community.

INSTRUCTIONAL DELIVERY SYSTEM

- Parents use Wengage to see grades, but those are not updated timely. One day the student has an A, the next day it's a C. Some assignments are popping up with zeros because teachers are not putting in grades. One parent is not using Wengage – their child provides the updates.
- For the upper grades, teachers all do something a little different – some post assignments for a week, some do something different. Some use textbooks, some use technology. Students seem to navigate the differences well and the parents see it as training for high school.
- District offers a little bit of everything for the students. They have advanced classes for those who need it.
- For some, the coursework seems too easy.
- Students really like the Makerspace and Art programs.
- Other schools have stepped up since the 2013 review and Maryetta students transitioning to high school are at about the same level as the other 8th graders going to 9th grade.
- They have heard from high school teachers that Maryetta students are better prepared with technology than others.
- Teachers are caring.
- Majority of the teachers are great.
- They hear from middle school students that their teachers are not always in their classrooms. Some parents have observed this recently.

Counseling

- District has more of this than other districts.
- Parents of students who went to counseling reported that the counselors were excellent, really cared, showed lots of compassion.

- Some concerns about the inclusion of special education students in regular classrooms. Some special ed students seem like they would be better served via 1-on-1 services. Sometimes they disrupt classrooms and there is not a room to which they can go to regroup. Examples of when there is a disruptive special education student, it disrupts the whole classroom. They would like a dedicated space for those students to calm down and regroup.

BUSINESS OPERATIONS

- Seems to handle their money well.
- Better stuff here than the surrounding districts.
- They have a lot of technology.
- They get a lot of grants.
- No signs that money is being wasted. When they spend money, it is usually upgrades.
- In the process of offering day care for children of staff. Trying to get it by August 2023.

FACILITIES USE AND MANAGEMENT

- Our facilities are better kept than those they see at other schools.
- The maintenance people are the best at maintaining the facilities.
- The football field is spectacularly well-maintained.
- Cameras have been updated and they are upgrading facilities security controls.
- There are lots of unlocked doors remaining. If you want to get in, you can. And the kids can get out. Some would prefer to always have to be buzzed in.
- Excited about the new cafeteria. It will be nice to reinstate the meals where parents can attend - Thanksgiving meal, Dads and Doughnuts. Let parents come to eat lunch with the students. In addition, they would like to allow parents to attend classroom birthday parties, etc. (it was available pre-COVID).
- Why isn't there a fence along the highway by the gym? The track is close to that.
- Mowing shouldn't be happening when there are children on the playground.

SUPPORT SERVICES

Child Nutrition

- Students report that the meal period is crowded and crazy.

- Several report that their children “hate” the food. Others have not heard that from their children.
- Some have children who enjoy staying after school just for the snacks.
- They have heard that teachers complain that they only get the same portion as the students. They have heard that 8th graders get the same portions as the younger students.

Technology

- Students should be allowed to take their computers home. There are some programs that require the students to use their account on their school-issued computers, so they need a chance to finish that work at home. Sometimes teachers are assigning computer work during snow days, but they don’t have a computer at home.
- There are concerns as to whether all families have reliable internet at home.
- Students don’t remember their passwords and then parents can’t help them.
- Some students are smarter at technology than their parents and teachers.
- That gaming room and e-sports is well above what other districts offer.
- Coding is an option for students and some students really like it.

Transportation

- A stoplight is needed at Fairfield (Maryetta) and 59. Traffic is horrible. Why can’t a light be installed? Or an officer assigned to do traffic control in the morning? A traffic cop would be nice.
- No complaints about school bus transportation.
- One has two school buses go by their house.

Appendix E:
Resource Referenced in Chapter 2

Audit



Professional Learning Communities:
source materials for school leaders and
other leaders of professional learning

Deciding where you are as a professional learning community

Louise Stoll, Ray Bolam, Agnes McMahon, Sally Thomas, Mike Wallace,
Angela Greenwood and Kate Hawkey

What is an implementation rubric?

Rubrics are usually used as assessment tools to measure pupils' work. They are scoring guides that don't depend on a numerical score. Instead, they list a full range of criteria or elements to assess a particular piece of work or performance. They describe varying degrees of quality

for each element, increasing from left to right. A benefit of rubrics is that they provide signposts to where you can get to as a result of development, and pointers to next steps that might be taken when trying to develop particular activities.

What is the purpose of this rubric?

This implementation rubric helps you see where colleagues think you are as a professional learning community (PLC) as they reflect on different criteria related to specific characteristics and processes of PLCs. The 12 topics down the left-hand side are the eight characteristics and four developmental processes of PLCs we identified in our study. For each of these, a number of key descriptors are mapped out horizontally, showing the development of each through four phases of their journey, highlighted at the top of the four columns. These range

from what might be happening when you are starting on the journey to develop a PLC to action taken when the PLC is self-sustaining:

Starting out; acquiring information and beginning to use ideas.
Developing; experimenting with strategies and building on initial commitment.
Deepening; well on the way, having achieved a degree of mastery and feeling the benefits.
Sustaining; introducing new developments, re-evaluating quality – PLC as a way of life.

How might you use the rubric?

You might choose to use the rubric in a range of ways. For example:

- individual staff members complete the rubric privately and give it to a designated person or team who collate(s) responses and feed(s) these back to the staff for discussion
- individual staff members complete the rubric before sharing and discussing their responses with each other
- small groups complete the rubric together and then compare and summarise their responses

The rubric on pages 3–9 and summary response sheet on page 10 can be photocopied for circulation. Each person completing the rubric needs to look at the descriptors, perhaps highlighting comments that represent your PLC. They can then decide which phase best

represents the PLC's current position, either highlighting the appropriate box in the table or marking the box in the blank response sheet included after the rubric. There is also a space labelled 'How do you know?' where people can note down evidence.

Looking through individual highlighted responses can help you see trends and patterns as well as differences in opinion. You can prepare a summary sheet of all the responses using the blank summary response sheet.

At the end of the activity, you will find some questions to discuss once you have pulled together the results.

The process can be repeated each year. You can look at changes people think have occurred and discuss the reasons for these changes.

Professional learning community implementation rubric



PLC characteristics

Starting out

Acquiring information and beginning to use ideas

Developing

Experimenting with strategies and building on initial commitment

Deepening

Well on the way, having achieved a degree of mastery and feeling the benefits

Sustaining

Introducing new developments, and re-evaluating quality – PLC as a way of life

Shared values and vision

Staff have diverse values related to educational issues. They are beginning to recognise the need to attend to some PLC-wide issues. There are initial discussions about these issues.

Some smaller groups (PLCs) within the staff may share values about education and leadership.

An increasing number of staff share educational values, and participate actively in discussions about vision and values.

Shared educational vision is often stronger and more apparent in particular sections or departments of the PLC.



Educational values and vision are fairly widely shared throughout the PLC and generally demonstrated through practice.



The vision is revisited regularly and commitment to whole-school, centre or college-wide professional values is increasing.

Educational values and vision are widely shared throughout the PLC, regularly revisited and revised as appropriate by the whole staff, and demonstrated through practice.

There is a high degree of commitment to whole-school, centre or college-wide professional values and a strong sense of cohesion and consistency of approach.

How do you know this?

PLC characteristics	Starting out <i>Acquiring information and beginning to use ideas</i>	Developing <i>Experimenting with strategies and building on initial commitment</i>	Deepening <i>Well on the way, having achieved a degree of mastery and feeling the benefits</i>	Sustaining <i>Introducing new developments, and re-evaluating quality – PLC as a way of life</i>
<p>Collective responsibility</p> <p><i>How do you know this?</i></p>	<p>Staff do not feel a sense of whole-school, centre or college-wide shared responsibility for <i>all</i> pupils.</p> <p>Some smaller groups, particularly those with common teaching or support responsibilities, feel a sense of shared responsibility.</p> <p>There are few whole-school, centre or college discussions about learning, progress, development and successes of pupils.</p>	<p>Some staff members feel a sense of collective responsibility for <i>all</i> pupils in the school, centre or college.</p> <p>Smaller groups (PLCs) feel a sense of shared responsibility for <i>all</i> pupils within their subject, year, key stage or phase.</p> <p>There are some whole-school, centre or college discussions about pupils' learning, progress, development and successes.</p>	<p>There is a growing sense of collective responsibility throughout the school, centre or college for the learning, progress, development and success of <i>all</i> pupils.</p> <p>Discussions of learning, progress, development and success of individual pupils.</p>	<p>A desire to do the best for all pupils pervades the school, centre or college.</p> <p>There is regular and deep whole-school, centre or college dialogue about learning, progress, development and successes of individual pupils.</p> 
<p>Learning-focused collaboration</p> <p><i>How do you know this?</i></p>	<p>Many staff mainly work in isolation. They focus on their own goals, value self-reliance and rarely share practices and strategies.</p> <p>Some smaller groups or departments collaborate and share learning and teaching and support strategies.</p>	<p>Some staff work together across the PLC, with joint planning, sharing strategies, and engaging in whole-school, centre or college-wide projects.</p> <p>Some support staff or care workers and teaching staff collaborate closely but this is not a common feature.</p>	<p>Staff increasingly plan together, collaborate and share ideas through meetings, website resources, team teaching etc.</p> <p>There are examples of productive teamwork between teachers and support staff.</p>	<p>Collaborative planning of learning and teaching activities is taken for granted.</p> <p>Sharing of ideas and strategies and joint problem-solving are widespread.</p> <p>Teamwork involving teachers and support or care staff is widespread.</p> 

PLC characteristics	Starting out <i>Acquiring information and beginning to use ideas</i>	Developing <i>Experimenting with strategies and building on initial commitment</i>	Deepening <i>Well on the way, having achieved a degree of mastery and feeling the benefits</i>	Sustaining <i>Introducing new developments, and re-evaluating quality – PLC as a way of life</i>
<p>Existence of professional learning</p>	<p>Professional learning mainly consists of formal, short courses and whole-school, centre or college in-service training. Take-up is largely based on individual interest. Enthusiasm for whole-school, centre or college professional learning experiences is limited. There are few work-based professional learning opportunities eg peer observation, coaching etc. There is mainly ad hoc talk about learning from external courses and visits.</p>	<p>A considerable number of staff are engaged in a variety of professional learning opportunities based on individual interest (eg courses, higher degrees etc) and increasingly this is also linked to school, centre or college aims. An increasing number of staff participate enthusiastically in whole-school, centre or college professional learning experiences. Staff feed back on their learning to smaller groups and, sometimes, the whole staff.</p>	<p>Staff are generally interested in a diverse range of individual and group opportunities to increase their knowledge, understanding and skills. Many staff participate enthusiastically in whole-school, centre or college professional learning experiences. Staff generally feed back their learning to the whole staff.</p>	<p>All staff are enthusiastically involved in a diverse range of individual, group and whole-school, centre or college professional learning experiences. The school, centre or college as a workplace is seen as an important site for learning by all staff. Staff devote effort and energy into incorporating valuable new strategies into their practice. Learning is widely shared across the whole staff.</p> 
<p>How do you know this?</p>	<p>There is little reflection on, or enquiry into, practice. Data collection and the use of data to inform and develop learning and teaching practice are limited. Data may be seen as an end in itself and often as someone else's problem.</p>	<p>Some staff are involved in activities to investigate and improve learning and teaching, eg peer observation and coaching, action research, review and moderation of pupils' work etc. Data collection and the use of data to inform and develop learning and teaching are variable across the school, centre or college.</p>	<p>Many staff are actively involved and show increasing confidence about using different methods to explore and improve learning and teaching. Data collection and the use of data to inform and develop learning and teaching are increasingly consistent across the school, centre or college.</p>	<p>A questioning orientation to practice and 'need to know how we are doing and how we can improve' is pervasive. Staff confidently use a wide range of methods to investigate learning and teaching, using findings to inform and develop their practice. Data are collected, analysed and used to support this process.</p> 
<p>How do you know this?</p>	<p>Reflective professional enquiry</p>			

PLC characteristics	Starting out <i>Acquiring information and beginning to use ideas</i>	Developing <i>Experimenting with strategies and building on initial commitment</i>	Deepening <i>Well on the way, having achieved a degree of mastery and feeling the benefits</i>	Sustaining <i>Introducing new developments, and re-evaluating quality – PLC as a way of life</i>
<p>Openness, networks and partnerships</p> <p><i>How do you know this?</i></p>	<p>There is very little professional contact outside the school, centre or college.</p> <p>External networks and partnerships are limited, as is the seeking of external ideas and strategies.</p> <p>The school, centre or college is relatively isolated from its community.</p>	<p>Some staff are interested and engaged in networks and activities beyond the school, centre or college as a source of generating and sharing ideas and strategies.</p> <p>There is some involvement with the community.</p>	<p>External sources for generating and sharing ideas and strategies are generally perceived as valuable.</p> <p>Staff are increasingly taking up opportunities to become involved in networks and external partnerships. Some whole-school, centre or college networking is being explored.</p> <p>Community partnerships are generally welcomed and positive.</p>	<p>Staff look beyond the school, centre or college for new ideas and strategies. External input is sought out and welcomed.</p> <p>Links with other schools, centres, colleges and external agencies are seen as valuable, productive and important.</p> <p>Many staff are involved in individual and school, centre or college-wide external networks.</p> <p>Community partnerships are thriving.</p> 
<p>Inclusive membership</p> <p><i>How do you know this?</i></p>	<p>Membership of the PLC is confined to a small group of teaching staff and some or all school leaders.</p> <p>Input of support staff is not invited.</p> <p>Parental and governor or school council member involvement is limited.</p>	<p>Classroom support staff are increasingly involved as active members of the PLC.</p> <p>Other support staff are less involved.</p> <p>Parental and governor or school council member involvement is generally welcomed.</p>	<p>Many support staff (teaching and other) participate as active members of the PLC.</p> <p>Parental and governor or school council member involvement is welcomed.</p>	<p>The PLC includes all members of staff.</p> <p>All support staff are highly valued members of the PLC.</p> <p>The whole-school, centre or college PLC draws people together from across the organisation.</p> <p>Parental, pupil and governor or school council member involvement is welcomed and encouraged.</p> 

PLC characteristics	Starting out <i>Acquiring information and beginning to use ideas</i>	Developing <i>Experimenting with strategies and building on initial commitment</i>	Deepening <i>Well on the way, having achieved a degree of mastery and feeling the benefits</i>	Sustaining <i>Introducing new developments, and re-evaluating quality – PLC as a way of life</i>
Mutual trust, respect and support	<p>Staff relationships highlight issues around trust and conflict.</p> <p>A blame culture may exist.</p> <p>Trust and respect exists among some members of smaller groups or departments.</p> <p>Development issues are viewed as a threat by a number of staff.</p>	<p>A moderate level of mutual trust exists school, centre or college-wide, with increasing mutual respect, although there is some anxiety about classroom observation etc.</p> <p>There is strong mutual trust and respect among some groups of staff who work closely together.</p>	<p>Trust, respect and positive professional relationships are developing school, centre or college-wide.</p> <p>Staff are increasingly open about their practice.</p>	<p>Staff relationships are characterised by openness, honesty, mutual trust, respect, support and care.</p> <p>Everyone's contribution is valued.</p>
<i>How do you know this?</i>				




PLC processes	Optimising resources and structures	PLC processes	PLC processes	PLC processes
<i>How do you know this?</i>	<p>There are few systems and policies in place to support the development of the PLC.</p> <p>Time, space, money and/or communication mechanisms tend to act as barriers.</p>	<p>Attention is paid to trying to put into place the necessary structures, systems and policies that will help support PLC development: creating time; locating space; planning communication mechanisms; use of meetings and other procedures; arranging staff deployment etc.</p>	<p>Most of the necessary structures, systems and policies are in place to support PLC development.</p> <p>Attention is paid to dealing with resource and structural issues that get in the way of PLC development.</p>	<p>Time, money, space, meetings, communication procedures and staff deployment are targeted as a priority to promote the ongoing development of the PLC.</p> <p>Resource and structural issues are dealt with swiftly and actively.</p>





<p>PLC processes</p>	<p>Starting out <i>Acquiring information and beginning to use ideas</i></p>	<p>Developing <i>Experimenting with strategies and building on initial commitment</i></p>	<p>Deepening <i>Well on the way, having achieved a degree of mastery and feeling the benefits</i></p>	<p>Sustaining <i>Introducing new developments, and re-evaluating quality – PLC as a way of life</i></p>
<p>Promoting professional learning</p> <p><i>How do you know this?</i></p>	<p>An explicit needs identification process is rarely used, either for individual staff or whole-school, centre or college needs.</p> <p>Co-ordination responsibility for continuing professional development is unspecified or unclear.</p> <p>Information for staff mainly comprises details about courses and training days.</p>	<p>A needs identification process has been developed and is being used for staff and whole-school, centre or college professional learning needs.</p> <p>Continuous learning of all staff is increasingly promoted.</p> <p>Attention is paid to strengthening the co-ordination of professional learning.</p> <p>Performance management is starting to be used as a process to support the PLC's development.</p>	<p>Staff and whole-school, centre or college professional learning needs are clearly identified.</p> <p>Continuous learning of all staff is promoted and carefully co-ordinated. A range of opportunities is planned to enable staff to learn from and with each other and facilitate the transfer of new learning into practice.</p> <p>Performance management is used as a positive process to support the PLC's development.</p> <p>Some staff are encouraged to take responsibility in promoting the professional learning of colleagues.</p>	<p>Staff and whole-school, centre or college professional learning needs are regularly and consistently identified.</p> <p>Continuous professional learning and development for all staff is actively promoted and carefully co-ordinated.</p> <p>Attention is paid to ensure that new learning is transferred into practice.</p> <p>Opportunities are automatically planned to ensure staff can learn with and from each other.</p> <p>Staff are actively encouraged to take responsibility in promoting the professional learning of colleagues.</p>

PLC processes	Starting out <i>Acquiring information and beginning to use ideas</i>	Developing <i>Experimenting with strategies and building on initial commitment</i>	Deepening <i>Well on the way, having achieved a degree of mastery and feeling the benefits</i>	Sustaining <i>Introducing new developments, and re-evaluating quality – PLC as a way of life</i>
<p>Evaluating and sustaining the PLC</p> <p><i>How do we know this</i></p>	<p>There is little or no discussion about the concept of a PLC.</p> <p>There is little evaluation of how the process of the PLC operates or how its development progresses.</p> <p>There is little evaluation of continuing professional development's (CPD's) impact or of other PLC activities.</p>	<p>The idea of a PLC is introduced to staff.</p> <p>There is occasional evaluation of how the process of the PLC operates or how its development progresses.</p> <p>There is some evaluation of CPD's impact and of other PLC activities.</p>	<p>The PLC is consciously and actively developed.</p> <p>There is regular evaluation of how the process of the PLC operates or how its development progresses.</p> <p>CPD's impact on practice is evaluated, as are many other PLC activities.</p>	<p>Being a PLC is just 'part of the way we do things here'.</p> <p>People understand and support the idea of a PLC.</p> <p>Regular attention is given to evaluating the process, progress and impact of the PLC and all of its activities, including CPD.</p> 
<p>Leading and managing to promote the PLC</p> <p><i>How do we know this</i></p>	<p>The headteacher (principal) works to build trust and begins to develop and share a learning vision and focus.</p> <p>Senior leadership team members are encouraged to participate in PLC leadership.</p> <p>Few other staff are involved in leading any PLC activities.</p>	<p>Attention is given by senior leaders to developing and spreading a learning vision and focus and building trust.</p> <p>Senior leaders model teamwork and leadership of learning.</p> <p>Other staff are involved in leading some PLC activities.</p>	<p>Senior leaders maintain their attention to developing and spreading a learning vision and focus and building trust.</p> <p>Senior leaders model learning.</p> <p>Leadership for different PLC activities is increasingly taken up by other staff.</p>	<p>Senior leaders are deeply committed to the development and sustainability of the school's PLC and prioritise this as a major leadership and management task.</p> <p>Distributing leadership among staff is an accepted practice.</p> 

Summary response sheet

	Starting out	Developing	Deepening	Sustaining
Shared values and vision				
Collective responsibility				
Learning-focused collaboration				
Existence of professional learning				
Reflective professional enquiry				
Openness, networks and partnerships				
Inclusive membership				
Mutual trust, respect and support				
Optimising resources and structures				
Promoting professional learning				
Evaluating and sustaining the PLC				
Leading and managing to promote the PLC				

You can use this sheet to: a) mark down individual responses to the implementation rubric;
b) summarise all of the responses of individuals.



Questions for reflection and discussion



What did you notice as you were completing the rubric?

Which are the characteristics and processes, or aspects of these, where you feel you have progressed furthest along the route? What factors seem to have helped you?

Which are the characteristics and processes, or aspects of these, where you feel progression has been slower? What seems to have been holding back the PLC's development in these areas?

How will you move forward with this information? (You may also find it helpful to use *Investigating the culture of your professional learning community*, another *Audit* activity, to gather some different kinds of data. Alternatively, the *Planning* and *Action* materials may offer some ideas about next steps.)



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Audit

Investigating the culture of your professional learning community
Comparing your preferred future and the current situation in your
professional learning community

Deciding where you are as a professional learning community

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