Oklahoma
School Performance Review

Hennessey Public Schools

July 2020

Fellow Oklahomans:

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

Hennessey Public Schools (HPS) 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 HPS 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 HPS 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,

Dr. Daniel Craig
Executive Director

Oklahoma School Performance Review

Hennessey Public Schools
July 2020

Commission for Educational Quality & Accountability
Secretary of Education Michael Rogers, Chairman
John Daniel
Dr. Joanna Lein
Brett MacArthur
Katherine Nations
Kenneth Parker
Ryan Walters

Office of Educational Quality and Accountability
Dr. Daniel Craig, Executive Director
Valarie Autry
Angie Bookout
Jennifer Gambrell
Jerry Hsieh
Renee Launey-Rodolf
Abby Murphey
Lecrecia Schmidt

Prismatic Services, Inc.
Tatia Prieto – President, Project Manager
Gary Gerber – Chapter 1 – Personnel, Management, & Communications
Loretta Schmidt – Chapter 2 – Instructional Delivery
Larry Keiser – Chapter 3, Business Operations
Tom Martineau – Chapter 4, Facilities Use Management & Safety and Security
Donna Wittrock – Chapter 5, Child Nutrition
Courtney Lockridge – Chapter 5, Technology
Gary Greenhill – Chapter 5, Transportation

Office of Educational Quality and Accountability
www.oeqa.ok,gov

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

www.oklahomaworks.gov

Building Oklahoma's Workforce
Oklahoma Works brings all of our state's workforce resources together, connecting employers, employees and job-seekers to information and programs that help build Oklahoma's workforce.

Table of Contents

Executive Summary

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

The Office of Educational Quality and Accountability began the performance review of Hennessey Public Schools (HPS) in October 2019. The Office of Educational Quality and Accountability contracted with Prismatic Services to assist with the review. The Prismatic consulting team conducted individual and focus group interviews with district personnel. The team also reviewed operations by touring facilities, observing cafeteria operations, and riding 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 **D**.

For comparison purposes, the Office of Educational Quality and Accountability selected five Oklahoma school districts as peer districts based upon size, geography, and demographics. They are Atoka, Chouteau-Mazie, Pawhuska, Tishomingo, and Watonga. These districts are called peer districts throughout this report.

For further comparison, a Community Group average is also used throughout the report. HPS 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 HPS students eligible to receive free or reduced price meals is above the state average.

During this review, 68 recommendations were developed; they were designed to improve operations and support increased academic performance. In some cases, these recommendations should result in a net savings to the district, in some cases a net cost, and in some cases they should have no fiscal impact but should improve district efficiency or effectiveness. A detailed list of costs and savings by recommendation appears in **Exhibit 5**.

ACKNOWLEDGMENTS

The Office of Educational Quality and Accountability and Prismatic wish to express their appreciation to the Board of Education of Hennessey Public Schools, its superintendent, Dr. Michael Woods, its principals, Mr. Barry Crosswhite, Ms. Stacey Schovanec, and Ms. Angela Avila and the many district employees, students, parents, and community residents who supported and provided input for this review.

HENNESSEY PUBLIC SCHOOLS

Located in the City of Hennessey, in Kingfisher County, HPS operates one campus that serves approximately 900 students from Pre-K through 12th grade.

Most students identify as Caucasian and Hispanic and qualify for free or reduced-price meals (**Exhibit 1**).

Exhibit 1
HPS Student Enrollment and Socioeconomic Characteristics, 2017-18

School	Grade Span	Fall Enrollment	Caucasian	Black	Asian	Hispanic	Native American	Two or More Races	Eligible for Free or Reduced-Price Meals
Hennessey Elementary School	EC-4	410	57.6%	0.2%	0.0%	37.6%	1.7%	2.9%	86.1%
Hennessey Middle School	5-8	240	59.2%	1.3%	0.0%	37.9%	1.7%	0.0%	90.8%
Hennessey High School	9-12	249	47.0%	1.2%	0.0%	47.8%	4.0%	0.0%	91.6%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2 shows demographic changes over the last five years in HPS. Over that time period, the average assessed property valuation per student increased by 18.3 percent and eligibility for free and reduced-price meals increased by 7.1 percent.

Exhibit 2
HPS Change in Demographics from 2013-14 to 2017-18

School Year	ADM	Ethnic Group					Average Assessed Property Valuation per Student	Eligible for Free or Reduced-Price Meals
		Caucasian	Black	Asian	Hispanic	Native American		
2013-14	884	50.0%	0.0%	0.0%	44.0%	6.0%	$46,126	83.0%
2014-15	909	53.0%	1.0%	0.0%	43.0%	3.0%	$46,817	84.0%
2015-16	914	53.0%	1.0%	0.0%	43.0%	3.0%	$48,148	86.0%
2016-17	905	53.9%	1.0%	0.0%	41.2%	3.2%	$48,752	86.6%
2017-18	890	55.1%	0.8%	0.0%	40.5%	2.3%	$54,563	88.9%
Change	0.7%▲						18.3%▲	7.1%▲

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3 compares HPS' demographics with its peers, the community group, and the state for 2017-18. HPS had demographics similar to most of its peers, with a few differences. In HPS, the Hispanic population was higher than all comparison groups while the HPS Native American

population was much lower. The HPS Asian and Black populations were also slightly lower than found in most of the comparison groups.

Exhibit 3
Demographics of HPS, Peer Districts, and State, 2017-18

Entity	ADM	Ethnic Group					Average Assessed Property Valuation per Student	Eligible for Free or Reduced-Price Meals
		Caucasian	Black	Asian	Hispanic	Native American		
Hennessey	**890**	**55.1%**	**0.8%**	**0.0%**	**40.5%**	**2.3%**	**$54,563**	**89%**
Atoka	870	46.1%	7.3%	1.5%	5.8%	31.4%	$35,046	74%
Chouteau-Mazie	867	53.3%	0.5%	0.6%	3.5%	21.7%	$60,905	78%
Pawhuska	711	34.8%	4.3%	0.3%	3.3%	46.2%	$48,233	76%
Tishomingo	889	53.3%	1.7%	0.4%	5.7%	25.1%	$34,056	73%
Watonga	751	50.0%	3.4%	0.5%	20.2%	12.8%	$72,539	77%
Community Group	**702**	**46.8%**	**4.1%**	**0.5%**	**9.3%**	**31.6%**	**$36,165**	**77%**
State	**1,280**	**48.9%**	**8.6%**	**2.4%**	**17.2%**	**13.6%**	**$52,219**	**63%**

Source: Office of Educational Quality and Accountability, Profiles Database

The data in **Exhibit 4** reflect five-year ADM trends compared to the peers, community group, and state. HPS had a slight increase in ADM, behind Atoka and Pawhuska in the percentage increase. The three other peer districts declined in ADM, as did the state overall.

Exhibit 4
Hennessey, Peer Districts, and State Student ADM Trends, 2013-14 to 2017-18

Entity	ADM					Percent Change
	2013-14	2014-15	2015-16	2016-17	2017-18	
Hennessey	**884**	**909**	**914**	**905**	**890**	**0.7%▲**
Atoka	840	927	949	929	870	3.6%▲
Chouteau-Mazie	890	896	880	895	711	(20.1%)▼
Pawhuska	847	827	812	788	867	2.4%▲
Tishomingo	969	981	947	942	889	(8.3%)▼
Watonga	782	766	770	734	751	(3.9%)▼
Community Group	**709**	**721**	**709**	**704**	**702**	**0.0%●**
State	**1,292**	**1,299**	**1,305**	**1,279**	**1,280**	**(0.9%)▼**

Source: Office of Educational Quality and Accountability, Profiles Database

COMMENDATIONS

The Office of Educational Quality and Accountability identified "exemplary" or "best practices" in Hennessey Public Schools that led to 41 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 superintendent is commended for being accessible to district staff and gaining the trust and confidence of the majority of staff and the community.

The superintendent and BOE are commended for establishing an atmosphere of trust and cohesiveness. The positive progress that is being realized by HPS is a direct result.

The school board and superintendent are commended for the efficient organization and conduct of BOE meetings.

The BOE and superintendent are commended for developing efficient and effective central office and school site administration.

The district has implemented the TLE model to provide an effective teacher evaluation framework.

HPS demonstrates dedication to staff development.

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

HPS is commended for using a variety of technologies to communicate with district stakeholders.

HPS is commended for recognizing how the creativity of teachers can be a valuable asset to students and for creatively encouraging teachers to solicit donor funding for classroom projects.

Chapter 2: INSTRUCTIONAL DELIVERY SYSTEM

The district is commended for launching one-to-one technology to support a standards-based curriculum.

The district is commended for supporting teachers with a technology integration specialist.

The district is commended for administering on-going student assessments and analyzing the data.

The district is commended for implementing early release time for teachers.

The district is commended for implementing full inclusion for all IEP students.

The district is commended for updates and improved library services.

The district is commended for employing two full-time counselors and working to implement a comprehensive counseling program.

Chapter 3: BUSINESS OPERATIONS

The superintendent and the encumbrance clerk are commended for their frequent reviews of the district budget, and for their attention to the anticipated year-end results.

The district uses blanket purchase orders with some vendors, such as the lumber yard, for routine maintenance items.

The HPS business manager and treasurer stay current with their respective duties by attending numerous continuing education sessions each year.

The district invests its idle cash in FDIC-insured interest-bearing accounts.

The district is commended for the level of attention it pays to following procedures that are in place to reduce or eliminate fraud or theft involving activity funds.

The district is commended for the way it handles Activity Fund disbursements.

The superintendent provides the BOE listings of purchase orders and checks for review monthly.

Chapter 4: FACILITIES USE AND MANAGEMENT

HPS successfully used the CMAR process in building its new events center, keeping costs under control with a guaranteed maximum price (GMP) provision.

The HPS maintenance director and custodians have achieved excellent results in the district's facilities.

HPS addressed a substantial amount of deferred maintenance with the superintendent's decision to replace rooms and HVAC systems.

HPS is commended for its conscious efforts to conserve electrical and natural gas energy in the operation of its building inventory.

HPS is commended because of its swift and decisive district-wide preparations to keep all persons safe and secure.

Chapter 5: SUPPORT SERVICES

The HPS child nutrition program is financially self-sufficient.

Contracting with the FSMC has resulted in numerous menu improvements that offer more options and are attractive and healthful.

HPS has implemented a one-to-one technology initiative for all grades.

HPS is commended for supporting technology with adequate staffing: a full-time technology director, a part-time student information specialist, and trained high school students.

HPS is commended for establishing and encouraging a culture of risk-taking and experimenting with technology.

HPS is commended for employing a technology integration specialist to provide coaching and training for staff in implementing technology in the classroom.

HPS has integrated a student internship program to assist with technology support.

HPS is commended for seeking and successfully acquiring external funds for district technology purchases, upgrades, and teacher professional development.

HPS has implemented a districtwide wireless access system to increase Internet access.

HPS uses technology tools to communicate with staff, students, parents, and community members to ensure that information is disseminated in a timely manner.

HPS is solving their driver shortage by using school staff members to drive route buses.

The HPS transportation department is effectively managing the records required by the SDE auditors.

HPS is evaluating ways to save district monies on yearly bus inspections.

RECOMMENDATIONS AND PROJECTED COSTS AND SAVINGS

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

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

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

Exhibit 5
Summary of Costs and Savings by Recommendation

Recommendation		Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2020-21	2021-22	2022-23	2023-24	2024-25	
Chapter 1	**Management, Personnel, and Communications**						
1	Create a superintendent's evaluation process that is clearly tied to district goals and provides for tangible documentation of goal accomplishment.						$0
2	Revise the current BOE policy review requirements to be less frequent.						$0
3	Study several different methods of reorganizing job responsibilities and determine which provides the most feasible option.						$0
4	Review HPS policies regarding students leaving campus for lunch, vaping, drug use or possession during the school day, and determine whether the consequences are consistently implemented.						$0
5	Establish a strategic planning process that involves school and community stakeholders.	($10,000)	($5,000)	($5,000)			($20,000)
6	Investigate the resources available to HPS for conducting a demographics study and implement a study as soon as it is feasible.	($6,000)					($6,000)
7	Develop a mission statement for approval of the board of education.						$0
8	Develop and implement an evaluation system for support staff.						$0
9	Improve the security of personnel files.	($480)					($480)
10	Adopt formally an evaluation model for principals.						$0
11	Reduce the number of direct reports to the superintendent.	($8,300)	($8,300)	($8,300)	($8,300)	($8,300)	($41,500)
12	Develop a succession plan policy and process for administrator positions, veteran teachers, non-teaching staff, and key temporarily funded positions.						$0
13	Provide professional development to teachers and administration on the effects of generational poverty and how to assist children and families in that situation while encouraging parental involvement.						$0

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2020-21	**2021-22**	**2022-23**	**2023-24**	**2024-25**	
14	Develop a group messaging plan in order to strengthen HPS communications with all stakeholders.						$0
	Subtotal	**($24,780)**	**($13,300)**	**($13,300)**	**($8,300)**	**($8,300)**	**($67,980)**
Chapter 2	**Instructional Delivery System**						
15	Develop and implement Pre-K-12 standards-based core curriculum alignment frameworks, along with teacher accountability measures.						$0
16	Develop and implement district-wide processes and procedures to horizontally and vertically align and pace the core curriculum from Pre-K through 12th grade.						$0
17	Develop and implement a plan to annually evaluate instructional resources, including websites, apps, software, and digital enrichment and remediation resources.	($5,000)	($5,000)	($5,000)	($5,000)	($5,000)	($25,000)
18	Continue to advance teacher facilitation instructional delivery skills and practices to all students.	($2,000)					($2,000)
19	Implement a standardized process and hold teachers accountable for using student performance data to adjust standards-based curricula and improve instructional delivery.	($3,000)					($3,000)
20	Review the use of Friday release time.						$0
21	Review practices and procedures for all teachers and para-professionals to plan and coordinate instruction between inclusionary and resource classrooms.						$0
22	Explore options for implementing a tiered intervention model for ELL and at-risk students, along with accountability measures for teachers.						$0
23	Continue to strengthen the Gifted and Talented program.						$0
24	Continue to strengthen library media services to support standards-based curriculum and technology integration.						$0
25	Add at least a half-time counselor at the middle school.	($25,000)	($25,000)	($25,000)	($25,000)	($25,000)	($125,000)
26	Review Eagle Time to strengthen student impact and improve teacher support and involvement.						$0
	Subtotal	**($35,000)**	**($30,000)**	**($30,000)**	**($30,000)**	**($30,000)**	**($155,000)**

PRISMATIC
SERVICES, INC.

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2020-21	**2021-22**	**2022-23**	**2023-24**	**2024-25**	
Chapter 3	**Business Operations**						
27	Establish a budgetary process that is timely, easily understood, and involves all stakeholders.						$0
28	Address existing software glitches in the posting of BOE meeting minutes.						$0
29	Develop a formal policy for the district's general fund balance that establishes a minimum and maximum balance, provides guidance on how to maintain the minimum and maximum balances, and requires periodic reports concerning fund balance status to the BOE.						$0
30	Develop a BOE policy that requires direct deposit of employee pay.						$0
31	Seek to join one or more purchasing co-ops.						$0
32	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.						$0
33	Develop a process to solicit proposals for performing the district's annual audit.						$0
	Subtotal	**$0**	**$0**	**$0**	**$0**	**$0**	**$0**
Chapter 4	**Facilities Use and Management**						
34	Adopt, implement, and use a continuous facility master planning protocol.	($30,000)	($30,000)	($30,000)			($90,000)
35	Seek to convene a "lessons learned" assessment/conference once the Dome construction has been completed.						$0
36	Hire a "successor-in-waiting" 12 to 18 months before the retirement of the current maintenance director.	($24,075)	($48,150)				($72,225)
37	Purchase and use a computerized maintenance management system (CMMS).	($2,500)	($2,500)	($2,500)	($2,500)	($2,500)	($12,500)
38	Task the events planner and coordinator with creating the infrastructure to attract, schedule, coordinate, hold, and close out events in the Dome and other HPS facilities.						$0
39	Add two full-time custodians once the Dome opens.	($58,070)	($58,070)	($58,070)	($58,070)	($58,070)	($290,350)

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2020-21	2021-22	2022-23	2023-24	2024-25	
40	Invite Energy Service Companies (ESCOs) to propose performance contracting arrangements and potentially uncover additional cost savings, including energy alternatives (wind, photovoltaics) and behavior modification programs to cultivate and foster energy conservation awareness among HPS staff.						$0
	Subtotal	**($114,645)**	**($138,720)**	**($90,570)**	**($60,570)**	**($60,570)**	**($465,075)**
Chapter 5	**Support Services**						
41	Institute a monitoring plan to ensure compliance with USDA regulations and BOE Policy regarding the sale of food items in schools and in vending machines by entities other than the child nutrition department.						$0
42	Operate child nutrition as an enterprise system and reimburse the general fund for their share of utility costs.						$0
43	Staff the kitchen using the Oklahoma State Department of Education staffing standards and MPLH calculations.	$21,524	$43,047	$43,047	$43,047	$43,047	$193,712
44	Evaluate and select one of two options for the position of district child nutrition director: 1. Assign additional district duties and charge half the salary and benefit costs to the general fund. 2. Adjust the position to be half-time.	$15,695	$15,695	$15,695	$15,695	$15,695	$78,475
45	Analyze the process used to determine which students are eligible for free meals through direct certification to ensure the maximum number of students are captured.						$0
46	Contact the SDE to evaluate the feasibility of participating in a Provision program to provide free meals to all students.						$0
47	Determine factors that may be negatively impacting breakfast participation and take corrective action.						$0
48	Determine factors that may be negatively impacting lunch participation and develop strategies for increasing it.						$0
49	Provide nutrition education to students using a variety of venues.						$0
50	Purchase additional meal-purchasing equipment: an additional pin pad for the main line POS; and an additional POS and pin pad for the salad bar, then relocate it to another area of the cafeteria to minimize congestion.	($2,000)					($2,000)
51	Implement the available component of the current software provider to automate the process of online meal applications.						$0

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2020-21	**2021-22**	**2022-23**	**2023-24**	**2024-25**	
52	Explore options to expand space for student eating.						$0
53	Develop and test a disaster recovery plan that includes the district's critical data, systems, and programs.						$0
54	Establish a systematic method to regularly assess technology placement, use, and effectiveness to ensure the district is maximizing its technology investments.						$0
55	Develop and implement an instructional technology plan in conjunction with the district's professional development plan.						$0
56	Improve the technology planning process and create a long-term strategic plan for technology with input from a variety of stakeholders.						$0
57	Adopt explicit expectations for teacher and administrator competencies in technology.						$0
58	Develop policies, procedures, and a disposal plan for surplus, obsolete, and inoperable equipment.						$0
59	Continue to update and expand the district website.						$0
60	Develop a school bus turn-around agreement form and develop a district policy.						$0
61	Develop a transportation SOP manual which will provide sufficient direction for all transportation employees in procedures and processes.						$0
62	Develop a policy and procedure to check for children after routes.						$0
63	Identify the chemicals used in the shop area, contact the vendors to collect the SDS and make them available to anyone in the shop. The district will need to train all employees on reading and understanding the SDS sheets.						$0
64	Develop a BOE policy on a school bus replacement cycle.						$0
65	Evaluate the cost of a video recording system for use on HPS buses.	($16,800)	($5,600)	($5,600)	($2,800)	($2,800)	($33,600)
66	Hire a full-time person to assist in the director's duties and drive a bus.	($44,640)	($44,640)	($44,640)	($44,640)	($44,640)	($223,200)
67	Research the feasibility of finding a single location for the transportation department.						$0
68	Address the conditions of some of the buses.						$0
	Subtotal	**($26,221)**	**$8,502**	**$8,502**	**$11,302**	**$11,302**	**$13,387**
	Total savings	**$37,219**	**$58,742**	**$58,742**	**$58,742**	**$58,742**	**$272,187**

		Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
Recommendation		2020-21	2021-22	2022-23	2023-24	2024-25	
	Total costs	($237,865)	($232,260)	($184,110)	($146,310)	($146,310)	($946,855)
	Total net savings and costs	($200,646)	($173,518)	($125,368)	($87,568)	($87,568)	($674,668)

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

Of the 68 recommendations made, the Office of Educational Quality and Accountability believes these seven recommendations to be the most critical:

- **Develop a succession plan policy and process for administrator positions, veteran teachers, non-teaching staff, and key temporarily funded positions.** HPS has a number of long-term employees approaching retirement age. Without planning and preparation, the institutional and historical knowledge gaps left by these types of retirements can be detrimental. For a school district to continuously improve, it needs to explicitly plan for the retirement of key leaders.

- **Develop and implement Pre-K-12 standards-based core curriculum alignment frameworks, along with teacher accountability measures.** District leaders have introduced HPS teachers to various local, state, and national frameworks. With teacher awareness in place, the district needs to standardize the curriculum and adopt a district-wide curriculum framework. Along with adopting the framework, teachers need an accountability system to ensure the framework is taught with fidelity.

- **Develop a formal policy for the district's general fund balance that establishes a minimum and maximum balance, provides guidance on how to maintain the minimum and maximum balances, and requires periodic reports concerning fund balance status to the Board of Education (BOE).** The BOE should provide guidance through a fund balance policy that establishes a fund balance target range, how to maintain the balance, and the use of the district's fund balance that exceeds the target amount. This should help ensure that funds are only used for critical priority items.

- **Hire a "successor-in-waiting" 12 to 18 months before the retirement of the current maintenance director.** This recommendation is aimed at achieving a smooth transition with key values and attitudes kept in place, while allowing for the introduction of best practices and other improvements of current policies and strategies moving forward. A successor candidate is needed to work with the current director for a substantial length of time to obtain the essence of the maintenance director's "brain knowledge repository" and to strategize how to introduce CMMS to maintenance operations.

- **Explore options to expand space for student eating.** The district should look for solutions to alleviate the problem of insufficient space in the high school cafeteria for the number of students served. Solutions should include both short-term (for school year 2020-21) and long-term remedies. Short-term remedies include lengthening the lunch period for middle and high school students, splitting up middle and high school students into two periods each, set up a cart service for reimbursable grab and go meals, and provide vending machines that dispense reimbursable meals. Long-term remedies include hiring a design firm to determine

feasibility of remodeling the middle school to provide a cafeteria and kitchen and determine feasibility of expanding the current cafeteria in the high school.

- **Develop and implement an instructional technology plan in conjunction with the district's professional development plan.** Professional development should focus on the specific needs of individual staff and be sustained through coaching and periodic updates. A tiered technology training plan should outline the opportunities afforded to district staff for learning job specific technology skills. This information should be considered in developing the technology professional development plan that meets the needs of HPS and is aligned with data-driven goals supported by long-term professional development activities

- **Hire a full-time person to assist in the transportation director's duties and drive a bus.** HPS should hire a full-time person to assist the director in all duties and to free the director from driving a bus every day. The person hired should be trained sufficiently to be able to succeed the current director when he retires.

Chapter 1:

*Management, Personnel, and
Communications*

Management, Personnel, and Communications

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

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

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

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

Background

Hennessey is located in northern Kingfisher County, about 20 miles north of the county seat of Kingfisher, Oklahoma. U.S. Highway 81 leads 18 miles south to Kingfisher and 20 miles north to Enid. Hennessey lies on the Chisholm Trail, the historic cattle trail that U.S. highway 81 follows. The town was laid out by the Hennessey Townsite Company after the land run of April 22, 1889 and was incorporated on June 10, 1890. The 2010 census found 2,131 people residing in the town of Hennessey though about 4,000 live in the school district as a whole. The economy of the Hennessey area is supported by farming, oil extraction and production, and wind energy production.

The school system has 243 square miles in its attendance area. HPS operates three schools on the same campus but in different buildings that serve students from Pre-K through 12th grade. In 2017-18, the fall enrollment in HPS was 899 (**Exhibit 1-1**). The majority of the population was Caucasian at 55.1 percent, with Hispanic a close second at 40.5 percent. Approximately 88.9 percent of all HPS students are eligible for free or reduced-price meals.

Exhibit 1-1
Hennessey Student Enrollment and Socioeconomic Characteristics, 2017-18

School	Grade Span	Fall Enrollment	Caucasian	Black	Asian	Hispanic	Native American	Two or More Races	Eligible for Free or Reduced-Price Meals
Hennessey Elementary School	EC-4	410	57.6%	0.2%	0.0%	37.6%	1.7%	2.9%	86.1%
Hennessey Middle School	5-8	240	59.2%	1.3%	0.0%	37.9%	1.7%	0.0%	90.8%
Hennessey High School	9-12	249	47.0%	1.2%	0.0%	47.8%	4.0%	0.0%	91.6%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-2 shows demographic changes over the last five years in HPS. During the five-year period, the percentage of the Caucasian population went up slightly, causing declines in the proportions of non-Caucasian students. At the same time, the average net assessed property valuation increased by 18.3 percent and the eligibility for free and reduced-price meals increased by 7.1 percent. The net loss of student membership over the five years was just six students.

Exhibit 1-2
Hennessey Change in Demographics from 2013-14 to 2017-18

School Year	ADM	Ethnic Group					Average Assessed Property Valuation per Student	Eligible for Free or Reduced-Price Meals
		Caucasian	Black	Asian	Hispanic	Native American		
2013-14	884	50.0%	0.0%	0.0%	44.0%	6.0%	$46,126	83.0%
2014-15	909	53.0%	1.0%	0.0%	43.0%	3.0%	$46,817	84.0%
2015-16	914	53.0%	1.0%	0.0%	43.0%	3.0%	$48,148	86.0%
2016-17	905	53.9%	1.0%	0.0%	41.2%	3.2%	$48,752	86.6%
2017-18	890	55.1%	0.8%	0.0%	40.5%	2.3%	$54,563	88.9%
Change	**0.7%▲**						**18.3%▲**	**7.1%▲**

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-3 compares HPS' demographics with its peers, the community group, and the state for 2017-18. HPS had demographics similar to most of its peers, with a few differences. In HPS, the Hispanic population was higher than all comparison groups while the HPS Native American

population was much lower. The HPS Asian and Black populations were also slightly lower than found in most of the comparison groups.

The assessed property valuation in HPS was lower than two of the five peer districts and was higher than the community group and state. HPS' percentage of students eligible for free or reduced-price meals was the highest of all the comparison groups.

Exhibit 1-3
Demographics of Hennessey, Peer Districts, and State, 2017-18

Entity	ADM	Ethnic Group					Average Assessed Property Valuation per Student	Eligible for Free or Reduced-Price Meals
		Caucasian	Black	Asian	Hispanic	Native American		
Hennessey	**890**	**55.1%**	**0.8%**	**0.0%**	**40.5%**	**2.3%**	**$54,563**	**89%**
Atoka	870	46.1%	7.3%	1.5%	5.8%	31.4%	$35,046	74%
Chouteau-Mazie	867	53.3%	0.5%	0.6%	3.5%	21.7%	$60,905	78%
Pawhuska	711	34.8%	4.3%	0.3%	3.3%	46.2%	$48,233	76%
Tishomingo	889	53.3%	1.7%	0.4%	5.7%	25.1%	$34,056	73%
Watonga	751	50.0%	3.4%	0.5%	20.2%	12.8%	$72,539	77%
Community Group	**702**	**46.8%**	**4.1%**	**0.5%**	**9.3%**	**31.6%**	**$36,165**	**77%**
State	**1,280**	**48.9%**	**8.6%**	**2.4%**	**17.2%**	**13.6%**	**$52,219**	**63%**

Source: Office of Educational Quality and Accountability, Profiles Database

The data in **Exhibit 1-4** reflect five-year ADM trends compared to the peers, community group, and state. HPS had a slight increase in ADM, behind Atoka and Pawhuska in the percentage increase. The three other peer districts declined in ADM, as did the state overall.

Exhibit 1-4
Hennessey, Peer Districts, and State Student ADM Trends, 2013-14 to 2017-18

Entity	ADM					Percent Change
	2013-14	2014-15	2015-16	2016-17	2017-18	
Hennessey	**884**	**909**	**914**	**905**	**890**	**0.7%**▲
Atoka	840	927	949	929	870	3.6%▲
Chouteau-Mazie	890	896	880	895	711	(20.1%)▼
Pawhuska	847	827	812	788	867	2.4%▲
Tishomingo	969	981	947	942	889	(8.3%)▼
Watonga	782	766	770	734	751	(3.9%)▼
Community Group	**709**	**721**	**709**	**704**	**702**	**0.0%**●
State	**1,292**	**1,299**	**1,305**	**1,279**	**1,280**	**(0.9%)**▼

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 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 1-5** reflects sections relevant to board of education organization and basic governance principles.

Exhibit 1-5
OSC: BOE 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 – BOE– 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 BOE	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, 2017

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

- election of officers;

- establishing board policies;

- building and operating schools and related facilities; and

- contracting for an annual audit of all district and school activity funds.

Section 126 addresses the size and election of school boards in Oklahoma, and Section 149 provides a description of the required officers for school boards. The HPS Board of Education (BOE) consists of five members, each of whom is elected to a five-year term. **Exhibit 1-6** reflects the year elected and the next election date for each BOE member.

Exhibit 1-6
Hennessey School BOE Members

Board Member	Board Position	Year of Election or Appointment	Term Expires
Patrick Griffin	President	2015	2020
James Matousek	Vice President	2016	2021
Joe Garrison	Member	2017	2022
Luke Lough	Clerk	2018	2023
Christopher Choate	Member	2019	2024

Source: HPS website, February 2020

The district holds board elections each February. The current BOE president did not draw an opponent in 2020 and will continue as a member of the board until 2025. Sections 157, 158, and 159 of the School Law Book list the duties of each officer of the BOE. The board must elect a new clerk each year, who may or may not be a member of the board.

Section 127 outlines the training requirements for BOE 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 BOE 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. The HPS business manager keeps the records of board training needs.

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

- school finance;

- the *Oklahoma Open Records Act* and the *Oklahoma Open Meeting Act*; and

- ethics.

The remaining hours may be satisfied by attending a workshop, class, or seminar addressing the education issues set forth above for new members.

Board of Education Meetings

The Hennessey BOE meets on the second Monday of the month at 7:00 pm in the seminar room at the school auditorium. The meeting place and time may be changed by agreement of a majority of the board members. Special meetings are held as needed, and board members receive agendas and any supporting information in advance of the meeting. The BOE meeting agenda is posted at the administrative offices and online. The district's philosophy statement is included in the BOE policy book (**Exhibit 1-7**).

Exhibit 1-7
Philosophy Statement of Hennessey Public Schools

- Since public education is a state function, there is a need for a local BOE to conduct the business of organizing and maintaining a system at the local level. These policies have been developed to give direction to this endeavor.

- The Hennessey BOE believes that all legally qualified children should have an opportunity to secure a good public school education.

- The board shall work toward this goal by providing experiences which will help each individual adjust to and improve his environment under the democratic form of government.

- Because excellence is its constant goal, the school should always evaluate itself and should ask, "Can it do better?" Not only does it turn to research for more knowledge but it should encourage in-service education for its teachers.

- The BOE will find it necessary to revise its written policies when the best interests of the school can be served.

- It is constantly searching for fresh materials and new techniques that will make learning more effective. It judges its curriculum in the light of new knowledge and changes in society.

- More than it ever did in the past, it tries to draw upon all disciplines to enrich its curriculum.

- In these efforts, the BOE solicits the cooperation of the patrons of the district.

Source: Hennessey BOE Policy Handbook, February 2020

HPS does not have a mission statement evident in any of its printed material or on its website. The mission statement found in the *2004 Performance Review* still seems to fit with the current board's philosophy:

> committed to providing encouragement and opportunities for students to develop their educational and behavioral talents and skills to their fullest potential in order to meet the challenges of the 21st century and to become responsible, productive citizens. We believe parents, the community, school administrators, faculty and staff must share the commitment, as well as support participation and cooperation necessary to ensure student success in the development of capabilities and life goals.[1]

---

[1] 2004 Hennessey Public Schools Performance Report, Chapter 1, page 1-1.

FINDING 1-1

Interviews and focus group results indicate that the superintendent has earned the confidence of the BOE, administrators, staff, and community. He is described as knowledgeable, honorable, and accessible to all stakeholders.

All stakeholders interviewed for this review noted the superintendent's listening skills, as well as his supportive management. He is largely credited for the success of the district's grant writing efforts and the passage of the bond that is paying for the Event Dome. The technology initiatives, planning, and the support system to teachers as they integrate technology are exceptional.

Exhibit 1-8 shows that 83 percent of staff *agreed* or *strongly agreed* that the superintendent is accessible, and 74 percent of the staff indicated that the superintendent communicates effectively with staff. Regarding the parents who responded to the survey, 52 percent felt the superintendent is a respected and effective leader.

Exhibit 1-8
Staff and Parent Survey Results Regarding the Superintendent

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	The superintendent is accessible to district staff.	30%	53%	9%	5%	3%
Staff	The superintendent effectively communicates with district staff.	25%	49%	10%	14%	1%
Parent	The superintendent is a respected and effective leader.	19%	33%	27%	15%	5%

Source: Prismatic Survey Results, February 2020

COMMENDATION

The superintendent is commended for being accessible to district staff and gaining the trust and confidence of the majority of staff and the community.

FINDING 1-2

The superintendent's evaluation and goal setting are part of an informal conversational process. There is currently no clear document trail for this important function of the board. Additionally, district goals are not clearly tied to the superintendent's evaluation. Although BOE members like this easy style, they do realize that a more formal structure is needed. State law has required a written policy and an evaluation based on the Oklahoma Teacher and Leader Effectiveness Evaluation System (TLE) for all administrators, including superintendents, since 2017-18.[2]

---

[2] https://www.oscn.net/applications/oscn/DeliverDocument.asp?CiteID=89917

Interviews suggest that the superintendent and BOE have discussed a more formal evaluation process but to this point the superintendent has not found the right system. Currently, the process is more conversational and retrospective with no instrument or checklist. The superintendent would like a system that evaluates goal progress quarterly or at least more frequently than once per year.

It is clear in interviews that the superintendent and BOE have developed a relationship of trust and respect for one another. However, a more documented approach provides more legal protection for the board of education, the school district, and the superintendent should that relationship change. Additionally, mutually set goals can provide the focus for the entire district.

A recent study published by the Center for Public Education cites eight characteristics of effective BOEs.[3] Paramount is the establishment of goals and collaboration with the superintendent and HPS stakeholders. **Exhibit 1-9** shows the eight characteristics and the assessment the consulting team found regarding whether Hennessey's BOE processes meet each characteristic. The setting of goals is the trigger for all other effectiveness indicators in this analysis.

---

[3] CPE. (2011, January 28). *Eight characteristics of effective school boards: At a glance*. Retrieved from http://www.centerforpubliceducation.org/Main-Menu/Public-education/Eight-characteristics-of-effective-school-boards

Exhibit 1-9
Eight Characteristics of Effective School Boards and HPS Rating

	Characteristic	HPS
1	Effective school boards commit to a vision of high expectation for student achievement and quality instruction and define clear goals toward that vision. a. Establishing "non-negotiable" goals (goals that all staff must act upon once set by the board) in at least two areas: student achievement and instruction goals. b. Having the board align with and support district goals. c. Monitoring goals for achievement and instruction. d. Using resources to support achievement and instruction goals.	Partially Present
2	Effective school boards have strong shared beliefs and values about possibilities for students and their ability to learn the system and its ability to teach children at high levels. a. Board members consistently expressed their belief in the learning ability of all children and gave specific examples of ways that learning had improved as a result of district initiatives. b. Poverty, lack of parental involvement, and other factors were described as challenges to be overcome, not as excuses. c. Board members expected to see improvements in student achievement quickly as a result of initiatives. d. Comments made by board members were indicative of the differences in high-achieving versus low-achieving schools. In a high-achieving district, for example, comments might include: "This is a place for all kids to excel." Another might be, "Sometimes people say the poor students have limits. I say all have limits. I believe we have not reached the limits of any of the kids in our system."	Mostly Present
3	Effective school boards are accountability driven, spending less time on operational issues and more time focused on policies to improve student achievement.	Partially Present
4	Effective school boards have a collaborative relationship with staff and the community and establish a strong communication structure to inform and engage both internal and external stakeholders in setting and achieving district goals.	Mostly Present
5	Effective boards are data savvy; they embrace and monitor data, even when the information is negative, and use it to drive continuous improvement.	Partially Present
6	Effective school boards align and sustain resources, such as professional development, to meet district goals.	Mostly Present
7	Effective school boards lead as a united team with the superintendent, each from their respective roles, with strong collaboration and mutual trust: a. a trusting and collaborative relationship between the board and superintendent; b. creation by the board of conditions and organizational structures that allow the superintendent to function as the chief executive officer and instructional leader of the district; c. evaluation of the superintendent according to mutually agreed-upon procedures; and d. effective communication between the board chair and superintendent, and among board members.	Present
8	Effective school boards take part in team development and training, sometimes with their superintendents, to build shared knowledge, values, and commitments for their improvement efforts.	Mostly Present

Source: Adapted by Prismatic in February 2013 and updated with HPS data in February 2020

It should be noted that improvement in goal setting between the superintendent and BOE was also a recommendation in the *2004 Performance Review*.[4] In that report, the recommendation was to establish measurable goals in key areas of the school district, identify roles and support for achieving the goals, and develop a superintendent's evaluation instrument tying performance to the board approved goals.

The 2004 review occurred before any of the current BOE members were serving on the board. It also took place three superintendents prior to the current one. There is no documentation available on whether improved goal setting was attained previously by HPS.

RECOMMENDATION

Create a superintendent's evaluation process that is clearly tied to district goals and provides for tangible documentation of goal accomplishment.

The creation of a system for documenting the superintendent's evaluation should include a process for goal setting and for completing the final evaluation. The process and instruments to be used should be linked to the state legal requirements. It should also include the actual written evaluation document, which is the product of BOE deliberations on the superintendent's annual performance.

Goal setting for the evaluation should include:

- The superintendent and BOE set goals collaboratively with give and take discussions. At the same time, collaboration on how often to review and measure progress is jointly determined. This typically takes places once a year.

- Collaboratively set goals serve to guide HPS improvement and provide both the BOE and superintendent with a focus for planning.

- After the superintendent and BOE agree on goals, those same goals become actions for the entire district to achieve through formal BOE approval of district goals.

- The BOE and superintendent agree on a process for documentation. A drop file approach is one method of documentation. The superintendent creates a file for each goal and simply drops documentation as it happens into the drop file. If there is a quarterly or biannual review of progress in meeting goals it can be done as an oral report at a BOE meeting or as an oral report in an executive session. As the final evaluation date approaches, a three-ring binder is created for each board member to review progress on each goal. The superintendent can extend the documentation plan to involve principals and department directors by having each one create a drop file of the goals and at a pre-specified time providing a copy of the file to the superintendent.

---

[4] 2003-04 Hennessey Performance Report Chapter 1 pages 1-10

The goals once acted upon by the board are open and public. The final written evaluation document completed by the BOE is confidential. A summary however may be provided to the public.

Formats for a final written evaluation document vary by organization (**Exhibit 1-10**). A performance appraisal system is likely the best option and places the superintendent's evaluation in closer alignment with new systems being utilized to evaluate principals and teachers.

Exhibit 1-10
Methods for Evaluating a Superintendent

- **Checklist or Rating Systems.** This is the most common method of evaluating the superintendent. Typically, it is a numerical rating system to quantify the performance of the superintendent. For example, 5 is Excellent, 4 is Good, 3 is Fair, 2 is Needs Improvement, and 1 is Poor.

- **Written Essay.** This evaluation process relies on written essays by each board member that identify the strengths and weaknesses of the superintendent's performance. The key to the success of this approach is that board members focus on being constructive in their analysis.

- **Objective Analysis.** This evaluation process requires the superintendent – with the board's assistance – to develop a plan for what he or she plans to accomplish in the coming year. Included in the plan is the timing of monitoring reports that the superintendent will provide to the board.

- **Performance Appraisals.** This evaluation process mixes the rating and checklist system and the objective analysis. It is becoming more popular because it helps translate board policy and the written work plan, with a scalable system of measuring the superintendent's performance.

Source: Namit, C. (2008, November 1). Superintendent Evaluation Tool Box. *District Administration Magazine.* Retrieved May 13, 2014, from http://www.districtadministration.com/article/superintendent-evaluation-tool-box

However, final decisions on the instrument to be utilized and other aspects of the evaluation should be determined jointly by the BOE and the superintendent. The BOE and the superintendent will need agreement and a similar comfort level with the instrument and the process. The process to be followed for the superintendent's evaluation may look something like the example shown in **Exhibit 1-11**.

Exhibit 1-11
Example of Superintendent's Evaluation

- **Evaluation Instrument**. It should be filled out individually by each board member. The summary of the individual board members' evaluations are compiled by the board chair or president and distributed to each board member prior to the evaluation session.

- **District Goals and Priorities**. The board chair or president should compile all written evaluation documents and distribute them to the other board members.

- **Superintendent Employment Contract**. This is reviewed in relation to the accomplishment of the established goals of the evaluation. The contract becomes more relevant when the board considers the status of the superintendent's employment.

- **Superintendent Evaluation Policy and Procedures.** The board can check if policy and procedures have been followed.

- **Other Relevant Documents**. All other documents are supplied as needed.

Source: Namit, C. (2008, November 1). Superintendent Evaluation Tool Box. District Administration Magazine. Retrieved May 13, 2014[5]

The superintendent's evaluation should be conducted at a separate board meeting. It should focus on performance goals and priorities, with the superintendent presenting his or her accomplishments and areas that need improvement, as well as identifying the circumstances that prevented the accomplishment of goals. In the meantime, board members should identify the strong points of a superintendent's performance, areas for improvement, and any priorities or goals that the board wishes the superintendent to focus on. Board members should also review the contractual implications of the evaluation. For example, some options might include rolling the contract for an additional year, freezing the contract, and/or discussing a remediation program and plan of improvement (**Exhibit 1-12**).

---

[5] http://www.districtadministration.com/article/superintendent-evaluation-tool-box

Exhibit 1-12
Example Timeline for the Superintendent Evaluation Process

Timeline	Action
July–August of upcoming year	1. Superintendent and board set goals for the evaluation. 2. Superintendent and board clarify vision and mission and update long-range plans for the district. 3. Board and superintendent review superintendent's previous evaluation, job description and the evaluation process, forms and cycle timelines to be used next year.
January	4. Superintendent reports interim progress on district goals to the board.
February	5. Superintendent decides to use the 360-degree evaluation, prepares questions, selects individuals to participate, distributes the forms, collects and collates the results to be shared with the board. 6. Board members complete Parts 1 and 2 of the superintendent evaluation form. 7. Board members meet to discuss their evaluations and develop the board's official written evaluation document(s) that will be shared with the superintendent. 8. Superintendent completes a self-assessment of the evaluation form Parts 1 and 2.
By March 15	9. Board and superintendent meet to discuss and clarify the results of the evaluation documents. Changes to the evaluation may be made as a result of the discussions. Evaluation meetings may be held in executive session. 10. A copy of the final written evaluation form is placed in the superintendent's personnel folder. 11. As soon as evaluation is complete, the results of the evaluation are shared with the community. 12. Return to the beginning of the cycle.[6]

Source: Created by Prismatic, April 2014

FISCAL IMPACT

This recommendation can be implemented with existing resources. OSSBA can provide an evaluation instrument or the district can acquire a commercially available instrument, such as the Marzano District Leader Evaluation.[7] If the district decides to implement a commercial instrument, there will be a cost.

---

[6]http://osba.org/en/Resources/Article/Board_Operations/Superintendent_Evaluation.aspx
[7]http://www.marzanocenter.com/District-Leader-Evaluation/

FINDING 1-3

The BOE is focused on improving the school district. In interviews with three of the five-member board, it was clear that the BOE is highly motivated, realistic about the current status of the school district, and focused on the future of HPS.

All the board members interviewed expressed great satisfaction with the performance of the superintendent, the principals, and teachers. They were all confident in the current direction of the school system. The philosophy of the BOE places academic education and low class sizes at the forefront of district thinking. The record of bond issue approvals in HPS is further evidence of the community's trust in the job HPS is doing.

The mutual trust the superintendent and BOE have developed is having a positive impact on HPS. The development of mutual trust is a best practice and improves the leadership exhibited by both the BOE and the superintendent. Cohesiveness in beliefs and action is a best practice that starts with the BOE and can lead to more effective decision-making in all areas of school district operations.

COMMENDATION

The superintendent and BOE are commended for establishing an atmosphere of trust and cohesiveness. The positive progress that is being realized by HPS is a direct result.

FINDING 1-4

Current BOE policy requires an annual review of all board policies. That is more frequent than is necessary.

The superintendent brings both new policies and adjusted policies to the BOE as needed. The consulting team reviewed minutes of 11 board meetings, December 2018 through December 2019. In that time, the BOE only acted to update four policies.

Policies provide a basis of continuity for district and school-level decisions. Consistent policies serve to inform the public regarding how the district operates and convey a sense of stability and fairness.

RECOMMENDATION

Revise the current BOE policy review requirements to be less frequent.

The board president and superintendent should annually review statutory changes made during the annual state legislative session. Each June, the Cooperative Council for Oklahoma School Administration publishes a binder of new school laws. They also hold a conference to discuss the impact and implementation of these laws. At least one member of the district leadership should attend this conference and collaborate with colleagues from other districts about effective policy updates in areas where there are new or revised laws.

With existing policies where no changes are needed to respond to legislative changes, annual reviews are not necessary. Those district leaders (principals and department heads) affected by each policy should have the opportunity to review them and provide the board with feedback once every three years. This schedule reduces the administrative burden on BOE members and staff. If deemed necessary, the superintendent and board should place any needed proposed policy changes on the agenda for review. Following a whole-board review, the final form of the policy change should be proposed for approval at the next board meeting.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 1-5

Observation, review of documents, and interviews indicate that HPS BOE meetings are handled legally and efficiently. The easy relationships and cooperation are apparent. The BOE agendas are posted appropriately, and agenda items include reports on academics and activities. The BOE minutes are posted online for the public.

The superintendent provides a board packet of relevant material prior to the meeting and an oral report at the meeting. The superintendent also provides regular financial reporting to the board members. The school district utilizes a computer application called "Assemble" to handle meeting details and the meeting is conducted using an interactive television screen. The HPS business manager provides support to the superintendent and board regarding procedural and action documentation.

COMMENDATION

The school board and superintendent are commended for the efficient organization and conduct of BOE meetings.
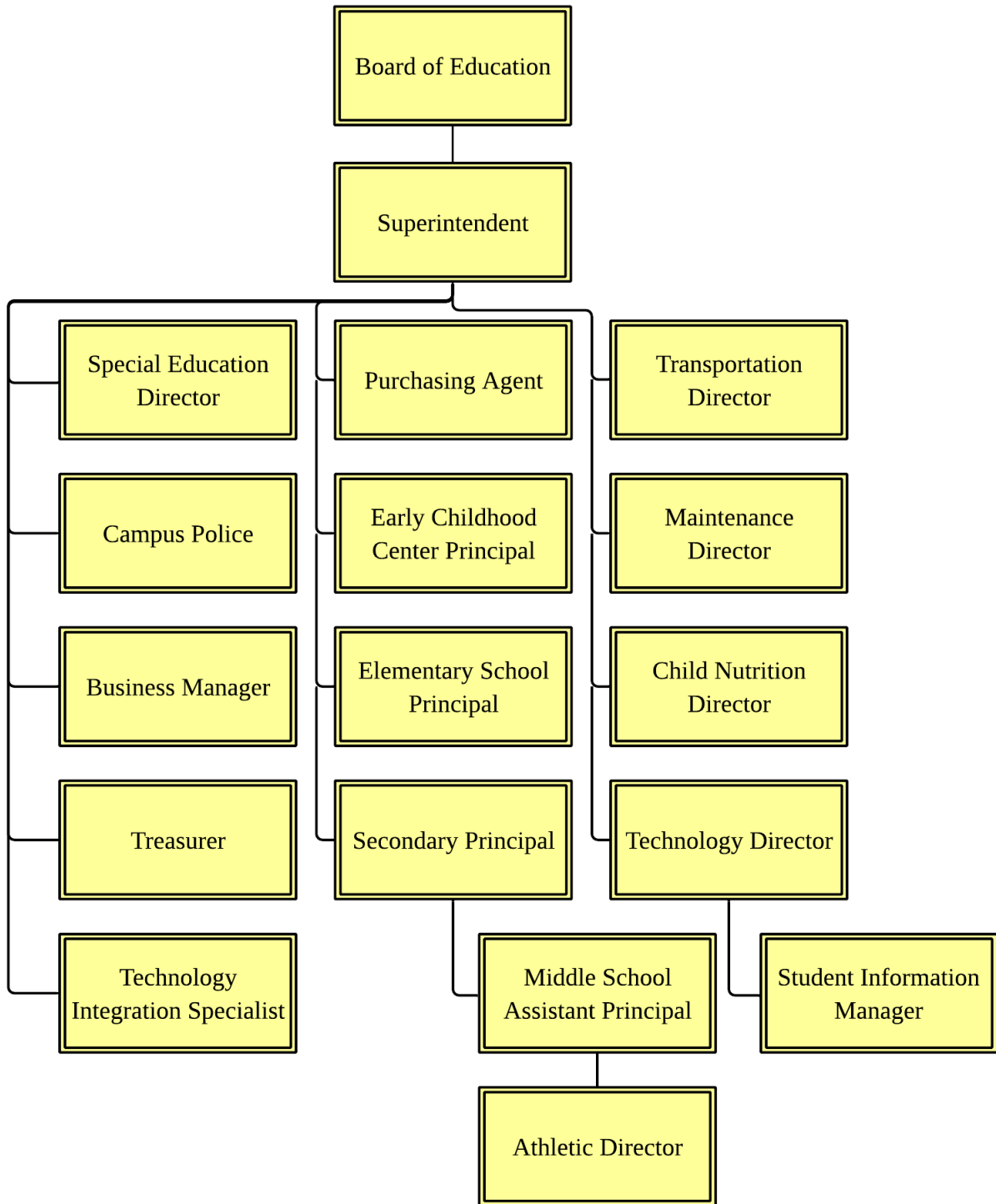
B.   *ORGANIZATION AND MANAGEMENT*

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

Exhibit 1-13 reflects the current organizational chart for HPS. This is a typical organizational structure for an Oklahoma school district the size of Hennessey. It reflects a board and superintendent philosophy of staffing departments to provide effective support to students, parents, and teachers.

The district has three sites that include an early childhood center (ECC), an elementary school, a middle school, and a high school. Staff consists of a principal and an office secretary at two sites (elementary and ECC). The secondary principal has responsibility for the middle school and high school. Additionally, there is an assistant principal assigned to the middle school. There is also an athletic director assigned at the high school and a school nurse who covers all sites. The district has a technology integration specialist who coaches teachers and organizes professional development activities.

Exhibit 1-13
**HPS Organizational Chart**

```
                        Board of Education

                          Superintendent

   Special Education      Purchasing Agent      Transportation
       Director                                    Director

    Campus Police        Early Childhood         Maintenance
                         Center Principal          Director

   Business Manager      Elementary School       Child Nutrition
                            Principal               Director

      Treasurer          Secondary Principal    Technology Director

     Technology                        Middle School      Student Information
  Integration Specialist              Assistant Principal       Manager

                                        Athletic Director
```

Source: Created by Prismatic, February 2020

FINDING 1-6

The staffing of the central office and staffing of leadership positions at the schools seems optimal, with an experienced superintendent, principals, and support staff. The staffing levels are both appropriate and lower than some comparable districts.

Exhibit 1-14 compares the number of administrative positions as a function of student enrollment for all 68 of the Oklahoma school districts in the F2 community grouping, which is devised by the OEQA. The HPS data point is shown in orange. As shown, HPS' 2017-18 administrative staffing was higher than many peers and below that of several.

Exhibit 1-14
Administrative Staffing as a Function of Enrollment
All F2 Oklahoma School Districts, 2017-18
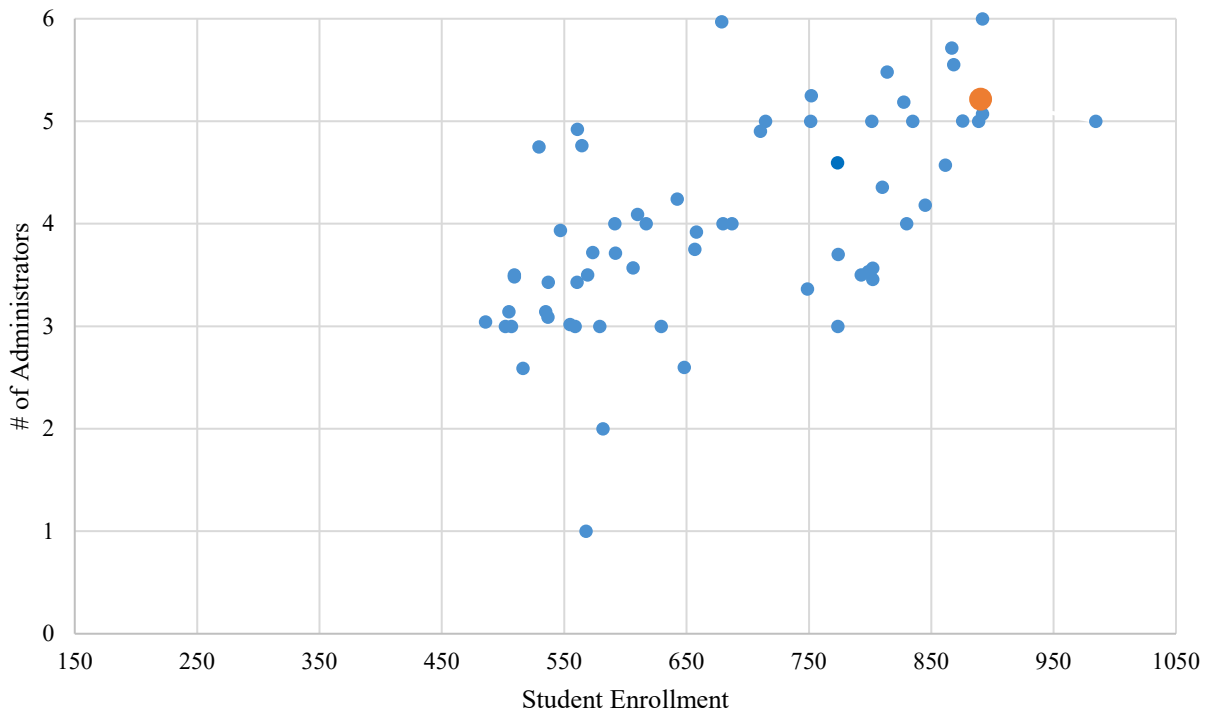
Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-15 compares the HPS ratio of administrative staff to teaching staff with the five peer districts. HPS had the highest ADM in the comparison but was in the middle of peers on number of administrators and lower than the peer average. Additionally, HPS had the second highest in number teachers, which was also higher than the peer average. The result was an 11:1 ratio of teachers to administrators, which compared favorably to the peers.

Exhibit 1-15
Comparison of Teacher and Administrator Staffing, 2017-18

Entity	ADM	Number of Administrators (FTE)	Number of Classroom Teachers (FTE)	Ratio of Teachers to Administrators
Hennessey	**890**	**5.2**	**58.0**	**11:1**
Atoka	870	7.4	50.1	7:1
Chouteau-Mazie	711	7.0	62.3	9:1
Pawhuska	867	4.9	47.2	10:1
Tishomingo	889	5.0	57.3	11:1
Watonga	751	5.0	45.9	9:1
Peer Average	**818**	**5.8**	**52.6**	**9:1**

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-16 compares HPS per student spending on administrator salaries with that of peers. As shown, HPS spending per student was the second lowest of its peers and below the peer average of $596.

Exhibit 1-16
Administrative Expenditures Comparison, 2017-18

Entity	ADM	Number of Administrators	Total Salary	Administrator Cost per Student
Hennessey	**890**	**5.2**	**$426,832**	**$479**
Atoka	870	7.4	$615,599	**$707**
Chouteau-Mazie	711	7.0	$533,897	**$751**
Pawhuska	867	4.9	$397,243	**$458**
Tishomingo	889	5.0	$471,745	**$531**
Watonga	751	5.0	$415,895	**$553**
Peer Average	**818**	**5.8**	**$486,876**	**$596**

Source: Office of Educational Quality and Accountability, Profiles Database

The management at each school site seems optimal in terms of the number of staff. Principals are all experienced in their positions and supportive regarding the direction of the school district. Interviews and focus group results reflect the confidence and trust that faculty and support staffs have in their leadership.

Exhibit 1- 17 reflects staff survey results on school leadership. The results provide further evidence of the overall effectiveness of HPS administrators. A majority of staff indicated that principals are accessible (78 percent), effective communicators (67 percent), and effective instructional leaders (72 percent).

Exhibit 1-17
Staff Survey Results Regarding the Principals

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The principals are accessible to their staffs.	31%	47%	5%	12%	5%
The principal effectively communicates with his/her staff.	27%	40%	10%	16%	6%
The principal is an effective instructional leader	23%	49%	13%	9%	5%

Source: Prismatic Survey Results, February2020

The expense of administrative staff in small districts is often under scrutiny by patrons and the media. Small district administrators must accomplish the same basic duties as those in large districts, but with less staff assisting and all doing many different jobs on top of their main job responsibilities. Nevertheless, small school district administrative levels should be roughly comparable while still providing some flexibility for differences in district needs.

COMMENDATION

The BOE and superintendent are commended for developing efficient and effective central office and school site administration.

FINDING 1-7

Based on interview and focus group input, the current division of duties between the middle school assistant principal and secondary principal is not optimal.

The middle school assistant principal is responsible for:

- student discipline;

- counseling;

- afternoon alternative school relief for one of the HPS coaches;

- federal programs; and

- substitute driving a school bus.

The assistant principal is not currently generally available in the afternoons; this loss was noted by middle school teachers.

There is also some confusion among district staff regarding the specifics of the assistant principal's job responsibilities, as he is paid as an instructional program administrator (for federal programs) and as a school counselor (for the middle school).

At the time of the onsite review, the secondary principal was aware of the likely need for adjustments. In addition to administrative duties, the principal is also shouldering responsibility for grading of students who have online coursework.

A lack of clearly defined supervisory roles or a lack of sufficient available supervisory time limits the district's ability to ensure operations are managed in a cohesive, coordinated manner. When employees are not sure who to report to or who to ask for help, it is difficult to establish clear workplace expectations and responsibilities. A lack of formally defined job roles within school leadership ranks can lead to confusion, ineffective performance, and morale issues.

RECOMMENDATION

Study several different methods of reorganizing job responsibilities and determine which provides the most feasible option.

The consulting team recommends that the district consider these options:

- relocate the principal's office closer to the middle school, in order to provide teacher supports;

- remove bus driving as a possible additional duty for all HPS administrators;

- adjust the extra duties of the assistant principal to provide full day disciplinary coverage at the middle school;

- adjust the position of assistant principal to a principal while removing the extra duties;

- add a coordinator of federal programs at half-time, combined with a teaching position;

- add a middle school counselor at least half-time;

- add a half-time position charged with staffing the alternative school in the afternoons and managing the online programming and grading for HPS; or

- some combination of the above.

The superintendent, secondary principal, and the assistant principal should meet and determine a direction regarding support administration for the middle school, how many hours it takes to do the extra jobs of both secondary administrators, define the assistant principal's job in specific terms, take some input from stakeholders, and develop a plan of action.

FISCAL IMPACT

The consulting team believes that any of the actions taken by the district to address this problem will result in a fiscal impact, although that impact cannot be estimated at this time. The consulting team further believes that a phased approach over several years may be the most logical course of action. For example, the district may choose to implement these actions over three years:

- Year 1 - Move the principal's office to a location closer to the middle school.

- Year 2 - Add an alternative programs teacher.

- Year 3 - Add a federal programs coordinator and transition to either full-time assistant principal or middle school principal.

In this scenario, the budget would be less impacted initially and each change could be evaluated individually before making the next change.

There is fiscal impact on any position adjustments selected. The consulting team estimates these fiscal impacts to be those shown in **Exhibit 1-18**. The cost for moving the principal's office is estimated to cover some minor facility renovation work that might be needed to create an office space. The position costs are based on existing district salaries for similar positions, excluding any benefits costs. As the district implements this recommendation it may find other ways of achieving the goal, while attending to other costs.

Exhibit 1-18
Potential Fiscal Impacts from Reorganizing Secondary Administrative Duties

Implementation Action	One-Time Impact	Annual Impact
Move the principal office.	$5,000	$0
Add a position with teaching and coverage responsibilities for the afternoon alternative school and the online program.	$0	($23,000)
Add a half-time coordinator of Federal Programs.	$0	($23,000)
Adjust the duties of the assistant to full-time availability at the middle school. Remove federal programs, afternoon alternative coverage, and counselor responsibilities from role and give to other existing staff members.	$0	$0
Adjust the assistant principal position to that of middle school principal. Remove federal programs, afternoon alternative coverage, and counselor responsibilities from role and give to other existing staff members.	$0	($20,000)

Source: Created by Prismatic, March 2020

FINDING 1-8

The current perception of stakeholders at the high school and middle school is that disciplinary efforts are not consistent nor is enough time devoted to student discipline. This was perceived to be a particular problem at the middle school.

There are student discipline policies in the BOE policy book and in the student handbook. The student handbook mentions vaping as unacceptable behavior at school. A three-step disciplinary consequences plan is mentioned on academic misconduct, bullying, and fighting. The disciplinary consequences include detention and suspension.

In focus groups and on surveys staff and parents expressed concerns regarding discipline consistency in the middle and high schools. **Exhibit 1-19** shows that sizeable percentages of parents and teachers feel that improvement is needed.

A majority of student survey respondents indicated that discipline is fairly and equitably administered in their school. However, students in grades 6-12 were asked to participate in the survey and it is not possible to separate the responses by grade level, so the problem may be more prevalent at one school than the other.

Exhibit 1-19
Staff, Parent, and Student Survey Results Regarding Student Discipline

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	Student discipline is well-maintained.	1%	42%	15%	26%	15%
Parent	Discipline is fairly and equitably administered at my child's school.	1%	26%	26%	29%	17%
Student	Discipline is fairly and equitably administered in this school.	9%	49%	17%	13%	13%

Source: Prismatic Survey Results, February 2020

In addition to the survey questions, staff, parents, and students provided written comments on the surveys. Teachers in focus groups also made specific comments regarding discipline. Comments from these sources included:

- District standards/consequences are inconsistently applied.

- Stakeholders perceive that consequences sometimes depend on who your parents are and that attendance, truancy, and dress code policies are inconsistently applied.

- Both middle and high school need closer attention to student discipline than what is currently being provided.

- Drug use and vaping are problems during the school day particularly in restrooms and when students leave for lunch.

Exhibit 1-20 compares the ratios of students per short-term suspension for HPS and the peers. For this statistic, a higher number means fewer suspensions overall in the school. In addition, this statistic can be heavily skewed by local disciplinary practices – for example, some districts choose not to suspend any elementary student and offer alternative forms of discipline. As shown, at the middle school level HPS has a suspension ratio that is in the middle of the peer districts, but lower than the community group and state. At the high school level, HPS has the highest ratio of all the comparison groups, meaning that the district suspends the least often.

Exhibit 1-20
Student Discipline Data, 2017-18

Entity	Ratio of Students to Short-Term Suspensions			
	Elementary	**Middle**	**High**	**District**
Hennessey	**68.3**	**14.1**	**27.7**	**28.1**
Atoka	6.9[8]		15.5	8.5
Chouteau-Mazie	17.5[9]	18.4[10]	12.6	20.7
Pawhuska	6.3[11]	5.9	13.6	5.4
Tishomingo	23.6	6.5	15.9	12.1
Watonga	None	33.0	6.1	20.4
Community Group	21.5			
State	15.6			

Source: Office of Educational Quality and Accountability, Profiles Database

The hallmark of any disciplinary plan is fairness, documentation, and consistent application of disciplinary consequences. The perception of uneven or even unfair application of consequences can lead to unnecessary litigation or civil rights investigations.

Successful disciplinary programs across the nation have both an academic component and a social/behavioral improvement component. A number of references are available that describe best practices in student discipline and effective in-school suspension:

- *Effective In-School Suspension Programs*;[12]

- *Turning Research into Practice: TRIP Report on In-School Suspension*;[13]

- *Best Practices for Award Winning Secondary Principals*;[14] and

- *In School Suspension Strategy Brief*.[15]

RECOMMENDATION

Review HPS policies regarding students leaving campus for lunch, vaping, drug use or possession during the school day, and determine whether the consequences are consistently implemented.

---

[8] Atoka has only one school for elementary and middle schools, K-8,
[9] Chouteau Elementary figure used. School has grades 2-5.
[10] Chouteau-Mazie Middle figure used. School has grades 6-8.
[11] Average of figures for Indian Camp Elementary and Pawhuska Elementary used.
[12] https://kycss.org/pdfs-docs/clearpdf/issuesbriefs/iss.pdf
[13] http://successfulschools.org/wp-content/uploads/trip_iss_edited.pdf?phpMyAdmin=168c4a6ce7f3t76b9b6da
[14] https://us.sagepub.com/en-us/nam/best-practices-of-award-winning-secondary-school-principals/book226951
[15] https://k12engagement.unl.edu/strategy-briefs/In-School%20Suspension%2011-10-15%20.pdf

It is difficult for stakeholders to know all the circumstances that lead to different disciplinary consequences for the same or similar school policy violations, but the perceived lack of consistency is a concern.

The district should establish a committee of stakeholders to review the consistent application of discipline policies and procedures. The superintendent should chair this committee with principals attending and providing documentation for review.

A feedback loop to other teachers should be established either by minutes kept of the meetings and shared or, a time set up for the teacher representative to share results with the teachers as a group. In this process, student confidentiality must be respected; specific students should not be identified when discussing discipline events and consequences. Teachers and parents should be represented in discussions.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

C.   PLANNING AND EVALUATION

Planning, evaluating, and correcting strengths and weaknesses 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 in a large entity like a school district. In that case, there is a need to strategically plan when and how to change the district for the improvement of the student learning experience.

To be effective, a strategic plan must lay out key milestones to measure progress, establish a priority ordering 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 school district's organization. Finally, the organization must provide periodic reports on the status of the plan's 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.[16] 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 the long-term goals.

FINDING 1-9

The district lacks a formal long-term strategic planning process.

---

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

In recent years, the superintendent has been focused on completion of a major bond project – a domed shelter and event center that will have long-term benefits for the district and community. The superintendent, principals, and BOE have discussed the long-term health of the district but planning and evaluation of the district remains an informal process with only immediate administrators involved.

In 2007, Reeves summarized his work, which analyzed hundreds of strategic plans across 20 dimensions, controlled for school demographics, and compared student achievement to a baseline year.[17] The study found that substantially higher 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.

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

---

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

4. evaluation or sustainment/management phase, where ongoing refinement and evaluation of performance, culture, communications, data reporting, and other strategic management issues occur.[18]

The graphic in **Exhibit 1-21** explains the logic of the balanced scorecard approach to strategic planning.

Exhibit 1-21
Balanced Scorecard Approach

Source: Balanced Scorecard Institute,[19] *September 2008*

More strategic planning in all areas of HPS operations can assist in efforts to improve student academic achievement, address facility needs, establish appropriate roles and responsibilities for staff members and clarify perceptions and the goals of the BOE.[20] Most importantly, communicating the goals and plans to all levels of the organization and the community will promote a positive perception that the board understands the needs of the district. A successful, forward-looking school district is the best method of attracting students and quality teachers.

RECOMMENDATION

Establish a strategic planning process that involves school and community stakeholders.

This performance review may provide a basis for more long-term planning and an opportunity to broaden the range of people involved in planning. That can help ensure the continued positive district growth. A strategic planning process can start with an annual superintendent's report to

---

[18]http://balancedscorecard.org/Resources/Strategic-Planning-Basics
[19]http://www.balancedscorecard.org/BSCResources/TheNineStepstoSuccess/tabid/58/Default.aspx
[20]https://digitalcommons.utep.edu/cgi/viewcontent.cgi?referer=https://search.yahoo.com/&httpsredir=1&article=1014&context=iped_techrep

the BOE on the state of the school district in all its many facets. The basic steps for a strategic planning effort are:

- The superintendent convenes an internal administrative staff planning group. Decide who will chair the main committee and/or serve as liaison to the group.

- Establish a BOE approved strategic planning committee heavily weighted to include teachers and parents. As many as two of the BOE members can serve if so desired.

- 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.

- Develop a vision statement.

- 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.

- Develop follow-up and review procedures.

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

FISCAL IMPACT

The HPS BOE and superintendent can undertake the process of launching the strategic plan process. This approach to planning has no fiscal impact.

Alternatively, the district may want assistance in working through a strategic planning process. This approach will have a fiscal impact. The BOE can issue a request for proposals and enter a contract for services. Based on HPS' size and complexity, an estimated cost for facilitating this process would be around $20,000. This is, of course, a negotiable fee which would include meetings with stakeholders, follow-up, and production of documents. Lastly, in the third year of strategic plan development, a communication strategy would be developed, including print ready public relations documents, and a final print ready strategic plan document.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Develop a strategic plan.	($10,000)	($5,000)	($5,000)	$0	$0

FINDING 1-10

Effective strategic planning is largely based on an understanding of historical and projected student demographic changes. The district lacks explicit, data-driven demographic projections.

The district leadership understands its current population mix and its ramifications. However, a more in-depth study of demographics would provide a sound basis for future decision-making regarding the school district. Over the past five years, enrollment has been largely flat. Although the average assessed property valuation per student has increased by 18.3 percent in the same timeframe, the percent of students eligible for free or reduced-price meals has increased by 7.1 percent. While the increase in property valuation is a positive sign of growth, the increase in needy students is a negative sign. The impact on student enrollment due to the opening of the new HPS facilities is unknown at this time. Without professionally completed demographic projects, it is not possible to know if the observed trends are likely to continue at the same rate, increase sharply in the near futures, or increase but at a slower rate.

Effective facilities (and district) 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.

The district of Durant ISD recently published the results of a demographic study it undertook with an outside consulting firm.[21] Over the next five years, that study projected student enrollment growth of 10 percent. Over the next nine years, that study projected growth of 17.6 percent. The results of the Durant study provide an example of the type of data a professional demographics study can provide.

RECOMMENDATION

Investigate the resources available to HPS for conducting a demographics study and implement a study as soon as it is feasible.

Recent data with projections out five to ten years will help HPS plan better. The district should use the results to inform strategic planning, bond development, future classroom construction activities, transfer policies, and other aspects of operational decisions.

To implement the recommendation, HPS should find a contractor with experience in providing demographic studies for schools. This is typically accomplished through a request for proposals. Following board approval of a time-limited contract, a meeting should then be held with administrative staff and no more than two BOE advisers. This meeting should profile HPS expectations and what will be needed from HPS by the researchers and what they will go out and get on their own. At the conclusion of the study, researchers should provide a complete written

---

[21] http://www.durantisd.org/web/district/DISD_growth2018.pdf

report, an explanatory meeting with administrative staff, and an oral report to the BOE in a public board meeting. A copy of the DISD report presentation is contained in **Appendix E.**

FISCAL IMPACT

The consulting team anticipates about 40 hours of work at approximately $150 an hour will be required for a demographic analysis. This fee should include some onsite time to meet with local planners and builders.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Hire a firm or consulting team to conduct a demographic analysis.	($6,000)	$0	$0	$0	$0

FINDING 1-11

HPS has a board of education philosophy statement in the BOE policy book. However, HPS does not have a mission statement publicized online, in current documents or in their policy book. A mission statement is typically developed as a part of district strategic planning. A committee including no more than two BOE members, the superintendent, teachers and parents should review the purpose of a district mission statement and develop one for BOE approval. The mission statement is the fundamental reason for the organization's existence. It explains who you are and why you exist.

According to Olsen (2012)[22], the mission statement is a day-to-day guide of what the organization wants to accomplish and the foundation from which future decisions are made. An effective mission statement meets these criteria:

- It focuses on satisfying stakeholder needs.

- It is based on organizational core competencies.

- It is motivating and inspires employee commitment.

- It is realistic, clear, and easily understood.

- It is specific, short, sharply focused, and memorable.

- It leaves a lasting impression that represents what should be remembered about the organization.

---

[22] Olsen, J.E., & Martins, L.L. (2012). Understanding organizational diversity management programs: A theoretical framework and directions for future research. *Journal of Organizational Behavior*, 33(8), 1168-1187. Doi: 10.1002/job.1792.

RECOMMENDATION

Develop a mission statement for approval of the board of education.

The following action steps can lead to development of an effective mission statement:

- Collect ideas and opinions of your senior staff and key employees about the organization's mission. This can be accomplished through a group meeting or an individual survey.

- Collect and synthesize the responses, looking for similar themes.

- Develop several different versions of a draft mission statement.

- Evaluate the different drafts against the criteria and throw out any that do not meet it.

- Circulate the draft statements and ask for feedback.

- Select the best one.

- Ask for BOE approval.

- Make sure every employee receives a copy to post in classrooms and offices.[23]

FISCAL IMPACT

This recommendation can be implemented with existing resources.

D.   PERSONNEL MANAGEMENT

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

- recruiting employees;

- overseeing the interviewing, selection, and processing of new employees;

- retaining employees;

- processing promotions, transfers, and resignations;

---

[23] Adapted from *Strategic Planning Kit for Dummies* 2nd edition, John Wiley & Sons. Inc. copyright 2012, page 93-94.

- 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.

FINDING 1-12

The district does not have a personnel evaluation system for support staff. As a result, most support employees do not receive consistent feedback to enhance their performance. The only exception seems to be instructional assistants in special education programs.

In interviews and document review, the consulting team did not see evidence of a consistent plan of evaluation for support staff, nor a format for the evaluation activity. The *2004 Performance*

Review also included a recommendation that the district evaluate all employees annually resulting in a written record for documentation in the personnel file.[24]

Exhibit 1-22 provides a sample evaluation document used in another Oklahoma district.

Exhibit 1-22
Sample 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

RECOMMENDATION

Develop and implement an evaluation system for support staff.

The superintendent should convene a working group to develop an evaluation policy for BOE approval and to develop the format and schedule. Support staff should provide input into the development of the evaluation form and schedule.

Supervisors should provide support employees with a deliberate and thorough evaluation process. 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 where the employee can add comments, if desired. Most importantly, it should include a signature line so that each employee's performance is officially documented.

---

[24] Chapter 3, page 3-8

PR SMATIC
SERVICES, INC.

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 recommendation can be implemented with existing resources.

FINDING 1-13

The district is not adequately securing personnel files.

The file cabinets have locks and are kept behind a lockable office door. The contents included in the files were consistent across the files reviewed. A best practice was observed in personnel files completed over the last few years – a checklist attached inside that facilitates check off the contents of the file.

However, files are not kept adequately secure in two areas:

- The district does not maintain a sign-in sheet indicating who has had access to personnel files. This leaves the district at-risk of someone removing or erroneously adding information to the files. Any staff person reviewing a file should sign in, including the superintendent, principals, contracted or state auditors, and state accountability staff.

- The file cabinets containing personnel files are not fire-rated. The district does not maintain any electronic offsite storage of personnel files. According to federal and state requirements personnel records are permanent legal documents. These documents must be protected and be available to employees themselves and supervisors.

According to the Society of Human Resource Management (SHRM) guidelines, personnel files and medical records are private documents and should be maintained in locked file cabinets in a secure location. Files should only be accessible to those people with a legitimate need to access the files. Special guidelines apply to securing and handling medical information obtained through medical examinations and tests.[25] The *Americans with Disabilities Act (ADA)* also requires that medical records be secured and accessible only for safety and health purposes.

RECOMMENDATION

Improve the security of personnel files.

The district should maintain a sign-in sheet to track those having access to personnel files. The sheet should include printed name, date, purpose, and signature of the person accessing the personnel file. The sign-in sheet should be kept on a clipboard on top of file cabinets holding

---

[25]www.shrm.org

records. Staff near the sheets may need to give a verbal reminder to sign in. A posted sign reminding those getting access to use the sign-in sheet will also likely be helpful.

The district should further protect personnel files from loss, either by acquiring fire-rated file cabinets or developing/acquiring a system to scan and maintain copies of files offsite. If the district chooses to scan personnel documents then those documents should be downloaded to memory sticks that are then kept in locked storage separate from the office files. Scanned documents should include leave records, contracts, time sheets, board minutes, sign-in sheets for professional development, and other documents that the district wishes to keep long-term.

FISCAL IMPACT

Purchasing a document scanner would likely be less expensive than purchasing fire-rated cabinets and will offer the possibility of using scanned documents for various purposes. However, the scanning of personnel file documents will require staff time.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Purchase a document scanner.	($480)	$0	$0	$0	$0

FINDING 1-14

The district uses the Teacher Leader Effectiveness (TLE) system for teacher evaluation. The TLE model is designed to provide teachers and principals with data that can lead to self-improvement. **Exhibit 1-23** shows the evaluation rubric for teachers.

Exhibit 1-23
Tulsa TLE Observation and Evaluation Rubric for Teachers

Domain	Relative Weight	Dimensions
Classroom Management	30%	1. Preparation 2. Discipline 3. Building-Wide Climate Responsibility 4. Lesson Plans 5. Assessment Practices 6. Student Relations
Instructional Effectiveness	50%	7. Literacy 8. Common Core State Standards 9. Involves All Learners 10. Explains Content 11. Explains Directions 12. Models 13. Monitors 14. Adjusts Based upon Monitoring 15. Establishes Closure 16. Student Achievement
Professional Growth and Continuous Improvement	10%	17. Uses Professional Growth as an Important Strategy 18. Exhibits Professional Behaviors and Efficiencies
Interpersonal Skills	5%	19. Effective Interactions/Communications with Stakeholders
Leadership	5%	20. Leadership Involvements

Source: https://sde.ok.gov/sites/ok.gov.sde/files/TLE-TPSFramework12.pdf

The model provides a link to improvement through professional development by utilizing an evaluation rubric that clearly profiles areas of needed improvement. The teacher is expected to assist the principal in evaluation activities and to select professional development that will enhance teacher performance and improve outcomes for students. The principal assists the teacher by removing barriers and helping the teacher acquire high quality professional development. The principal has the role of analyzing the results of TLE for the entire staff and noting trends and areas where larger groups of teachers could use training to increase effectiveness and then reporting that to professional development planners. The TLE model also includes evaluation models for non-teaching certified staff such as counselors.

In interviews and focus groups, HPS teachers and principals seemed well acquainted with the process and have started implementing the Professional Learning Focus (PLF) approach that is tied to the TLE. The PLF approach guides the teacher in selecting areas of need that would improve their teaching skills.

Principals explained their process in detail and provided summary evaluation data for inspection. All teachers receive an evaluation annually, including those with more than three years' experience.

COMMENDATION

The district has implemented the TLE model to provide an effective teacher evaluation framework.

FINDING 1-15

The district does not have a formal adopted evaluation plan for principals. Interviews indicate that an informal approach is being utilized for principal evaluations. It is not clear whether a formal system like the McRel system was previously adopted; the superintendent indicated that the McRel system was not being used yet during his tenure. State law has required a written policy and an evaluation based on the Oklahoma Teacher and Leader Effectiveness Evaluation System (TLE) for all administrators, since 2017-18.[26]

Currently, the superintendent collaborates with the principals on an evaluation of strengths and weaknesses and sets goals. At the end of the year, each principal sits down with the superintendent and evaluates the year. The superintendent conveys what he wants the focus to be the next year and it is discussed. Principals seem fine with what is currently done on evaluation and commented that we all trust each other and communicate often.

This informal approach can lead at times to a lack of clarity on performance issues that need to be addressed by principals. The formal adoption and implementation of an evaluation program is not only a state evaluation requirement, but a properly executed evaluation also provides legal protection for all parties involved in the evaluation process. A formal process serves to focus principals on improvement in their management of teachers and support staff. **Exhibit 1-24** shows the McREL rubric.

---

[26] https://www.oscn.net/applications/oscn/DeliverDocument.asp?CiteID=89917

Exhibit 1-24
McREL Rubric Used for Principal Evaluations

Domain	Dimensions
Managing Change involves understanding the implications of change efforts for stakeholders and adjusting leadership behaviors accordingly.	• Change Agent: is willing to and actively challenges the status quo. • Flexibility: adapts his or her leadership behavior to the needs of the current situation and is comfortable with dissent. • Ideals and Beliefs: communicates and operates from strong ideals and beliefs about school and schooling. • Intellectual Stimulation: ensures that the faculty and staff members are aware of the most current theories and practices and makes the discussion of these a regular aspect of the school culture. • Knowledge of Curriculum, Instruction, and Assessment: is knowledgeable about the current curriculum, instruction, and assessment practices. • Monitor and Evaluate: monitors the effectiveness of school practices and their impact on school learning. • Optimize: inspires and leads new and challenging innovations.
Focus of Leadership involves accurately and proactively targeting appropriate areas for school improvement efforts.	• Contingent Rewards: recognizes and rewards individual accomplishments. • Discipline: protects teachers from issues and influences that would detract from their time or focus. • Focus: establishes clear goals and keeps those goals in the forefront of the school's attention. • Involvement in Curriculum, Instruction, and Assessment: is directly involved in helping teachers design curricular activities and address assessment and instructional issues. • Order: establishes a set of standard operating procedures and routines. • Outreach: is an advocate and spokesperson of the school to all stakeholders. • Resources: provides teachers with material and professional development necessary for the execution of their jobs.
A Purposeful Community is one with the collective efficacy and capability to develop and use assets to accomplish goals that matter to all community members through agreed upon processes.	• Affirmation: recognizes and celebrates school accomplishment and acknowledges failures. • Communication: establishes strong lines of communication with teachers and among students. • Culture: fosters shared beliefs and a sense of community and cooperation. • Input: involves teachers in the design and implementation of important decisions. • Relationships: demonstrates awareness of the personal aspects of teachers and staff. • Situational Awareness: is aware of the details and undercurrents in the running of the school and uses this information to address current and potential problems. • Visibility: has quality contacts and interactions with teachers and students.

Source: http://www.ok.gov/sde/oklahoma-teacher-leader-effectiveness-tle, October2012

RECOMMENDATION

Adopt formally an evaluation model for principals.

The superintendent and principals should meet to discuss the McRel evaluation system and what it would be required to implement it. The superintendent and principals should contact some other districts using the McRel and ask them questions and for suggestions on implementing. Once a formal system is selected for implementation, the superintendent and principals should map out annual timelines together, develop the forms, roll out software support, and decide on a launch date.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 1-16

Currently, the superintendent has 13 direct reports; this is too many. This has resulted in less attention to formal aspects of evaluating district level staff and could lead to a lack of clarity over to whom they report daily.

The superintendent of a school district is, by definition, the supervisor of all staff and responsible for all district activities involved. However, that does not necessarily translate into all staff members reporting directly to the superintendent. If they did, daily questions regarding operations, handling leave requests, and evaluating job performance would preclude the superintendent from working on anything else. Those administrative and management functions are most efficiently and effectively handled by the administrators who have the most natural daily contact with the individual staff members.

An effective organizational structure is essential to the efficient delivery of services throughout a school district. Efficient organizational structures have appropriate spans of control for district leadership with clearly defined lines of authority that are reflected in the district's organization charts.

RECOMMENDATION

Reduce the number of direct reports to the superintendent.

A more reasonable number of direct reports, of nine or less, would free time for the superintendent to focus more on improving student instruction, instituting more formal evaluation procedures for administration and support staff, district goal development, and strategic planning. These changes in direct reports can also assist the district in developing a leadership pool by broadening the experiences of various administrative staff.

The consulting team recommends that the district consider a phased approach to organizational realignment and offers the following options as an example. These options incorporate several other recommendations of the consulting team found elsewhere in this report.

Exhibit 1-25 is a proposed organizational chart for 2020-21 that reduces the superintendent's direct reports to eight. The superintendent would have direct responsibility for leave requests, daily questions, and performance evaluations of his direct line of reports only. The business manager would pick up two direct reports, the child nutrition director one, the elementary principal one, the high school principal two, and the maintenance director one.

Exhibit 1-26 is a proposed organizational chart for 2022-23 which maintains the superintendent's direct reports at seven or eight depending on other decisions and adjustments to positions. If the district determines it desirable, the middle school assistant principal position would change to a principal position and pick up one direct report. The business manager would pick up one additional direct report.

Exhibit 1-25
Proposed Organizational Chart for 2020-21
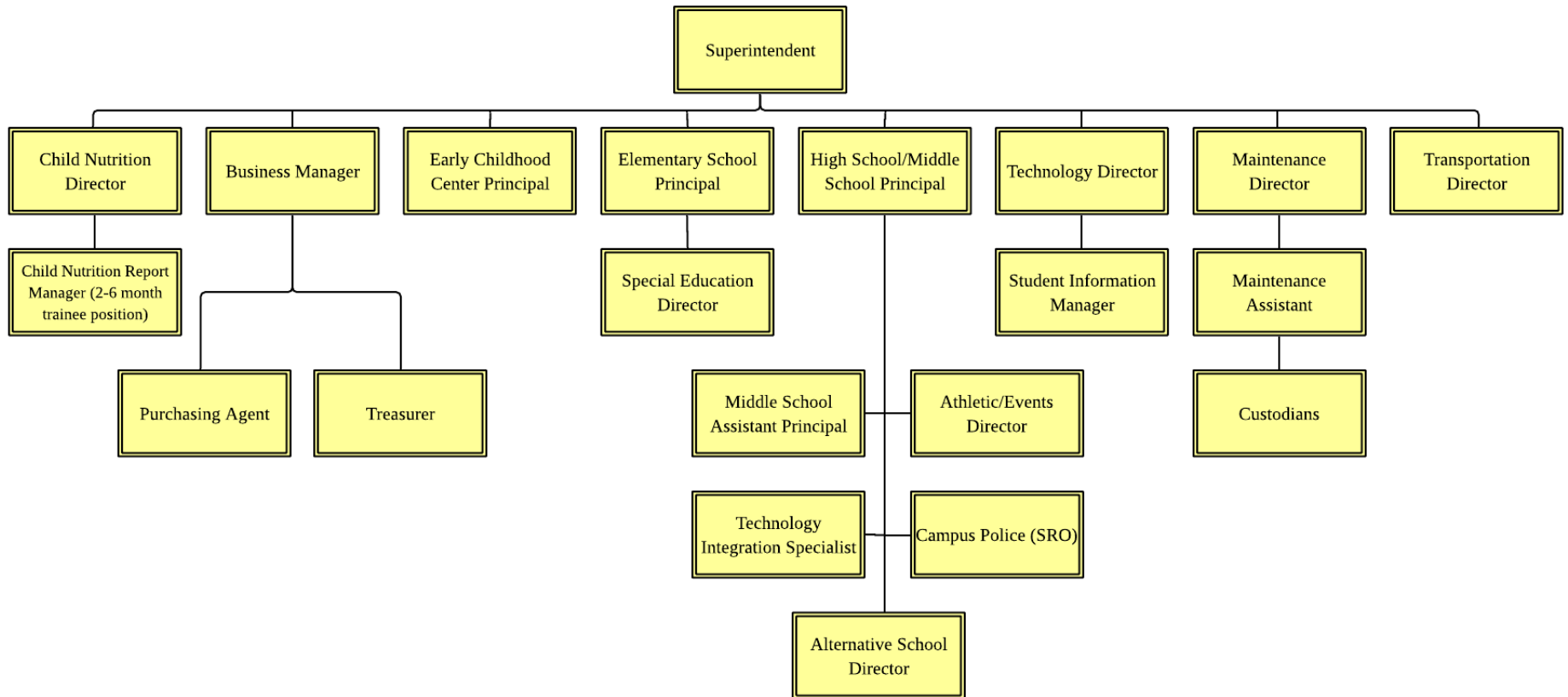
Source: Created by Prismatic, February 2020

Exhibit 1-26
Proposed Organizational Chart for 2022-23
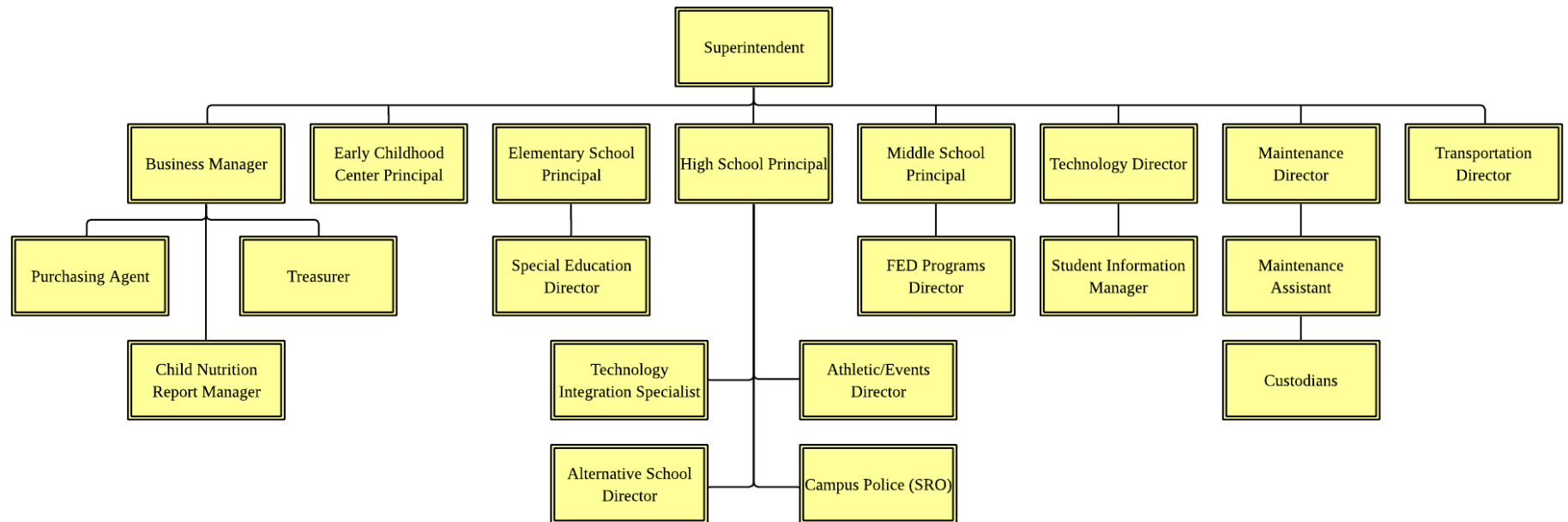
Source: Created by Prismatic, February 2020

FISCAL IMPACT

The fiscal impacts for all but the revised business manager position have been calculated in the various sections of this report where recommendations have been made for additional staff. The consulting team recommends that an adjustment to the business manager position to include supervisory duties should result in a salary increase.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Compensate business manager for supervisory duty responsibilities.	($8,300)	($8,300)	($8,300)	($8,300)	($8,300)

FINDING 1-17

HPS has a number of long-term employees approaching retirement age. Without planning and preparation, the institutional and historical knowledge gaps left by these types of retirements can be detrimental. Additionally, HPS relies on temporary grant funding for the key position of technology integration specialist but has not planned for carrying on technology integration work past the period of grant funding.

There is, at this time, no formal succession planning for veteran staff such as the directors of maintenance, transportation, and child nutrition. Likewise, there are no formal succession plans for replacing veteran teachers. Replacing veteran teaching staff is particularly important in small school districts where teachers and non-teaching staff perform a variety of functions other than their main job. Those secondary job assignments also have to be filled when someone leaves.

There is a staff-initiated informal cross-training effort for support staff employed in the central office and at school offices. However, the district has not planned for addressing sudden long-term absences in essential areas, such as payroll.

Thoughtful and deliberate planning for changes in teachers, non-teaching staff, and leadership is needed in order to avoid organizational chaos and instability. Students and staff benefit from smooth transitions and agenda continuity. Short tenures are not helpful. Typical succession planning includes several elements:

- anticipate (assess) 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 a leader;

- adopt the attitude that the district will search for teacher, administrative, and central office candidates proactively before a vacancy happens. Establish recruiting practices that help with this. These recruiting practices can range from advertising hard to find positions such as math, science, or special education before vacancies happen, to seeking intern teachers, partnerships with other organizations, shared teaching staff, outsourcing, and other techniques;

- provide for distributed leadership throughout the district's organization – that recognizes and allows motivated individuals, no matter their position, to lead. Deepen the district's leadership pool by creating a bench of experienced staff who assume leadership positions, such as, teachers chairing committees;

- once potential leaders are identified, mentor/coach them and continue to give them opportunities to experience leadership;

- 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.[27]

RECOMMENDATION

Develop a succession plan policy and process for administrator positions, veteran teachers, non-teaching staff, and key temporarily funded positions.

Succession planning is a relatively new concept in education and key staff may need to research it and perhaps acquire some training. Once leaders are comfortable with the concept, a formal succession planning effort should take place, which includes board policy and gathering specific information concerning veteran staff and their many responsibilities. As succession plan policies and activities are developed, a review by the district legal counsel is also appropriate.

The superintendent or his designee should develop a committee to address succession planning for all veteran staff. Timing on this should coincide with efforts to profile the district and its needs in a strategic planning process. Lastly, the district does not have to enter full-blown succession planning to benefit from some of its concepts. Those include:

- identifying potential leaders based on what they voluntarily do such as chairing committees or leading professional development;

- regarding key staff, clearly identifying all of the things specifically that they do and, more importantly, how they do them;

- selecting staff for cross-training in key job duties in the event that a key staff member is out for an extended time;

- providing necessary cross-training;

- searching for replacement staff before vacancies happen and creating a potential employee list; and

---

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

- broadening the opportunities in HPS for staff to voluntarily take on leadership roles.

In addition to the planning aspects mentioned above there is a need for a current and immediate assessment of district needs regarding succession. Three specific areas of immediate need are the maintenance director, child nutrition director, and the transportation director:

- **Director of Maintenance** – The current maintenance director has worked at HPS since 1977. For many decades, he has served as the district's only maintenance tradesperson, while also supervising a staff of eight custodians. He has consistently earned the trust and respect of teachers, staff, and administrators for his management of high-quality cleaning services, and the provision of responsive and consistent building maintenance.

  In his tenure, the director has eschewed record-keeping (electronic or otherwise), so when he retires his vast knowledge of HPS buildings and grounds will leave with him. Given these circumstances, the district should plan to hire a designated new maintenance director 12 to 18 months prior to the current director's retirement. This person should be given two major assignments initially:

  o   make affirmative efforts to emulate the dedication, diligence, and attitude with which the current director performs his job. While the current director cannot be cloned, his character and deportment should be modeled, copied, and imitated as much as possible; and

  o   plan best practice innovations for the future management of maintenance and custodial services. It is important that universally recognized best practices for cleaning and maintenance be introduced.

  A lack of succession planning in this area would likely guarantee a disruptive and unproductive shock from the current director's retirement to the transition into a "new world order."

- **Director of Child Nutrition** – The current child nutrition director has been in her position for 15 years. Two years ago, she announced that her retirement would take place within the next two or three years. When she announced her retirement, she informed the superintendent that no current staff member was in training to replace her. At that point, there was no attempt to interview current staff as to their interest in the position. There was no effort to advertise for the upcoming opening as a trainee position. Such a posting may have resulted in finding and hiring a district employee who could have been trained over a period of several years to take over when the director retired.

  Instead the decision was made to solve the problem quickly by outsourcing to a Food Service Management Company (FSMC). Outsourcing to a for-profit company does result in management of the program but another outcome is increased costs to the district as well as losing control of most aspects. With an established transition protocol, HPS would have been better prepared to deal with the director's departure, especially given that her departure was not imminent.

At this point, the district should still prepare for the retirement of the current director, who as an HPS employee will still be needed for the numerous state and Federal reports associated with the child nutrition program. Moreover, outsourcing to an FSMC does not absolve the district for the overall responsibility of the child nutrition program; the district will also need to provide effective management of the FSMC once the current director retires. The superintendent should meet with the current director to map out a training plan, which will likely require at least three months of overlap with the current director's tenure. Then the district should identify either someone already on staff or hire someone to move into the role.

- **Director of Transportation** – The current transportation director has been with the district for more than 30 years, starting as a bus driver and then advancing to become a director. His current responsibilities also include serving as the district's only mechanic and taking care of HPS grounds. His expertise and knowledge of the buses, grounds, and transporting students are vast. In addition, he has strong, positive relationships with students' families.

   As noted in Chapter 5 of this report, the transportation director is meeting all state requirements regarding paperwork and documentation but is also often short on time to complete all needed operational tasks. Given these circumstances, if the district implements the consulting team's recommendation to hire an assistant for the transportation department, it should endeavor to hire someone who can grow from that position into the director position, upon the retirement of the current director. If the district does not implement that recommendation, it should plan to hire a designated new transportation director six to 12 months prior to the current director's retirement. As with the designated replacement for the maintenance director, this person should first prioritize learning to do the job in the same manner as the retiring director, in order to provide the highest level of continuity possible. After that, the new director should consider implementing any remaining unimplemented transportation recommendations in this report.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Professional Development

While the development of a competent team of certified teachers and non-teaching staff is often considered a human resource function, the professional development of personnel is also a critical component of instructional delivery and school improvement. Professional development programs enhance the professional knowledge, skills, and attitudes of educators to improve student learning. The base of knowledge in education is growing so rapidly in every academic discipline that educators must stay current and develop new expertise. Effective school districts provide ongoing learning opportunities for all educators. The SDE standards specify that professional development should increase competencies in core curricular areas. Professional Growth, Development, and Evaluation is also one of the Oklahoma Nine Essential Elements of Effective Schools. As noted by SDE, school leaders are expected to provide "opportunities for

research-based, results-driven professional development for staff."[28] In the Nine Essential Elements, the SDE lists nine subareas that are concerned with professional development:

- Long-term professional development plans are written.

- There is a plan to build instructional capacity with on-going professional development.

- Professional development is aligned with student performance goals.

- School improvement goals are connected to student learning goals.

- Professional development is on-going and job-embedded.

- Professional development is aligned to analysis of test data.

- The district and site leaders provide sufficient professional development resources.

- Teacher evaluations and professional development plans are used effectively.

- The needs of instructional leaders are addressed.[29]

The organization, Learning Forward, formerly the National Staff Development Council, has established standards for quality professional learning that increase educator effectiveness and results for all students.[30] These standards characterize quality professional learning as that which:

- occurs within learning communities committed to continuous improvement, collective responsibility, and goal alignment;

- requires prioritizing, monitoring, and coordinating resources for educator learning;

- integrates theories, research, and models of human learning to achieve its intended outcomes;

- aligns its outcomes with educator performance and student curriculum standards;

- requires skillful leaders who develop capacity, advocate, and create support systems for professional learning;

- uses a variety of sources and types of student, educator, and system data to plan, assess, and evaluate professional learning; and

---

[28]https://sde.ok.gov/sites/default/files/documents/files/Oklahoma%209%20Essential%20Elements%20of%20Effective%20Schools%20-%20Needs%20Assessment%20Checklist.pdf
[29] Ibid.
[30] http://learningforward.org

- applies research on change and sustains support for implementation of professional learning for long-term change.

FINDING 1-18

Interviews and focus groups indicated that professional development for certified and non-certified staff is strongly supported in HPS.

The districts uses surveys and discussions to determine the professional development needs of staff. Professional development opportunities are posted on websites, on FaceBook, in newsletters, etc. Teaching staff members are encouraged to select appropriate opportunities and the district pays the costs. Teachers are also paid stipends when attending off-contract professional development activities. Principals mentioned initiatives they have launched with teachers that the district has supported. One example is the ECC arts integration training in the summer, where the superintendent is paying the teachers to attend this off-contract.

Additionally, the district won a technology grant that supported the hiring of a technology integration specialist. The specialist is responsible for coaching teachers and bringing in technology training.

HPS has implemented early release Fridays to give teachers an opportunity for professional development and collaboration. The monthly schedule includes:

- First Friday - designated for the site to provide training or collaboration time;

- Second Friday – used for committee meetings;

- Third Friday – used for technology training; and

- Fourth Friday – used as a bonus short day for teachers.

Each July, HPS has a summer workshop and teachers are paid to attend. Although optional, the pay incentive improves attendance. The first day back each August is also a professional development day. The district invites surrounding school districts to attend its summer and beginning of the year workshops.

Exhibit 1-27 reflects staff survey results regarding professional development activities. As shown, most staff members have positive opinions regarding professional development opportunities in the district.

Exhibit 1-27
Staff Survey Responses Regarding Professional Development

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I receive adequate training overall to perform my job functions.	29%	54%	5%	10%	1%
There is adequate high quality professional development for principals and teachers.	21%	57%	11%	7%	4%
Non-teaching staff has opportunities for professional development relevant to their responsibilities. (Classroom teacher responses excluded for this question.)	15%	69%	12%	4%	0%
At least some of the required professional development is offered online.	25%	68%	3%	4%	0%

Source: Prismatic Survey Results, February 2020

COMMENDATION

HPS demonstrates dedication to staff development.

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. In order to strengthen this role, school districts should develop effective communications and community involvement programs that lead to a more informed and engaged staff and community. Research demonstrates that community outreach benefits both the community and the schools.

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

FINDING 1-19

The consulting team found that the Hennessey community generally supports the school district.

The community's support of the recent bond issue for the dome is a prime example of its support for the school district. The size of that bond issue reflects the faith the Hennessey community has in the school district, the superintendent, and the BOE.

The district also enjoys a high level of community involvement, as evidenced by its ongoing partnerships. In addition to the successful bond partnership, HPS is collaborating with the city on the new pool and park located across the street from the Early Childhood Center. HPS relies on the Kingfisher paper for publishing news about the district and also receives communications assistance through a privately owned website called "All About Hennessey." Additionally, the superintendent has developed points of contact by attending community meetings and representing the schools. Through this, he has developed partnerships with the Ministerial Alliance, the Lions Club, and Hennessey United.

In interviews and focus groups it was clear that community support is a point of pride for HPS. Interviewed BOE members all indicated that community support is a strength of the school district. **Exhibit 1-28** shows the active business and community alliances of HPS.

Exhibit 1-28
HPS Business and Community Alliances

Community Alliances
Ministerial Alliance
Lion's Club
Kingfisher Newspaper: All About Hennessey
City of Hennessey
Hennessey United
Hennessey Clipper
Public Library
Locally sponsored scholarship programs
All About Hennessey
Partnerships on Grants (3)
Partnerships with other institutions (2)
Vo-Tech Pilot Program
Parent Teacher Organization

Source: Compiled by Prismatic, February 2020

COMMENDATION

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

FINDING 1-20

District staff was split on the level of parental involvement in the district. Some described it as great with some families but poor with others, with not much in the middle. Data review, interviews, and focus group results pointed to pockets of poverty within the community where

parents are struggling to survive and have little interest in school involvement. Most HPS students qualify for free or reduced lunch, an indicator of the high overall level of poverty in the area. Additionally, there were some concerns regarding parent conference attendance rates, volunteer opportunities, communications, and opportunities for parent involvement in school decision-making.

Exhibit 1-29 shows a five-year comparison of parent conference attendance rates for HPS, its peers, and the state. The district had a participation rate at parent/teacher conferences that was below the state averages in all years. Compared to peers, HPS parent conference attendance was the lowest for two years, second highest for one year, and third lowest for one year.

Exhibit 1-29
Trend in Parent Conference Attendance

Entity	2013-14	2014-15	2015-16	2016-17	2017-18
Hennessey	**67.9%**	**60.0%**	**62.0%**	**62.0%**	**56.0%**
Atoka	57.0%	60.0%	64.0%	83.0%	85.0%
Chouteau-Mazie	61.3%	66.0%	67.0%	55.0%	61.1%
Pawhuska	71.6%	63.0%	80.0%	62.0%	64.6%
Tishomingo	69.4%	69.0%	64.0%	60.0%	59.5%
Watonga	72.4%	72.0%	64.0%	62.0%	67.8%
State	**74.1%**	**74.0%**	**74.0%**	**62.0%**	**72.0%**

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-30 reflects the parent and staff survey results concerning volunteers. Less than a majority of school staff believed that the district effectively uses volunteers; almost one-fourth believed the district does not use them effectively. While most parents feel they are encouraged to volunteer (56 percent), more than one-fourth (27 percent) do not feel encouraged to volunteer.

Volunteers could lighten the load of the staff while encouraging the development of positive relationships. The main reason for HPS to push volunteer use is the payoff in parent involvement. HPS reports to the State of Oklahoma average hours per student for volunteer time of 3.6 hours; with the ECC listing 3.0, the elementary school listing 4.2, and the middle/high school listing 4.0.

Exhibit 1-30
Staff and Parent Survey Results Regarding School Volunteers

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	The district effectively uses volunteers to assist with meeting district goals.	4%	44%	29%	19%	4%
Parent	My child's school encourages parents to volunteer, if they are able.	21%	35%	18%	24%	3%

Source: Prismatic Survey Results, February 2020

As shown in **Exhibit 1-31,** HPS school sites seem to have some of the pieces in place for high levels of parental involvement. Most parents indicated they felt welcome at school and that they believed their children felt the same. Parents had mixed responses on the next three survey questions. The first concerned timely communication from teachers regarding student progress – only 57 percent of parents felt those communications to be timely. The second concerned overall parental satisfaction with the education their children receives at HPS – here, parents were nearly evenly split. The third concerned the parental role in district decision-making – 63 percent of parents did not feel that parents play an active role in this area of the district.

Exhibit 1-31
Survey Results-Parent Involvement

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Parent	I feel welcome at my child's school.	22%	58%	8%	7%	4%
Parent	My child feels welcome and accepted at school.	19%	59%	8%	7%	7%
Parent	I receive timely communications from my child's teachers regarding his/her progress in school.	19%	38%	5%	26%	11%
Parent	I am satisfied with the education my child receives.	10%	31%	10%	39%	11%
Parent	Parents play an active role in decision-making in our school.	7%	13%	18%	35%	28%

Source: Prismatic Survey Results, February 2020

RECOMMENDATION

Provide professional development to teachers and administration on the effects of generational poverty and how to assist children and families in that situation while encouraging parental involvement.

Consider inviting other community leaders into the professional development including church and business leaders. Following that, convene committees at each school to discuss methods of encouraging parental involvement. The items considered during these meetings might include how to increase parent conference participation, how to launch effective school volunteer programs including school site business partners, how to include parents in decision-making, how to improve timely communications to parents, and how to be more effective with various populations and income levels.

For example, it was mentioned in an interview that not all families have Facebook or computer access at home. After discussions, each school site should convene a committee to write a plan of action with timelines for achievement. To assist HPS with committee discussions the consulting team has listed strategies for developing volunteer programs and increasing parent conference attendance.

Increasing Parent Conference Attendance:

Epstein (2001) at Johns Hopkins University[31] 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.

The committee strategy can include analyzing existing efforts at achieving parent conferencing, determining which new strategies have the best chance of success, and implementing at least one new strategy and analyzing the results.

Strategies for increasing parent conference attendance can include the following:

- Schedule siblings back-to-back when possible.

- Offer early evening, early morning, and night conferences when necessary.

- Use prearranged phone call appointments.

- Offer drop-in babysitting during conference times.

- Provide a sandwich dinner for those coming straight from work.

- Make sure the teachers have training in conferencing and provide personalized worthwhile information about the students.

- Implement student-lead conferencing.[32]

- HPS principals should assist committees with analyzing the efforts to achieve parent conference attendance.

Developing Volunteer Programs

The available information seems to support an expanded role for parent and community volunteers to go to work in the school. Action on enhancing the use of volunteers will not only

---

[31] Epstein, J. L. (2001). *School, family and community partnerships: Preparing educators and improving schools.* Boulder, CO: Westview Press.
[32]http://www.pta.org/3549.htm

benefit the school and staff, it will also help create a more informed and engaged community, which can lead to greater support for BOE and bond elections. Additionally, an enhanced effort to use volunteers can help create a pool of trusted substitutes and people that can be relied on for input and advice regarding the school district.

HPS should study and develop a volunteer program that promotes parent and community involvement in the district, with specific goals in leveraging volunteer efforts toward improved academic outcomes. The superintendent should gather and task a committee with researching successful small school volunteer programs, providing suggestions for volunteer policies and implementation strategies. The district level committee should include administrators, teachers, parents, and community members. If BOE members have an interest no more than two should attend any meeting.

The program can include classroom, bus and school grounds volunteers, formal development of parent/teacher organizations, and programs that are aimed at involving specific groups like grandparents. It should seek consistency in policies and practices throughout the district and should also be formally approved by the BOE.

The committee should be flexible in thinking of opportunities for parents, grandparents, and guardians to be involved outside the traditional concept of classroom volunteering and should focus on ways they can help support academic outcomes. To allay fears regarding the quality of volunteers, the program should provide training to the volunteers so that expectations are understood. The parent input provided through the surveys should be used as a starting point to inform district leaders of parent priorities and concerns.

Without district guidelines and emphasis, volunteering can quickly be lost in all the other pressures that schools face. The National Parent Teacher Association's *Seven Steps to a Successful Volunteer Program*[33] provides useful information for creating and maintaining an active school volunteer program. 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;

- training and recognizing volunteers; and

- evaluating volunteer performance and program success.

---

[33]Ibid.

FISCAL IMPACT

This recommendation can be implemented with existing resources

F.   COMMUNICATIONS/PUBLIC RELATIONS

The primary role of communications in a school district is to convey a message and image consistent with school board policies and implemented through procedures established by the superintendent and district staff. Critical components of communications include strategies for externally communicating with the community and internally communicating within the school district.

The Hennessey BOE has a detailed policy regarding how it expects communication to be handled by staff. Policy Item 430 covers expectations for school staff regarding electronic communications, including "e-mails, instant messages, and communications made by means of an Internet website, including social media and social networking websites" and requires that the superintendent and principals

> annually remind staff members and orient new staff members concerning the importance of maintaining proper decorum in the on-line, digital world as well as in person. Employees must conduct themselves in ways that do not distract from or disrupt the educational process.

FINDING 1-21

The district makes use of a variety of channels to communicate with internal and external stakeholders. **Exhibit 1-32** outlines the district's current communication methods mentioned in interviews and focus groups. In interviews and focus groups, faculty and support staff seems to be satisfied with communication strategies.

Exhibit 1-32
HPS Communication Methods

Technology-Based	Written and Published	Personal Contact
main website and teacher sites	student handbooks	school visits/parent conference/face to face
Facebook	teacher handbooks	attending school events
email	posted BOE agendas	attending booster club meetings
texting		
Twitter		
newsletters (school site)		
student information system		

Source: HPS interviews and documentation, February 2020

COMMENDATION

HPS is commended for using a variety of technologies to communicate with district stakeholders.

FINDING 1-22

The district encourages teachers to solicit external funding through an unusual arrangement that likely results in greater donor funding that would otherwise be achieved.

DonorsChoose (www.donorschoose.org) is a non-profit that connects classrooms in need with donors. Hennessey encourages its teachers to post projects that need funding on DonorsChoose. When an HPS teacher is successful in getting a project funded through DonorsChoose, the district pays the teacher a stipend out of district funds to compensate them for the work of soliciting the donations. This both encourages teachers to seek external funding and likely increases the amount of external funding the district ultimately receives.

This also recognizes what a powerful force that teacher work ethic and creativity can be for students and HPS. At the time of the onsite work, the district had seven open DonorsChoose campaigns. More than 120 projects have been funded over the last four years.

COMMENDATION

HPS is commended for recognizing how the creativity of teachers can be a valuable asset to students and for creatively encouraging teachers to solicit donor funding for classroom projects.

FINDING 1-23

The school board is not maximizing regular communications mechanisms with stakeholders, beyond the times of bond campaigns. HPS has made some indirect efforts at communication to the public for the purposes of public relations, but work remains. There is no overall messaging effort.

HPS has relied primarily upon Facebook, the website, posted activity schedules, and involvement in some community-sponsored activities. More direct methods of developing good public relations would include parent meetings (involving more than PTO members), community advisory groups, regular parent surveys, community surveys, or a district newsletter that provides targeted HPS messaging.

An example of needed targeted messaging is evident in **Exhibit 1-33.** A large percentage of parents indicated they have no opinion regarding BOE listening and understanding. This typically indicates that they do not have enough information to be able to respond to the questions. The parents who did have an opinion were split on their assessment of the BOE in these areas.

Exhibit 1-33
Parent and Staff Survey Results Regarding the Board of Education

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Parent	School board members listen to the opinions and desires of parents and community members.	7%	23%	38%	21%	11%
Parent	School board members know and understand the educational needs of students in the district.	5%	25%	34%	25%	11%
Staff	School board members listen to the opinions of parents and community members.	8%	51%	34%	6%	1%
Staff	The school board understands the needs of the school district.	5%	47%	27%	17%	4%

Source: Prismatic Survey Results, February 2020

On the community survey, to which parents of current students, former students, community members without children in the district, and some HPS employees responded, 32 percent *disagreed* or *strongly disagreed* that the district communicates frequently with the entire community. Another 23 percent *disagreed* or *strongly disagreed* that the district communicates effectively. Almost half of the respondents (47 percent) indicated they mostly hear about the school district when there is a bond measure (**Exhibit 1-34**).

Exhibit 1-34
Community Survey Results Regarding District Communications

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The school district communicates **frequently** with the entire community, not just families with students in the district.	5%	41%	23%	23%	9%
The school district communicates **effectively** with the entire community, not just families with students in the district.	2%	39%	36%	16%	7%
I mostly hear about the school district when the district wants to pass a bond.	10%	37%	24%	24%	5%

Source: Prismatic Survey Results, February 2020

A good public relations program sets up success in community support that becomes visible in bond voting support, parent involvement, volunteering, and business support of the district. A good public relations program can illuminate for everyone the strengths of the school district. **Exhibit 1-35** profiles some of the strengths of HPS identified by stakeholders, gleaned from interviews and focus groups. While staff and BOE members had no difficulty in identifying a plethora of district strengths, it appears these are not widely known, either inside or outside the staff ranks.

Exhibit 1-35
District Strengths Identified by HPS Stakeholders

Strengths of Hennessey Public Schools
The BOE is excellent and focused on kids in every decision.
Caring attitude of teachers. Relationships developed with students are great.
Truly helping community raise its kids.
Whole school is working on improvement.
School is a welcoming and friendly place.
Teachers are responsive through the Email system.
School is exceptionally clean and well maintained.
Technology available to teachers and students is outstanding.
Technology integration activities are cutting edge and won an award last year.
Extra- curricular activities are enthusiastically supported by the community.
Custodial staff is fantastic.
Principals and support directors are all excellent.
HPS consistently has high quality professional development.
Special education students are well taken care of in HPS.
Community always comes through when we fundraise for activities.
Teachers are emotionally invested in the kids.
Community is 100 percent behind the school.
Keeping kids safe is a priority.
Extra- curricular programs and the agricultural program are excellent.
Internally the entire team of educators and support staff works great together.
HPS has a full-time nurse and great school counselors.
HPS prides itself on low class sizes.
Overall school climate is positive
Teachers are high quality and show leadership by always wanting to do better for the kids.
HPS has developed a strong school foundation.
Grant writing is encouraged and modeled.
Events Center will have long-term value to HPS and the community.
Extracurricular activities are strong (sports, choir, academic team, debate etc.).
Teachers desire to get better.
The BOE is excellent at working with the community.
Superintendent is the best we have had works well with everyone and is open and honest. He is an out of the box thinker!

Source: Prismatic Interviews and Focus Groups Results, February 2020

As noted by the National School Public Relations Association:

> The role of school public relations is to maintain mutually beneficial relationships between the school district and the many publics it serves. Each school district has its own unique way of carrying out this role, but there is one common element of all successful school PR programs: they are planned. A well thought-out, strategic communication plan will help ensure that a school district carries out its mission and meets its goals with the support of its staff and community.[34]

RECOMMENDATION

Develop a group messaging plan in order to strengthen HPS communications with all stakeholders.

This can be accomplished through a number of different methods, including newsletters, a superintendent's corner in local media, informational mailings, hand-outs at events, periodic surveys, or a district newsletter.

Administration already has points of contact by attending community meetings. The next step is asking for time to talk about the schools. For example, speaking at Lions Club or Hennessey United meetings on behalf of the schools is an excellent approach. Public relations basically involve taking advantage of community opportunities to tell the district's story.

To implement this recommendation, HPS should develop a committee to brainstorm methods. The committee should include administrators, BOE members, teachers, and parent representatives. Once the committee is established, the superintendent should reach out and invite people from the HPS community that deal with public relations to come and talk with the committee. This might be newspaper editors/manager, business managers who themselves deal with public relations, local TV, radio personnel with experience in public relations, university professors in journalism and public relations, or others. The committee can also acquire materials for review from the National School Public Relations Association.[35]

FISCAL IMPACT

This recommendation can be implemented with existing resources.

---

[34] https://www.nspra.org/resourcesarticles
[35] https://www.nspra.org/resourcesarticles

Chapter 2:

Instructional Delivery

Chapter 2

Instructional Delivery System

This chapter addresses the instructional delivery of Hennessey Public Schools (HPS) in the following sections:

A. Curriculum
B. Instructional Delivery and Student Performance
C. Special Programs
D. Student Services

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

A.   CURRICULUM

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

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

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

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

prepares high school graduates for success in college courses and in workforce environments. **Exhibit 2-1** further explains the OAS standards.
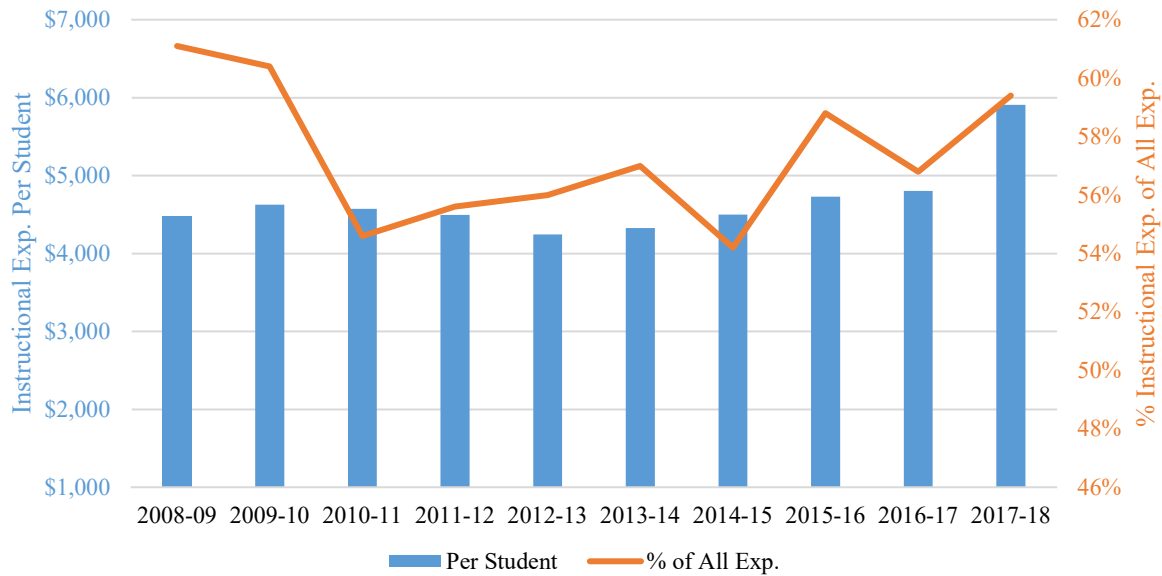
Exhibit 2-1
Oklahoma Academic Standards

What the OAS Does	What the OAS Does Not Do
• 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 (ELL) and students with special needs	• 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), 2019

Exhibit 2-2 provides a 10-year comparison of HPS 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 54 percent to 61 percent of all expenditures. Instructional dollars per student have varied from to $4,479 in 2008-09 to $5,909 in 2017-18.

Exhibit 2-2
Trend in Instructional Spending

Source: Office of Educational Quality and Accountability, Profiles Database
and Prismatic calculations January 2020

A comparison of core units in the high school curriculum reveals a number of HPS strengths (**Exhibit 2-3**). In 2017-18, the district:

- offered more core subject units than most of the peer districts and greatly exceeded the community group and state number of units;

- offered the highest number of social studies and computer education units of any of the comparison groups;

- was tied in first place with two peer districts and was higher than the community group and state in the number of science and math units offered; and

- offered the second-highest number of language arts and fine arts units among the peer districts and exceeded the community group and state.

Exhibit 2-3
Comparison of Core Curriculum Units by Subject, 2017-18

Subjects	Hennessey	Atoka	Chouteau-Mazie	Pawhuska	Tishomingo	Watonga	Community Group	State
Language Arts	5.0	5.0	4.0	6.0	6.0	4.0	4.7	5.2
Science	7.0	5.0	2.0	5.0	7.0	7.0	5.6	6.1
Math	6.0	4.0	4.0	4.0	6.0	6.0	5.2	5.4
Social Studies	9.0	6.0	4.0	6.0	8.0	6.0	6.1	6.8
Fine Arts	11.0	8.0	7.0	5.0	18.0	7.0	6.7	8.1
Languages	3.0	3.0	3.0	0.0	3.0	3.0	1.5	2.4
Computer Education	6.0	2.0	2.0	3.0	3.0	2.0	3.0	3.2
Total	50.0	36.0	29.0	29.0	54.0	38.0	32.8	37.2

Source: Office of Educational Quality and Accountability, Profiles Database

FINDING 2-1

The district introduced one-to-one technology for grades pre-K through 12th. Each student is issued a digital device for learning a standards-based curriculum. The district is in the second year of implementing this large-scale change.

Pre-K students have an iPad, and all other students have Chromebooks. Every teacher has an interactive touchscreen panel in their classroom. **Exhibit 2-4** provides examples of students using the one-to-one technology.

Exhibit 2-4
HPS One-to-One Technology Initiative
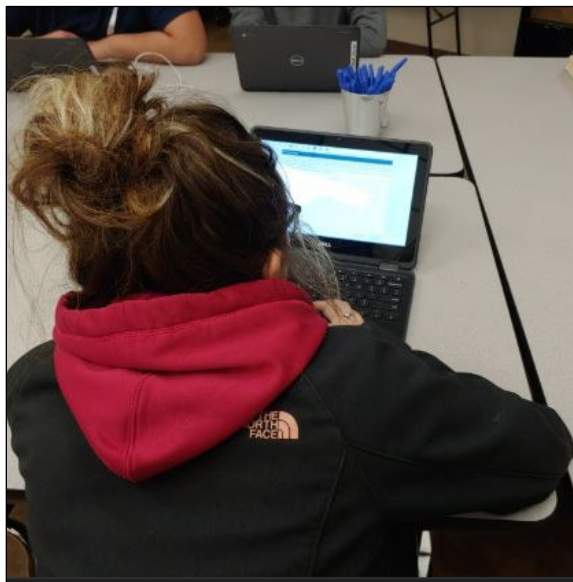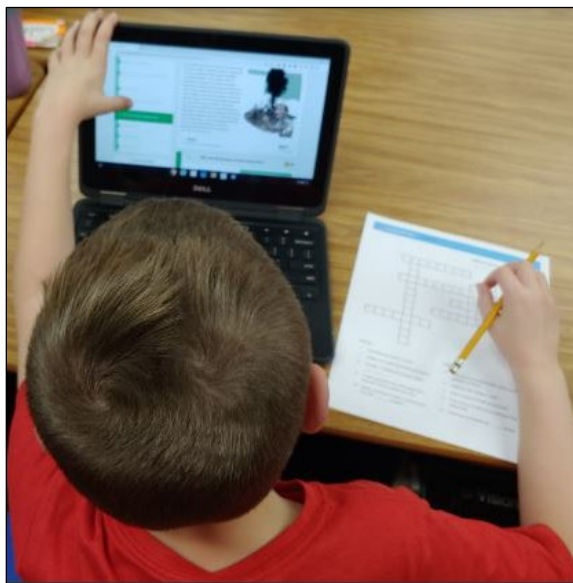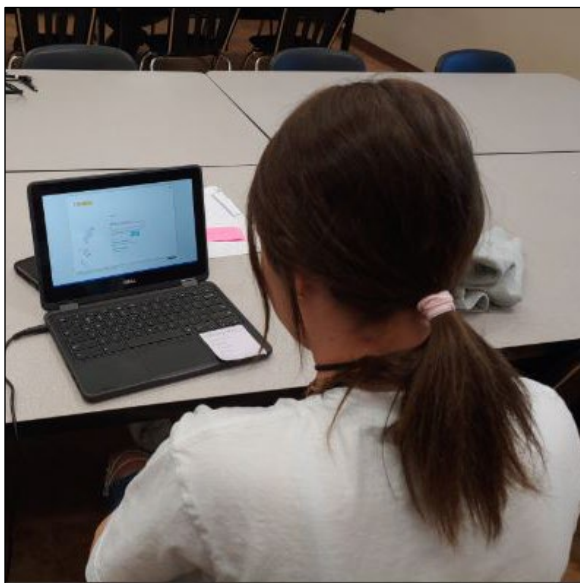
Source: Prismatic, February 2020

The district hired an education technology integration specialist to support teachers and students in this new endeavor. A Striving Readers grant provided funding to initiate the launch to one-to-one technology and a standards-based curriculum. A Rural Utility Service Grant also provided technology funding. This leading-edge educational effort is a result of the superintendent's vision, the support of the BOE and community, and the hard work of the district's administrators and teachers.

One-to-one technology in the classroom allows all students full participation and collaboration and enhances the interaction with what they are learning. Loss of instructional time and passive learning is prevented because students do not wait for access to or share devices.[1]

More and more studies show that technology integration in the curriculum improves students' learning processes and outcomes. Teachers who recognize computers as problem-solving tools change the way they teach. They move from a behavioral approach to a more constructivist approach.[2]

> Integrating technology into classroom instruction means more than teaching basic computer skills and software programs in a separate computer class. Effective tech integration must happen across the curriculum in ways that research shows deepen and enhance the learning process. In particular, it must support four key components of learning: active engagement, participation in groups, frequent interaction and feedback, and connection to real-world experts.[3]

COMMENDATION

The district is commended for launching one-to-one technology to support a standards-based curriculum.

FINDING 2-2

The district has no common district-wide curriculum framework to horizontally and vertically align a standards-based core curriculum. The district is focused on moving from textbook-driven to a standards-based curriculum. The teachers have autonomy in choosing curriculum, resources, and making decisions regarding standards selection and curriculum pacing.

Curriculum 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 state of Oklahoma has developed comprehensive curriculum frameworks. Available on the SDE website, there are frameworks in Mathematics, English Language Arts, and Science.

In Hennessey, the district did not adopt a math textbook, so math teachers had to find their own curriculum resources. All HPS teachers are transitioning from a textbook-driven curriculum and instruction to standards-based. There are random efforts across the district to define and pace curriculum. In elementary schools, "5 ins and outs" are practiced between grades 1st and 2nd.

---

[1] https://www.spectrumfurniture.com/en//blog/480-5-benefits-of-1-1-technology-in-the-classroom
[2] https://www.edutopia.org/technology-integration-guide-importance
[3] https://www.edutopia.org/video/introduction-technology-integration

The second grade teachers tell first grade teachers five things they want first graders to be able to do when entering second grade. However, no evidence was presented to indicate the "5 ins and outs" are guided by the SDE Blueprints and OAS most frequently tested.

In middle school and high school, standards-based curricula are primarily decided by one teacher teaching most grade level sections. No district curriculum framework or curriculum guide anchors and details standards-based instruction. At the time of the onsite review, student assessment data indicate no consistent upward spiral for improvement. Without a common document to guide teacher decision-making, implementation of a standards-based curriculum remains random and individually driven by teachers and or grade levels.

As part of the curriculum frameworks, the district lacks a common focus for leveraging the key components of digital learning: "active engagement, participation in groups, frequent interaction and feedback, and connection to real-world experts."[4] The district's administrators and technology integration specialist make intentional effort to raise awareness, provide options, and set expectations to standardize the core curriculum using a Pre-K through grade 12 curriculum framework. However, these efforts do not rise to the level of a common focus in this area.

Content standards that are aligned with and support digital age learning and work 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 an 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 desired learning outcome. A curriculum framework bridges the gap between overall curriculum goals and the use of technology for learning and teaching.[5]

RECOMMENDATION

Develop and implement Pre-K-12 standards-based core curriculum alignment frameworks, along with teacher accountability measures.

District leaders have introduced HPS teachers to various local, state, and national frameworks. With teacher awareness in place, the district needs to standardize the curriculum and adopt a

---

[4] https://www.edutopia.org/video/introduction-technology-integration
[5] http://id.iste.org/connected/standards/essential-conditions/curriculum-framework

district-wide curriculum framework. Along with adopting the framework, teachers need an accountability system to ensure the framework is taught with fidelity.

The superintendent, principals, and technology integration specialist, along with teachers, should explore options for adopting a district-wide curriculum framework. Many frameworks are available that sequence standards and pace curriculum while allowing teacher instructional delivery autonomy. The district's instructional team 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 technology.

There is need for regularly scheduled meetings with focused agendas. Restructuring Friday release time, refocusing the summer, and refocusing the beginning of the year professional development days are possible venues for framework adoption. 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. Once an HPS district-wide framework is agreed upon, the leadership team must continue to provide targeted intentional guidance with accountability measures to ensure all teachers are implementing the frameworks with fidelity.

FISCAL IMPACT

This recommendation can be implemented with existing resources. It can be implemented by restructuring Friday release time and use of existing professional development funds.

FINDING 2-3

The district lacks an ongoing system to horizontally and vertically calendar pace the core curriculum. There are no pacing measures to address curriculum gaps and redundancies. The district lacks a system to monitor appropriate remediation, review, and maintenance based on student data.

The district expects teachers to use formative and summative student performance data. However, district-wide student performance data are not maximized by interfacing and weaving the student data results into adjusting and calendar pacing the standards-based curriculum. There are no pacing calendars to mirror the scope and sequence of a standards-based curriculum framework. HPS teachers follow no calendar-based pacing guides laying out a visual format of when to cover material at each grade level and subject area.

According to selected HPS staff (administrators, classroom teachers, and other certified), only 57 percent *agreed* or *strongly agreed* they "know what is to be taught" (**Exhibit 2-5**). No evidence was presented to the consulting team that indicated the existence of a "district-adopted pacing calendar that reflects OAS." Additionally, only 43 percent of the selected staff *agree* or *strongly agree* the district implements "scope and sequence documents that determine what is taught and when." Although parents typically lack the vocabulary used in education, their survey results indicate an awareness of a lack of teacher accountability, vertical curriculum alignment, and general academic rigor. Half of the parents did not feel teachers are held accountable, 42 percent

did not see evidence of vertical alignment, nearly half (49 percent) are not satisfied with their child's education, and 39 percent would not describe HPS as a "good place to learn".

Exhibit 2-5
Selected Staff[6] and Parent Survey Responses Regarding Curriculum

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Selected Staff	Teachers know what is to be taught and when because they have access to a district-adopted Pacing Calendar that reflects the current Oklahoma Academic Standards (OAS)	5%	52%	13%	20%	11%
Selected Staff	Teachers have scope and sequence documents that determine what is taught and when.	2%	41%	18%	32%	7%
Parent	Teachers are held accountable for ensuring that students learn.	8%	25%	16%	37%	13%
Parent	Students learn the necessary material to be prepared for the next grade.	8%	41%	10%	30%	12%
Parent	I am satisfied with the education my child receives.	9%	31%	9%	38%	11%
Parent	Our school can be described as a "good place to learn."	8%	36%	16%	31%	8%

Source: Prismatic Survey Results, February 2020

Curriculum that is vertically mapped and aligned is a process for detailing what content and skills are required and taught at each grade level and course during a school year. Calendar pacing tells when the content is taught and revisited. The curriculum maps provide a year-long overview, rather than a daily classroom perspective, of what content and skills are required over the course of the school year (Jacobs, 1997). Curriculum mapping creates a document for teachers to follow and gives guidelines to monitor accountability and ensure the required curriculum is being followed (O'Malley, 1982).[7]

Curriculum pacing guides or calendars help teachers stay on track, pace the frequency content is taught, and ensure skills are revisited for review, reteach and/or maintenance. These pacing guides serve a similar purpose to that of traditional scope-and-sequence documents, which lay out expectations of the material to be covered in each subject at each grade level. Pacing guides are different because they detail when the skills and content that are expected to be on the annual state test are presented to students. Teachers schedule these ongoing topics before the spring

---

[6] Includes only responses from administrators, classroom teachers, and other certified staff who responded to Prismatic's staff survey (n=56).
[7] http://www.ascd.org/publications/curriculum-handbook/421/chapters/Overview.aspx

testing dates. Pacing guides are tied to benchmark assessments that take place quarterly or even more frequently, further delineating what teachers must teach and when they teach it. Some pacing guides specify the number of days, class periods, or even minutes that teachers should devote to each topic.[8]

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

> involves dramatic departures from the expected, both in defining a given problem and in finding a solution. Curriculum Mapping may be considered a second-order change for our district because it challenges the status quo of historical practices and therein may result in resistance. However, it has the potential of resulting in transformative learning.[9]

Jacobs (1997) states:

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

> Though the micro and macro levels are connected throughout a district, there is a conspicuous lack of macro-level data for decision-making. Yet we need that big picture for each student's journey through his or her years of learning. With data from curriculum mapping, a school and its feeding and receiving sites can review and revise the curriculum within a larger, much-needed context. Data on the curriculum map can be examined both horizontally through the course of any one academic year and vertically over the student's K-12 experience.[10]

Research is clear that the quality of pacing guides and how teachers respond to them vary greatly. For example, new teachers need curricular guidance. Study finds that new teachers can benefit from resources such as pacing guides designed to help them figure out what to teach and how to teach it.[11] It is also important for instructional leaders to understand that pacing guides, if poorly developed, intensify pressure on teachers to cover all the material specified and that teachers attempt to meet this demand in several ways. One is to devote more time to subjects that

---

[8] http://www.ascd.org/publications/educational-leadership/oct08/vol66/num02/Pacing-Guides.aspx

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

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

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

are tested, giving less attention to science, music, art, and social studies.[12] As noted in one resource:

> The best pacing guides emphasize curriculum guidance instead of prescriptive pacing; these guides focus on central ideas and provide links to exemplary curriculum materials, lessons, and instructional strategies. Guides like these embody what many experienced teachers do when they plan their curriculum for the year: They chunk it, put topics in a sensible order, determine what resources to draw on, and develop a good sense of how long different elements will take. They also allow for some unpredictability depending on their particular mix of students. Constructive pacing guides assume differences in teachers, students, and school contexts. They adjust expectations through frequent revisions based on input from teachers. Most important, they encourage instruction that challenges students beyond the content of the test.[13]

The Curriculum Decisions Website examines mapping research and provides pragmatic rationale. The site addresses the importance of the horizontal and vertical curriculum alignment and serves as a valuable foundational resource. It also provides descriptions of the mapping process and how the process is completed.[14]

RECOMMENDATION

Develop and implement district-wide processes and procedures to horizontally and vertically align and pace the core curriculum from Pre-K through 12th grade.

Pacing guidelines should be incorporated into the curriculum framework. As HPS instructional leadership seeks to adopt and implement standards-based curriculum frameworks that horizontally and vertically align curriculum, pacing guides also need consideration. Implementing pacing guides requires caution so they are not too prescriptive, mandated tight timelines for coverage of content only.

Pacing is about the student, not the teacher. Pacing guides need built-in flexibility to address what to do if a student falls behind the pace and does poorly on an assessment. Pacing guides should allow for teacher autonomy to find instructional approaches and effective ways to reinforce and adjust the curriculum, as needed based on student data, that leads to standards mastery. **Exhibit 2-6** provides an example of a pacing guide that is mindful of outcomes on formative assessments and year-end goals. While it does not give teachers advice on how to monitor and adjust the pacing of the curriculum, this example does identify the priority lessons and the suggested alternatives for non-mastery.

---

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

[13] http://www.ascd.org/publications/educational-leadership/oct08/vol66/num02/Pacing-Guides.aspx

[14] http://www.curriculummapping101.com/curriculum-mapping-general

Exhibit 2-6
Denver Public Schools Pacing Guide

Region	Pacing	Unit	Standards	Big Ideas	Essential Questions	Materials
	1 week	Population Density in Japan: Life in a Crowded Country	4.4, 5.2	• Place • Interaction	• *How does population density affect the way people live?*	• *Geography Alive!* Chapter 31, "Population Density in Japan: Life in a Crowded Country"
	2 weeks	The Global Sneaker: From Asia to Everywhere	4.3, 4.5	• Interaction	• *What is globalization, and how does it affect people and places?*	• * *Geography Alive!* Chapter 32, "The Global Sneaker: From Asia to Everywhere"
Oceania and Antarctica	3 days	Mapping Lab: Oceania and Antarctica	1.3, 2.2	• Geographic Tools • Region	• *How do I use and maps and other geographic tools to learn about the world around me?* • *How does defining the world by regions help me understand the world around me?*	• * *Geography Alive!* "Oceania and Antarctica Mapping Lab," Challenges 1-5 OR • The Nystrom *World Atlas*, "Antarctica and the Arctic" lesson and "Australia and its Neighbors," Lessons 1-2
	2 weeks	The Pacific Islands: Adapting to Life Surrounded by Ocean	3.1, 5.2	• Place	• *How do people adapt to life in an island region?*	• *Geography Alive!* Chapter 34, "The Pacific Islands: Adapting to Life Surrounded by Ocean"
	2 weeks	Antarctica: Researching Global Warming at the Coldest Place on Earth	3.1, 5.1, 6.2	• Interaction • Planning for the Future	• *How might global warming affect the environment in the world's coldest places?*	• * *Geography Alive!* Chapter 35, "Antarctica: Researching Global Warming at the Coldest Place on Earth"

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

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

Ultimately, the curriculum framework and pacing guide become one working document. There is a plethora of formats and options to peruse for designing and implementing standards-based frameworks and pacing guides. HPS framework and pacing conversations must consider teacher friendly formats, processes, and procedures for implementation and maintenance that integrate one-to-one digital technology. Phasing out or balanced use of textbooks should accompany the transition to adopting a framework for alignment and pacing the curriculum. Supporting the learning needs of the districts at-risk and English Language Learner (ELL) students is also of primary importance.[15]

FISCAL IMPACT

This recommendation can be implemented with existing resources, using existing professional development funding.

FINDING 2-4

The district lacks an ongoing process to evaluate instructional resources. Since adopting one-to-one technology and a standards-based curriculum, textbooks are not the primary curriculum source.

---

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

No comprehensive review and evaluation processes exists to specify foundational and supplemental resources. No process is in place to help teachers determine relevancy, developmental appropriateness, and alignment of materials with Oklahoma Academic Standards (OAS). The district lacks processes and procedures to annually evaluate if the instructional resources used by teachers lead to standards mastery or just fill instructional time. The district does not comprehensively review curricula and supplemental resources to determine weighted importance based on SDE Blueprints and alignment with OAS.

Across the district, there are no defined efforts to routinely collect data to determine the efficiency and cost effectiveness of instructional resources and the impact on student achievement. The consulting team did not find evidence of an evaluation process to determine how digital software, websites, supplemental and remedial interventions, instructional strategies, and enrichment activities are aligned with student data results. The district has a high population of ELL students. The consulting team found library books and some software available for ELLs. However, there was no evidence presented to indicate these resources are screened for alignment with the taught and tested curriculum, have direct impact on improved student learning, and support learning English through the study of content.

At the junior high and high school, teachers primarily work in isolation and select their own supplemental resources. The district expects teachers to move from textbook driven to a standards-based curriculum. Interviews and focus group conversation revealed there is nothing in place to help teachers filter, select, add, or abandon instructional resources and materials. No comprehensive evaluation or screening process is in place to ensure new purchases support student need based on data and align with standards-based curricula. No evaluation screens resources ensuring they support instructional best practices. There was no evaluation process is in place to evaluate the quality of digital learning resources, websites, and the alignment to OAS. Currently teachers have no evaluation measures to help screen resources in designing best practice instruction.

Most federal and state instructional resource/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 are effective for remediation or enrichment at each grade level, content area, and student sub-groups. An annual evaluation process ensures all instructional resources, programs, and software are not "busy work" but directly improve standards driven student learning. Likewise, an annual evaluation process determines if instructional resource materials are addressing identified learning gaps or redundant and repetitive overlaps based on student performance data. All teachers need resources that are relevant, support curricula rigor, and most importantly, seamlessly align with state standards and improved student performance.

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

Evaluations should measure and answer questions such as:

- Is there a need to improve, modify, or abandon the supplemental instructional resources?

- Does the resource yield the intended effect on improved student learning, including all subgroups?

- Are the resource goals still relevant to student need 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?[16]

Districts can then use the evaluation to make data-driven, informed decisions. The evaluation guides the district to keep or abandon instructional resources/programs. Based on data, modifications, additions, deletions, or revisions to instructional resources/programs can be determined. The evaluation should determine the instructional impact resources have on subgroups such as struggling readers, ELLs, and special education students and their Individualized Education Plan (IEP) requirements.

Such information is crucial for aligning district funds with new purchases. Teachers have easy access to digital and electronic resources. However, instructional resources/programs must support best instructional practices and directly align with the identified paced and aligned curriculum. In the area of technology-based resources, Hill and Hannafin (2001) observed that they often suffer from a lack of regulation of content validity, reliability, and credibility – using evaluation instruments helps teachers identify digital resources of high quality.[17]

Without implementing a regularly scheduled evaluation system, HPS positions itself to fund instructional resources/programs that are misaligned, not meeting identified student need or the intent behind their implementation. Most of all, the Hennessey community and stakeholders need assurance the district is not spending money and time on ineffective instructional resource/programs.

RECOMMENDATION

Develop and implement a plan to annually evaluate instructional resources, including websites, apps, software, and digital enrichment and remediation resources.

---

[16] http://ies.ed.gov/ncee/edlabs/regions/pacific/pdf/REL_2014007.pdf
[17] https://www.researchgate.net/publication/260392089_How_to_evaluate_the_quality_of_digital_learning_resources

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

- impacts improved student learning in all subgroups;

- contributes to the relevance and rigor of instruction and OAS curriculum;

- meets the intended curricular and instructional purpose; and

- supports best instructional practices.

In the long-term, instructional resource/program evaluations focus on improving student achievement. Resource evaluation is a guide to use and build upon those products that nurture success and lead to ongoing improvement in instructional practices and outcomes.

The superintendent, principals, and all teachers should develop a list of all major curricular and instructional resources they routinely implement to supplement, remediate, or enrich their instruction, and support the curriculum. The list should include a rank ordering of total dollars spent on each implemented resource. The superintendent should then direct evaluation efforts to those with the highest costs and the strongest correlation to student performance data in the bottom quartiles.

The superintendent and principals should work with teachers to identify and abandon resources and materials that are no longer robust and relevant to the knowledge base students need for the next level of study and college and career-readiness. This evaluation and abandonment process must be simple, easily implemented, and directly focused on student data results and improved student achievement.

All materials should undergo a formative and summative evaluation. A formative instructional resource/program evaluation can be used in purchasing new instructional resources/programs and during the implementation of the resource. Such evaluation promotes close examination of instructional resource/program implementation, as to whether there were changes, adjustments, or improvements, and that it is adapted with fidelity. **Exhibit 2-7** presents examples of formative evaluation questions to explore.

Exhibit 2-7
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 HPS instructional resource/program users implementing the instructional resource/program in the same way?

- Is the instructional resource/program being implemented on schedule?

- Is there enough time to implement all aspects of the instructional resource/program?

- What aspects of the instructional resource/program do not seem to be working as well as you intended?

- Do instructional resource/program implementers need additional training on the instructional resource/program?

- Are there any negative outcomes surfacing?

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

Summative instructional resource/program evaluation takes place after the instructional resource/program has been implemented and is conducted at the end of each school year, or another logical time, such as the end of instructional resource/programmatic intervention. **Exhibit 2-8** presents examples of summative evaluation questions to explore.

Exhibit 2-8
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 the instructional resources/programs align tightly with the current OAS, depth of knowledge (DOK) expectations, and Oklahoma's expected student performance levels. HPS demographics such as language, poverty, mobility, ethnicity, and bottom quartile student test scores should also be taken into consideration for abandonment or retention purposes. Teachers cannot afford to implement instructional resources/programs and materials that do not have high impact on closing the achievement gap and improving student performance. There are many free resources available to gather additional information, including:

- resources on designing and planning instructional resource/program evaluation;[18]

- a basic guide to instructional resource/program evaluation;[19] and

- an evaluation matrix and template.[20]

---

[18] https://www.cde.state.co.us/fedprograms/designing-and-planning-your-program-evaluation
[19] https://managementhelp.org/evaluation/program-evaluation-guide.htm
[20] https://www2.ed.gov/about/offices/list/oese/sst/evaluationmatters.pdf

FISCAL IMPACT

This recommendation can be implemented with existing resources. Initially, HPS staff could objectively and fairly evaluate resources with input from all administrators and teachers. However, federal guidance notes that districts should expect to spend between five and seven percent of the total funding of an instructional resource/program on evaluation. In time, it may be preferable to contract with an outside evaluation firm with credibility and expertise in statistical analysis. Using federal monies, the consulting team recommends that a minimum of $5,000 per year be allocated to evaluation efforts.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Evaluate all curricula and instructional resources, digital programs, website and initiatives.	($5,000)	($5,000)	($5,000)	($5,000)	($5,000)

B.   INSTRUCTIONAL DELIVERY AND STUDENT PERFORMANCE

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

The College of Education at Washington University, Center for Educational Leadership, has developed a framework for instructional leadership. According to their website, the framework is not the sum total of the work of instructional leaders, rather it is a description of the most important aspects of instructional leadership. **Exhibit 2-9** describes the five core beliefs that drive the work in school leadership at the Center and **Exhibit 2-10** describes the four dimensions of instructional leadership.

Exhibit 2-9
Core Beliefs - Center for Educational Leadership

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

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

Exhibit 2-10
Dimensions of Instructional Leadership

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

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

Waters, Marzano, and McNulty (2003), from the Mid-Continent Regional Educational Laboratory (McREL), synthesized the body of research on the effects of leadership practices on student achievement. In their research, McREL identified 21 leadership responsibilities and 66 practices that are substantially associated with student achievement. These characteristics and responsibilities are now integrated into a Balanced Leadership Framework.[21] Much of the TLE evaluation process adopted for Oklahoma administrators uses this research.[22]

---

[21] www.mcrel.org/~/media/Files/McREL/Homepage/Products/01_99/prod54_BL_Framework.ashx page 15
[22] http://ok.gov/sde/sites/ok.gov.sde/files/TLE-McRELBooklet.pdfpage 3

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 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.[23]

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 2-11 provides the current organizational structure for instructional delivery at HPS.
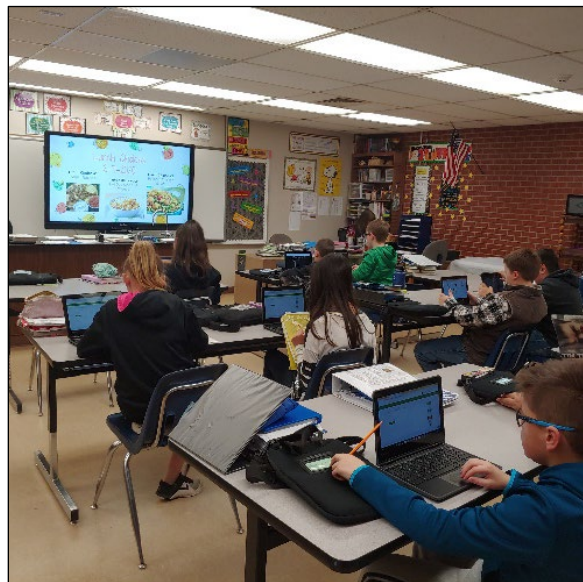
---

[23] http://www.youblisher.com/p/110815-New-thinking-about-educational-leadership/

Exhibit 2-11
HPS Instructional Delivery Organizational Structure
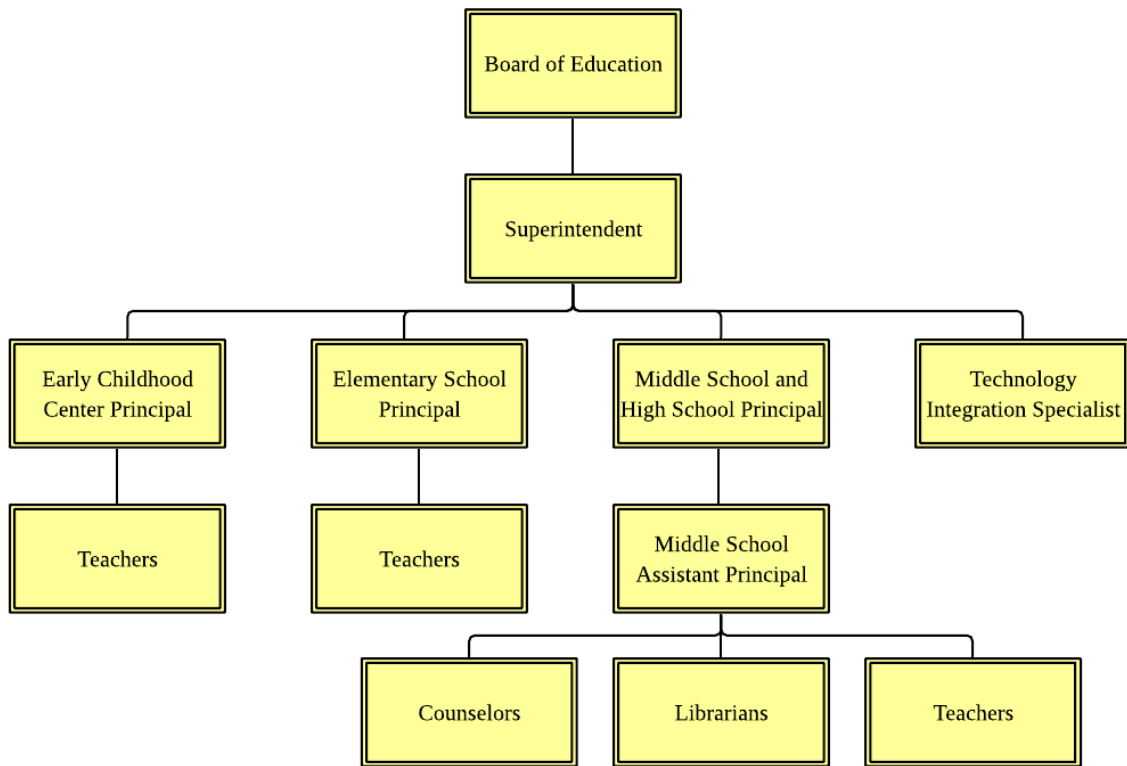
Source: Created by Prismatic, February 2020

Exhibit 2-12 provides illustrations of HPS classrooms.

Exhibit 2-12
HPS Classrooms

Source: Prismatic, February 2020

Oklahoma School Testing Program

Student assessment is an integral part of measuring student performance. The Oklahoma School Testing Program (OSTP) for students in grades 3-8 and the College and Career Ready Assessment (CCRA) for students in grade 11 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 10 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.[24]

Exhibit 2-13 provides the results of the math OSTPs in 2017-18. HPS 4th and 5th graders scored the highest among all comparison groups. HPS 6th graders scored second highest while 3rd graders scored the third highest among all comparison groups. Unlike those in lower grades, HPS 7th and 8th graders students scored at or below the community group and lower than the state.

Exhibit 2-13
Percentage of HPS and Peer District
Full Academic Year Students Scoring Proficient or Above in Math
2017-18

Entity	3rd Grade	4th Grade	5th Grade	6th Grade	7th Grade	8th Grade
Hennessey	**56%**	**69%**	**54%**	**36%**	**34%**	**2%**
Atoka	70%	35%	27%	27%	33%	16%
Chouteau-Mazie	50%	45%	36%	23%	38%	5%
Pawhuska	33%	17%	5%	10%	26%	13%
Tishomingo	33%	17%	15%	31%	26%	17%
Watonga	58%	57%	29%	52%	48%	16%
Community Group	**51%**	**40%**	**33%**	**29%**	**34%**	**19%**
State	**51%**	**45%**	**37%**	**34%**	**41%**	**25%**

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-14 provides the results of the reading OSTPs in 2017-18. HPS 5th graders scored the highest among the peer districts, surpassed the community group, and tied with the state. HPS 6th and 7th graders scored second highest among the peer districts, and higher than community group and state. In contrast, HPS students in 3rd and 8th grade scored lower than most of the comparison groups.

---

[24] http://sde.ok.gov/sde/assessment-administrator-resources-administrators

Exhibit 2-14
Percentage of HPS and Peer District
Full Academic Year Students Scoring Proficient or Above in Reading
2017-18

Entity	3rd Grade	4th Grade	5th Grade	6th Grade	7th Grade	8th Grade
Hennessey	**34%**	**64%**	**46%**	**51%**	**40%**	**22%**
Atoka	60%	20%	24%	38%	34%	45%
Chouteau-Mazie	41%	49%	38%	26%	32%	32%
Pawhuska	33%	43%	18%	27%	26%	33%
Tishomingo	35%	27%	21%	53%	30%	30%
Watonga	41%	51%	36%	36%	53%	43%
Community Group	**38%**	**40%**	**41%**	**40%**	**30%**	**37%**
State	**43%**	**46%**	**46%**	**46%**	**33%**	**41%**

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-15 shows the 2017-18 science scores. HPS 5th graders scored the highest in all comparison groups. HPS 8th graders were nearly as successful, tying with one other district and the state for the highest proficiency rate.

Exhibit 2-15
Percentage of HPS and Peer District
Full Academic Year Students Scoring Proficient or Above in Science
2017-18

Entity	5th Grade	8th Grade
Hennessey	**57%**	**48%**
Atoka	35%	48%
Chouteau-Mazie	45%	24%
Pawhuska	14%	43%
Tishomingo	37%	35%
Watonga	40%	35%
Community Group	**47%**	**44%**
State	**49%**	**48%**

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-16 shows math scores over a five-year period. From 2013-14 to 2017-18, HPS scores generally declined in math. The 2016-17 and 2017-18 percentages reflect Oklahoma's higher performance standards adopted in 2017.

Exhibit 2-16
Five-year Data Trend in Math

Grade	2013-14 Hennessey	State	2014-15 Hennessey	State	2015-16 Hennessey	State	2016-17 Hennessey	State	2017-18 Hennessey	State
3rd	65%	75%	72%	71%	100%	75%	73%	54%	56%	51%
4th	94%	74%	93%	79%	86%	77%	87%	49%	69%	45%
5th	78%	75%	70%	77%	91%	79%	58%	42%	54%	37%
6th	67%	76%	89%	76%	59%	76%	64%	42%	36%	34%
7th	64%	74%	67%	76%	77%	76%	27%	42%	34%	41%
8th	46%	63%	55%	64%	36%	64%	38%	29%	2%	25%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-17 shows reading scores over a five-year period. From 2013-14 to 2017-18, all scores generally declined in reading. The 2016-17 and 2017-18 percentages reflect Oklahoma's higher performance standards adopted in 2017.

Exhibit 2-17
Five-year Data Trend in Reading

Grade	2013-14 Hennessey	State	2014-15 Hennessey	State	2015-16 Hennessey	State	2016-17 Hennessey	State	2017-18 Hennessey	State
3rd	77%	80%	90%	81%	92%	82%	40%	49%	34%	43%
4th	69%	76%	93%	80%	77%	78%	67%	46%	64%	46%
5th	72%	76%	68%	77%	88%	82%	56%	49%	46%	46%
6th	73%	75%	76%	74%	78%	74%	55%	48%	51%	46%
7th	77%	81%	76%	82%	87%	82%	29%	42%	40%	33%
8th	81%	82%	88%	86%	94%	86%	54%	43%	22%	41%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-18 displays results for the 2017-18 11th grade test scores. In math, HPS had the third highest score among the peer districts and almost tied with the state. In English, HPS had the second highest score among the peer districts but was a little lower than the state.

Exhibit 2-18
Percentage HPS and Peer District Grade 11 Regular Education,
Full Academic Year Students Scoring Proficient or Above
2017-18

Entity	Math	English
Hennessey	**27%**	**44%**
Atoka	11%	43%
Chouteau-Mazie	13%	42%
Pawhuska	7%	19%
Tishomingo	37%	63%
Watonga	28%	41%
Community Group	**18%**	**36%**
State	**27%**	**45%**

Source: Office of Educational Quality and Accountability, Profiles Database

The number of HPS high school graduates completing Regents' College-Bound Curriculum has ranged from 11 to 91 percent (**Exhibit 2-19**). Through 2015-16, HPS' rate was higher than the rates for most peers, the community group, and the state. In 2016-17 and 2017-18, HPS' rate was the lowest of all the comparison groups.

Exhibit 2-19
Trend in Percentage of HPS and Peer District Graduates Completing
Regents' College-Bound Curriculum

Entity	2013-14	2014-15	2015-16	2016-17	2017-18
Hennessey	**86%**	**88%**	**91%**	**11%**	**70%**
Atoka	59%	55%	69%	73%	86%
Chouteau-Mazie	12%	20%	82%	85%	100%
Pawhuska	55%	100%	90%	75%	85%
Tishomingo	67%	62%	90%	100%	89%
Watonga	84%	83%	90%	93%	91%
Community Group	**78%**	**73%**	**82%**	**76%**	**79%**
State	**84%**	**81%**	**81%**	**80%**	**80%**

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-20 compares the trends in the district's ACT composite scores over time. HPS' scores have declined over the five-year period, as have all the comparison groups. Oklahoma began testing all high school 11th graders with the ACT in 2017-18. Prior to that point, only students seeking college admission tended to take the ACT. This may account for some of the changes from 2016-17 to 2017-18, as the tested population changed.

Exhibit 2-20
Trend in ACT Composite Scores

Entity	2013-14	2014-15	2015-16	2016-17	2017-18	Percentage Change
Hennessey	**20.0**	**19.5**	**20.7**	**19.2**	**17.6**	**(12.0%)▼**
Atoka	19.2	19.6	18.3	18.8	18.9	(1.6%)▼
Chouteau-Mazie	20.1	19.7	18.8	17.9	17.6	(12.4%)▼
Pawhuska	20.1	19.8	19.8	17.1	16.9	(15.9%)▼
Tishomingo	20.7	21.7	21.0	20.5	19.3	(6.8%)▼
Watonga	20.0	19.6	20.2	19.9	18.7	(6.5%)▼
Community Group	**19.4**	**19.3**	**19.3**	**18.4**	**18.2**	**(6.2%)▼**
State	**20.8**	**20.7**	**20.6**	**19.5**	**19.4**	**(6.7%)▼**

Source: Office of Educational Quality and Accountability, Profiles Database

In 2017-18, HPS had the lowest percentage for the four-year dropout rate and highest for the senior graduation rate (0.0 percent and 100.0 percent, respectively). HPS' four-year dropout rate was lower than both the community group and state. HPS' senior graduation rate was the highest of all the comparison groups (**Exhibit 2-21**).

Exhibit 2-21
HPS and Peer District Four-Year Dropout and Senior Graduation Rates
2017-18

Entity	Four-Year Dropout Rate	Senior Graduation Rate
Hennessey	**0.0%**	**100.0%**
Atoka	20.3%	94.0%
Chouteau-Mazie	25.4%	90.4%
Pawhuska	15.7%	89.6%
Tishomingo	7.7%	94.7%
Watonga	10.4%	97.7%
Community Group	**6.9%**	**97.7%**
State	**9.8%**	**97.5%**

Source: Office of Educational Quality and Accountability, Profiles Database

FINDING 2-5

The district employs a technology integration specialist. The focus is standards-based curriculum integration via one-on-one technology. Along with technology integration, the specialist coaches the teachers to set curricular and instructional goals, differentiate instruction, and plan instruction based on student performance data, reflection, and best practice.

Instructional coaches help teachers focus on their individual classroom needs. The coaches assist in finding learning resources to support individual student need. They guide teachers in sharing

best practices. They are a resource that bridges that gap to continuously improving curriculum and instructional delivery.[25]

COMMENDATION

The district is commended for supporting teachers with a technology integration specialist.

FINDING 2-6

The district's move to one-to-one technology creates new challenges for teachers and their instructional delivery practices. Textbooks and whole group lecture are no longer the foundational sources for curriculum and delivery of instruction. This means enhancing the teachers' roles to include facilitation skills and strategies. Facilitation skills require teachers to enlarge and differentiate instruction. Both lecture and facilitation methods of instruction serve a purpose and allow students the chance to grow. However, digitalized instruction positions teachers as facilitators.

The consulting team found the majority of HPS teachers delivered instruction primarily through lecture and whole group questioning strategies. They follow the traditional teaching method of explaining subject matter to students and adding activities to help understand the material. At HPS, most teachers create whole group lesson plans that direct the course of study for all students to follow. All teachers are responsible for creating their own learning environment and measuring student learning, primarily in the form of tests. Without intentional effort to do otherwise, classrooms could be characterized as more teacher driven than student driven.

With the introduction of one-to-one devices, standards-based curriculum, data-driven instructional design, and technology integration, the role of HPS teachers is expanded to include faciliatory skills and techniques. Clear and concise objectives are still delineated, standards are still taught and mastered, yet the pathway to learning may not be the same for all students; nor what a student learns may not be the exactly the same on any given day. A teacher facilitator helps individual students build on their skills and interests and learn new ones. They offer support, advice, and provide necessary scaffolding knowledge and skills. The teacher as facilitator gives direction in finding necessary resources, information, and support in order for the learner to complete a task and master learning.

> They assist students in learning for themselves, picking apart ideas, forming their own thoughts about them and owning learning through self-exploration and dialog. As needed, a teacher facilitator corrects misinformation, provides clarification, and ensure students understand subject matter.[26]

Research is clear that more and more schools and colleges are advising teachers to shift their roles from that of sole classroom leader/lecturer to one who aids students in leading themselves in the learning process. They are recognizing that the most powerful kind of learning does not come from being told what to think but in learning how to think about it for oneself. Now the

---

[25] http://blogs.edweek.org/edweek/finding_common_ground/2014/11/5_reasons_we_need_instructional_coaches.html

[26] https://study.com/academy/lesson/facilitator-of-learning-definition-lesson-quiz.html

role of teacher is as a facilitator in learning. Teaching and learning are being modified due to innovations in education. There is also clear evidence that teachers should become mentors of learning. Teaching means teacher is doing the act of teaching. Facilitation means students are doing the act of learning.[27]

RECOMMENDATION

Continue to advance teacher facilitation instructional delivery skills and practices to all students.

As the district evolves with one-to-one technology integration and standards-based curricula, the district's instructional leadership team should articulate expectations and provide teachers with learning opportunities to grow and develop facilitation skills. Professional development opportunities, staff meeting discussion and dialog, and observing faciliatory teachers are possible options for supporting and increasing facilitation skills and expertise.[28]

The most impactful statement for teachers as facilitators comes from those who daily practice it. As noted by one professor on the subject:

> The difference in the enthusiasm and learning that takes place isn't even quantifiable. Not only do I adhere to the idea of being a facilitator and guide, I'm nearly an evangelist on the subject![29]

FISCAL IMPACT

The consulting team estimates a one-time cost of $2,000, based on fees charged by firms that provide training in this and similar areas for a district the size of HPS. This fee includes a full day of training for all district staff.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Provide training in teachers as learning facilitators	($2,000)	$0	$0	$0	$0

---

[27] http://oaji.net/articles/2016/1201-1476521024.pdf

[28] The following links provide background knowledge, pragmatic "how to" information, and examples for teacher facilitation skills.
https://educationaldividends.com/teachers-as-facilitators/
https://journals.sagepub.com/doi/abs/10.1177/002248717502600319?journalCode=jtea
https://www.brown.edu/academics/education-alliance/teaching-diverse-learners/teacher-facilitator
https://www.teachermagazine.com.au/articles/the-teacher-as-a-facilitator-and-resource-person
https://www.academia.edu/11577977/Teaching_and_Research_Role_of_Teacher_as_Facilitator_in_Classroom

[29] http://jan.ucc.nau.edu/jde7/ese425/eco/optional/facilitator.html

FINDING 2-7

The district has made intentional efforts to use data to inform instruction. Northwest Education Assessment (NWEA) provides teachers with student performance data fall, mid-year, and spring. The data results show measured growth, skills mastery, and reading fluency.

Teachers are given this timely assessment data providing direction to align and pace curriculum, plan instructional delivery, and target student need for maintenance, remediation and reteach. The technology integration specialist works with teachers in disaggregating the student data.

COMMENDATION

The district is commended for administering on-going student assessments and analyzing the data.

FINDING 2-8

The district's teachers have access to data provided by NWEA. However, the use of student data to inform curriculum alignment, pacing, and instructional delivery remains in initial stages. The technology specialist works with teachers to disaggregate the performance data. Teachers are not consistently held accountable for adjusting instruction based on the disaggregated student data.

The district has no uniform process for analyzing either NWEA data or OSTP student performance data. Teachers also receive assessment results from various software programs. There is no uniform process to assist teachers in breaking down the data and applying it to instructional pacing and adjusting curriculum and instruction. There is no process to use student performance data to vertically align and pace curriculum and make adjustments in re-teaching specific topics. There was isolated reporting of teachers using item analysis to find trends and patterns in student learning. Teachers may independently review the data but have limited knowledge and expectations for using those reviews to plan and adjust horizontal and vertical instruction and remediation.

There are no district-wide procedures or software programs to assist teachers in using NWEA or OSTP data to inform targeted instruction and form flex groups for tiered remedial instruction. There are no standardized methodologies for disaggregation of data and looking for horizontal or vertical reoccurring learning gaps and redundancies. Random evidence was presented to indicate how student performance data collected at the end of each grading period are used to plan re-teach, remediation, or maintaining mastery. There is no district-wide use of student performance data to disclose underlying trends, patterns, or insights among subgroups. Across the district, student performance data are not regularly used to plan, adjust, pace, and design instruction along with implementing evidence-based interventions.

One of the longest-standing bodies of research is the "effective schools" research. One of the original correlates of effective schools' research is the "frequent monitoring of student progress." As stated by the University of Oklahoma's research in effective schools:

The effective school frequently measures academic student progress through a variety of assessment procedures. Assessment results are used to improve individual student performance and improve instructional delivery. Assessment results will show that alignment must exist between the intended, taught, and tested curriculum.[30]

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

- make data part of the ongoing cycle of instructional improvement;

- teach students to examine their own data and set learning goals;

- establish a clear vision for school-wide data use;

- provide supports that foster a data-driven culture within the school; and

- develop and maintain a district-wide data system.[31]

RECOMMENDATION

Implement a standardized process and hold teachers accountable for using student performance data to adjust standards-based curricula and improve instructional delivery.

Working with the teachers, district's instructional leadership team should determine which assessment data currently being gathered, is the best measure of HPS student's mastering the Oklahoma standards-based curriculum. A timeline should be developed that details which student assessment data are required throughout the school year. Using this timeline, the superintendent and principals should hold meetings and use Friday release time for analyzing data. Meetings should focus on determining the strengths and weaknesses of the students and how the results impact the district in pacing instruction. Reviewing formative benchmark test data throughout the school year allows timely feedback on student performance, the effectiveness of teaching strategies, and any needed adjustments and alignment to the curricula. It is important to hold all teachers accountable for using data to drive curriculum and instruction.

The purpose of teachers analyzing classroom data are to determine what the students have learned, what they need help to learn, and how teachers plan instruction to ensure that they all learn. The use of student performance results is essential to identify skill gaps in student learning. The learning and skill gaps must be addressed through re-teaching or remediation. The use of data also guides improvements in the rigor, pacing, and vertical articulation of curriculum and instruction. As teachers monitor performance data, patterns of teaching and individual student learning successes and challenges become evident. It is essential for teachers to have

---

[30] http://www.ycschools.us/downloads/ycs_hs/sevencorrelates_20151104_223914_1.pdf
[31] http://www.naesp.org/sites/default/files/Student%20Achievement_blue.pdf

ongoing formative data to measure learning at the end of each instructional segment. This allows teachers to make informed, collaborative decisions to address potential problems.[32]

A helpful resource for administrators and teachers to use is found in an article published in *Educational Leadership*, "*Developing Data Mentors.*" The authors say that "gathering student-assessment data are not enough. Administrators and teachers must learn to analyze the data and apply this information in the classroom."

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

- Which content standards is the teacher assessing?

- What percent of students demonstrated proficiency? 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 the class performance, what re-teaching needs to be done?

- After re-assessing, did students demonstrate proficiency?

- Are 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's being done about that?

- Are there students who are not attaining proficiency across standards?

- What diagnostic information do we have about them to inform instruction?

- What interventions have we tried? What interventions do we plan to try next? [33]

The superintendent, principals, technology specialist, and teachers should consider pragmatic methods for displaying data. Graphing data are visual depictions of the student information and often yields additional insights.

Another 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

---

[32] The following link provides rationale and background regarding importance of using disaggregated student data. http://www.educationnewyork.com/files/The%20importance%20of%20disaggregating_0.pdf
[33] Nichols, B. W. & Singer K. P. (2000). Developing data mentors. *Educational Leadership*, *57*(5).

could be assigned a different color. This would allow teachers to quickly determine who was progressing and who needed additional support.[34]

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 2nd grade.[35] The SDE Family Guides are resources aligned with the OAS 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. As Family Guides are developed for third grade and up, these can continue to be a valuable resource to share with parents.

FISCAL IMPACT

This recommendation can be implemented with existing resources. This can happen through using the expertise and guidance of the technology integration specialist. 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 $3,000.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Hire a consultant to help design a process for analyzing student performance data, if needed.	($3,000)	$0	$0	$0	$0

FINDING 2-9

The district has early release for students every Friday. Currently across the district, the release time is used to address such things as district needs, committee meetings, site-based issues and staff meetings, and departmental and grade level meetings.

Building principals have autonomy to use the release time differently. Initially, early release Friday started as remediation time for students but has morphed into teacher professional development time. All students leave at 2:00 pm. Time for teachers to collaborate is important. For HPS teachers the job is increasingly complex due to new innovations. The teachers are adapting to new curricular reforms, technology, and assessment procedures. The district's diverse student population along with the social and emotional issues brought to school create increasing complex planning.

---

[34] http://mdk12.msde.maryland.gov/instruction/progress/using.html
[35] https://sde.ok.gov/oklahoma-family-guides

The research is clear that students are not the only ones who need more time to learn; teachers also need more and better time for learning and for planning. Teachers teach several subjects or courses each day, review student work, plan differentiated lessons to meet the needs of diverse learners in their classroom, and strategize with parents and specialists about how to support individual students. All these tasks require time and concentrated effort.[36]

Teachers from Wisconsin listed more planning time as their top choice when they were asked what they believe would have the greatest positive impact on their ability to help their students learn and realize their potential.[37] There was another group of teachers ranked more planning time during the school day as the most important factor that would help them with their teaching.[38] Teachers also have listed lack of planning time as a reason for leaving the profession and as a barrier to successful implementation of curricular reforms or evidence-based practices.[39]

Teachers also have access to so much information about effective teaching strategies and digital interventions. They need time to process and integrate new information from professional development, review student data from multiple sources for decision-making, and prepare timely, constructive feedback for students on their learning.

COMMENDATION

The district is commended for implementing early release time for teachers.

FINDING 2-10

Teacher released time is important. However, the consulting team found that the district does not routinely examine if the Friday early release time is being used as efficiently and effectively as possible. District leaders do not consistently screen for maximized use. The teachers are not routinely canvased for specific or current issues that need addressing.

The curricular and instructional delivery changes emerging from the initiation of one-to-one technology and standards-based curriculum and instruction are monumental for teachers. Using Friday release to monitor and adjust the progression to standards-based curriculum and technology integration is not usually reviewed and evaluated. The student assessment tools implemented, the time and effort for administering the assessments, and the usefulness of the student data results, need continuous teacher examination and dialog. No evidence was presented to indicate the time on Friday is used to comprehensively address these district-wide issues.

Through interview and focus group dialog, the consulting team found limited accountability to ensure efficient, relevant, and appropriate use of the time. For teachers, the curricular and instructional delivery changes emerging require extensive collaborative effort. District leaders generally followed the pre-set monthly schedule. The consulting team found minimal monitoring

---

[36] https://kappanonline.org/time-teacher-learning-planning-critical-school-reform/
[37] https://kappanonline.org/time-teacher-learning-planning-critical-school-reform/
[38] https://files.eric.ed.gov/fulltext/ED568172.pdf.
[39] https://nces.ed.gov/pubs2005/2005114.pdf

and accountability for the school improvement work being done. On occasion, teachers were free to go home early rather than use the time for professional learning.

The district has not evaluated whether the Friday early release time is being used as effectively as possible. For teachers, the curricular and instructional delivery changes emerging from the launch of one-to-one technology and standards-based curriculum and instruction are epic. District leaders currently do not regularly ask teachers for specifics as to what they really need to work on and how to improve the use of release time.

Research clearly supports the importance of teachers meeting regularly as a group to share expertise, work collaboratively to improve teaching skills, and the academic performance of students. A paradigm shift is needed, however, both in the public and in teachers themselves about what the role of teacher entails. Many in the public and in the profession believe that the only legitimate use of a teacher's time is standing in front of the class, working directly with students. In studies comparing how teachers around the globe spend their time, it is clear that in countries such as Japan, teachers teach fewer classes, using a greater portion of their time in planning, conferring with colleagues, working with students individually, visiting other classrooms, and engaging in other professional development activities (Darling-Hammond, 1994, 1996).

A district seeking to improve, as HPS is, must be mindful that capacity building is as important as accountability because the former is the route to the latter. Clearly, one needs both. Finding the right combination and integration of the two is the trick.[40] Being the change agent in successful schools means that growing and learning are ongoing phenomena.[41] **Exhibit 2-22** summarizes Fullan's insights regarding change.

---

[40] Fullan, M. (2008). *The six secrets of change*. San Francisco, CA: Jossey-Bass.
[41] http://www.sedl.org/change/issues/issues61.html

Exhibit 2-22
Insights on Change for Continuous Improvement

Change Insights	• 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	Change savvy leadership involves: • 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

RECOMMENDATION

Review the use of Friday release time.

The superintendent and principals should examine the existing practices, agendas, and levels of teacher expertise and engagement being utilized during Friday release time. The instructional leadership team should clearly communicate expectations and solicit accountability. The release time should be consistently used for sharing or learning of classroom innovative and engaging best practices. As the district navigates to one-to-one technology and standards-based curriculum all teachers must be focused on learning which "best practices" interface, support and have high impact on improved student achievement. Staff should reflect on trends and patterns emerging from technology and standards driven curriculum. Utilizing exemplary staff to model effective student engagement practices creates common practice among all staff members.

HPS release time is not formalized as a professional learning communities (PLC), yet the pragmatic focus and expectations mirror PLC function. PLC agendas focus participants to address specific problems and strategies: How do I teach *this* particular student better? How do I teach *this* specific standard more effectively? Teachers discuss and reflect on their instructional

techniques, lesson designs, and assessment practices. District administrators may use the time to address leadership questions, strategies, and issues.[42]

Exhibit 2-23 cites examples of common activities of a district's leadership that may take place in release time meetings.

Exhibit 2-23
Professional Learning Activities

> **Discussing teacher work:** Participants collectively review lesson plans or assessments that have been used in a class, and then offer critical feedback and recommendations for improvement.
>
> **Discussing student work:** Participants look at examples of student work in a class, and then offer recommendations on how lessons or teaching approaches may be modified to improve the quality of student work.
>
> **Discussing student data:** Participants analyze student-performance data from a class to identify trends such as which students are consistently failing or underperforming and collaboratively develop proactive teaching and support strategies to help students who may be struggling academically.
>
> **Discussing professional literature:** Participants select a text to read, such as a research study or an article about a specialized instructional technique, and then engage in a structured conversation about the text and how it can help inform or improve their teaching.

Sources: https://www.edglossary.org/professional-learning-community/
https://files.eric.ed.gov/fulltext/ED410659.pdf

HPS is going through numerous district-wide changes. **Exhibit 2-24** describes the change process and gives insights from Fullan's *The Six Secrets of Change* (2008). The implementation dip is expected as change is introduced. However, after recovery, actual performance is better than before the change.

---

[42] https://www.edglossary.org/professional-learning-community/

Exhibit 2-24
Change Implementation
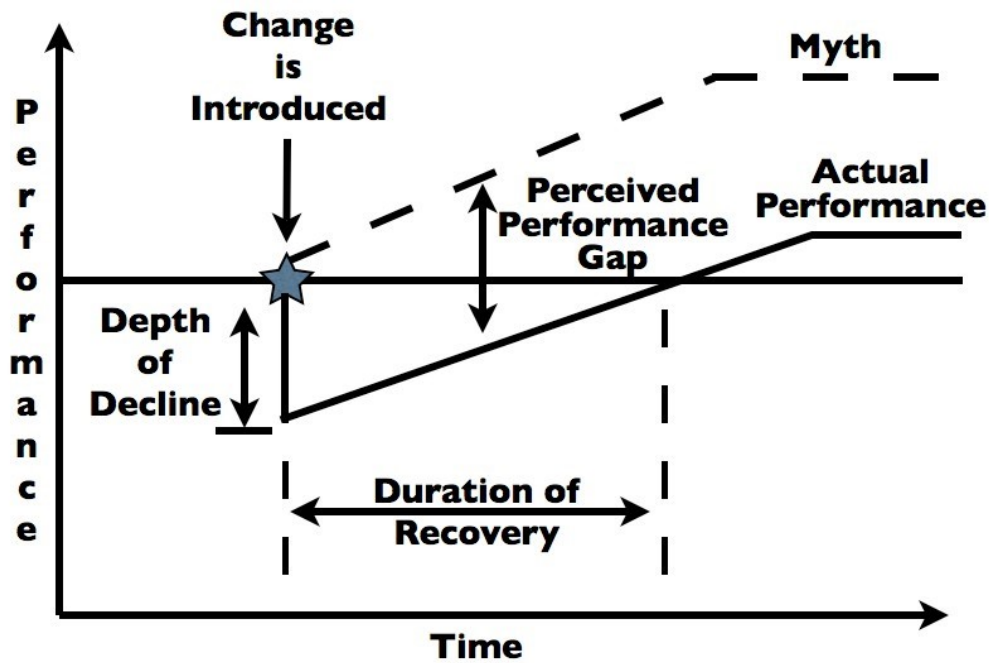
Maximizing Friday release time requires dedicated and intentional effort on the part of the HPS instructional leaders and the professional staff. Moving to collaborative planning and learning creates organizational change. It takes teachers from teaching in isolation and moves them to corporate thinking and shared expertise. It takes seasoned teachers out of their comfort zone and into facilitation and shared learning.

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 Ac*t.

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 may need a referral for additional testing to determine if there is a specific learning disability.

IDEA now allows a school district to use up to 15 percent of its *IDEA* allocation to support services to students who have not been identified as needing special education services, but who need additional academic and behavioral support to succeed in a general education environment. Funds may be used for professional development in scientific research-based interventions, literacy instruction, and the use of adaptive or instructional technology. It also permits use of funds for educational and behavioral assessments.

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

- pre-referral or tiered intervention in regular education;

- referral to special education for evaluation;

- comprehensive nondiscriminatory evaluation;

- initial placement through an IEP meeting;

- provision of educational services and supports according to a written IEP;

- annual program review;

- three-year re-evaluation; and

- dismissal from the special education program.

Exhibit 2-25 shows comparison data on the percentage of special education students and the number of full-time equivalent (FTE) teachers in special education for 2017-18. HPS had a special education student-to-teacher ratio that was the third highest of the peer districts, and higher than the community group and state.

Exhibit 2-25
Students and Teachers in Special Education Programs, 2017-18

Entity	ADM	Special Education Percentage of All Students	Special Education Teachers FTEs	# of Special Education Students per FTE
Hennessey	**890**	**23.4%**	**5.2**	**40.1**
Atoka	870	27.3%	5.0	47.5
Chouteau-Mazie	711	16.9%	9.3	12.9
Pawhuska	867	20.1%	5.1	34.2
Tishomingo	889	21.4%	4.5	42.3
Watonga	751	15.9%	4.0	29.9
Community Group	**702**	**19.3%**	**4.0**	**33.9**
State	**1,280**	**16.1%**	**8.2**	**25.1**

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-26 compares district special education revenues and expenditures for 2018-19. At 94.4 percent, HPS had an average education revenue-expenditure ratio among its peers. With a ratio of less than 100 percent, HPS received less revenues for special education than it spent on special education.

Exhibit 2-26
Comparison of Special Education Revenues and Expenditures, 2018-19

Entity	Total Revenues	Total Expenditures	Revenues as Percent of Expenditures
Hennessey	**$494,321**	**$523,690**	**94.4%**
Atoka	$1,097,183	$920,041	119.3%
Chouteau-Mazie	$646,409	$1,041,248	62.1%
Pawhuska	$642,527	$698,691	92.0%
Tishomingo	$835,152	$615,452	135.7%
Watonga	$297,370	$465,821	63.8%
Peer Average	**$703,728**	**$748,251**	**94.6%**

Source: OCAS Impact Aid Letters

Exhibit 2-27 shows the trend in special education revenues and expenditures over time. HPS' special education revenues exceeded special education expenditures every year until 2018-19.

Exhibit 2-27
Trend in HPS Special Education Revenues and Expenditures

Year	Total Revenues	Total Expenditures	Revenues as Percent of Expenditures
2013-14	$524,277	$381,310	137.5%
2014-15	$613,975	$407,344	150.7%
2015-16	$612,061	$379,122	161.4%
2016-17	$626,554	$383,278	163.5%
2017-18	$469,678	$443,042	106.0%
2018-19	$494,321	$523,690	94.4%

Source: OCAS Impact Aid Letters

FINDING 2-11

The district implements inclusionary practices. There are no self-contained special education classrooms.

Regardless of handicapping condition or severity, all HPS special education students are attending a regular classroom full time. There are no full-time pullout special education classrooms. All student instruction initiates in the regular classroom. If needed, the student has opportunity to go to the resource room. At HPS the general education teachers and special education teachers meet annually to review the needs of each identified student's Individualized Education Plan (IEP).

Studies show inclusion benefits all students. Students with special education needs who are in inclusive classes are absent less often, they develop stronger skills in reading, and are more likely to have jobs and pursue education after high school. Peers also benefit. They are more comfortable and more tolerant of differences, have increased self-esteem, and have more diverse, caring friendships.[43,]

COMMENDATION

The district is commended for implementing full inclusion for all IEP students.

FINDING 2-12

The consulting team found that HPS general education teachers, the special education teachers, and instructional aides collaborate randomly and informally. Teachers reported that they see great need for coordinated classroom routines and schedules between the inclusionary classroom and the resource room. Dedicated time is needed across the district to address IEP updates, specific student performance struggles, remediation efforts, or overall instruction and learning issues. The staff survey and the parent survey responses indicate the school district needs to

---

[43] https://www.understood.org/en/learning-thinking-differences/treatments-approaches/educational-strategies/4-benefits-of-inclusive-classrooms, https://vittana.org/15-pros-and-cons-of-an-inclusion-classroom

review the special education program. The teachers and paraprofessionals communicate through informal, random, and intermittent discussions.

The district's special education resource room is available to Individual Education Plan (IEP) students. The district is not sufficiently ensuring its process and procedures provide for the most appropriate use of the resource room. There is no regularly time or structured process for intentional, focused, and job-embedded collaborative planning, scheduling, and instructional coordination between classrooms. Special education teachers, general education teachers, instructional aides, and para-professionals need targeted communication regarding the required modifications in student IEP's, and how to coordinate daily educational services.

Students need targeted monitoring to determine if they legitimately need the resource room learning environment or if their learning needs can be met in the inclusionary classroom. The procedures for student use of the resource room are not clearly defined and coordinated among the special and general education teachers and para-professionals. Assessing the need for students to legitimately transition to the resource room and how instruction is to be delivered is not consistently planned. There is not routine dialog among teachers and para-professionals to ensure instruction is seamless and cohesive with the inclusionary classroom. No consistent procedures determine if the resource room is the best learning environment or if student learning needs can be met in the inclusionary classroom.

There is no dedicated time for teachers to review the adaptations and modifications students require. There is need for increased collaboration to avoid the mindset of pull out and resource room services over mainstreaming and inclusionary practices. Some general education teachers and para-professionals were apprehensive about how to provide students with least restrictive environment (LRE) in the inclusionary classrooms and needed input and direction from special education teachers.

HPS special education students also utilize the resource room for testing accommodations. The consulting team found the resource room accommodates the students need for review, reinforcement, and re-teaching of content area concepts. In some IEP cases, the resource room offers students a sheltered environment for learning. Going to the resource room also provides additional time for students to process content and a slower pace as they strive to become independent and self- directed learners. These instructional supports need to be strategically and intentionally coordinated.

Interview and focus group discussions revealed the need to continuously communicate, monitor, and coordinate services between the regular classroom and the resource room. Even though the district is implementing full inclusionary classrooms, co-teaching is not implemented as an alternative to the resource room. Neither is teachers modeling adaptive lessons operationalized instructional procedures at HPS. Teachers and para-professionals need more continuity for adapting instructional resources and materials for IEP students. It was not clear how setting common academic goals and expectations for each student's success was achieved. Communicating about an IEP student's social and behavioral needs was random and sporadic. General education teachers, para-professionals, and special education teacher are aware of the need to find time to communicate and continuously monitor and find avenues for improvement between the full inclusionary classrooms and the support provided in the resource classroom.

RECOMMENDATION

Review practices and procedures for all teachers and para-professionals to plan and coordinate instruction between inclusionary and resource classrooms.

The administration should establish guidelines and expectations for improvements, so they are viewed as a priority for all teachers and paraprofessionals. The principals, special education teachers, para-professionals and general education teachers should review resource room and inclusionary classroom practices and procedures. HPS should implement ongoing, regularly scheduled time for all teachers, paraprofessionals, and instructional aides to coordinate services and cooperatively plan curriculum and instruction based on student IEP's. The improvement dialog should examine if co-teaching, modeling or transitioning between classrooms are best practices. The time should be spent developing lessons, reviewing resource materials and digital programs, and planning one-to-one remediation and instruction.

Continuity among the rules and expectations in both classrooms should be clearly understood and enforced by all. Meaningful ways the content in the two classrooms is taught and presented needs examination. It is important to establish clear criteria as to when students need to transition back and forth between classrooms. There should be strategic coordination in assisting IEP students in knowing their strengths, equipping them with strategies to address their learning weaknesses, and directing them to be independent, not dependent learners. There should be a coordinated effort to seamlessly teach students and maximize the learning needs in the inclusionary classroom with nominal resource room support.

Planning for middle and secondary students is more difficult as required courses may dictate which class students must attend. Ideally, weekly planning times work best. However, bi-weekly and monthly can also serve the collaborative planning process. The purpose of the teacher collaborative planning is to combine expertise and meet student needs based on IEP requirements.

FISCAL IMPACT

This recommendation can be implemented with existing resources

FINDING 2-13

The district's English Language Learner (ELL) performance data indicate the need for improvement. At-risk and struggling learners along with ELLs currently lack intentional and targeted instructional strategies that address their unique learning needs. There is no formalized tiered intervention and instructional support system in place.

The district has no established tiered intervention measures for at-risk students or ELLs. There are no formalized structures in place to assist teachers in effectively monitoring the frequency and intensity of remedial interventions for students. Teachers provide interventions, but there is no strategic plan for determining appropriate remediation strategies, planning how to differentiate instruction, selecting the level, and assessing the effectiveness of interventions.

Leveled or tiered interventions are random and minimally structured to guide teachers in selecting interventions that sustain student progress. Benchmark assessments are inconsistent to help teachers determine if the interventions are closing learning gaps. Benchmarks are not routinely used to reorder instruction and fine tune remediation for at-risk and struggling ELLs. Protected time is not uniformly embedded into all daily schedules to provide targeted discussion about the progress and effectiveness of remediation for skill-based flex groups. No clearly defined and organized early intervention system is implemented for all at-risk students. Teachers provide interventions, but there is no strategic plan for monitoring and assessing the effectiveness of remediation strategies and determining their impact on improved learning.

The consulting team noted in focus groups and interviews no uniform understanding of structured tiered interventions. Test scores for ELLs indicate the need for targeted interventions (**Exhibit 2-28**). District administrators and teachers expressed awareness of the need to address targeted interventions and define procedures to more effectively meet the needs of ELL and struggling learners. The district understands the importance of meeting the needs of all students. However, no comprehensive continuum of prevention/intervention services are in place. Interviews and focus group discussions indicated that some teachers are attempting to provide more data-driven interventions. Other teachers were vague and inconsistent in articulating how struggling learners are identified, how intervention strategies and support structures are selected, and how the interventions are evaluated as appropriate and helpful for meeting student need and closing learning gaps.

Exhibit 2-28
English Language Learners (ELLs) Assessment Results

	Number of ELLs Enrolled	English Language Proficiency Progress	Academic Achievement Composite	English	Math	Science
Hennessey Elementary	71	32%	33%	32%	40%	NA
Hennessey Middle	29	17%	27%	12%	43%	46%
Hennessey High	20	5%	NA	NA	NA	NA
Hennessey Overall	**120**	**24%**	**19%**	**24%**	**39%**	**46%**
State	**47,113**	**29%**	**4%**	**21%**	**27%**	**24%**

Source: https://schoolreportcards.ok.gov/school/1490/, https://schoolreportcards.ok.gov/school/301/, https://schoolreportcards.ok.gov/school/534/

The district is not implementing the tiered interventions with its ELLs, such as the Response to Intervention (RTI) model. This model has both an academic and behavioral component. Oklahoma's RtI model is Oklahoma Tiered Intervention Support System (OTISS) model. **Exhibit 2-29** illustrates the RtI process.

Exhibit 2-29
Essential RtI Components
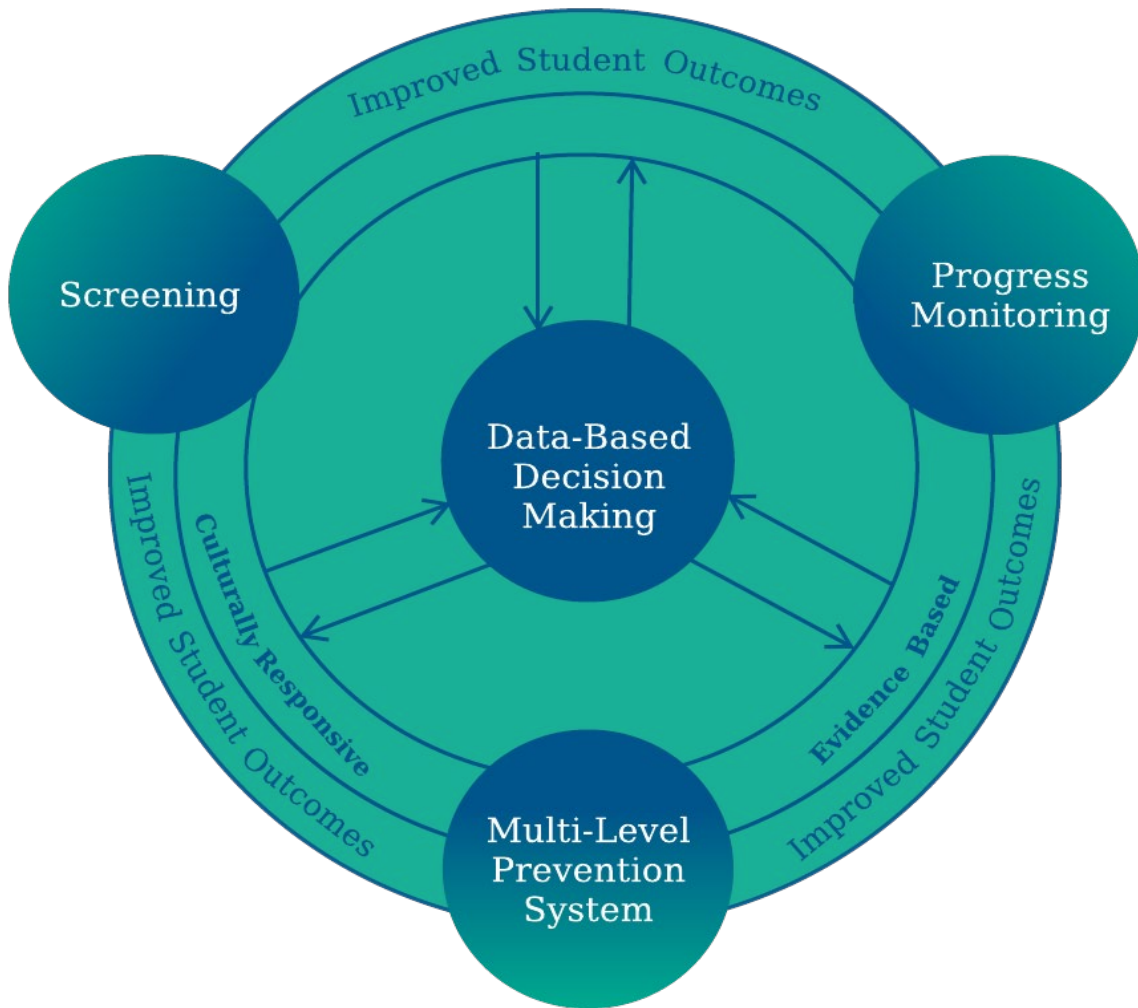
Source: http://www.rti4success.org/essential-components-rti/data-based-decision-making, re-created by Prismatic, March 2016

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

- a valid and reliable assessment system in place;

- curriculum that is evidence-based and includes grade level components across tiers; and

- instructional practices are evidence-based and follow set parameters.[44]

---

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

RtI provides structure for lesson planning and instructional delivery. **Exhibit 2-30** summarizes the essential questions teacher teams need to address in lesson planning and planning for delivering instruction.

Exhibit 2-30
RtI Lesson Planning and Instruction

Adherence	• How well do you "stick to the plan?" • How well do you stay true to the intervention and not drift from the core elements? • Did you make sure all pieces of the intervention have been implemented as intended?
Duration/Exposure	• How often does a student receive an intervention? • How long does an intervention last? • In elementary schools: Providing 90 minutes of reading instruction five days a week? Progress monitoring a minimum of every two weeks?
Quality of Delivery	• How well was the intervention or instruction delivered? • How well do you differentiate one intervention from another? • How well do you avoid inserting pieces from other interventions?
Program Differentiation	• How well do you differentiate one intervention from another? • How well do you avoid inserting pieces from other interventions?
Student Responsiveness	• How engaged and involved are the students in this intervention or activity? • Amount of time students spend on task? • Levels of enthusiasm for activity? • Extent students feel they learned what was expected? • Number of students meditating with their eyes closed and heads on their desks?

Source: http://www.rti4success.org/sites/default/files/FidelityImplementation_10-20-09_FINAL.pdf, March 2016

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

• detail responsibilities of specific persons (coaches, teachers, administration);

• create a data system for measuring operations, techniques, and components;

• link fidelity data to improved outcomes data;

- approach instructor observation in a positive manner, emphasizing problem-solving; and

- create accountability measures for noncompliance.[45]

Research indicates that teachers as facilitators are more effective with ELLs:

> Teachers should develop a learning environment that is relevant to and reflective of their students' social, cultural, and linguistic experiences. They act as guides, mediators, consultants, instructors, and advocates for the students, helping to effectively connect their culturally-and community-based knowledge to the classroom learning experiences.[46]

RECOMMENDATION

Explore options for implementing a tiered intervention model for ELL and at-risk students, along with accountability measures for teachers.

The superintendent, principals, and select teachers should review tiered intervention models such as the RtI programs. They should then determine to adopt the standard RtI program or a hybrid district approach to tiered intervention for struggling learners. The review process should focus on how to increase the effectiveness of tiered interventions. If needed, external consultants are available to assist in the process.

The district needs to ensure:

- staff follow clear data-based decision-making rules;

- predetermined fidelity checks are applied routinely;

- integration and sustainability practices are followed; and

- staff regularly communicate using the same vocabulary.[47]

The guide *Considering Tier 3 Within a Response-to-Intervention Model* can serve as a resource to understand the RtI process.[48] The *RtI Essential Components Integrity Rubric* and the *RtI Essential Components Integrity Worksheet* are useful appraisal tools.[49]

The district may also consider guidelines for planning remediation for ELL students. All students, and particularly ELLs, learn best if the following components are included in lesson planning.

---

[45] Johnson, E., Mellard, D.F., Fuchs, D., & McKnight, M.A. (2006). *Responsiveness to intervention (RTI): How to do it.* Lawrence, KS: National Research Center on Learning Disabilities.
[46] https://work.chron.com/difference-between-facilitators-teachers-11510.html
[47] Ibid.
[48] http://www.rtinetwork.org/essential/tieredinstruction/tier3/consideringtier3
[49] https://www.rti4success.org/resource/essential-components-rti-integrity-rubric-and-worksheet

- Content objectives - what exactly is to be taught;

- Language objectives - ELL students are not likely to be as familiar with the vocabulary associated with content specific vocabulary, this must be explicitly taught, clearly defined, using some sort of visual, revisited and reviewed multiple times, taught and used contextually;

- Utilizing Visuals - photographs, pictures, authentic video materials, graphs, maps, and graphic organizers;

- Activating Prior Knowledge - each student has a different set of experiences that influences how a student interprets and organizes new information. Once the topic becomes personal, it is more interesting and applicable to the student;

- Expanding Upon Prior Knowledge - using their experiences to help make connections to new information;

- Scaffolding - introduce skills and tasks in a slow, manageable manner, in the beginning stages of learning, students need more support, as the skill is strengthened the supports are methodically eliminated; and

- Working Together - working with peers creates a low-pressure, confidence-building environment optimal for progress, small groups provide safe settings for practicing language, students learn language nuances, native speakers, or more fluent peers are excellent mentors.[50]

FISCAL IMPACT

This recommendation can be implemented with existing resources. These can be Title I, Title III, or Special Education resources.

Gifted and Talented Education

Oklahoma statutes (*70 OS § 1210.301-308*) 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 education or 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.

Oklahoma 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 BOE 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.

---

[50] https://www.fluentu.com/blog/educator-english/instruction-strategies-for-ell-students/

The required components for Gifted and Talented education programs includes:

- a written policy statement that specifies a consistent process for assessment and selection of children for placement in Gifted and Talented programs in grades 1st through 12th;

- a description of curriculum for the Gifted and Talented 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 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 program staff; and

- a budget for the district's Gifted and Talented programs.

The HPS gifted coordinator follows the state guidelines for identification, assessing, and over-seeing the gifted and talented program. **Exhibit 2-31** shows the trend in the gifted and talented identification rate over time. From 2013-14 to 2017-18, HPS' identification rate declined. In 2017-18, HPS had the third lowest rate among its peers, and was lower than the community group and state. No federal agency collects data on the number of gifted and talented students identified; however, the National Association for Gifted Children notes that between five and seven percent of students should be identified. In each of the past five years, HPS exceeded this standard.

Exhibit 2-31
Trend in Percentage of Gifted and Talented Education Students

Entity	2013-14	2014-15	2015-16	2016-17	2017-18
Hennessey	**10.9%**	**11.3%**	**8.3%**	**9.2%**	**9.5%**
Atoka	29.5%	30.3%	30.4%	29.2%	25.9%
Chouteau-Mazie	7.7%	6.7%	5.7%	7.5%	7.6%
Pawhuska	6.2%	5.9%	5.9%	5.4%	7.5%
Tishomingo	2.8%	7.2%	4.9%	4.2%	2.6%
Watonga	11.5%	11.1%	11.0%	11.3%	9.1%
Community Group	**12.6%**	**12.6%**	**12.9%**	**13.4%**	**13.0%**
State	**14.2%**	**14.2%**	**14.2%**	**14.5%**	**13.9%**

Source: Office of Educational Quality and Accountability, Profiles Database

Oklahoma districts receive additional weighted funding in the State Aid Formula for Gifted and Talented students. There is no limit to the number of students who can be identified as Gifted through an IQ-type test (Category 1 identification). Students can also be identified using two or more local criteria (Category 2 identification); however, the state limits weighted funding for Category 2 students at eight percent of a district's average daily membership.[51] For the 2019-20 school year, HPS' initial state Gifted funding was $23,272.

FINDING 2-14

The Gifted and Talented program is not as strong as other HPS programs.

In the elementary and middle schools, it is primarily teacher driven. Elementary students also participate in the STEM program. In the high school, students have options for Advance Placement and concurrent enrollment. One-on-one technology at all grade levels offers enrichment opportunities for all students, yet these are not strategic planned and organized for gifted students. The consulting team found there was little evidence to indicate routinely enriching and challenging gifted students. There is limited intentional differentiation, enrichment, or acceleration to challenge the gifted students.

On the staff survey, about half of the staff *disagreed* or *strongly disagreed* that the needs of gifted and talented students were being met (**Exhibit 2-32**). Although not questioned about it on their survey, one parent included comments expressing discontent with the gifted program.

Exhibit 2-32
Staff Survey Results Regarding Gifted Program

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The needs of the gifted and talented are being met.	0%	26%	26%	27%	22%

Source: Prismatic Survey Results, February 2020

Research indicates that acceleration and enrichment are confused. Gifted students may be asked to read more, answer more questions, and complete longer assignments; these are not enrichment. **Exhibit 2-33** illustrates the differences.

---

[51] https://sde.ok.gov/sites/default/files/District%20Coordinator%20Manual%20vs.%202_0.pdf'

Exhibit 2-33
Differentiating Between Acceleration and Enrichment

Acceleration	Enrichment
• Acceleration is about the destination and moving through curriculum. • Pacing of content and instruction is sped up to match learner needs. • The goal is to accelerate content mastery. • When acceleration is the goal, students are moving faster through content or skill development.	• Enrichment is about the journey and extending the experience with depth and complexity. • Effort is made to allow students to explore topics of interest. • The goal is to enhance and investigate. • When enrichment is the goal, connections are made to units of study with integration of real-world applications.

Source: https://hwlearninglinks.wordpress.com/2015/08/03/enrichment-for-gifted-learners-in-a-general-education-classroom/

School districts must provide additional support for students who are already high achieving and those with the potential for high achievement. In planning for educational opportunities, school leaders must communicate a clear purpose and common goal that is endorsed by classroom teachers, gifted coordinators, counselors, and other district staff. Gifted education strategies, when employed, not only increase the achievement of identified gifted students, but have been shown to increase achievement levels of all students, making their use well worth the investment.

RECOMMENDATION

Continue to strengthen the Gifted and Talented program.

The superintendent, principals, and gifted coordinator should periodically share websites and resources with the regular classroom teachers.[52] The SDE also has resources to assist in teaching gifted students. Release time meetings can also be used to focus on effectively serving and modifying instruction for gifted students.

The SDE provides options for classroom curricular modifications. The modifications must be challenging and enriching to the student. The district should consider how it might incorporate one or more of these options (**Exhibit 2-34**).

---

[52] https://docs.google.com/presentation/d/1lKiJPSr9d8FAjSN2sVC8dZbTwMXXhs9bDz_b6vib1Ps/edit#slide=id.p

Exhibit 2-34
Enrichment Options

- **Enrichment in the Regular Classroom**: Experiences provided in regular classrooms that are supplemental to the established curriculum and which are purposefully planned with the needs, interests, and capabilities of students in mind. Appropriate enrichment experiences are NOT a repetition of material.

- **Seminars/Convocations**: Special short-term sessions where students focus on one area of study.

- **Mentorships**: A program which pairs individual students with someone who has advanced skills and experiences in a discipline and can serve as a guide, advisor, counselor, and role model.

- **Summer Enrichment Programs**: Enrichment classes or courses offered during the summer months.

- **Saturday Enrichment Programs**: Enrichment classes or courses offered on Saturday.

- **Creative/Academic Competitions**: Organized opportunities for students to enter local, regional, state, or national contests in a variety of areas.

- **Differentiated Curriculum**: Curriculum designed to meet the needs of high ability students and differentiated according to content, process, and product.

- **Learning Centers**: A designated area or portable center designed to enrich and/or accelerate students' interests in a given content area.

- **"Great Books" and "Junior Great Books"**: Discussions of great literature led by an adult discussion leader using a prepared question guide.

Source: http://ok.gov/sde/gifted-and-talented-education-programming-options

There are multiple resources with insights for teachers to use to support learning to identify gifted students.[53] The superintendent, principals, and gifted coordinator should periodically share websites and resources with the regular classroom teachers.[54] The SDE also has resources to assist in teaching gifted students. Friday early release meetings can also be used to focus on effectively serving and modifying instruction for gifted students.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

---

[53] https://rossieronline.usc.edu/blog/teaching-gifted-students-in-full-inclusion-classrooms/; http://www.hoagiesgifted.org/

[54] https://docs.google.com/presentation/d/1lKiJPSr9d8FAjSN2sVC8dZbTwMXXhs9bDz_b6vib1Ps/edit#slide=id.p

Library Services

Effective libraries and media resources support a strong instructional program. As noted on the SDE website:

> School libraries launch students into a world of new knowledge by providing instant access to exciting books, online resources, and emerging technologies. They provide equal opportunities to all students for learning.[55]

HPS offers students two libraries, one in the middle school and one in the elementary school (**Exhibit 2-35**). Both are bright and functional. The middle school library is staffed with a certified librarian, serves grades five to 12, and has undergone extensive updating.

Exhibit 2-35
HPS Libraries

Middle School Library   **Elementary Library**

Source: Prismatic, February 2020

As shown in **Exhibit 2-36**, staff and students expressed satisfaction with the library services.

---

[55] http://ok.gov/sde/library-media

Exhibit 2-36
Student and Staff Survey Results Regarding the School Library

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	The school library meets the needs of the teachers and students.	23%	64%	7%	7%	0%
Student	The school library meets my needs for books and other resources.	45%	34%	17%	2%	2%

Source: Prismatic Survey Results, February 2020

FINDING 2-15

The district's two libraries are housed in the elementary and middle schools. The middle school library is staffed with a certified librarian, serves grades 5 to 12, and has undergone extensive updating. The librarian is visionary with strategic future plans.

The certified librarian has purged the shelves of outdated, worn, and inappropriate materials and resources. In spite of limited funding, through the use of grants and seeking free materials, new books and resources are made available to students. The computer lab is no longer located in the library. There is effort to ensure ELL students have books and reading materials support literacy and language proficiency. The librarian's goal is to provide HPS students with relevant and credible resources and information and support teachers and students with digital resources that align with OAS. The librarian envisions HPS library as more than just a book warehouse for reading but as a gathering space for learning and synchronizing with emerging technology. On the staff survey 87 percent of the staff and 79 percent of the students strongly agree or agree the school library meets student needs for books and other resources.

According to the American Library Association, 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. English as a Second Language students can perhaps benefit the most, since books and other resources can be used for them to get familiar with the American English language.

That being said, 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.[56]

COMMENDATION

The district is commended for updates and improved library services.

FINDING 2-16

The available library media services are not being fully leveraged to support the one-to-one initiative. There is need for structured library time to be built into students' schedules.

The district would benefit from continued improvement in delivering cutting edge library service to students. The current progress and improvements lay the foundation for increased support in advancing one-to-one technology integration. There is need for more structured library time built into weekly schedules so teachers and librarians can coordinate standards-based curriculum with library services. Students benefit from regularly partnering and blending classroom assignments and activities with library resources.

The HPS librarian envisions after-school clubs and up-graded library furnishings to make the library a fun, attractive, and providing a comfortable place to gather. She would like to expand library services and technology to find innovative ways to make digitalized reading and learning a valued curriculum resource.

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.[57]

Modern librarians no longer spend most of their time monitoring the stacks and checking out books to students. Now their role as school librarians includes teaching students how to navigate and consume information online and helping teachers embed those skills into their curriculum. Librarians are becoming instructional partners, innovation leaders, and digital-literacy scholars. They are included in collaborative processes and contribute to innovative instructional strategies. The American Association of School Librarians (AASL) has taken the position that through providing professional development and co-teaching, school librarians today should be "leading the way in digital learning and literacies." Research has shown that when school librarians are

---

[56] http://teacherhabits.com/why-schools-still-need-libraries/
[57] http://sde.ok.gov/sde/library-media

involved in instruction, student learning improves.[58]

RECOMMENDATION

Continue to strengthen library media services to support standards-based curriculum and technology integration.

The superintendent, principals, librarian, and select teachers should work together to identify materials that support and enrich OAS. The library staff should attend staff, grade level, and departmental meetings and make teachers aware of digital and hard copy library resources that can be linked to classroom content and state standards. Library resources and services should be an essential component for teaching information literacy skills to students. The librarian and all classroom teachers should engage in collaborative planning. They should continuously seek options for delivering information that enables students to learn the foundations needed to become information literate. The teacher teams should look for ways to implement flexible scheduling and keep the library open to all students at all times.

The library staff should seek ways to intentionally connect the library with classroom curricula. The library staff can use the AASL Framework as an initial resource to look for innovative learning opportunities to share with classroom teachers.[59] A number of websites describe how school libraries interface digital literacy services with classroom content.[60]

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;

---

[58] Will, M. (2016). As information landscape changes, school librarians take on new roles. *The Changing Face of Literacy, 36*(12), pp. 25-28.
[59] http://sde.ok.gov/sde/sites/ok.gov.sde/files/webform/180205-AASL-frameworks-spreads-libraries.pdf
[60] http://geiendorsed.com/blog/beyond-the-classroom/school-libraries-of-the-future-5-trends-to-watch/;
   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/

- 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 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.[61]

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.

---

[61] http://www.ascanationalmodel.org/

- 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 2-37 provides the trend in counselor staffing over time. In 2017-18, HPS' counselor staffing tied with three of its peer districts and was higher than the community group but lower than the state. Moreover, HPS has increased its counselor staffing over the last five years, while other districts have remained the same or declined.

Exhibit 2-37
Trend in Counselor Staffing Over Time

Entity	2013-14	2014-15	2015-16	2016-17	2017-18	Percent Change
Hennessey	**1.9**	**2.0**	**2.0**	**2.0**	**2.0**	**5.3%▲**
Atoka	1.0	1.0	1.0	1.0	1.0	0.0%●
Chouteau-Mazie	1.9	2.0	2.0	2.0	2.0	5.3%▲
Pawhuska	1.0	1.0	1.0	2.0	1.9	90.0%▲
Tishomingo	3.0	3.0	3.0	3.0	2.0	(33.3%)▼
Watonga	2.4	2.3	2.3	2.0	2.0	(16.7%)▼
Community Group	**1.5**	**1.6**	**1.6**	**1.5**	**1.6**	**6.7%▲**
State	**3.1**	**3.1**	**3.1**	**2.9**	**2.9**	**(6.5%)▼**

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

FINDING 2-17

The district employs two counselors, along with supplemental outsourced counseling services with ATS Counseling Agency. The assistant principal in the middle school assists in providing counseling services to HPS students.

In the last three or four years, the district has expanded services to meet the social and emotional needs of students. The counselors emphasize that school is a "safe place" and work at nurturing a culture of acceptance and belonging with the district's diverse population. Staff and student survey responses indicate general approval of the district's counseling services (**Exhibit 2-38**).

Exhibit 2-38
Student and Staff Survey Results Regarding Counseling Services

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Student	I have received sufficient college and/or career counseling.	13%	45%	28%	13%	2%
Staff	The district provides students with adequate counseling services.	9%	61%	12%	12%	5%

Source: Prismatic Survey Results, February 2020

The high school counselor works with eighth grade students preparing them for the transition to high school. All high school students are enrolled in Individual Career Academic Plan (ICAP). ICAP is an ongoing student driven process developed by the SDE. It helps students engage in academic and career development activities. The ongoing process enables students to discover their strengths, learning styles, and interests. It helps them establish a personal plan for setting goals and achieving a vision for the future. The counselors also keep students informed of the Oklahoma Promise program and assist students with the needed paperwork to apply for the program.[62]

The high school counselor, along with the support of the administration and BOE, is instrumental in providing the student population with vocational-technical education. The district is not a member of the vocational system and therefore pays $1,000 for each student who attends Vo-tech. Currently, 30 to 40 students attend Chisolm Trail Vo-tech. Along with academics, the vocational students receive practical learning and hand-on experiences that prepare them for a career following high school. The consulting team found many HPS students view attending vocational school as a pathway to earning professional skills and a continuing education alternative.

At the elementary level, the counselor focuses on building relationships and providing classroom guidance. In Pre-K through 5th grade, the counselor started sending teachers a weekly Character Counts video. The teachers show the videos at their convenience. On Friday during Eagle Rally time, one or two students from each grade are recognized with a pencil and handshake from the SRO for exemplifying the weekly character trait. The counselor sends a photo to the local paper of all students honored during the weekly Eagle Rally. A clothing pantry was recently organized to meet needs of elementary students. There are tentative plans to start a group for children of divorce/separation for 3rd-5th grade.

The middle school counseling program facilitated The Hope Outreach Abstinence Program for 7th grade girls. There are initial plans to start an Eagle Time Book Club where students listen to an audio book with social issues and then use the story line for character discussions; implement

---

[62] https://sde.ok.gov/documents/2017-08-29/what-is-icap, https://www.okhighered.org/okpromise/

Restoration Discipline to address behavior/discipline problems; and create Calm Down Corners in classrooms and provide teacher training on how to properly utilize them.

Effective school counseling programs are a collaborative effort between the school counselor, teaching staff, families, and community stakeholders. Counselors work with other educators to create an environment resulting in a positive impact on student achievement. School counselors' value and respond to the diversity and individual differences in their student population and community. They are culturally sensitive and responsive to student needs. Comprehensive school counseling programs become an integral part of the school setting. Counselors ensure equitable access to opportunities and rigorous curriculum for all students to participate fully in the educational process.[63]

COMMENDATION

The district is commended for employing two full-time counselors and working to implement a comprehensive counseling program.

FINDING 2-18

The middle school counselor's role seems to be a critical need in HPS. There are two effective counselors that bracket the middle school (high school and elementary), but once students reach middle school there is minimal service. This is a crucial age of emotional and behavioral development for students. Neither should be neglected particularly when there are high levels of poverty that are also a factor in student's lives.

The middle school assistant principal is also tasked with providing counseling services in the middle school. This results in a conflict between the job roles. A counseling role is inherently different from that of an administrative role that also includes disciplinary duties. Neither should be neglected at the middle school level. The various duties additional to that of assistant principal/counselor position work against success in either role.

Oklahoma high schools and middle schools are required to have one full-time counselor for every 450 students. The actual ratio in Oklahoma in 2015-16 was 430 to 1.[64]

The American School Counselor Association recommends a staffing level of one counselor for every 250 students (regardless of level). At a current enrollment of 899, HPS is below the national recommendation and the Oklahoma average. Interviews, focus groups, and stakeholder surveys identified several areas of need where additional counseling resources could be useful, particularly drug use and student bullying.

Counseling programs at the elementary and middle school level that emphasize character, good decision-making, and resilience can have a positive impact on bullying behavior and drug abuse. Additionally, if counselors are given time, they can work more closely with community supports, and programs to reduce the impact of drugs and bullying on families.

---

[63] https://www.schoolcounselor.org/asca/media/asca/PositionStatements/PS_ComprehensivePrograms.pdf
[64] https://www.schoolcounselor.org/asca/media/asca/home/Ratios15-16.pdf

RECOMMENDATION

Add at least a half-time counselor at the middle school.

The superintendent and the high school principal should work together to find a counselor who is a good fit with the students and the community. Ideally, they will find someone who is equipped to handle the challenging social and developmental needs of middle school students while helping the administration manage the academic programs. Additionally, because the district has a high free and reduced lunch count and a relatively high Hispanic American count the superintendent should research whether federal funds can be used for some of the cost in the next budget.

FISCAL IMPACT

The consulting team estimates that a full-time middle school counselor position will require approximately $50,000 in salary and benefits. The district should fund at least a half-time position.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Hire at least a half-time counselor for the middle school.	($25,000)	($25,000)	($25,000)	($25,000)	($25,000)

FINDING 2-19

The district's teachers are not maximizing the value of Eagle Time - an advisory period where students report to a designated teacher. All teachers are supposed to use this small group time to improve the school's culture, and meet student academic, social, and behavioral needs.

Eagle Time is a period four days a week where teachers strive to personalize and maximize learning for every student. The period is a complement to classroom instruction and is designed for individualized intervention when students need behavioral and emotional support, enrichment, and academic advisory.

The high school counselor is instrumental in facilitating Eagle Time. They post the focus and daily agenda for teachers well in advance, and the high school teachers are given the suggested activities, discussion topics, and tasks to accomplish during this time. Eagle Time is intended as an opportunity to build and strengthen small group relationships among the students and teachers.

Despite the presence of Eagle Time, interviews and staff survey results indicate the need to address lingering social-emotional issues such as drugs and bullying. Interviews and focus groups suggest that drugs, specifically marijuana, continue to be a concern at HPS. Bullying was also identified as a concern, in both online and in-person environments. Informal interactions revealed that some students found little value in current use of Eagle Time.

Survey results reflect the extent of identified student needs based on data from staff, parents, and high school students (**Exhibit 2-39**). As shown, sizeable percentages of each stakeholder group

believe that bullying and drugs are problems in the district. A few students also provided written comments expressed dissatisfaction with Eagle Time specifically.

Exhibit 2-39
Parent, Student, and Staff Survey Results Regarding Bullying and Drugs

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Parent	Bullying is a problem in this district.	26%	30%	26%	16%	3%
Student		19%	9%	26%	30%	17%
Staff		7%	38%	21%	34%	0%
Parent	Drugs are a problem in this district.	29%	31%	31%	9%	0%
Student		26%	28%	22%	13%	11%
Staff		23%	41%	22%	14%	0%

Source: Prismatic Survey Results, February 2020

Eagle Time affords HPS the opportunity to engage in the social and emotional aspects of learning (SEL). Research on students who participated in some form of SEL instruction has found short- and long-term benefits in student outcomes. For example, a meta-analysis of 213 school-based SEL programs involving 270,034 K-12 students showed that, compared to control groups, SEL participants demonstrated substantially improved social and emotional skills. These effects have been consistent across all grade levels and school demographics, in urban, suburban, and rural areas.[65]

Students need more than just academic knowledge to succeed in life. Social and emotional skills undergird positive student academic success and build better citizens. When SEL skills are intentionally taught, practiced, and reinforced in schools, students have better behavioral, social, and academic outcomes.[66]

RECOMMENDATION

Review Eagle Time to strengthen student impact and improve teacher support and involvement.

The superintendent, principals, counselors, teachers, and select students should initiate dialog and discussion regarding how Eagle Time can be improved. They should canvas all stakeholders - teachers, students, parents, support staff, and community groups. The team should ask basic questions such as:

- What is the purpose and intended outcome(s) of Eagle time?

- How does this meet HPS student needs?

---

[65] https://www.casel.org/wp-content/uploads/2016/08/PDF-3-Durlak-Weissberg-Dymnicki-Taylor-_-Schellinger-2011-Meta-analysis.pdf
[66] https://casel.org/wp-content/uploads/2017/04/When-Districts-Support-SEL-Brief.pdf

- What is working?

- What is not working?

- What barriers keep students from participating?

- What time of day is the best?

- What keeps teachers from buying in?

- What are successful Eagle Time teachers doing?

- What is the profile of students who do not participate?

- What activities create student participation?

- What activities do students not participate in?

- How would you improve Eagle time?

Based on the information received from reviewing Eagle Time, the district should make the needed adjustments for Eagle Time.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 3:

Business Operations

Business Operations

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

A. Planning and Budgeting
B. Financial Processes
C. Asset and Risk Management
D. Activity Funds
E. Auditing and Internal Controls

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 district person as treasurer.

The HPS superintendent oversees business services and is assisted by three employees who perform various business operations and treasurer duties. Business operations duties include processing payrolls and encumbrances, as well as completing transactions pertaining to the district's child nutrition fund. Treasurer duties involve preparing monthly financial reports, reconciling the district's bank accounts, and completing financial transactions pertaining to the district's activity funds. **Exhibit 3-1** shows the organization of HPS business operations.

Exhibit 3-1
HPS Business Operations Organization
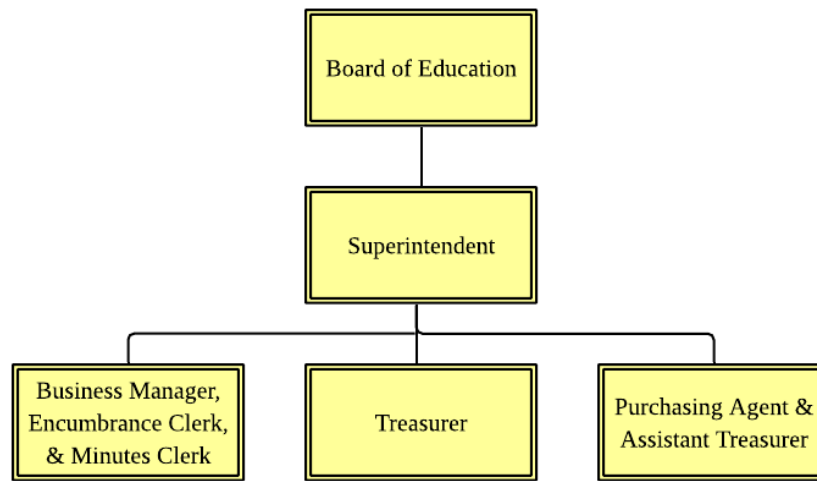
Source: Created by Prismatic, February 2020

Financial Statements

Generally Accepted Accounting Principles (GAAP) 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. HPS prepares financial statements that include the fund types illustrated in **Exhibit 3-2**.

Exhibit 3-2
Funds Contained in the 2019 HPS Annual Financial Report

Type	Purpose
General Fund	To account for all revenues 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: HPS Annual Financial Report, June 30, 2019

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 (one tenth 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 HPS district boundary had a net valuation of $13,220,868 in 2017 and $13,102,374 in 2016. The millage rate levied was 98.86 in 2017 and 94.55 in 2016.

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 2013-14 and 2017-18, the average assessed property value per student for HPS has increased by 18.3 percent (**Exhibit 3-3**). This was second-lowest increase among all the comparison groups.

Exhibit 3-3
Trend in Assessed Property Value per Student
2013-14 through 2017-18

Entity	2013-14	2014-15	2015-16	2016-17	2017-18	Percent Change
Hennessey	**$46,126**	**$46,817**	**$48,148**	**$48,752**	**$54,563**	**18.3%▲**
Atoka	$34,343	$30,627	$31,490	$32,165	$35,046	2.0%▲
Chouteau-Mazie	$47,279	$52,250	$57,786	$55,569	$60,905	28.8%▲
Pawhuska	$30,509	$40,472	$40,063	$41,278	$48,233	58.1%▲
Tishomingo	$26,099	$27,521	$30,707	$30,946	$34,056	30.5%▲
Watonga	$46,592	$46,584	$53,909	$56,525	$72,539	55.7%▲
State	**$45,248**	**$47,329**	**$49,623**	**$49,471**	**$52,219**	**15.4%▲**

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3-4 shows the percentage of bonding capacity utilized in 2017-18. Hennessey had the highest percentage out of all the peer districts, but was less than the state.

Exhibit 3-4
Estimated Percentage of Bonding Capacity Utilized

Entity	2017-18
Hennessey	**49.2%**
Atoka	23.8%
Chouteau-Mazie	32.1%
Pawhuska	32.5%
Tishomingo	21.5%
Watonga	47.7%
Community Group	**37.7%**
State Average	**61.9%**

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3-5 shows the percentages of district and county, state, and federal revenues for HPS and its peers. The district's revenue percentage from district sources was in the middle of its peers, close to the community group and lower than the state. The district's revenue percentage from state dedicated sources was one of the highest of its peers, and much higher than the community group and state. The district's revenue percentage from state appropriated sources was one of the lowest of all comparison entities. The district's revenue percentage from federal sources was the second highest of its peers, close to the community group, and higher than the state.

Exhibit 3-5
Breakdown of Revenues by Source, All Funds, 2017-18

Entity	District Revenue	County Revenue	State Dedicated	State Appropriated	Federal Revenue
Hennessey	**32.5%**	**3.5%**	**28.5%**	**21.2%**	**14.4%**
Atoka	52.0%	0.9%	8.1%	26.8%	12.2%
Chouteau-Mazie	33.2%	3.3%	34.5%	17.5%	11.6%
Pawhuska	33.4%	2.8%	10.1%	41.7%	12.1%
Tishomingo	27.0%	2.6%	8.7%	43.1%	18.7%
Watonga	44.7%	3.8%	26.5%	14.5%	10.5%
Community Group	**30.0%**	**2.2%**	**9.5%**	**43.1%**	**15.2%**
State	**41.5%**	**2.7%**	**7.5%**	**37.6%**	**10.7%**

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3-6 shows the percent of revenue received from 2013-14 to 2017-18 for HPS, the community group, and state. The district's district and county revenue percentage were consistently higher than the community group and lower than the state. The percentage of revenue from state sources was lower than the community group and a little higher than the state. The percentage of federal funding was lower than the community group and a little higher than the state.

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

Source of Revenue	Entity	2013-14	2014-15	2015-16	2016-17	2017-18
District and County	**Hennessey**	**38.2%**	**38.5%**	**38.6%**	**36.6%**	**36.0%**
	Community Group	28.8%	30.0%	31.4%	33.2%	32.2%
	State	40.3%	40.8%	42.1%	43.2%	44.2%
State Dedicated and Appropriated	**Hennessey**	**50.1%**	**48.8%**	**47.7%**	**49.7%**	**49.7%**
	Community Group	55.7%	54.5%	52.9%	51.7%	52.6%
	State	48.0%	47.7%	46.3%	46.3%	45.1%
Federal	**Hennessey**	**11.7%**	**12.7%**	**13.8%**	**13.7%**	**14.4%**
	Community Group	15.5%	15.5%	15.7%	15.1%	15.2%
	State	11.7%	11.6%	11.6%	11.3%	10.7%

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3-7 compares 2017-18 expenditures as a percentage of total expenditures as shown:

- HPS was the highest of its peers, community group, and state for instructional expenditures.

- The percentage that HPS spent for student support was the lowest among all comparison groups.

- The percentage that HPS spent for instructional support was close to the highest peers, and higher than the community group and state.

- The percentage that HPS spent for district administration was in the middle of its peers and lower than the community group but higher than the state.

- HPS was second lowest of all comparison groups for school administration expenditures.

- The percentage that HPS spent for district support was lower than all except one of its peers and lower than both the community group and state.

Exhibit 3-7
Percentage Breakdown of Expenditures by Type, All Funds, 2017-18

Entity	Instruction[1]	Student Support[2]	Instruction Support[3]	District Admin.[4]	School Admin.[5]	District Support[6]	Other
Hennessey	**59.4%**	**3.8%**	**4.3%**	**3.3%**	**4.2%**	**14.9%**	**10.0%**
Atoka	27.6%	4.3%	1.6%	3.2%	3.2%	10.4%	49.7%
Chouteau-Mazie	54.6%	7.3%	2.7%	2.0%	5.6%	19.8%	8.0%
Pawhuska	50.6%	5.6%	4.9%	5.1%	6.9%	19.4%	7.5%
Tishomingo	54.1%	6.2%	2.1%	4.0%	5.2%	15.9%	12.4%
Watonga	51.4%	4.6%	2.0%	4.2%	5.9%	23.5%	8.5%
Community Group	**53.0%**	**6.5%**	**2.7%**	**4.2%**	**5.7%**	**17.1%**	**10.9%**
State	**53.1%**	**7.2%**	**3.7%**	**3.1%**	**5.8%**	**18.0%**	**9.1%**

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3-8 shows the trend in HPS expenditures per student and overall for the past ten years. Both the total district expenditures and the expenditures per student have on average remained

---

[1] Instruction – Activities dealing directly with the interaction between teachers and students
[2] Student Support – Activities designed to assess and improve the well-being of students and to supplement the teaching process
[3] Instruction Support – Activities associated with assisting the instructional staff with the content and process of providing learning experiences of students
[4] District Administration – Activities involving the establishment and administration policy in connection with operating the entire school district
[5] School Administration – Activities concerned with overall administrative responsibility for a single school or a group of schools
[6] District Support – Consists of central services (activities that support other administrative and instructional functions, fiscal services, human resources, planning, and administrative information technology), operation and maintenance of plant services (activities concerned with keeping the physical plant open, comfortable, and safe for use, and keeping the grounds, buildings, and equipment in an effective working condition and state of repair), and student transportation services (activities concerned with the conveyance of students to and from school as provided by state law)

the same over that period, except for the per student expenditure in 2017-18 that had the highest expenditure per student of $9,949, and the highest total district expenditure, when the district spent $9 million.

Exhibit 3-8
Trend in HPS Expenditures per Student, All Funds
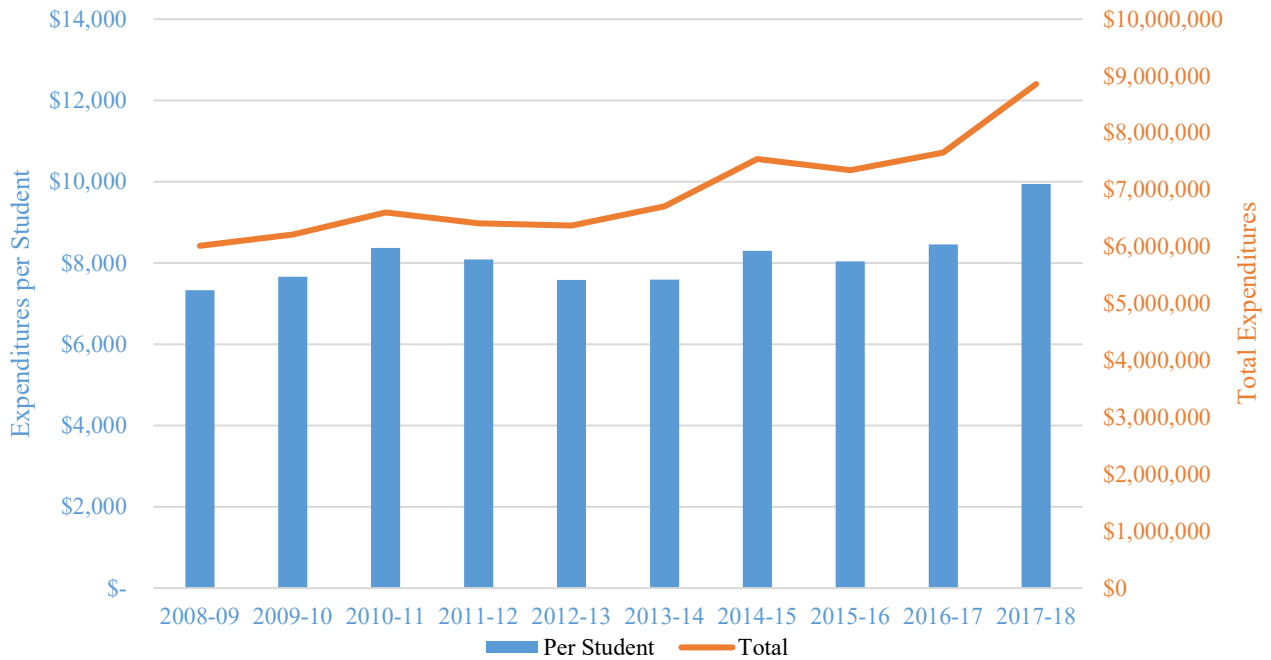
Source: Office of Educational Quality and Accountability, Profiles Database, and Prismatic calculations

Exhibit 3-9 shows HPS expenditures for the past three fiscal years, disaggregated by function code. The function code is a dimension used to describe the service or commodity obtained as a result of the expenditure. As the exhibit shows, total expenditures increased by 23.8 percent over the three years. Spending on each classification also increased.

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

Expenditure Classification	2015-16	2016-17	2017-18	Percent Change
Instruction	$4,729	$4,803	$5,909	25.0%▲
Student Support	$276	$306	$378	37.0%▲
Instructional Support	$311	$287	$427	37.3%▲
District Administration	$260	$291	$331	27.3%▲
School Administration	$336	$403	$423	25.9%▲
District Support	$1,190	$1,301	$1,487	25.0%▲
Other	$937	$1,065	$994	6.1%▲
Total	**$8,039**	**$8,456**	**$9,949**	**23.8%▲**

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

Fund Balance

The fund balance, often referred to as "carryover," is defined as the excess of assets over liabilities and is used in future years to offset any revenue shortfalls or negative midyear adjustments that may occur. Fund balance is the amount of cash that is not obligated by purchase orders, contracts, outstanding warrants, or other commitments. A healthy fund balance can be beneficial to a school district by permitting longer investment terms and bridging periods of low cash flow during the year. Perhaps more importantly, it helps the district maintain cash flow to get through the first part of the new school year until state aid distribution can catch up with the district's obligations.

A school district's fund balance policy can provide guidance for the development and implementation of an annual budget. Oklahoma public school laws provide guidance regarding the allowable year-end balances. *Title 70, Section 18* of Oklahoma Statutes provides the maximum amount, as a percentage of total general fund collections, that a school district can maintain as a fund balance. **Exhibit 3-10** shows the table of maximum allowable balances expressed as a percentage of their general fund collections.

Exhibit 3-10
Maximum Allowable Balances at Year End

General Fund Collections	Maximum Allowable Balances
less than $1,000,000	40%
$1,000,000 - $2,999,999	35%
$3,000,000 - $3,999,999	30%
$4,000,000 - $4,999,999	25%
$5,000,000 - $5,999,999	20%
$6,000,000 - $7,999,999	18%
$8,000,000 - $9,999,999	16%
$10,000,000 or more	14%

Source: SDE Technical Assistance Document, December 2018

Bonds

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 3-11** compares the district's average daily membership (ADM), assessed property value, and bonding capacity for the last five years. ADM, property value, and bonding capacity all increased.

Exhibit 3-11
HPS Trends in ADM, Assessed Values, and Bonding Capacity

School Year	ADM	Assessed Property Value	Bonding Capacity
2013-14	884.0	$40,775,384	$4,077,538
2014-15	909.0	$42,556,653	$4,255,665
2015-16	913.7	$43,992,828	$4,399,283
2016-17	905.0	$44,120,560	$4,412,056
2017-18	890.5	$48,587,806	$4,858,781
Percent Change	**0.7%**▲	**19.2%**▲	

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

The debt service expenditures per student are based upon the amount of outstanding debt and number of students a district has during a given school year. Districts must balance facility and equipment needs with the amount of tax money requested of district taxpayers. In 2017-18, HPS had the second highest debt service expenditure per student of its peer districts. HPS was also higher than the community group but lower than the state in debt service per student. (**Exhibit 3-12**).

Exhibit 3-12
Debt Service Expenditures per Student

Entity	2017-18
Hennessey	**$876**
Atoka	$851
Chouteau-Mazie	$39
Pawhuska	$10
Tishomingo	$9
Watonga	$1,767
Community Group	**$494**
State	**$1,018**

Source: Office of Educational Quality and Accountability, Profiles Database

A.   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 3-1

The superintendent and the business manager are the primary designers of the budget. Although the superintendent reports to the HPS board of education (BOE) concerning the budget, the BOE is not really involved in establishing priorities to be funded within the budget. Rather, its primary participation is to approve the budget after the Estimate of Needs has been received in September.

While the Estimate of Needs determines the official dollar amounts that the district will receive, it is not available until several months after the new fiscal year has begun. As the district is already spending from the new budget by that point, there is little call for community input at that time. Thus, the community is not involved in the budget process, except through its five BOE members, and the BOE's involvement is minimal. The district does not seek input from its community members or the BOE in the spring so that any identified priorities that the community or the BOE wish to have the district address in the next budget cycle can be factored in once the Estimate of Needs numbers were released by the state.

Exhibit 3-13 shows that only 16 percent of staff *agreed* or *strongly agreed* that district stakeholders provide input into the budget process and only 20 percent understand the budget process. Perhaps because they do not understand the budgeting process, the largest portion of staff had *no opinion* as to whether the district spends its money wisely. Parents generally did not believe that parents play an active role in district decision-making and most did not know whether the district asked for budget input or thought the district did not ask for input. Nearly half of parents (49 percent) *disagreed* or *strongly disagreed* that the district spends its money wisely. On the community survey, to which parents of current students, former students, community members without children in the district, and some HPS employees responded, 41 percent *disagreed* or *strongly disagreed* that the entire community has opportunities to provide input on the future direction of the district. Another 47 percent *disagreed* or *strongly disagreed* that HPS actively seeks input from the community.

Exhibit 3-13
Staff, Parent, and Community Survey Results Regarding District Decision-Making and Budgeting

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	District stakeholders provide input into the budgetary process.	1%	15%	78%	3%	3%
Staff	I understand the district's budgetary process.	1%	19%	49%	19%	12%
Staff	The district wisely manages its revenues and expenditures.	14%	38%	43%	5%	0%
Parent	Parents play an active role in decision-making in our school.	7%	13%	18%	35%	28%
Parent	The district asks the community for input when developing its budget.	3%	10%	40%	26%	21%
Parent	The district spends its money wisely.	6%	26%	19%	28%	21%
Community	The entire community has many opportunities to provide input on the future direction of the school district.	2%	24%	32%	39%	2%
Community	The school district actively seeks input from the community.	0%	22%	32%	32%	15%

Source: Prismatic Survey Results, February 2020

In the *2004 Performance Review*, it was recommended that the district "implement a budget process that allocates resources based on district goals and objectives and includes the involvement of the school board, administration, staff, and community." Since that recommendation was made, all of the BOE members have changed, as has the superintendency. Existing staff could not be sure if the 2004 recommendation to include community involvement was implemented at first, but there is no explicit process in place for it currently.

Although districts are not required to follow the *School District Budget Act* (*Title 70 O.S. § 5-155*) the district does "make available to the public and investors sufficient information as to the financial conditions, requirements, and expectations of the school district." *OAC 210:25-5-1* states, "The superintendent, as executive officer of the board of education, furnishes the

leadership for the board in taking the budget through its several stages of growth." *OAC 210:35-3-166(a)* states:

> The principal shall be responsible for planning and administering the school site budget as approved by the local board of education. The principal shall involve the staff in the preliminary development of the budget, in establishing expenditure allocations, and setting priorities within the budget.

The GFOA recommends that a school district budget be developed using a results and outcomes approach. Using this approach, the budget should be developed to address the highest priorities of the district that could be achieved with the available resources. For example, if the district identified a need for additional staff members, the budget would be developed to incorporate this need, and, subsequently, be communicated clearly to all stakeholders.

Many districts have a budget committee comprised of community members, business leaders, and district employees who provide input to the BOE and superintendent on the priorities that should be addressed. Some Oklahoma public school districts use a budget committee that provides regular input to the superintendent and treasurer during the budget process. Other districts publish their budget materials and related information on their websites to ensure that all stakeholders are informed of budget processes and decisions that are being made.

At the time it was reviewed under the Oklahoma School Performance Review process, Clinton Public Schools had a transparent budget development process with a commendable level of public input. The process for budget development in Clinton involved these steps:

1. Preliminary Budget: Prior to the end of the current fiscal year, the superintendent and other key administrators prioritized items for the following fiscal year. Many contributions for this process came from school employees and the public.

2. Preparation of Proposed Budget: After the BOE approved the estimate of needs, proposed budgets were devised within the approved revenues and expenditures for the budget year.

3. Receipt of Public Comments: The BOE conducted a public hearing to take all comments on financial matters, both past and future, in the district.

4. Adoption of a Final Budget: This included any revisions due to public comments and potential program allocations received prior to this date.

5. Amending of Final Budget: Changes were made throughout the year to ensure that all expenditures had an appropriate amount of budgeted funds available and to adapt the current budget to reflect midterm allocation changes.

RECOMMENDATION

Establish a budgetary process that is timely, easily understood, and involves all stakeholders.

As a best practice, districts should include a variety of stakeholders in the budgetary process. These stakeholders should include the principals, facilities and transportation directors, and the lead cafeteria manager. A teacher and parent representative could also be included in the process. The goal should be more transparency, communication, and input regarding the process.

The superintendent and BOE 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 in order 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 facilitate better communication, understanding, and support of the adopted budget. A sample budget calendar is provided in **Exhibit 3-14**. 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.

The superintendent and business manager should hold at least one public budget planning session with the BOE each spring to brief BOE members and any interested members of the public on the preliminary budget for the upcoming year. While the normal BOE rules for conducting meetings would be followed, there should also be an allotted portion of time for members of the public to offer their suggestions or concerns.

Exhibit 3-14
Sample Budget Calendar

Date	Budget Activity
October 3	Introduction of budget process to principals and administrative staff
October 16	Submission of budget calendar to school board (regular meeting)
	Establishment of December date for public hearing on budget
October 20	Preliminary administrative staff budget committee meeting #1
	Review of budget process assignments and calendar
October 30	Administrative budget committee meeting #2
	Establish preliminary overall budget priorities
October 31	Submission of budget requests by principals and administrative staff
November 20	Public reminder concerning December date for public hearing on budget
November 27	Administrative budget committee meeting #3
	Analysis of budget requests and review of preliminary priorities
	Preliminary report on market analysis of cohort school districts
November 29	Advertise for December public hearing
December 4	Advertise for December public hearing
December 4	Annual school board legislative work session
December 8	Administrative budget committee meeting #4
	Refinement and alignment of projected expenditures
December 11	Public hearing on proposed budget (regular meeting)
	Report to school board on preliminary budget priorities (regular meeting)
	Invitation for school board member input on preliminary budget priorities
December 18	Administrative budget committee meeting #5
January 8	Analysis of preliminary budget priorities
	Review of projected state revenues based on the state proposed budget
January 11	Administrative budget committee meeting #6
	Refinement of budget priorities based on school board work session
January 22	Presentation of projected state revenues based on state proposed budget
	Invitation for further school board member input on budget
January 25	Administrative budget committee meeting #7
	Refinement of budget priorities based on public hearing and board member input
February 5	Presentation of first formal draft of budget
February 7	Administrative budget committee meeting #8
	Refinement of budget priorities
February 19	Presentation of second formal draft of budget (regular meeting)
	Update on projected state revenues
March 8	Administrative budget committee meeting #9
March 19	Target date for school board approval of budget (regular meeting)
May TBD	Called meeting for school board certification of final budget April 25-May 4
May 7	Target date for issuance of professional personnel contracts
May 21	Target date for issuance of classified personnel contracts

Source: Created by Prismatic, based on records from an Oklahoma school district, November 2015

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-2

The superintendent and business manager meet regularly to review not only the official Categorical Budget which is based on the Estimate of Needs, but an unofficial "working" budget which takes into account variances that the district becomes aware of as the school year progresses. Using this "working" budget, the superintendent and business manager can more precisely estimate what the actual financial results of the district will be for the school year, and this budget is updated whenever facts warrant a change.

COMMENDATION

The superintendent and the encumbrance clerk are commended for their frequent reviews of the district budget, and for their attention to the anticipated year-end results.

FINDING 3-3

Although district staff has been producing minutes of each BOE meeting, they are not being correctly posted on the district's website. On the HPS webpage titled "Hennessey Public Schools Meetings" is a listing of BOE meetings from 11/05/18 through 02/10/20, with an Agenda field and a Minutes field. With the exception of the 01/14/20 BOE meeting, clicking on the Minutes field produces a document which is virtually a duplicate of the Agenda field, except that it is labeled as being Minutes. Only the 01/14/20 Minutes display correctly, with four pages of information concerning the actions taken at the BOE meeting.

The district uses a state-provided software program to post the agendas of its public meetings and, ostensibly, the resulting minutes. However, due to an apparent software glitch, the minutes are in fact not being posted correctly.

Best practices for BOEs call for fostering good relationships between the community and the school district/BOEs. Having the results of BOE meetings readily available typically help increase communication between the district and its stakeholders.

RECOMMENDATION

Address existing software glitches in the posting of BOE meeting minutes.

As the minutes clerk is responsible for the posting of BOE agendas and minutes, she will need to contact the software provider to determine why minutes she has posted do not display. After all the past minutes appear correctly on the site, she will want to check each future month's posting, to confirm that the posting displays correctly.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-4

The district does not have a formal general fund balance policy. At present, the district's fund balance exceeds the state maximum allowed under Oklahoma regulations. This could result in the district being penalized for this overage if the district continues carrying a too-high fund balance.

Based upon general fund collections of just under $10 million for 2018-19, HPS would be able to reserve up to 16 percent as a fund balance. *Title 70, Section 18* of Oklahoma Statutes allows a school district to exceed the allowable percentage of carryover for two consecutive years before a general fund balance penalty is assessed. *Title 70, Section 18* also allows districts to exclude federal revenues received in a year from the total fund balance when calculating if a general fund balance penalty is assessed.

Exhibit 3-15 provides the HPS fund balances for the last four years. From 2015-16 to 2018-19, the fund balance has increased by 115.6 percent. In addition, the district has exceeded the maximum allowable fund balance each year. The HPS superintendent is aware of this and plans to apply for a waiver from any penalties the SDE might impose.

Exhibit 3-15
Trend in HPS General Fund Balances

	2015-16 Actual	**2016-17 Actual**	**2017-18 Actual**	**2018-19 Actual**
General Fund Collections	$6,249,122	$6,912,650	$7,928,881	$9,711,208
Fund Balance	$1,632,840	$2,128,335	$2,659,105	$3,521,207
% of General Fund Collections	26.1%	30.8%	33.5%	36.3%
Fund Balance Year-Over-Year Change $		$495,495	$530,770	$862,102
Fund Balance Year-Over-Year Change %		30.3%▲	24.9%▲	32.4%▲
Fund Balance Four-Year Change (FY16 to FY19) $				**$1,888,367▲**
Fund Balance Four-Year Change (FY16 to FY19) %				**115.6%▲**

Source: HPS Annual Audit Reports, 2015-16 through 2018-19, and Prismatic calculations

The superintendent further noted that the district has not been subjected to penalties related to excess fund balance in years past because the fund balance increases were largely due to Gross Production increases and the SDE has not historically imposed a penalty in that circumstance. As noted in a technical assistance document developed by SDE, there are exclusions in the law:

> Any school district which receives gross production revenue apportionment during the 2002-2003 school year or in any subsequent school year that is greater than the gross production revenue apportionment of the preceding school year shall be exempt from the penalty assessed in this subsection, if the penalty would occur solely as a result of the gross production revenue apportionment, as determined by the State Board of Education.[7]

---

[7] https://sde.ok.gov/sites/default/files/documents/files/FY%202019%20TAD%2012.11.18%20mp_1.pdf, p. 47.

In the *2004 Performance Review*, it was recommended that the district "develop a written fund balance goal for the general fund." Based on available data, it does not appear that the district implemented this recommendation, as there is neither a policy nor a written goal currently.

A district's general fund balance policy should outline what the BOE considers to be an adequate balance to maintain efficient cash flow, cover emergency expenditures, adjust for revenue shortfalls, and avoid excess balance penalties or paying interest on non-payable warrants. The fund balance is a measure of the financial stability of a district and is an integral part of the budgeting process. Fund balance policies are also needed to provide guidance as to how to achieve and maintain a minimum fund balance. Districts that are fortunate enough to achieve a substantial fund balance should also include policy guidance as to what priority needs should be funded.

For example, Guthrie Public Schools has a general fund balance policy that states:

> An adequate level of general fund balance is required in order to maintain efficient cash flow, cover emergency expenditures, adjust for revenue shortfalls and avoid paying interest on non-payable warrants. In order to maximize the efficient use of this fund, the BOE 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 3-16** shows a sample of the data included in that report.

Exhibit 3-16
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

Keeping all BOE members informed on the status of the general fund is extremely important in order to manage the finances of a district. Reports that not only show the financial activity that has occurred but also includes projections to the end of the year based upon actual year-to-date data prepared by an informed district official are effective in providing the BOE with an understanding of the status of the general fund balance.

The Government Finance Officers Association (GFOA) has developed standards for fund balance and recommends that:

- Governmental agencies establish a fund balance policy setting forth unreserved balances.

- The level of these recommended unreserved balances are based on unique characteristics and needs.

- Unreserved balances are no less than five percent of general operating revenues or no less than one or two months of regular general fund operating expenditures.

- Accountability measures consider long-term forecasting.

RECOMMENDATION

Develop a formal policy for the district's general fund balance that establishes a minimum and maximum balance, provides guidance on how to maintain the minimum and maximum balances, and requires periodic reports concerning fund balance status to the BOE.

Although the district appears to have not incurred any state penalties for its continued excess fund balance, the BOE should still consider current needs that could be addressed with the use of the some of the fund balance.

The BOE should provide guidance through a fund balance policy that establishes a fund balance target range, how to maintain the balance, and the use of the district's fund balance that exceeds the target amount. This should help ensure that funds are only used for critical priority items.

The consulting team suggests that HPS aim to meet a standard of maintaining two months of regular general fund operating expenditures as recommended by the GFOA and remaining below the state-allowed carryover percentage. In 2018-19, general fund expenditures totaled $8,849,267 so the district would aim to maintain a balance of approximately $1.5 million, which is two months (or one-sixth) of total expenditures. The state allowance of 16 percent results in a slightly lower figure of approximately $1.4 million.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

B.   FINANCIAL PROCESSES

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 3-5

The district does not have a mandatory direct deposit requirement for its employees. Although the number of monthly payroll warrants required is less than 20, the bank account reconciliation would be easier to do if the payroll withdrawal was one entry instead of multiple entries. In addition,

direct deposit is more convenient for the employees, and eliminates the potential problem of lost payroll warrants.

The district provides a direct deposit process for employees to receive pay warrants and employees are encouraged to participate – but not required. Direct deposit expedites the availability of funds to the employees' bank accounts, reduces the possibility of warrants being lost or stolen, and is more efficient for district staff.

Direct deposit benefits both the organization and its employees. A school district benefits because bank account reconciliation is made simpler and funds are debited from an organization's account on a precisely known date. The district also enjoys reduced processing costs because direct-deposited warrants eliminate the need to print and distribute paper payroll warrants. Direct deposit saves employees time spent in making trips to the banks; moreover, electronically transferred funds generally are available immediately.

RECOMMENDATION

Develop a BOE policy that requires direct deposit of employee pay.

The superintendent should present to the BOE a draft policy requiring direct deposit for all monthly payroll checks. Once the BOE approves the policy, the few employees not currently on direct deposit could be instructed to change their pay preferences to indicate the financial institution of their choice.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-6

The district does not belong to any purchasing co-ops. In joining available co-ops, the district might be able to save money on some of its purchases.

With co-op membership, many different types of items are formally bid. Buying off a co-op bid relieves a district of doing its own formal bidding for the items within the co-op bid – but does not restrict a district from doing its own bidding on specific projects.

As a small district, HPS does not have the purchasing power that a much larger district might have. One way for smaller districts to perhaps get better pricing on at least some of their purchases is to join a purchasing co-op. A co-op, or cooperative purchasing program, allows municipalities, state, and national government agencies to purchase products and services from suppliers and service providers without having to go out to bid with the vendors.

HPS does sometimes go in with other districts for certain bulk purchases, such as copy paper, as the larger volume of the orders often translates to lower prices. Co-ops work in the same way often with negotiated prices available for all co-op members.

RECOMMENDATION

Seek to join one or more purchasing co-ops.

District purchasing staff should explore what purchasing co-ops might be readily available to join. They should also contact some members of those co-ops to discover how their experiences have been using the co-op method of purchasing. Two examples of purchasing cooperatives HPS might explore are Buyboard - Oklahoma State School Boards Association, and JPS Purchasing Association - Jenks Public Schools.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-7

Blanket purchase orders allow for the purchase of items from particular vendors up to a certain dollar amount of use. HPS requires staff utilizing a blanket purchase order to bring back to the business office whatever type of document they received from the vendor showing what purchases were made. When the invoices come in, they are matched to these "receivers" to confirm payment is accurate, and the district is not paying for items that were not actually received.

The benefits of blanket purchase orders include:

- speedier purchasing; and

- less administrative time spent developing and processing regular orders.

COMMENDATION

The district uses blanket purchase orders with some vendors, such as the lumber yard, for routine maintenance items.

FINDING 3-8

The HPS business manager and treasurer regularly participate in training provided by the Oklahoma Association of School Business Officials, the district's financial software provider, and others, to receive updated information on various topics related to their duties and responsibilities.

School district purchasing laws, rules on state-mandated account coding and reporting, personnel laws, and changes to software used by the district all change frequently. To stay current with not just the "what" but also the "how-to" concerning school business operations requires an ongoing process of continuing education.

COMMENDATION

The HPS business manager and treasurer stay current with their respective duties by attending numerous continuing education sessions each year.

C. ASSET AND RISK MANAGEMENT

Asset management involves managing the district's cash resources and physical assets in a cost effective and efficient manner. Effective cash and investment management involves forecasting cash requirements timely and accurately so that funds are made available when needed. Effective 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 3-9

Although each employee does an annual inventory of items assigned to them and sends that information to the business manager, there is no central listing of district assets. Oklahoma requires that assets costing $5,000 or more be listed as fixed assets.[8] While HPS may have such assets listed on their insurance policy, there is not another listing readily available for review.

The district tasks each employee with doing an inventory of whatever has been assigned to their area, and those listings are compared with previous reports to identify changed items. Most of the items being inventoried are under the $5,000 state threshold.

Districts may choose to have a lower dollar requirement if they wish. An individual computing device is far less than $5,000, for example, but HPS tracks each device, as its total investment in technology is large. In some cases, the annual counting of items may be verified. For example, while the transportation director does a report on the number of vehicles, the business manager confirms those numbers by doing a physical count of the vehicles.

Fixed asset transactions are not identified and tracked during the year. HPS does not have a complete listing of its fixed assets where additions and deletions are made as they occur, or a policy on assets to be capitalized. 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 if a theft occurs.

In the *2004 Performance Review*, it was recommended that the district "develop a policy that sets the fixed asset threshold at $5,000" and "develop a policy with regard to the useful life of fixed assets by category type." Since that recommendation was made, all of the BOE members have changed, as has the superintendency. Existing staff could not be sure if these 2004 recommendations were implemented at first, but there are no such policies currently.

Policies normally address many issues pertaining to an entity's investment in fixed assets.

---

[8] Oklahoma Cost Accounting System Revised July 2019, p. G-17, available at:
https://sde.ok.gov/sites/default/files/0%20FY%2020%20Combined%20OCAS%20Manual%202.pdf

Policies cover 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 for 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 inventory;

- receiving donated property; and

- transferring assets between department.

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. 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.

The district should use electronic spreadsheets for inventory listing and create a fixed asset inventory policy of only inventorying items worth $5,000 or more. The OCAS procedures manual establishes a capitalization threshold at $5,000. Therefore, the district should consider adopting a threshold of $5,000 to remain in compliance with the OCAS requirements. The district might also consider tracking locally items that fall below the $5,000 threshold, perhaps those items valued at $1,000 or more. Once the school board approves the policy, the superintendent should communicate the new policy to staff and begin implementation. This will reduce the total inventory listing and may allow for one staff member to complete the inventory count on a yearly basis.

Fixed assets policies and procedures along with a system to track fixed assets should help ensure that the district's investments are being managed as desired by the school board. The system should protect investments by documenting asset possession and hold staff accountable for the

proper care and protection of district assets.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-10

The district practices sound money management with its deposits and idle cash.

The district has a "sweep" account with its depository bank, whereby its idle cash is distributed among a series of banks, each providing FDIC protection for the deposits. On its 12/31/19 bank statement, the approximately $4.2 million cash balance was spread across 32 banks by the district's agent and custodian InterBank, all of which accounts had less than the Federal Deposit Insurance Corp (FDIC) coverage amount of $250,000 per depositor.

Rather than sitting in non-interest-bearing accounts, all cash not immediately used for the payment of warrants is invested in interest-bearing accounts, providing some additional monies for the district's use. Furthermore, all the district's cash is protected by FDIC insurance.

In the state of Texas, the Texas Comptroller of Public Accounts administers a local government investment pool known as TexPool. With over 2,500 participants and over $20 billion invested in the pool, the monthly interest rates paid to its participants was comparable to what the district earned with its InterBank agreement as stated in **Exhibit 3-17**.

Exhibit 3-17
Comparison of HPS Interest Rates Earned

Date	TexPool	HPS Rates (Interbank)
October 2019	1.9115%	1.75%
November 2019	1.6774%	1.75%
December 2019	1.6226%	1.75%

Source: www.texpool.com and HPS, February 2020

COMMENDATION

The district invests its idle cash in FDIC-insured interest-bearing accounts.

D.   ACTIVITY FUNDS

Activity funds are defined as funds that consist of resources received and held by the school as trustee to be expended or invested in accordance with conditions of the trust. Specifically, they are funds accumulated by district-affiliated organizations from various fundraising activities, membership fees, commissions, interest income, and donations. These funds are to be used to promote the general welfare of the school and the educational development and morale of students.

Oklahoma Statute *Title 70 O.S. § 5-129* outlines the procedures to be used to account for activity funds. Specifically, the statute requires that the board of education of each school district exercise control over all funds and revenues on hand, received or collected from revenue-generating sources such as student organizations or extracurricular activities that are conducted on school campuses. The statute further defines that deposits are to be made daily or when the cash on hand exceeds $100. Under the law, the school board is required to approve all school activity sub-accounts, all fundraising activities, and all purposes for which monies collected in each subaccount may be expended.

FINDING 3-11

The district has a number of good procedures regarding activity funds:

- Two people are always required to count money received.

- If the money received exceeds $100, the activity fund sponsors must bring the money to the business office, where it is counted again. The business office then issues a receipt to the activity fund sponsors.

- Activity fund information is provided monthly to the BOE.

- Monies from district events are given to the athletic director in a locked bag for transport to the business office – the athletic director does not have the bag key.

In addition, the secondary principal has set a limit of $50 for cash-on-hand for the secondary campuses and requires money to be stored in the school safe until it is taken to the business office. Overall, HPS staff appears to be well versed in activity fund procedures intended to safeguard funds and to take these procedures seriously.

COMMENDATION

The district is commended for the level of attention it pays to following procedures that are in place to reduce or eliminate fraud or theft involving activity funds.

FINDING 3-12

Activity Fund checks are manually signed by two persons in the business office. If needed, a school principal can be the second signer. A good practice concerning activity fund checks is to require multiple original signatures, and to disallow the use of signature stamps. HPS adheres to this practice.

COMMENDATION

The district is commended for the way it handles Activity Fund disbursements.

E.   *AUDITING AND INTERNAL CONTROLS*

Internal and external audits provide a review of the district's compliance with established standards and practices. External audits are required of all Oklahoma school districts and are performed by state-approved public accounting firms. The external audit provides:

- an annual financial and compliance report;

- an examination of the expenditure of federal funds (as applicable); and

- a report to management on internal accounting controls (as applicable).

The internal audit function supplements the work of the external auditor. The internal audit function examines specific areas to determine:

- the adequacy of internal controls;

- compliance with adopted policies and procedures and adherence to applicable law and regulation; and

- efficiency and effectiveness of operations.

FINDING 3-13

The district has a robust safeguard in place for purchasing.

District policy calls for all purchases to be on approved purchase orders. The business office will not pay for items until the BOE has approved the purchases at one of its monthly meetings.

Occasionally (not more than six times per year according to staff), someone orders something before a purchase order has been approved. If this occurs, as evidenced by the order/invoice date preceding the purchase order date, the individual and his/her principal or director must sign a form entitled "Illegal Expenditure Acknowledgement" and provide an explanation for this expenditure.

Business office staff encumbers all purchase requisitions completed by the superintendent or the principals and compiles a listing of all requested purchase orders for the BOE's approval. To complete the purchase request, the BOE votes to approve the listing of purchase orders at its regular meeting. In cases where an order was needed between BOE meetings, the purchase order may be sent, but payment is not made until the BOE approves the purchase order list.

A check listing is completed after an invoice is received and matched against a BOE-approved purchase order. The check listing is provided to the BOE for information purposes but does not require approval.

Having the BOE approve all purchase orders adds another layer of security for district assets, since the district accounting staff is small. The listing of checks helps the BOE to look for

unusual payments or unrecognized vendors who are being paid, thus reducing the chances for fraud.

COMMENDATION

The superintendent provides the BOE listings of purchase orders and checks for review monthly.

FINDING 3-14

The district has used the same external audit firm for many years. HPS does not have a formal policy for rotating or competitively soliciting for external auditor services.

Routinely soliciting proposals and qualifications from external auditing firms through a competitive process enables districts to obtain and review the qualifications from interested firms, and to select the one that offers the best qualifications at the lowest reasonable price. Rotation of audit services helps ensure that district financial practices and internal controls are periodically reviewed from a fresh perspective.

According to the GFOA recommended audit procurement practices, "Governmental entities should enter into multiyear agreements of at least five years in duration when obtaining the services of independent auditors." While Oklahoma school districts may not enter into multiyear contracts, many do enter into engagement agreements with the mutual understanding that the district must reapprove it every fiscal year, for a total service time of five years. At the conclusion of the fifth year, GFOA recommends that "Governmental entities should undertake a full-scale competitive process for the selection of independent auditors." GFOA also recommends that governments choosing an external auditor actively seek the participation of all qualified audit firms including the current one, assuming its past performance was satisfactory.

Although Oklahoma law requires that an auditor must be selected from an approved list compiled by the State Department of Education, it does not require competitive selection for auditing services. The cost is not the sole determining factor when contracting for professional services; however, sound business practices and standards of independence indicate that periodic evaluation is prudent. Many school districts have established policies requiring periodic use of a competitive process for the procurement of external audit services.

RECOMMENDATION

Develop a process to solicit proposals for performing the district's annual audit.

The superintendent should draft a policy requiring a competitive solicitation for audit services at least every five years. He should then submit it to the BOE for review and approval.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 4:

Facilities Use and Management

Facilities Use and Management

This chapter addresses the facilities use and management of Hennessey Public Schools (HPS) 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, design, construction, and maintenance of buildings, the safety of students and staff using those buildings, and the security of facilities before, during, and after school hours. More specifically, this area includes the following:

- planning and designing facilities to meet educational standards and provide a physical framework that enhances teaching and learning;

- properly maintaining and cleaning facilities so that teaching and learning can take place in a healthy and clean environment;

- ensuring that the facilities are safe when students and teachers are present;

- creating proper safeguards to ensure the security of the facilities during and after school hours; and

- having safety plans in the event of a crisis or natural disaster so that students and staff members are protected.

Background

Hennessey is located in Kingfisher County at the convergence of U.S. Highway 81 and State Highway 51 (**Exhibit 4-1**). Population estimates are expected to be in the range of 2,200 once the 2020 census is completed. In the 1900s, an oil boom and wheat as an agricultural primary crop dominated the economy and boosted the population in the region.
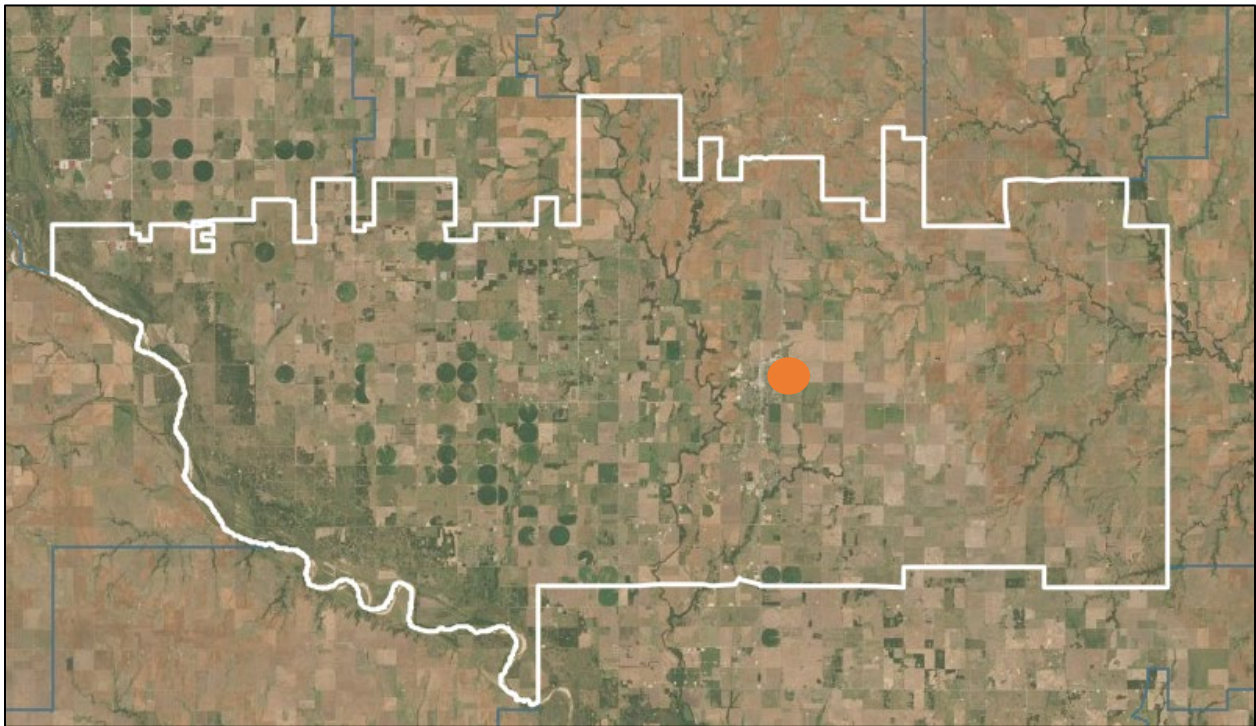
Exhibit 4-1
Hennessey's Location in Kingfisher County
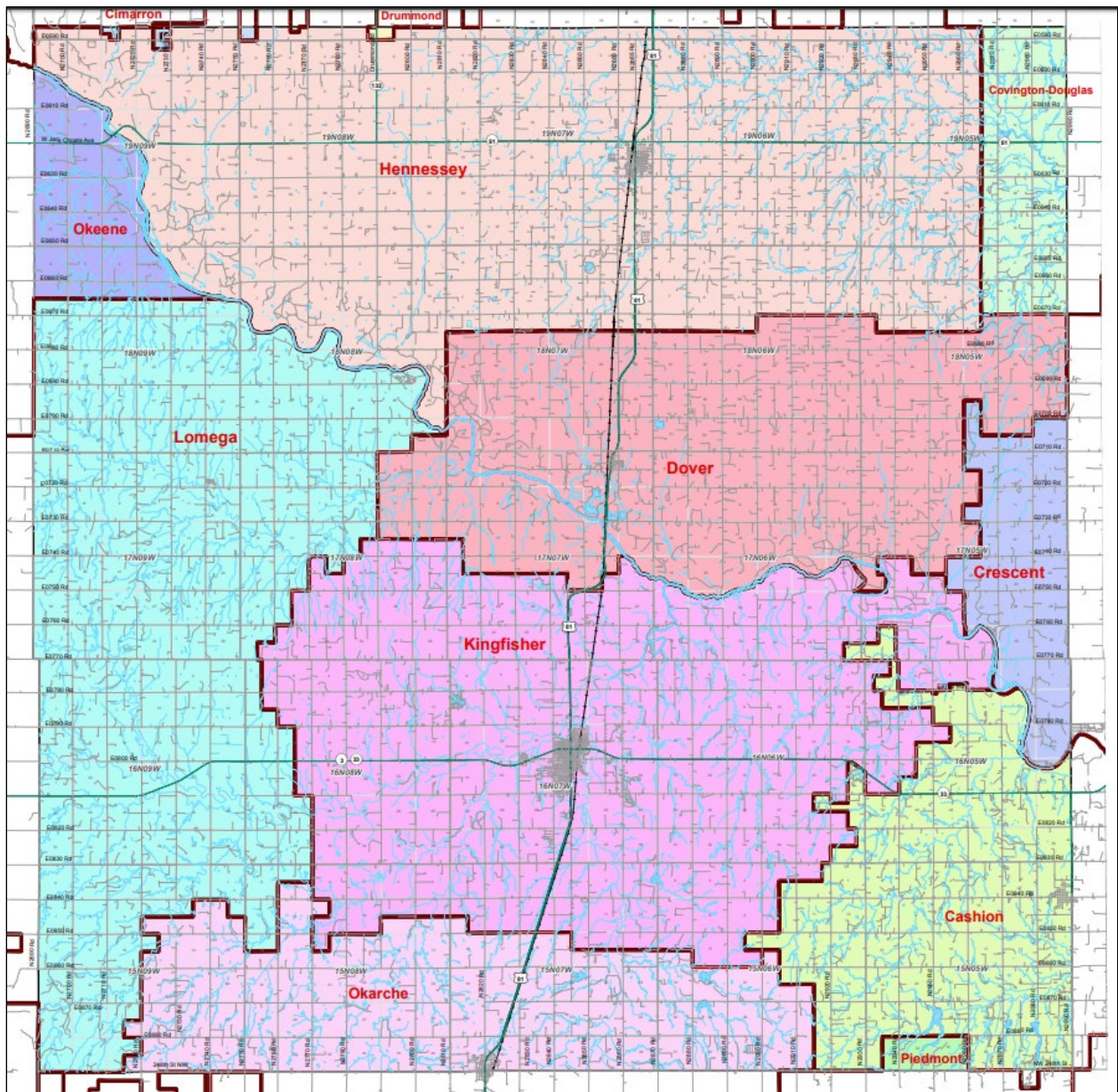
As shown in **Exhibit 4-2**, HPS has largely retained its agricultural character. All of the HPS facilities are centrally located in the school district catchment area, as noted by the orange dot.

Exhibit 4-2
Typography of HPS

Source: https://nces.ed.gov/programs/maped/acsmaps/, March 2020

Exhibit 4-3 provides an aerial view of the HPS campus. It shows six major buildings: the high school, science building, high school auditorium, middle school, elementary school, and Early Childhood Center. A seventh structure is not yet displayed, but it will be after the next Google Maps fly-over has been documented. This building is the "Eagle Events Center," also known as "The Dome" (**Exhibit 4-4**). At the time of the site visit in February 2020, the Dome was approximately 85-90 percent complete, and occupancy was expected in a few months.

Exhibit 4-3
Location of Hennessey Public Schools Campus and Facilities

Source: Created by Prismatic with Google Maps, March 2020

Exhibit 4-4
HPS Eagle Event Center "Dome"

Source: Prismatic, February 2020

On the community survey, to which parents of current students, former students, community members without children in the district, and some HPS employees responded, a majority (73 percent) indicated they were pleased with the construction of the Dome thus far. A majority of the community respondents (59 percent) also *agreed* or *strongly agreed* that HPS has kept them well-informed about the construction of the Dome. Only 20 percent still had lingering questions about the funding or construction of the Dome (**Exhibit 4-5**).

Exhibit 4-5
Community Survey Results Regarding the Dome

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I am pleased with the construction of the Dome thus far.	17%	56%	17%	7%	2%
The school district has kept me well-informed about the construction of the Dome.	15%	44%	22%	17%	2%
I have unanswered questions about the funding or construction of the Dome.	5%	15%	39%	32%	10%

Source: Prismatic Survey Results, February 2020

The HPS campus embodies several substantial features:

- It is one single campus – one location for all district facilities. Buildings are not scattered across town, but in one single, relatively compact place. This creates a strong physical

identity and encourages efficiency of operations by making the school district ergonomically dense.

- The campus is surrounded by a residential community on three sides. Unlike many modern school district campus sites, it is not placed several miles outside of town. Instead, HPS is embraced by a major residential area of Hennessey. This neighborhood contains two recently constructed luxury homes on lots directly across from the HPS campus. One of these homes is directly across the street from the new dome. The owners of these high-end homes could have selected any sites they wished but chose instead to make the obvious gesture of identifying with, and supporting, the school district.

- Most structures on the campus display colors, patterns, and building materials that create an unmistakable kinship. This "family resemblance" or "design vocabulary" unifies the campus visually as well as attitudinally. The only facility not showing its red brick façade with white horizontal stripes is the HPS elementary school. Instead, it has a totally white exterior. Yet, this departure from the norm does not appear to be disturbing. One district official labeled the Elementary School as "the white sheep of the family."

The eastern edge of the HPS campus is the only one not adjacent to residences. This area is instead suitable for expansion and facilities requiring more ample sites. All outdoor athletic facilities for football, baseball, softball, and track and field are on this eastern side of the campus. VoAg facilities are likewise in this area, including the animal barn. This placement reinforces the gesture of keeping everything in one place, but in this case not in direct juxtaposition to the surrounding neighborhood.

Exhibit 4-6 provides an inventory of the seven major HPS facilities and other smaller district buildings. In total, the district has approximately 254,000 square feet of facilities in its inventory. The major facilities amount to about 231,000 square feet. The Current Replacement Value (CRV) for all existing facilities is $34 million. Once the Eagle Event Center receives its Certificate of Occupancy, the CRV will rise to $44 million.

Exhibit 4-6
HPS Facilities Inventory

Facility	Address	Square Feet
Major Facilities		
Dome (Eagle Events)	605 E Oklahoma	36,000
HS Building	707 E Oklahoma	34,841
ES Classroom	130 N Mitchell	31,415
MS Building	120 N Mitchell	28,488
HS Auditorium	213 N Walnut	21,289
HS Gym	707 E Oklahoma	11,400
VoAg Project Building	1201 E Oklahoma	11,200
Early Childhood Center	320 N Mitchell	10,000
HS Science CR Annex	707 E Oklahoma	8,775
ES Gym and Cafeteria	130 N Mitchell	8,119
MS Gym	120 N Mitchell	6,000
Weight Room	115 N Mitchell	6,000
HS Cafeteria/Kitchen	707 E Oklahoma	5,249
Administration Building	604 E Oklahoma	2,511
HS Cafeteria Expansion	707 E Oklahoma	1,580
MS A/V Classroom	120 N Mitchell	1,378
Other Facilities		
Bus Maintenance	808 E Jack Choate	10,000
VoAg Building	724 E Oklahoma	6,820
Bus Maintenance	203 N Mitchell	6,000
2 Storage Buildings	700 E Oklahoma	2,980
Trailer	620 E Oklahoma	1,436
Vending Plaza	435 N Mitchell	928
Football Storage Building	120 N Mitchell	900
Pressbox/Concession FB Field	707 E Oklahoma	342
Metal Storage @ FB Field	707 E Oklahoma	240
Concessions HS FB Field	130 N Mitchell	79
Total		**253,970**

Source: HPS insurance carrier's data provided by HPS superintendent, February 2020

Exhibit 4-7 provides a photo review of the current district facilities.

Exhibit 4-7
HPS High School and Middle School

Dome in the background, secure entry vestibule ahead, geothermal system wells at exterior wall

Science Annex

Auditorium

The High School's Secure Entrance

Exhibit 4-7 (continued)
HPS Elementary School and Early Childhood Center

| Elementary School | Early Childhood Center |

Source: Prismatic, February 2020

A.   *FACILITIES PLANNING AND CONSTRUCTION*

Well-planned facilities are based upon the educational program and accurate student enrollment projections. The design process should have input from stakeholders including administrators, principals, teachers, security specialists, parents, students, and the maintenance and operations staff. The selection of building materials, interior finishes, hardware, mechanical, electrical, and plumbing systems, and other major building components should be made by applying life cycle cost analyses for an optimum total cost of construction, operations, and maintenance.

This, coupled with the functional need of providing the best physical learning space possible for students, should lead a district to recognize the absolute necessity of developing, presenting, and implementing a long-range facilities master plan. Failure to implement a long-range facilities master plan will eventually lead to dissatisfaction and facility concerns.

Having a long-range facilities master plan will ensure that building projects are prioritized, begun, and completed following a studied, developed, and logical process. As administrators, faculty, staff, and school board members 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), formerly CEFPI.[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 amount of square feet required per student in a classroom. These standards deal with the minimum size of core facilities, such as classrooms, gyms, cafeterias, and libraries, so that schools do not overload these facilities or overuse portable classrooms.

In 2008, the Oklahoma State Department of Education (SDE) published the second edition of *Planning for Education: Space Guidelines for Planning Educational Facilities.*[2] The guidelines were developed to assist local school boards, school administrators, architects, engineers, and planners in planning and designing educational facilities. The guidelines arrange space information by the major activities of instructional spaces, auxiliary spaces, and service and structure spaces for the various grade ranges. They also provide suggested methods of calculating preliminary net and gross square footage for school buildings by grade and major activity. Another excellent resource for facility construction is *An Administrator's Guide to School Construction Projects*, also published by SDE. [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. Additions, renovations, and other improvements to schools over the years are noted in the inventory so it can be kept up to date.[4]

- **Enrollment Projections**: Effective planning requires accurate enrollment projections at least five years into the future.[5] 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 improvement 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 upon those goals and objectives.[6]

- **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

---

[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
[4] Only floor area information is available for HPS buildings. Building histories showing years of renovations, additions, and other major capital improvements are not available from HPS.
[5] No official enrollment projections are available from any sources for HPS.
[6] The current serial bond issue represents elements of a still needed capital improvements plan for HPS.

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.[7]

FINDING 4-1

HPS does not maintain or use a written facilities master plan document. Without a master plan, the district runs the risk of overbuilding, underbuilding, or otherwise spending on facilities that do not meet district needs.

HPS lacks processes and data for developing and maintaining a long-range, continuous facility plan that addresses building maintenance and students' educational needs. Neither the BOE nor the leadership team of HPS are engaged in active facilities master planning. The superintendent has a facilities plan in mind, but it is unclear how much of this information is shared with BOE members or others on the leadership team. This leaves unclear if BOE members are encouraged or expected to bring forward their own facilities planning proposals, or if their role is viewed more passively as one of approving or disapproving the proposals of others.

Facilities planning is not just about new construction or big projects. Rather it includes a broad spectrum of actions, including, but not limited to, the following:

- properly and realistically funded facility maintenance and operations activities, including preventive and reactive maintenance tasks, operational energy efficiency improvements, custodial services, and many other tasks aimed at keeping buildings safe, clean, healthy and conducive to teaching and learning;

- major and minor capital improvement projects, such as additions, renovations, replacements, facility adaptive reuse projects, or upgrading of building systems or elements;

- outsourcing of maintenance and custodial functioning;

- land and facilities sales or acquisitions; and

- new construction.

Districts that engage in facilities master planning systematically identify and collect the data needed to inform decision-making in the facilities master planning process. Major data collection activities include:

- periodic building condition assessments;

- demographic, economic and geographic development trends;

- building capacity and space use; and

---

[7] No official facilities maintenance plan is available from HPS.

- any other research or data collection efforts needed for decision-making.

But there are additional best practices to consider as the plan's components. A school district's long-range facilities master plan is a compilation of district policies and statistical data that provide a basis for educational facilities to meet the changing needs of a community. As noted in resources developed by the Association for Learning Environments (A4LE), formerly CEFPI,[8] effective long-range school facilities master planning incorporates the elements previously described as lacking at HPS.

RECOMMENDATION

Adopt, implement, and use a continuous facility master planning protocol.

HPS should take the initiative to design and implement a protocol for a continuous, ongoing facilities master planning activity. As noted in one best practice resource for facilities master planning:

> [Facility Master Plans] should be developed with a wide range of community stakeholders to ensure that multiple perspectives are included. Many districts find community workshops to be beneficial in both understanding the facility needs of each school and in building support for the plan and any future financing efforts. Finally, approval by the BOE demonstrates the significance of the FMP and that the plan has a high level of support.[9]

In this process, the district may find it necessary to keep specific details of the plan confidential until such time that they can be openly shared with the public, but it should use public workshops to discuss alternatives before deciding on the best course of action.

Additional implementation steps should include:

1. HPS should consider hiring a facilities master plan consulting team on a retainer basis. This will have a fiscal impact but may be desirable for the first few years of activity on continuous facility master planning. The hired facilities master plan consulting team would serve as designated committee staff, and would be tasked with preparing all minutes, reports, or other committee records and correspondence.

2. The district should form a permanent HPS Master Plan Committee, with committee membership determined by the BOE and district administrators. Broad community-wide stakeholder representation is desirable. The major purpose of this group would be to recommend the addition of new plan action items for approval by the BOE. The committee should meet quarterly on a standing basis, or more frequently should the need arise. Care should be taken not to overlook stakeholders from all walks of life.

---

[8] Council of Educational Facility Planners International. (2004). *Creating connections: The CEFPI Guide for Educational Facility Planning*. Can be purchased at http://creatingconnections.a4le.org/
[9] Ibid.

3. A Facility Master Plan update should be scheduled at the same time each year. This activity would require one full day, consisting of the following:

    a. Full detailing of the Master Plan's current year, Year Zero, for full funding of all included projects and other activities, and recommendation by the HPS Master Plan Committee for approval of this year by the BOE.

    b. Refinement of Years 1 to 9 and addition of Year 10 to complete the Master Plan's time horizon. Each year should be discussed individually, and the overall 10-year timespan also viewed as a continuum of increasingly likely plan actions. The completed time horizon should be recommended to the BOE for approval.
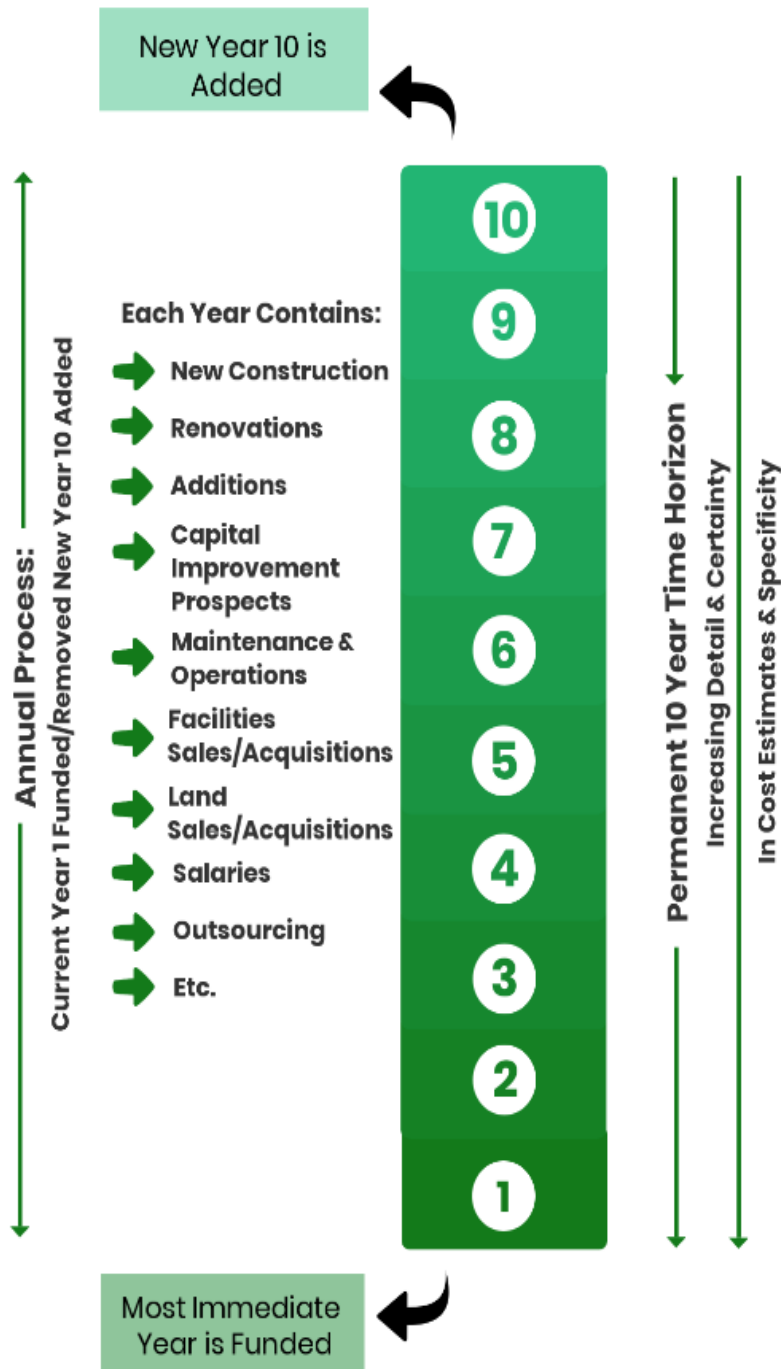
Exhibits 4-8 and **4-9** show in diagrammatic form how a continuous facility master planning process can function.

Exhibit 4-8
Facility Master Planning Structure and Process
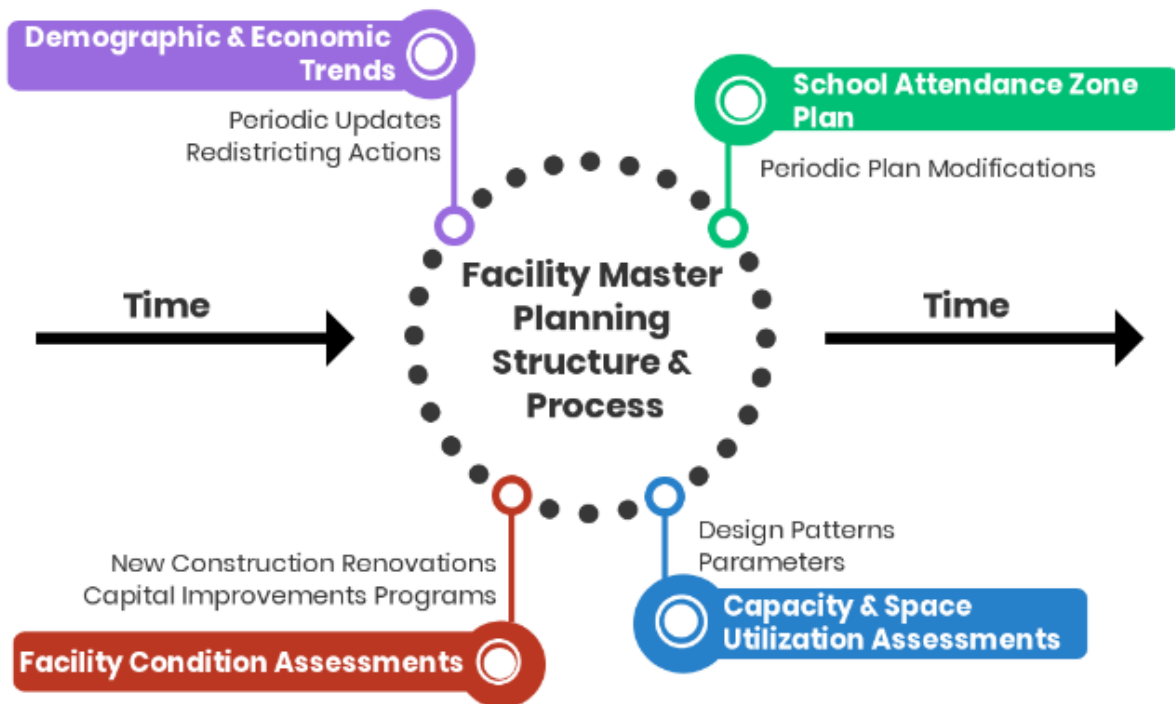
Source: Created by Prismatic, March 2020

Exhibit 4-9
Procedure for Maintaining a Continuous 10 Year Time Horizon

Source: Created by Prismatic, March 2020

FISCAL IMPACT

If the district elects to not hire an outside firm to facilitate and support facilities master planning, this recommendation can be implemented with existing resources. The consulting team estimates

that hiring an outside firm on retainer would require an annual cost of approximately $30,000.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Engage a consulting firm to assist with facilities master planning, if needed.	($30,000)	($30,000)	($30,000)	$0	$0

FINDING 4-2

HPS used construction management contracting (sometimes called construction manager at risk, CM at-risk, or CMAR) to procure the design and construction services for the $10 million Dome project. This is a departure from what is typically done in smaller school districts when tackling larger construction projects.

The CMAR process is a delivery method that entails a commitment by the construction manager (CM) to deliver the project for a guaranteed maximum price (GMP). The GMP is based upon the construction documents and specifications at the time of contract signing with the CMAR, plus any reasonably inferred items. The CMAR then acts as a consulting team to the school district (project owner) in the design development and construction phases. Oftentimes, the CMAR also provides some of the actual construction of the project. In addition to acting in the owner's interest, the CMAR must manage and control construction costs to not exceed the GMP, as the CMAR must bear any costs exceeding the GMP that are not change orders.

Generally, the CMAR will give the project owner a GMP prior to the school district requesting bids for the actual design and construction services. By giving the owner the GMP prior to bids, the CMAR assumes the risk of bids coming in higher, as he is contractually bound to deliver the project per the plans and specifications and any additional allowances as defined in his GMP.[10]

The benefits to the school district from using the CMAR process include:

- a higher level of cost control and lower risk of cost overruns;

- a building expert who is contractually obligated to act in the best interest of the district; and

- construction management expertise on the side of the district.

COMMENDATION

HPS successfully used the CMAR process in building its new events center, keeping costs under control with a guaranteed maximum price (GMP) provision.

---

[10] https://www.ccgov.net/DocumentCenter/View/3238/CMAR-Information?bidId=

FINDING 4-3

The district's use of the CMAR approach has resulted in what will likely be an outstanding facility, the Eagle Event Center, or Dome (**Exhibit 4-10**). Sharing the Hennessey experience with other Oklahoma districts would likely be beneficial to the educational community.

Exhibit 4-10
The HPS Dome

Source: Prismatic, February 2020

Other than CMAR, the district could have selected from a variety of approaches in constructing the dome. These approaches include:

- Design-Bid-Build – This is typically considered to be the traditional method. The school district first contracts with a team of designers/architects and engineers to design the building and provide drawings and specifications. The district then requests bids from construction companies to build according to the drawings/specifications. Because the designers and builders are not contracted together and have no obligations to each other, the school district bears all the risks for design changes and cost overruns if the design documents for the new facility are incomplete.[11]

- Design/Build – In this method the school district selects one firm to both design and build the new facility for a fixed price. Typically, the design/build firm is primarily a construction contractor with some in-house design expertise. The design function is often then subservient to the build function – the reverse of the traditional method. Often, this results in the design process being less intensive than is ideal and school district wants and needs for the new

---

[11] https://www.levelset.com/blog/design-bid-build/

facility not being given the attention they deserve. This can be managed if the school district begins the process with a well-defined and explicit scope of work. [12]

Currently, small Oklahoma school districts often lack reliable and detailed information when deciding upon the best procurement method to design and construct new facilities. Not all district leaders have sufficient background in facility design and appropriate construction costs to be able to avoid being easily swayed by persuasive proponents of different procurement methods. Instead, many Oklahoma districts work with sparse knowledge, expertise, and information about the choices they have in procuring design and construction services. They know even less about the advantages and disadvantages of the various methods available to them. Consequently, school district administrators can find themselves unsure about whether they are making the best decisions for their circumstances. As HPS has largely completed a major building on their campus using the CMAR method, its district leaders can provide others in the state with the benefits of their experiences. Knowledge and information sharing in this way are increasingly recognized as best practices.

RECOMMENDATION

Seek to convene a "lessons learned" assessment/conference once the Dome construction has been completed.

The district leadership could seek to present a lessons learned talk at a regularly scheduled meeting of Oklahoma leaders, such as those hosted by the Cooperative Council for Oklahoma School Administration (CCOSA). Alternatively, HPS could take a leadership role in sharing its lessons learned and provide other districts an opportunity to see the positive results of the CMAR method in person through an onsite conference that includes a tour of the Dome. This second process would involve the following:

- Invite school district administrators from across Oklahoma to a conference on procurement methods for design and construction services. Conference invitees could consist of Oklahoma school administrators in three categories: those seeking to become better informed, those wanting to share experiences, and those wanting to do both.

- Provide an in-depth tour of the completed Dome so that participants can see the excellent results achieved.

- Lead a discussion session covering these topics:

  - What went well?

  - Could the experience of procuring a major building for the district have been conducted more advantageously on the district's and taxpayers' behalf?

---

[12] https://www.ecmweb.com/content/article/20892960/how-to-develop-a-successful-approach-to-designbuild-construction

- What alternative methods of procurement might have been considered, or should be considered in the future?

- What are the advantages or disadvantages of the alternatives?

- Invite leaders of other districts to share their results in building new facilities, both good and bad.

The results of this conference could be shared beneficially with all other Oklahoma districts through OEQA.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

B.   *MAINTENANCE AND CUSTODIAL OPERATIONS*

The objective in maintaining and cleaning school facilities is to provide safe and cost-effective buildings, a sound educational environment, increased longevity of buildings and equipment, and the protection of school property. The maintenance and cleaning of the facilities must be accomplished in an efficient and effective manner in order to provide a safe and secure environment that supports the educational program and reflects proper stewardship for district resources.

Efficiencies and economies of maintenance and cleaning are critical to ensure that resources for direct instruction are maximized. However, extreme actions to reduce the cost of maintenance and cleaning can result in higher than acceptable costs of repair and replacement in the years to come. Consequently, a balance must be achieved between reasonable economies and unreasonable cost-cutting.

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.

Exhibit 4-11 provides survey results regarding student, staff, and parents perceptions of HPS' facilities. As shown, a majority of each group feel the facilities are attractive and well-maintained.

Exhibit 4-11
Student, Parent, and Staff Survey Results Regarding Maintenance

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Student	My school is attractive and welcoming.	28%	43%	19%	9%	2%
Parent	My child's school is attractive and welcoming.	16%	61%	5%	16%	1%
Student	My school building is well-maintained.	32%	57%	4%	2%	4%
Staff	The district's facilities are well-maintained.	15%	59%	7%	18%	1%
Parent	My child's school is well-maintained.	15%	62%	11%	9%	3%

Source: Prismatic Survey Results, February 2020

The district's operations and maintenance expenditures over the past five years as compared to the peer districts are shown in **Exhibit 4-12**. The increase in HPS' expenditures from 2014-15 through 2018-19 was 36.2 percent which was the fourth highest increase among the peers. HPS' expenditures were below the peer average in four of the five years.

Exhibit 4-12
Trend in Maintenance and Operations Expenditures

Entity	2014-15	2015-16	2016-17	2017-18	2018-19	Percent Change
Hennessey	**$770,212**	**$875,685**	**$737,632**	**$775,839**	**$1,049,114**	**36.2%**▲
Atoka	$1,082,536	$1,036,762	$755,507	$977,893	$1,056,973	(2.4%)▼
Chouteau-Mazie	$986,512	$1,141,413	$1,180,637	$1,154,611	$1,746,473	77.0%▲
Pawhuska	$571,922	$507,229	$733,109	$866,848	$834,850	46.0%▲
Tishomingo	$752,520	$636,904	$658,170	$874,742	$545,083	(27.6%)▼
Watonga	$621,862	$573,716	$692,428	$1,101,733	$919,026	47.8%▲
Peer Average	**$803,070**	**$779,205**	**$803,970**	**$970,721**	**$1,020,481**	**27.1%**▲

Source: SDE, School District Expenditure Reports 2014-19, and Prismatic calculations

On a per-student basis, HPS' expenditures for maintenance and operations increased by 40.2 percent. This was the fourth highest increase among peers (**Exhibit 4-13**). HPS' per-student expenditure was below the peer average in four of the five years.

Exhibit 4-13
Trend in Maintenance and Operations Expenditures per Student

Entity	2014-15	2015-16	2016-17	2017-18	2018-19	Percent Change
Hennessey	**$847**	**$958**	**$806**	**$863**	**$1,188**	**40.2%▲**
Atoka	$1,168	$1,092	$799	$1,113	$1,188	1.6%▲
Chouteau-Mazie	$1,102	$1,297	$1,321	$1,327	$1,978	79.6%▲
Pawhuska	$692	$625	$924	$1,175	$1,215	75.7%▲
Tishomingo	$767	$672	$691	$953	$602	(21.6%)▼
Watonga	$812	$746	$933	$1,457	$1,261	55.2%▲
Peer Average	**$908**	**$886**	**$934**	**$1,168**	**$1,249**	**37.5%▲**

Source: SDE, School District Expenditure Reports 2014-19, and Prismatic calculations

HPS' maintenance and operations expenditures by category are shown in **Exhibit 4-14**. Over the five-year period, all categories of expenditures increased. In most years, expenditures on salaries/benefits and expenditures on purchased services were roughly equal. According to the superintendent, the increase in salaries and benefits over the five-year period was largely due to the district recovering incrementally from drastic prior cuts in this area.

Exhibit 4-14
Trend in HPS Maintenance and Operations Expenditures, All Funds

Expenditure by Category	2014-15	2015-16	2016-17	2017-18	2018-19	Percent Change
Salaries	$163,189	$180,799	$212,993	$236,736	$262,178	60.7%▲
Benefits	$58,461	$60,347	$68,914	$86,383	$100,083	71.2%▲
Purchased Services	$302,835	$447,516	$274,484	$257,686	$382,796	26.4%▲
Supplies	$237,448	$157,578	$179,291	$192,996	$303,255	27.7%▲
Property	$8,253	$29,421	$55,410	$220,840	$16,175	96.0%▲
Other	$25	$25	$1,950	$2,037	$801	3105.9%▲
Total	**$770,212**	**$875,685**	**$793,043**	**$996,679**	**$1,065,288**	**38.3%▲**

Source: SDE, School District Expenditure Reports 2014-19, and Prismatic calculations

Exhibit 4-15 shows HPS' maintenance and operations expenditure amounts by fund over time. As shown, funding from the general fund has fluctuated over the years.

Exhibit 4-15
HPS Trend in Maintenance and Operations Expenditures by Fund

Fund	2014-15	2015-16	2016-17	2017-18	2018-19	Percent Change
General Fund	$741,964	$821,398	$618,294	$921,224	$848,420	14.3%▲
Building Fund	$19,610	$35,269	$173,489	$72,715	$215,783	1,000.4%▲
Co-Op Fund	NA	$1,230	$0	$0	$0	0.0%●
LEA Assigned Bond Fund	$0	NA	$0	$0	$0	0.0%●
School Activity Fund	$8,638	$17,789	$1,259	$2,740	$2,740	(68.3%)▼
All Funds	$770,212	$875,685	$793,043	$996,679	$1,066,943	38.5%▲

Source: SDE, School District Expenditure Reports 2014-19, and Prismatic calculations
Note: Column sums may not match the total shown due to rounding.

As noted by the Building Research Board – National Research Council:

> An appropriate budget allocation for routine [maintenance and repair] M&R for a substantial inventory of facilities will typically be in the range of two to four 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.[13]

The aggregate replacement value of the current HPS facilities inventory is $34 million. The recommended two to four percent range would require a maintenance and repair budget between $680,000 and $1,360,000 annually. HPS has spent in that range each of the last five years.

The HPS maintenance organization is shown in **Exhibit 4-16.** Groundskeeping is one of the responsibilities of the district's transportation director, so that function is outside of this department.

---

[13] https://www.nap.edu/catalog/9807/committing-to-the-cost-of-ownership-maintenance-and-repair-of

Exhibit 4-16
Hennessey Maintenance Organizational Structure
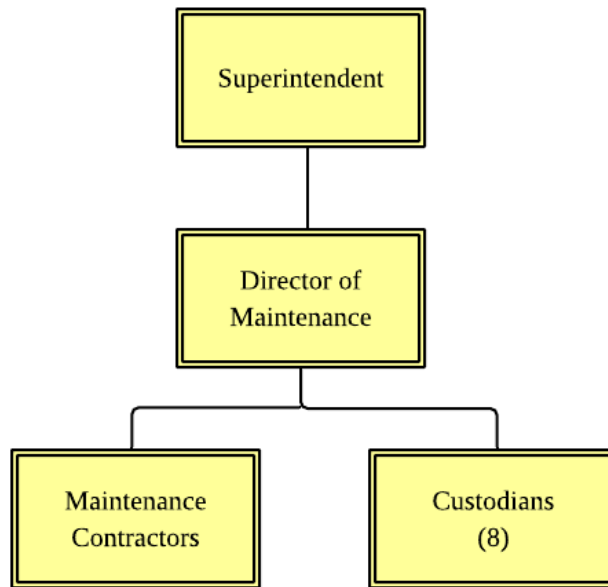
Source: Created by Prismatic, February 2020

FINDING 4-4

The HPS maintenance director is a long-tenured district employee and, to date, no succession planning has been undertaken. The district has little to no documentation regarding facilities maintenance operations, putting the district's building stock at risk if the director were to leave suddenly.

The HPS maintenance director has achieved excellent results in maintenance and cleaning of the district's buildings for decades, despite not using the most recognized best practices of maintenance and custodial services. He has been consistently admired and appreciated for his ability to keep the buildings and grounds well maintained and, with the assistance of eight custodians, well-cleaned. The maintenance director relies primarily upon verbal communications and instructions. He possesses detailed knowledge of all buildings and grounds, but none of this knowledge is recorded in paper or electronic format. The maintenance director works in the style of management by walking around (MBWA). He observes any maintenance needs on his MBWA rounds and repairs any items he can fix on the spot. He responds to phone calls that report maintenance issues/problems and addresses those personally or via outsourcing. He does not rely on email or text messaging.

Generic work order forms are available to principals **(Exhibit 4-17)**, but these are not required to be submitted. If a maintenance need is identified via a work order form, a file of these forms is not kept for later reference. Most maintenance tasks fall into the reactive category, but because of MBWA, most breakdowns are caught in the "impending" stage rather than in "ultimate failure" or "breakdown" mode. Preventive maintenance tasks are typically HVAC filter replacement. The remainder is MBWA "early detection."

Exhibit 4-17
Infrequently Used, Never Filed Generic Work Order Form

Source: Prismatic, February 2020

The *2004 Performance Review* for HPS contained a recommendation to implement a computerized maintenance management system (CMMS) that would provide a framework for documenting and tracking facilities maintenance. For various reasons, this recommendation was rejected by HPS.

The district has spent within the best practice range of two to four percent of its current building replacement value in recent years. However, because there is no documentation, it is not known how much deferred maintenance still exists in the HPS facilities inventory. In addition, once the Dome is added to the HPS facilities, the total replacement value will be $44 million, and the maintenance and repair funding level that will be required to remain within the two to four percent best practices range will jump to $880,000 to $1,760,000.

Beyond concerns regarding whether there is extensive but undocumented deferred maintenance in the HPS facilities, the lack of documentation in HPS extends to other areas of facilities management where there are clear best practices, such as:

- ***Building Condition Assessments* --** The National Research Council advocates periodic conduct of formal building condition assessments. These assessments serve as the basis for establishing appropriate levels of funding required to reduce and eventually eliminate maintenance backlog. Once backlog is eliminated and a steady-state performance is

achieved, the condition assessment becomes a management tool for monitoring the effectiveness of M&R activities. Condition assessment programs require trained technicians and managers and are standardized to ensure consistency of the results. HPS does not have current results from building condition assessments.

- ***Facilities Condition Index (FCI) --*** The FCI formula measures the cost of removing deferred maintenance from a building as a percentage of the total replacement value of that building. FCI is calculated on a scale that ranges from 0-30 percent. The FCI can be "Good" (0-5 %), "Fair" (5-10 %), "Poor" (10-30%), or "Critical" (30% or greater). As HPS lacks the underlying data on building conditions, FCIs cannot currently be calculated. In turn, this leaves HPS without assurances that its maintenance and repair spending levels are appropriate.

- ***Preventive Maintenance (PM) --*** As noted in *The Real Cost of Deferred Maintenance:*

  > Facility problems in rural schools that are not addressed may seem to disappear, but they do not go away – like molds and mildew; they just multiply out of sight. Poor conditions can affect the health and safety of everyone who uses the facility, damage the morale of students and teachers, and impair their ability to teach and learn, and threaten the facility itself.

  > Proper maintenance of rural schools is vital not only because facilities are often old and have suffered deferred maintenance for years or even decades, but because the consequences of improper and inadequate maintenance are so serious. If a leak in the roof isn't repaired, it can – like the leak in the fabled dike in Holland – wash away the entire structure. If the district doesn't allocate funds to fix such leaks, or do other necessary preventive work and if state policies are predisposed to new construction, deferring maintenance may force the closure of a good rural school. Therefore, a thorough program of preventive maintenance with regularly scheduled inspections is critical.[14]

  As noted in another resource:

  > Preventive maintenance takes a different approach which, in contrast to reactive interventions that aim to resolve issues after they occur, is based on systematic inspections and processes to identify and correct potential problems before they happen. If properly established, an efficient PM program extends the lifetime of equipment, enhances the safety of employees, improves machines reliability and helps the company avoid large and costly repairs. Equipment breakdowns lead to production slowdowns and stops, and cost manufacturers time and money. Implementing a successful preventative maintenance program decreases equipment downtime by

---

[14] Lawrence, B. K. (2003). *Save a penny, lose a school: The real cost of deferred maintenance.* The Rural School and Community Trust. Downloaded November 2016 from http://www.ruraledu.org/user_uploads/file/Save_a_Penny_Lose_a.pdf

maintaining all machines and ensuring that all potential issues are addressed before they progress too far.[15]

Avoidable costly repairs, extended service life of equipment, and improved reliability are as welcome to the bottom line of a school district's balance sheet as they are to the profitability of a business enterprise.

RECOMMENDATION

Hire a "successor-in-waiting" 12 to 18 months before the retirement of the current maintenance director.

This recommendation is aimed at achieving a smooth transition with key values and attitudes kept in place, while yet allowing for the introduction of best practices and other improvements of current policies and strategies moving forward. A successor candidate is needed to work with the current director for a substantial length of time to obtain the essence of the maintenance director's "brain knowledge repository" and to strategize how to introduce CMMS to maintenance operations.

To implement this recommendation, the district should:

1. Request that the maintenance director inform HPS of his retirement plans once he has made the decision.

2. Advertise timely for an assistant maintenance director position, in order to provide for a hire 12 to 18 months before the maintenance director's retirement. The maintenance director should be offered the opportunity to participate in the interviews of job candidates. He is universally regarded as a good judge of character.

3. Inform the selected assistant director that they will be hired as the designated successor of the maintenance director. Until his retirement, their assignment is to shadow the maintenance director for ~50 percent of their time to observe his MBWA style of supervision and management. The other 50 percent of the time they should work on a plan to implement current maintenance best practices, such as preventive maintenance, CMMS, building condition assessments, custodial and maintenance handbooks, and other measures as may be appropriate.

FISCAL IMPACT

The timeline below assumes the maintenance director's retirement in the 2022-23 timeframe: thus, the hiring of the assistant director in 2020-21. The cost of this hire is approximately 18 months at a salary ten percent below that of the maintenance director. According to the support staff salary schedule, the maintenance director's salary plus fringe benefits amounts to approximately $53,500.

---

[15] https://www.mobility-work.com/blog/5-best-practices-preventive-maintenance

Recommendation	2020-21	2021-22	2022-23	2023-24	2023-24
Hire a "successor in waiting" to maintenance director.	($24,075)	($48,150)	$0	$0	$0

FINDING 4-5

The maintenance director does not perform any specific preventive maintenance (PM) tasks, nor does he keep any maintenance files in either paper of electronic format. Thus, the district has no documentation of maintenance completed on the buildings over time or documentation of the kind needed for any warranty claims on systems.

In its *2004 Performance Review*, OEQA recommended that the district purchase and implement a computerized maintenance management system or CMMS. HPS declined to implement this recommendation in part because of the maintenance director's comfort level with technology. Furthermore, there are simply no maintenance records available in the district, nor does the district have a written maintenance plan.

A CMMS is frequently mentioned as an example of a prominent best practice in facilities management. While all aspects of maintenance can be tracked and adjusted with CMMS software, it is especially conducive to the establishment and management of preventive maintenance protocols, which are also a best practice. It states in the mobility work blog that:

> Designing and later implementing a good PM program is one of the most challenging areas of maintenance management. Defining the right practices to generate the best ROI isn't easy. Often, a significant part of the maintenance resources is wasted on inefficient tasks. One of the main reasons is because business owners are not using all the data coming from the equipment and providing valuable insight into assets' health. Some of them don't know how to use it or are simply overwhelmed. A CMMS (Computerized Maintenance Management System) can store and analyze all this information and turn it into powerful improvement tool by measuring performance and evaluating both the strengths and the weaknesses of the facility. Another challenge is the lack of standards and direction, leading to longer time intervals between preventive interventions and resulting in equipment damage. To have everything running as smoothly as possible, everybody should know his or her role. A CMMS adoption can optimize the time of your maintenance staff and improve internal communication by encouraging technicians to provide and share on the platform feedback from their inspections.[16]

Maintenance in a school is not merely replacing equipment when it quits working. There are various types of maintenance that should be performed to ensure the continued safe and efficient operation of equipment and systems, as well as reducing replacement costs. Becker (2011) wrote that maintenance can be depicted using a Venn diagram (**Exhibit 4-18**).

---

[16] https://www.mobility-work.com/blog/5-best-practices-preventive-maintenance

Exhibit 4-18
Overlap and Interrelationships in Types of Maintenance
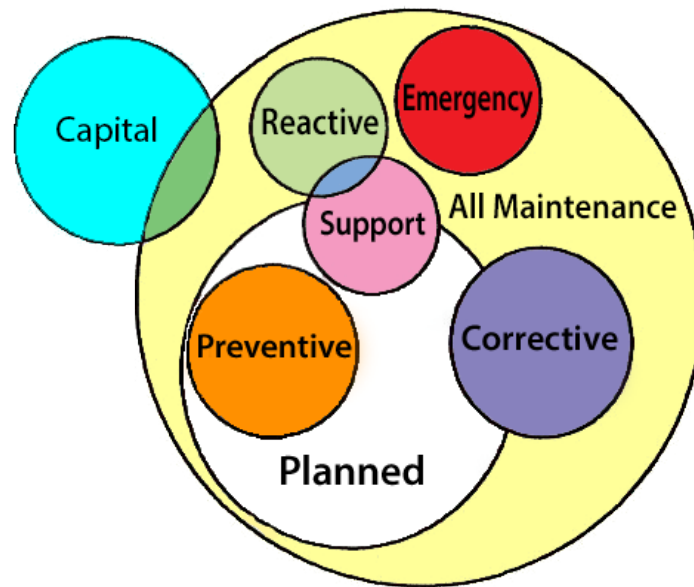
Source: APPA Operational Guidelines for Educational Facilities: Maintenance, February 2011

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.[17]

The older a building, the more corrective maintenance it will require, and all buildings, regardless of age, require regular preventive maintenance. Even new facilities, such as the Dome, require preventive maintenance.

RECOMMENDATION

Purchase and use a computerized maintenance management system (CMMS).

The consulting team recommends that HPS review commercially available and K-12 focused CMMS options. One such option that the consulting team recommends for review is Dude Solutions, formerly School Dude, which has been shown in other districts to provide the functionality HPS needs.

---

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

The steps the district should take to implement this recommendation include:

1. Select a CMMS product on the basis of its specific development for the K-12 maintenance manager. The district should consult independent websites that evaluate CMMS software, and peers in other school districts to obtain accounts of their experiences.

2. Enlist top students in the special projects class led by the district's technology director. These students, under the direction of the maintenance director, and with instructions from the CMMS vendor, should assist in implementing and customizing the CMMS for HPS.

3. Once the assistant maintenance director has been hired, they should be given full implementation responsibility.

4. Responsibility for CMMS should be assigned first to maintenance and custodial staff, and thereafter to administrators, teachers, and support staff district-wide. Online protocols for work order submission, emergency requests, and other CMMS functions should be included in training.

FISCAL IMPACT

A representative figure of $2,500 per year is shown for an annual subscription to CMMS software. This figure includes typically two or three system licenses, full assistance with implementation, system maintenance, and ongoing consultation.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Purchase and implement CMMS software.	($2,500)	($2,500)	($2,500)	($2,500)	($2,500)

FINDING 4-6

At the time of the onsite work, the district's new Dome facility was scheduled to open in only a few more months. The Eagle Event Center will bring unprecedented regional attractions, and the potential for positive community-wide economic impact. These extraordinary circumstances may require extraordinary responses.

HPS facilities have been made available for community use for decades but this has been handled in a largely informal manner. This has been the case especially for the athletic fields, the high school auditorium, and select spaces such as the gymnasiums and cafeterias. With the impending opening of the Eagle Event Center, the proper administration of the district's use of facilities function will expand beyond the local Hennessey community.

The Dome has the potential to attract crowds from the wider region, as much as a 100-mile radius. Beyond planned free uses as a storm shelter, indoor walking facility, and for HPS-specific functions, the Dome can accommodate revenue-producing events such as concerts, exhibitions, sports tournaments, and other regional attractions. Concurrent with the opening of

the Dome, HPS plans to create a full-time events planner and coordinator position but has not yet considered other needs to successfully manage the full potential of the new facility. [18]

RECOMMENDATION

Task the events planner and coordinator with creating the infrastructure to attract, schedule, coordinate, hold, and close out events in the Dome and other HPS facilities.

To do this, the district should first establish a subcommittee to the BOE – the Events Center Executive Committee (ECEC). This subcommittee should drive the development of events management infrastructure such as:

- developing necessary district policies, rental agreements, and fee structures;

- consulting with legal counsel as needed to protect the district when outside events are hosted in the Dome;

- purchasing event scheduling support software; and

- hiring of support staff, including additional custodians, ushers, and food kiosk attendants.

Student jobs, cooperation with chamber of commerce organizations, booking agencies, etc., should be given scrutiny. Dude Solutions has well-developed events software and the expertise to offer advice.

FISCAL IMPACT

This recommendation can be implemented with existing resources. Any incidental costs of legal or other professional advice should be reimbursed from event income.

FINDING 4-7

The HPS buildings and grounds appear to be well maintained and cleaned throughout. No outwardly visible maintenance or cleaning neglect was evident. This is largely the work of eight custodians and the maintenance director.

The HPS maintenance director has achieved excellent results in maintenance and cleaning of the district's buildings for decades. He has worked in the district for 34 years. He has been consistently admired and appreciated for his ability to keep the buildings and grounds well maintained and clean.

On the maintenance side, the maintenance director is the only person on the HPS payroll. He personally completes all the maintenance tasks for which he believes he is (a) qualified and (b)

---

[18] There are 17 event planning associations listed in this website: https://www.socialtables.com/blog/event-planning/associations/, Of the 17 associations, the following may be of interest and offer best practices: Meeting Professionals International: https://www.mpi.org/about/who-we-are, International Live Events Association: https://www.ileahub.com/, Academic Event Professionals: www.aep-edu.com/, Green Meeting Industry Council: https://www.gmicncn.org/, International Association of Exhibitions and Events: https://www.iaee.com/

physically capable of performing. When necessary, he is authorized to outsource those maintenance repairs he cannot perform himself.

All principals and teachers praise his performance. This was reported in the *2004 Performance Review*, and the same is the case today. The custodians are likewise valued and praised.

Best practices for maintenance have been presented and discussed under previous findings. The maintenance director uses prominently the management by walking around (MBWA) best practice, follows up rapidly when he receives reports of a maintenance deficiency or need, and supervises his custodians during his MBWA walk.[19] In the case of the maintenance director and the custodians he supervises, nothing succeeds like success.

COMMENDATION

The HPS maintenance director and custodians have achieved excellent results in the district's facilities.

This commendation is issued for the management demeanor of the HPS maintenance director and the custodians he supervises. The HPS facilities have been well maintained and cleaned consistently for decades. However, best practices are often lacking. The introduction of such key best practices is instead the subject of several recommendations.

FINDING 4-8

The district has made substantial strides in reducing deferred maintenance.

The major buildings on the HPS campus have new seamless white polymer membrane low-slope roofs. They were installed at the initiative of the superintendent shortly after he assumed his job. In addition, all major HVAC system installations have been either renovated or replaced.

The consulting team cannot recall a situation where these two major building components have been replaced or renovated to new working condition across a facilities inventory. According to the director of maintenance, these renovation and replacement actions were needed because roof leaks were abundant and HVAC system malfunctions frequent. Funds for the roof replacements were included in the $10 million bond issue, while the HVAC system upgrades and replacements were funded from general revenue sources. These actions have removed large amounts of deferred maintenance, as well as calls to repair roof leaks and heating or cooling malfunctions.

A best practice in facilities management is the avoidance of large accumulations of deferred maintenance. Failing that, an initiative to remove large amounts of deferred maintenance is commendable.

---

[19] For details, see https://www.cleverism.com/management-by-walking-around-mbwa/

COMMENDATION

HPS addressed a substantial amount of deferred maintenance with the superintendent's decision to replace rooms and HVAC systems.

Custodial Operations

Safe, clean, and sanitary facilities are essential elements of the education environment. School systems across the United States use different means to address these elements. Typically, school boards either contract out (outsource) custodial services or organize a comprehensive in-house program with staff to provide custodial services. Personnel will be employed by either the outsourced company or the school board.

Management responsibility, if the program is in-house, may reside partially or wholly with the central office, the individual school, or maintenance department. Determining the desired structure usually involves several criteria, including minimizing costs to the school district, improving services to schools, and reducing (or increasing) the span of control of district or school-based administrators.

Studies conducted by APPA demonstrate that one custodian should be capable of cleaning between 20,000 and 30,000 square feet of school facilities to achieve a level 2 or level 3 standard of cleanliness, respectively. The levels of cleanliness in the APPA standard are shown in **Exhibit 4-19.**

Exhibit 4-19
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%) 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%) 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

Based on the observations of the consulting team, cleaning levels throughout the school buildings were generally at a level 2 in the restrooms, and level 3 in all other areas. No classrooms, hallways, or common areas showed evidence of custodial inattention or neglect. No

surplus furnishings or equipment were found stored improperly in vestibules, under stairs, or within the three-foot distance of electrical or mechanical equipment in utility closets.

Exhibit 4-20 provides survey results regarding student, staff, and parent perceptions of cleanliness of HPS' facilities. As shown, a majority of each group *agreed* or *strongly agreed* that school facilities are kept clean.

Exhibit 4-20
Student, Staff, and Parent Survey Results Regarding Facility Cleanliness

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Student	My school is clean.	23%	47%	11%	17%	2%
Staff	The district's facilities are kept clean.	22%	54%	8%	15%	1%
Parent	My child's school is clean.	23%	70%	4%	1%	1%

Source: Prismatic Survey Results, February 2020

FINDING 4-9

When the Dome is placed in operation in early 2020, its floor area of 36,000 square feet will be added to HPS' facilities inventory. This will require the services of additional custodians.

The major school facilities subject to daily cleaning have a floor area of 231,000 square feet. Consequently, the allocation among the eight FTE custodians is 28,875 square feet each. The custodial staffing levels are therefore acceptable. However, when an additional 36,000 square feet are added with the Dome facility, the addition of 1.5 to 2 FTE custodians is warranted.

At the rate of 20,000 to 30,000 square feet per custodian, 1.5 or 2 FTE custodians can be justified for dedicated service to the Dome. Stretching the services of the current eight custodians is not a best practice or justifiable.

RECOMMENDATION

Add two full-time custodians once the Dome opens.

The district should assign 1.5 FTE to Dome duties and should allow one of the custodians to serve half-time as a rover in other building locations or as a substitute when needed.

FISCAL IMPACT

Based on the 2019-20 salary schedule, the higher paid full-time custodians earn $29,035 including fringe benefits. Two positions would therefore require $58,070 annually.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Add 2 FTE custodians after the Dome opens.	($58,070)	($58,070)	($58,070)	($58,070)	($58,070)

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, 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 usage and costs to the general staff. Tracking utility use can give a bird's eye view of how much each school is spending on its utilities compared to other schools. The energy manager can then target the most expensive utilities and work to reduce consumption. This communication helps foster awareness of the expenses of running a school and brings attention to energy conservation measures by both students and staff.

The American Society for Hospital Engineers (ASHE) has developed a list of ten components necessary for a successful energy management program. Although this list was originally intended for hospital organizations, they are applicable to all energy management programs. As recommended by ASHE, the items to consider are:

1. Measure/benchmark current energy consumption.

2. Develop an energy use profile.

3. Complete a greenhouse gas emissions inventory.

4. Build teams, get leadership support, and assign dedicated resources.

5. Set targets/goals.

6. Develop strategic action plans for improvement.

7. Consider adopting a strategic energy management plan.

8. Implement projects.

9. Track, measure, and report.

10. Train, educate, and celebrate.

The Association of School Business Officials (ASBO), in their publication *Planning Guide for Maintaining School Facilities*,[20] suggests that the following guidelines will help a school system accomplish more efficient energy management:

---

[20] http://nces.ed.gov/pubs2003/2003347.pdf

1. Establish an energy policy with specific goals and objectives.

2. Assign someone to be responsible for the district's energy management program and give this energy manager access to top-level administrators.

3. Monitor each building's energy use.

4. Conduct energy audits in all buildings to identify energy inefficient units.

5. Institute performance contracting (i.e., contracts requiring desired results rather than simply a list of needed products) when replacing older, energy inefficient equipment.

6. Reward employees of schools or buildings that decrease their energy use.

7. Install energy efficient equipment including power factor correction units, electronic ballasts, high-efficiency lamps, set-back thermostats, and variable-speed drives for large motors and pumps.

8. Install motion detectors that turn lights on when a room is occupied and off when the room is unoccupied.

Additional information about energy management can be found through the National Clearinghouse for Educational Facilities' Energy Page[21] 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 4-10

The energy consumption per square foot of total floor area at HPS is notably below the median value for natural gas, and below the lower quartile value for electricity, according to *Managing for Results 2019* as published by the Council of the Great City Schools.

HPS receives electricity from Oklahoma Gas & Electric (OG&E), and natural gas from Oklahoma Natural Gas (ONG). The data for the district's consumption of electricity and gas was taken from the data available at the respective websites for OG&E and ONG.

The electric consumption data shown in **Exhibit 4-21** are for the calendar year 2019. During that year, HPS spent $103,449 on 1,362,574 kwh of electricity. The district's total floor area is 254,000 square feet. Of that amount, 231,000 square feet represent the facilities with concentrated electrical power consumption. For the year 2019, this results in a per square foot expenditure for electricity of 41 cents for the total floor area, and 45 cents when counting only the 231,000 square feet where electrical consumption is concentrated. The actual 2019 electrical power consumption per square foot results in 5.36 kwh per square foot for the total floor area, and 5.90 kwh per square foot when only the floor area is counted where electricity consumption is concentrated.

---

[21] http://www.ncef.org/search/node/energy%20management

Exhibit 4-21
Trend in HPS Electricity Consumption
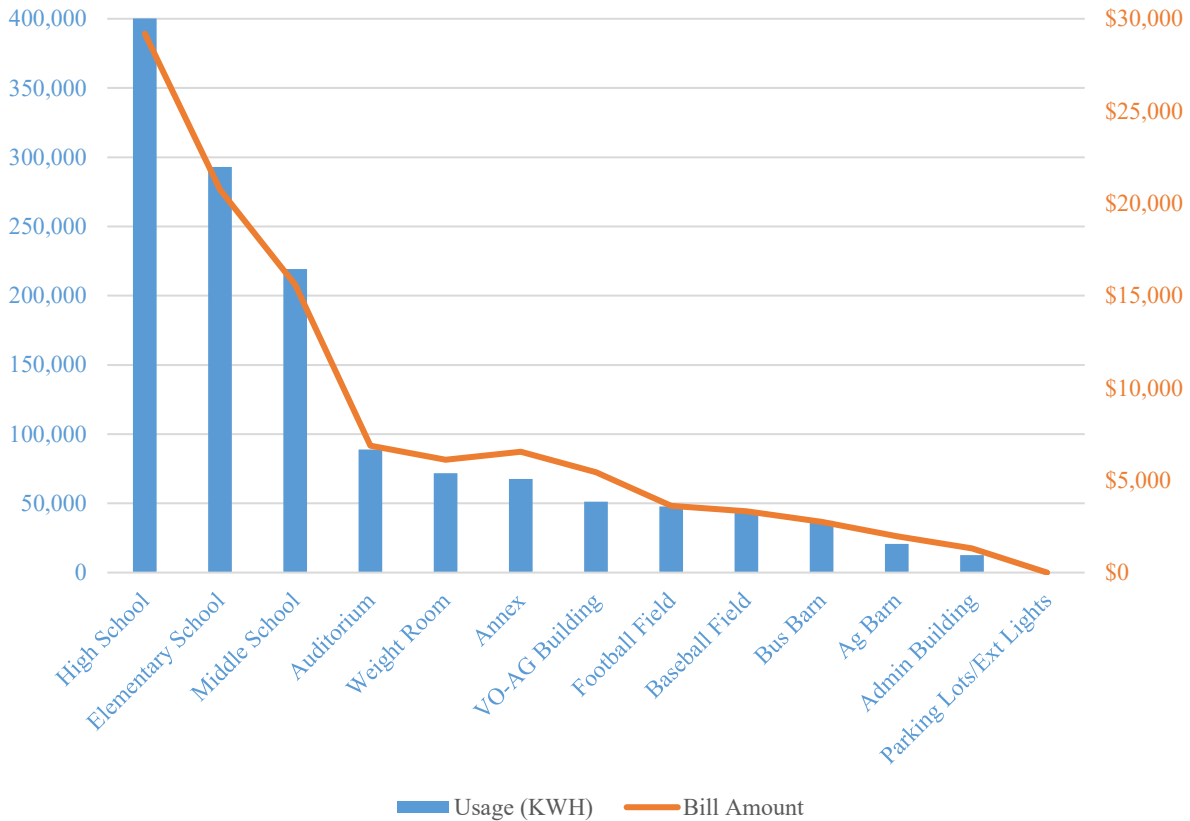
Source: Oklahoma Gas and Electric HPS Account Data

Exhibit 4-22 shows the volume and cost of natural gas consumption beginning with the bill for February 2017 and ending with the bill for January 2020 – a span of 36 months. The total cubic feet consumed during this period was 2,118,943 at a total cost of $12,070. This amounts to $5.70 per 1,000 cubic feet (MCF). On a per square foot basis, the ratio of cubic feet per total floor area is 8.34, at a per square foot cost of 5 cents. Using the slightly smaller floor area with a greater concentration of gas use, these numbers adjust to 9.17 cubic feet and 5.2 cents.

Exhibit 4-22
Trend in HPS Gas Consumption
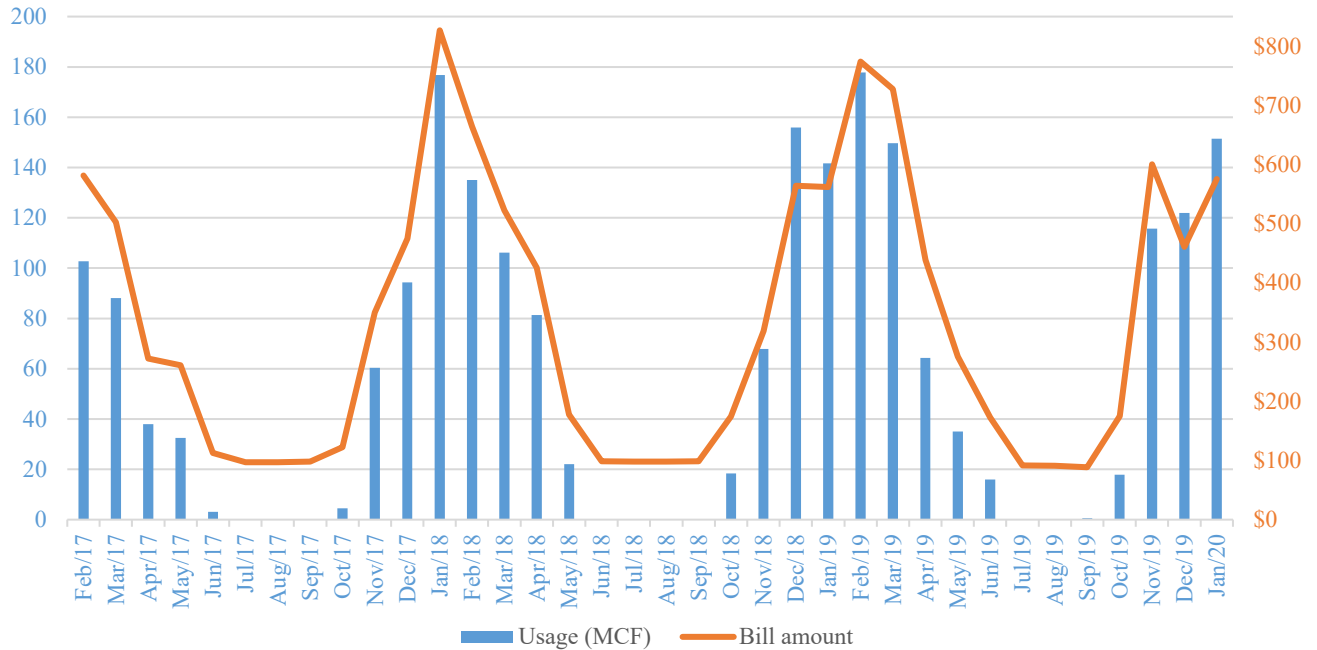
Source: Oklahoma Natural Gas HPS Account Data

The Council of the Great City Schools (CGCS) issues an annual summary of benchmark values under the title *Managing for Results.* The most current CGCS data was reported by school districts for 2017-18. For that year, CGCS found a median kwh/sf ratio of 9.5, with upper and lower quartile values of 11.8 and 7.1, respectively. The values calculated for HPS of either 5.36 or 5.90 for the total floor area or the more concentrated heated square feet compare most favorably to the nationwide benchmark values. This indicates an energy conservative use of electrical power by HPS.

HPS uses natural gas for heating. The 2017-18 CGCS median, upper, and lower quartile benchmark values were 15.3, 32.2, and .01 KBTU, respectively. Since 1 KBTU is the equivalent of one cubic foot of natural gas, the benchmark values expressed in KBTU convert to 15.3, 32.2 and .01 cubic feet, respectively, for the median and upper and lower quartile benchmark values for natural gas. Once again, the calculated values for HPS, 8.34 and 9.17 for the two square foot numbers employed, compare favorably to the CGCS benchmark values. This indicates an energy conservative use of natural gas by HPS.

HPS has engaged proactively in energy conservation efforts. Most recently, the district has replaced its inventory of worn-out low-slope roofing with new and more energy-efficient seamless white membrane material. In addition, HPS has either upgraded or replaced the HVAC systems in its building inventory, creating greater energy efficiencies in heating and cooling. Finally, HPS officials followed through on a recommendation in the *2004 Performance Review* which called for the completion of energy conservation measures and the installation of energy management software on selected laptop computers.

COMMENDATION

HPS is commended for its conscious efforts to conserve electrical and natural gas energy in the operation of its building inventory.

FINDING 4-11

Some of the buildings in the HPS facilities inventory were built during a time when energy management was of a low priority. Although the buildings have been well-maintained, and operate with energy efficiency, opportunities for actions to reduce energy consumption still exist. The *2004 Performance Review* recommended the completion of a planned energy savings plan, as well as the implementation of an energy management system that permits the remote identification of trouble in specific HVAC systems, or allows adjustments to heating and cooling modes on specific laptop computers. These recommendations were implemented, and the energy management system is still in use.

Energy conservation is never a "one and done" effort. Just like with customer service and Total Quality Management, the quest for improvement is continual. Although HPS has made significant strides in energy management and conservation, more energy saving opportunities likely exist. The staff survey results point to a pervasive lack of awareness that HPS is engaged in energy management efforts (**Exhibit 4-23**). This tends to indicate that, while facilities may have been improved to conserve energy, staff members have not been asked to engage in individual behavioral efforts to be energy savers. In addition, it is likely that more can still be done to make the district's building inventory even more energy efficient.

Exhibit 4-23
Staff Survey Results Regarding Energy Management

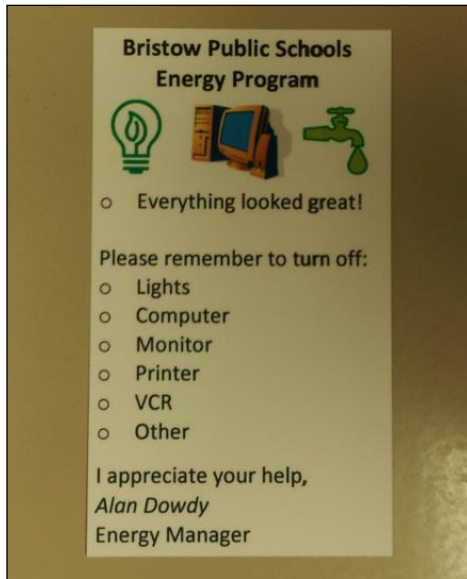| Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The district has an energy management program in place to minimize energy consumption.	0%	13%	76%	7%	4%

Source: Prismatic Survey Results, February 2020

An active energy awareness program is a best practice for school districts. A number of school districts around the country use several techniques to keep energy costs down. The following are some examples of these conservation efforts:

- entering monthly energy bill data into a spreadsheet to maintain a history of expenditures and to use in detecting problems (example: high-energy cost outliers that are contrary to experienced patterns at HPS);

- performing building checks to see if lights are turned off, doors are closed, water faucets are not dripping, etc.;
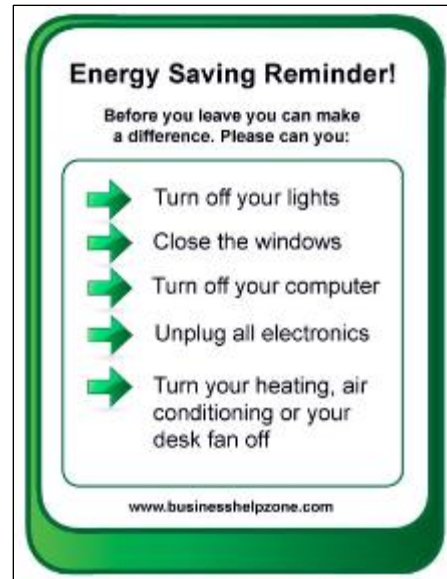
- leaving notes reminding teachers or staff of the proper procedure, such as those shown in **Exhibit 4-24**, if problems are found during building checks;

- establishing set points for thermostats at 76 degrees in the summer and 69 degrees in the winter;

- purchasing set-back thermostats and programming them to turn down cooling or heating in advance of daily adjournment and over the weekends; and

- setting water heaters or boilers at a maximum temperature of 140 degrees, except in areas requiring higher temperatures for sanitation purposes, such as kitchens.

Exhibit 4-24
Examples of Energy Saving Reminder Stickers

Bristow Public Schools **Energy Program** o Everything looked great! Please remember to turn off: o Lights o Computer o Monitor o Printer o VCR o Other I appreciate your help, *Alan Dowdy* **Energy Manager**	**Energy Saving Reminder!** Before you leave you can make a difference. Please can you: → Turn off your lights → Close the windows → Turn off your computer → Unplug all electronics → Turn your heating, air conditioning or your desk fan off www.businesshelpzone.com
Source: Prismatic Archives, April 2012	*Source: BusinessHelpZone.com, December 2015*

The U.S. Department of Energy determined that at least 25 percent of all energy consumed in a school facility is due to energy inefficiency. This inefficiency can be caused by:

- dry transformers;

- poor location of light switches;

- continuously burning hallway lights;

- excessive plug loads and use of personal appliances; and

- phantom loads.[22]

---

[22] See http://www.stratenergy.ca/phantom_loads.htm for a detailed explanation.

Best practices in energy conservation include the consideration of performance contracting, as well as a full spectrum of plausible and feasible energy conservation actions. Performance contracts use energy savings as the collateral for loans to finance energy-saving projects. They are guaranteed to have a net-zero cost to the district. Energy conservation measures are most effective if employed in the context of the fullest and most complete array of all feasible conservation actions. The search for more energy saving opportunities – and for more sources of energy – is never abandoned in high performing districts. One of the best sources of this attitude is Dr. Daniel Yergin's book *The Quest – Energy, Security, and the Remaking of the Modern World.*

According to the U.S. Department of Energy, an Energy Services Company (ESCO) "develops, designs, builds, and funds projects that save energy, reduce energy costs, and decrease operations and maintenance costs at their customers' facilities."[23] Under a performance contracting arrangement, the ESCO finds financing for energy conservation projects, collateralized by the energy savings that result from these projects. Consequently, the money borrowed by the school district is a net-zero cost to the district: the district will never pay more than the energy savings it realizes. Should the savings ever lag at any time, the ESCO guarantees to make up the difference. This is the essence of performance contracting. A 2010 White Paper authored by Shan Bates of Schneider Electric, *The Performance Contracting Advantage: Using Energy Savings to Fund Energy Infrastructure Improvements in Schools, Universities and Municipalities,* provides an excellent and more detailed overview.[24]

RECOMMENDATION

Invite Energy Service Companies (ESCOs) to propose performance contracting arrangements and potentially uncover additional cost savings, including energy alternatives (wind, photovoltaics) and behavior modification programs to cultivate and foster energy conservation awareness among HPS staff.

The district should consider performance contracting. The consulting team recommends that the district request information from a minimum of three experienced ESCOs, using a Request for Qualifications (RFQ) solicitation process. [25]

The RFQ should describe the district's interest in a performance contract that explores creating a borrowing equity from energy savings in three areas:

- energy conservation opportunities in the district's building inventory (window replacements, light shelves, insulation, etc.);

- behavior modification programs for building users; and

- alternative energy sources (solar, wind, more geothermal, etc.)

---

[23] https://www.energy.gov/eere/femp/energy-service-companies-0
[24] https://download.schneider-electric.com/files?p_File_Id=8635625899&p_File_Name=Performance-Contracting-Advantage.pdf&p_EndocType=Application%20solutions&p_Reference=0
[25] http://www2.schneider-electric.com/documents/buildings/the_performance_contracting_advantage.pdf

HPS should then assemble a team to read and critique the RFQs submitted and invite selected ESCOs for interviews. Team members for reviews and interviews should include the dome design and engineering professionals, school board members, and community stakeholders.

After examining and rating these analysis packages, the top-ranked ESCOs should be invited for presentations and discussions before the school board and the community. If the potential dollar savings are substantial and seem achievable, the district enter into a performance contract.

FISCAL IMPACT

This recommendation can be implemented with existing resources. Energy savings could be substantial but cannot be predicted or estimated until performance contracting proposals are available.

D.   *SAFETY AND SECURITY*

School districts are expected to provide a safe and secure environment for their students and staff. While districts are largely insulated from violent crime, incidents of violence at schools draw national attention. School districts must take proactive measures in safety and security even in incident-free schools. Students, teachers, and other district employees deserve a safe school environment in which to work and learn.

In 2003, Homeland Security Presidential Directive-5 (HSPD-5) initiated the development of a National Incident Management System (NIMS) and requires its use by public sector agencies, including school districts. The intent of this system is to provide a common template and language for responding organizations to work together in preventing, preparing for, responding to, and recovering from incidents. As noted by FEMA, NIMS represents "a core set of doctrine, concepts, principles, terminology, and organizational processes that enables effective, efficient, and collaborative incident management."

NIMS emphasizes that true preparedness requires a commitment to continuous review and improvement. Most districts understand the continuous nature of emergency management as well as the four phases that comprise the process circle (**Exhibit 4-25**).

Exhibit 4-25
Continuous Process of Emergency Management

Source: The Office of Safe and Drug Free Schools' Practical information on
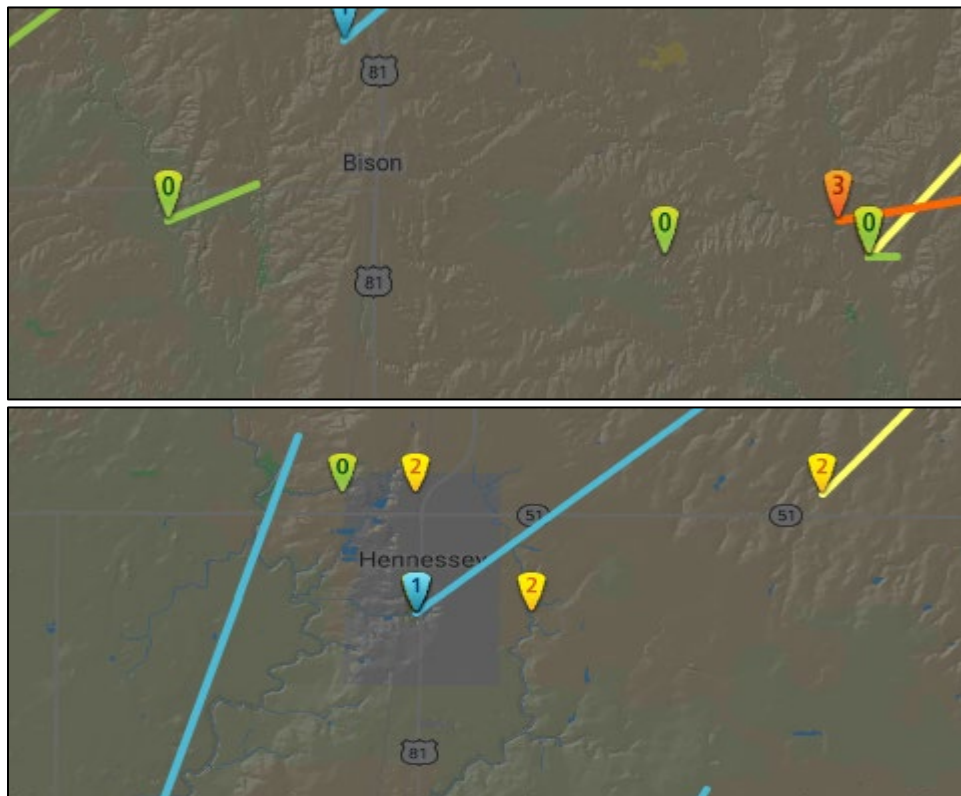*Crisis Planning: A Guide for Schools and Communities, January 2007*

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. Based on recommendations from the Oklahoma Commission on School Security, the Oklahoma School Security Institute (OSSI) was created by the Oklahoma State Legislature and signed into law on April 17, 2013. OSSI was established as an official division of the Oklahoma Office of Homeland Security on July 1, 2013.[26] Current Oklahoma laws require school districts to conduct and report to OSSI four security drills (two per semester) and six safety drills (two fire, two storm, and two on topics selected by the district).[27]

The Oklahoma geography lends itself to the development of high velocity winds that can intensify and develop into tornadoes. One of the main purposes of the new Eagle Event Center, a dome structure, is to serve as a storm shelter for the school district and the community at large. Since the HPS campus is located centrally within Hennessey, it is accessible and within reach of most town inhabitants. Although Kingfisher County, and especially Hennessey, has been spared from disastrous tornadic events thus far, disaster planning is always advisable (**Exhibit 4-26**).

---

[26] https://www.ok.gov/schoolsecurity/ABOUT/index.html
[27] For details, see : https://www.oscn.net/applications/oscn/DeliverDocument.asp?CiteID=450346 and https://www.oscn.net/applications/oscn/DeliverDocument.asp?CiteID=470820.

Exhibit 4-26
Tornado Tracks Through and Around HPS Since 1951

Source: www.tornadohistoryproject.com, March 2020

The Oklahoma Department of Emergency Management (ODEM) reports that the state has had an increased number of earthquakes in recent years. In 2017, there were 304 earthquakes across the state with a magnitude of three or higher. Actions that the district can take regarding earthquakes, and teach to students, staff, and visitors are provided on the ODEM website.[28]

FINDING 4-12

After the current superintendent assumed his job responsibilities at HPS, he requested a Risk and Vulnerability Assessment be conducted by staff of the Oklahoma School Security Institute (OSSI). The recommendations from OSSI are now being implemented systematically at HPS.

The HPS technology director has been charged with implementing the OSSI report's technology-based recommendations. A review of purchase orders furnished by HPS staff indicates that a number of technology-based improvements to safety and security have been made or are in the process of being made. Of these, the largest category of expenditures was approximately $184,000 to integrate all telecommunication systems. Previously, each school had its own public address and bell system. If one school issued a lockdown announcement, none of the other schools would hear it. The $184,000 investment has fixed this problem and HPS can now

---

[28] https://www.ok.gov/OEM/Programs_&_Services/Preparedness/Preparedness_-_Earthquakes.html

communicate districtwide. Other technology-based safety and security improvements are detailed in **Exhibit 4-27.**

Exhibit 4-27
Recent HPS Technology-Based Safety and Security Improvements

Improvement	Cost
Telecenter U Critical Communication System Integration	$184,041
Campus intercom and weather system for dome for emergency announcements and door unlocking of south main entrance	$32,900
Door access via reader and lock/unlock scheduling/emergency on dome access doors	$17,200
Electronic access controls and video intercoms at MS east, south and west entries, and auditorium east entry	$13,400
CCTV camera system for the dome – 14 cameras in 8 locations	$13,400
Door locks and power supplies for entry doors at HS, ES, ECC	$4,700
Telecenter hook-ups of 2 additional classrooms	$2,100
Telecenter hook-up to one additional classroom	$1,590
TOTAL	**$269,331**

Source: HPS, February 2020

Beyond technology-based improvements, all schools will be equipped with secure sally port entries.[29] These have been completed for the high school (**Exhibit 4-28**), elementary school, and Early Childhood Center. The middle school still required additional construction at the time of the onsite visit.

---

[29] A sally port is a secure, controlled entryway where the visitor enters through a first set of doors but must be approved to proceed through a second set of doors.

Exhibit 4-28
HPS High School Sally Port

Source: Prismatic, February 2020

Finally, special window film has been installed on the large glass areas at and near the main entries. This film keeps the glass from shattering if an intruder shoots at the glass. While bullets will penetrate, the glass remains held in place because the film is strong enough to keep it from collapsing. This is similar to the windshield safety glass on automobiles. An article in the January/February 2020 issue of *American School and University Magazine* describes the security scenario of this film material:

> It is assumed that one of three things might happen when an intruder shoots a filmed window and realizes its glass is held in place:
>
> 1. The shooter aborts and leaves the scene.
>
> 2. The shooter continues to shoot or kick through the glass, the delay giving law enforcement more time to respond.
>
> 3. The shooter seeks entry elsewhere, again, wasting time and giving law enforcement more time to respond.[30]
>
> 4. Other security measures are under consideration, but some of them may come from sources other than the OSSI Threat and Vulnerability Assessment.

Even if a school district has never experienced a threat, the security and safety of everyone must be taken seriously. Preparations must be in place, and updated measures must be planned.

---

[30] www.asumag.com

COMMENDATION

HPS is commended because of its swift and decisive district-wide preparations to keep all persons safe and secure.

Chapter 5:

Support Services

Support Services

This chapter reviews several areas of support services in Hennessey Public Schools (HPS). It is divided into these sections:

    A. Child Nutrition
    B. Technology
    C. Transportation

A.   CHILD NUTRITION

Successful administration of the child nutrition program depends upon consistent program organization, strong financial reporting, and precise personnel management. All of these administrative areas must align and support the district's goals for student achievement.

School meal programs began in 1946, when the *National School Lunch Act* was signed, authorizing the National School Lunch Program (NSLP) to "safeguard the health and well-being of the nation's children." The program, administered by the U.S. Department of Agriculture (USDA), is open to all public and nonprofit private schools, as well as all residential childcare institutions. The NSLP also offers afterschool snacks for sites that meet the eligibility requirements.

The *Child Nutrition Act of 1966* established the School Breakfast Program (SBP). This is a federally-assisted meal program that provides nutritionally balanced, low-cost, or free breakfasts to children in public schools, nonprofit private schools, and residential child care institutions.

HPS participates in the NSLP, the SBP, the After School Snack 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.

Students in the lowest socioeconomic bracket qualify for free lunches, while others qualify for reduced price lunches. Meals served according to federal guidelines receive some level of reimbursement, including those served to students who pay full price. School districts do not receive federal reimbursement support for teacher or guest meals. **Exhibit 5-1** shows the applicable 2018-19 and 2019-20 federal reimbursement rates for breakfast and lunch. HPS also receives an additional $0.07 cents per meal for meeting the meal pattern requirements – this was increased from $0.06 per meal for 2018-19 meals.

Exhibit 5-1
School Meals: Federal per Meal Reimbursement Rates
2018-19 and 2019-20

Meal Type	School Breakfast Program - Severe Need[1]		National School Lunch Program (with 6/7 cents)	
	2018-19	2019-20	2018-19	2019-20
Free	$2.14	$2.20	$3.39	$3.50
Reduced Price	$1.84	$1.90	$2.99	$3.10
Paid	$0.31	$0.31	$0.39	$0.41

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 campuses at any time during the school day, provide free water where meals are served, provide nutrition education to students in the district, and require school nutrition directors/managers 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. Those discussions concluded in December 2018; the results of the Final Rule as shown in **Exhibit 5-2**.

---

[1] HPS is eligible to receive severe need reimbursements for breakfasts served to eligible students on sites where 40 percent or more of the lunches claimed at the site in the second preceding school year were served free or at a reduced price, and the site is participating in or initiating a school breakfast program.

Exhibit 5-2
Summary of Nutritional Requirements for Breakfast and Lunch

	Breakfast		**Lunch**	
Fruit and Vegetables	1 cup per day (vegetable substitution allowed). Students are allowed to select ½ cup under Offer Versus Serve.		¾-1 cup vegetables plus ½-1 cup fruit per day.	

Grains	Daily minimum of 1 ounce equivalent minimum per day; weekly minimum ranges, varying by grade:
	    K-5: 7-10 ounces
	    6-8: 8-10 ounces
	    9-12: 9-10 ounces
			Daily minimums varying by grade:
			K-5: 1 oz. eq. min. daily (8-9 oz. weekly)
			6-8: 1 oz. eq. min. daily (8-10 oz. weekly)
			9-12: 2 oz. eq. min. daily (10-12 oz. weekly)	

Meat/Meat Alternate	May substitute meat/meat alternates after minimum daily requirement for grains is met.		K-5: 1 oz. eq. min. daily (8-10 oz. weekly) 6-8: 1 oz. eq. min. daily (9-10 oz. weekly) 9-12: 2 oz. eq. min. daily (10-12 oz. weekly)	
Whole Grains	At least half of weekly grains must be whole grain rich.		At least half of weekly grains must be whole grain rich.	
Milk	1 cup, 1% or fat-free (unflavored/flavored)		1 cup, 1% or fat-free (unflavored/flavored)	
Sodium*	Target 1 (2019-24): K-5: $\leq$ 540 mg 6-8: $\leq$ 600 mg 9-12: $\leq$ 640 mg	Target 2 (2024-25): K-5: $\leq$ 485 mg 6-8: $\leq$ 535 mg 9-12: $\leq$ 570 mg	Target 1 (2019-24): K-5: $\leq$ 1230 mg 6-8: $\leq$ 1360 mg 9-12: $\leq$ 1420 mg	Target 2 (2024-25): K-5: $\leq$ 935 mg 6-8: $\leq$ 1035 mg 9-12: $\leq$ 1080 mg
Trans Fat	Zero grams per serving (nutrition label)		Zero grams per serving (nutrition label)	

Source: USDA, December 2018
*Target 1 was set to be implemented by 2014-15

Exhibit 5-3 provides photos of a sampling of HPS trays selected by high school and elementary school students during the onsite period. Trays for breakfast and lunch are shown.

Exhibit 5-3
Sample of HPS Breakfast and Lunch Trays

High School Breakfast

High School Lunch

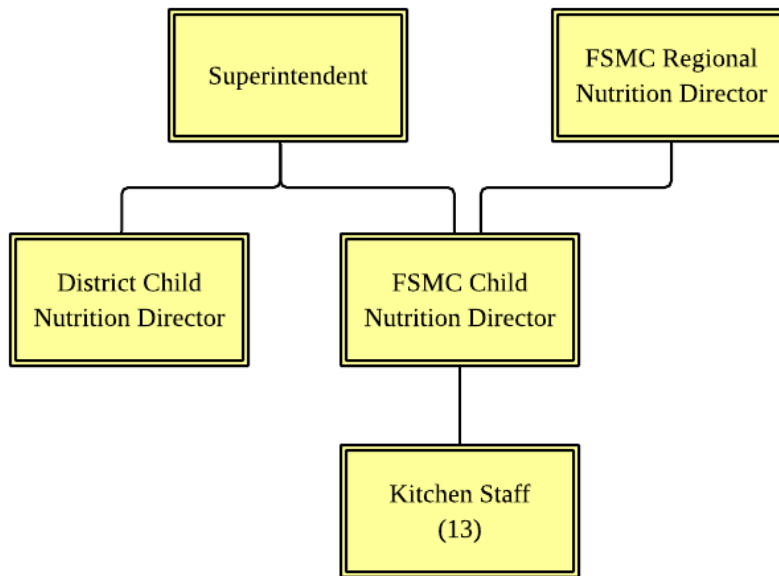**Elementary School Lunch**

Elementary School Lunch

Source: Prismatic, February 2020

Exhibit 5-4 shows the organization of staff within the HPS child nutrition department. As shown, the district employs a child nutrition director who works with a contracted food services management company (FSMC). Kitchen staff is a mix of district and FSMC employees.

Exhibit 5-4
HPS Child Nutrition Organizational Structure

Source: Created by Prismatic, February 2020

FINDING 5-1

HPS is not in compliance with the USDA Smart Snacks in Schools regulation and is not adhering to its own Board of Education (BOE) Policy regarding competitive food sales.

The elementary school Parent Teacher Organization (PTO) is selling slushies two days per week in the elementary lunchroom during lunch service, which may be in excess of the state limit on the number of fundraisers allowed per semester and is in violation of the prohibition on such fundraisers during meal times. Vending machines are available in the high school lunchroom for student purchases during meal times. Some items, such as Coke products, in the vending machines, are available to middle school students. Non-calorie, carbonated beverages are permitted for high school students but not for middle school students.

In February 2019, the Oklahoma State Department of Education (SDE) conducted an Administrative Review of the HPS child nutrition program. One finding noted that the vending machines did not meet Smart Snacks standards. In their corrective action plan, the district stated that vending machines would not be in operation during the meal service times. The SDE returned during the week of May 3, 2019 to ensure the corrective action had taken place with the vending machines. They found the district was still not in compliance. The superintendent responded that he had directed the teacher in charge of the vending machines to make sure they were disabled during meal times and stated he would check back at a later date to make sure they had complied. The consulting team found the machines were not disabled during the time of the review, and the district remained non-compliant.

USDA Federal Code (*7 CFR 210.11)* addresses competitive food sales. Competitive food is defined as all food and beverages other than meals reimbursed under programs authorized by the

Richard B. Russel National School Lunch Act and the *Child Nutrition Act of 1966* available for sale to students on the school campus during the school day.

USDA's *HHFKA* requires that all food sold on the school campus outside of the school meal programs and at any time during the school day must meet the nutrition standards set forth in the Smart Snacks rule. *HHFKA* provides flexibility for special exemptions for the purpose of conducting infrequent school-sponsored fundraisers during which foods that do not meet the nutrition standards for Smart Snacks may be sold. A provision of the rule specifies that such exempted fundraisers must not take place more often than the frequency specified by the State agency.

In October 2014, the Oklahoma Board of Education granted some exemptions from *HHFKA*. The OSSBA Deputy Executive Director and General Counsel stated the following:

- Districts can now exempt up to 30 food sale fundraisers per semester at each school site.

- Each fundraiser can last up to 14 school days.

- Fundraisers that involve food sales cannot take place during school breakfast, lunch or after-school programs.

- Each district can develop its own process for reviewing/granting exemptions.

HPS BOE Policy contains several statements regarding competitive foods sales:

- All foods and beverages sold outside the meals programs will meet the USDA Smart Snacks in School standards at a minimum.

- Foods of minimal nutritional value (FMNV) are prohibited from being sold or served during student meal services in the food service area where USDA reimbursable meals are served or eaten.

- Diet soda may be available for sale at middle schools and high schools only in vending areas outside of the cafeteria.

RECOMMENDATION

Institute a monitoring plan to ensure compliance with USDA regulations and BOE Policy regarding the sale of food items in schools and in vending machines by entities other than the child nutrition department.

HPS should assign the School Wellness Committee the task to develop a monitoring plan to ensure the district remains in compliance with federal regulations and BOE Policy. This plan should designate specific individuals to monitor on a regular basis and address penalties resulting from noncompliance. All faculty should be briefed as to the importance of adhering to regulations and policy regarding competitive food sales.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-2

The child nutrition department is not operating according to standard business practices in an enterprise system. The district is not being reimbursed to the full extent allowable for utility costs.

USDA regulations consider utilities to be an allowable cost to the program, as the kitchens need utilities such as electricity and gas to operate equipment. To provide the truest picture of the cost to operate the child nutrition program, all allowable costs must be included. As an enterprise, child nutrition should be responsible for paying all allowable costs. The 2004 Performance Review noted that costs such as utilities were not being reimbursed to the general fund and made a recommendation to compensate the general fund from the child nutrition fund for utility costs. The recommendation was apparently never implemented.

A district may charge child nutrition directly for utilities if there is a methodology to quantify how much energy is used by the program. The best method is to install separate utility meters for each kitchen area. Another acceptable method is to use a prorating system that allocates use and cost based upon child nutrition's percentage of the total square footage of the kitchen area.

HPS does not have separate utility meters for each of their kitchens. There is only one electric and one gas meter for the entire elementary school. There are no dedicated meters for the elementary school kitchen. The HPS maintenance director stated their use is a minor share of the total building use and estimates their fair share to be ten percent of the total building electricity costs and five percent of the gas. The high school kitchen does have a meter for electricity labeled "cafeteria" but it records consumption for both the kitchen and the cafeteria, which is also used for other functions, and the cafeteria includes six geothermal heating/cooling units. There is one gas meter for the entire high school. Estimates for the high school kitchen's fair share are 40 percent for electricity and 55 percent gas.

RECOMMENDATION

Operate child nutrition as an enterprise system and reimburse the general fund for their share of utility costs.

HPS should have dedicated gas and electrical meters installed in both the elementary and high school kitchens. Until that process is completed, an approximation of utility costs should be assessed based on the estimates of the maintenance director. Calculations should be made on a monthly basis applying the appropriate percentages to the bills. A transfer of funds from the child nutrition to the general fund should be made on a monthly basis.

FISCAL IMPACT

This recommendation can be implemented with existing resources. It will result in additional revenue to the district's general fund. The consulting team was not able to develop actual utility costs to be allocated to child nutrition because of the lack of billing data.

FINDING 5-3

The child nutrition program is not adequately managing its staff. The current meals per labor hour (MPLH) are below industry standards.

The district and the FSMC are not using the 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 child nutrition manager to equate all meals to a standard. By converting all food sales to meal equivalents, a manager can determine production rates. The SDE uses the following conversions to meal equivalents:

- one lunch equates to one meal equivalent;

- two breakfasts equate to one meal equivalent;

- three snacks equate to one meal equivalent; and

- à la carte sales of $3.67 (2019-20 rate) equate to one meal equivalent.

The most common means of measuring employee productivity in child nutrition is the MPLH measure. This is calculated by dividing the number of meal equivalents produced and served in a day by the number of labor hours required to produce those meals. The SDE guidelines for MPLH staffing are shown in **Exhibit 5-5** The SDE provides MPLH guidelines for both conventional and convenience systems of food preparation. The consulting team found HPS menus to be using a conventional (scratch cooking) food preparation. Therefore, their productivity in labor hours should be at the low end of the recommended total hours for the conventional system.

Exhibit 5-5
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: Oklahoma State Department of Education, Child Nutrition Manual, Compliance Section, July 2018

Exhibit 5-6 shows the 2018-19 monthly MPLH for the HPS cafeteria. The child nutrition program was self-operated during this time frame. Productivity (MPLH) was lower than the recommended standards. To determine staff hours needed using recommended guidelines the formula is total meal equivalents divided by desired MPLH. Using the average meal equivalents of 967 per day divided by 18 is 54 labor hours. During 2018-19, with 90 daily labor hours, the kitchens had an excess of 36 labor hours per day.

---

[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 5-6
Hennessey Cafeteria Meals per Labor Hour
2018-19

Month	Lunches Served	Breakfasts Served	Meal Equivalents[4]	School Days	Daily Meal Equiv.	Daily Labor Hours	MPLH
August	12,759	5,430	16,460	17	968	90	10.8
September	13,952	6,056	18,158	18	1,009	90	11.2
October	16,108	7,098	21,435	21	1,021	90	11.3
November	12,784	5,916	15,980	17	940	90	10.4
December	10,872	5,055	13,610	15	907	90	10.1
January	12,159	5,842	16,519	17	972	90	10.8
February	10,676	4,927	14,410	15	961	90	10.7
March	11,286	5,175	15,228	16	952	90	10.6
April	14,317	6,466	19,244	20	962	90	10.7
May	5,478	2,579	7,585	8	948	90	10.5
Total	**120,390**	**54,545**	**158,629**	**164**	**9,640**	**900**	**107.1**
Daily Average	**734**	**333**	**967**		**967**	**90**	**10.7**

Source: HPS and Prismatic calculations, January 2020

Exhibit 5-7 shows the MPLH data for the portion of 2019-20 completed at the time of the onsite review. This was the first year the program was managed by a FSMC. As shown, productivity (MPLH) decreased from 2018-19 due to decreased daily meal equivalents served and an increase in daily labor hours. Based on these data, with 92.5 daily labor hours, the kitchens had an excess of 43 labor hours per day.

Average daily enrollment from 2018-19 dropped by only 20 students which is not substantial enough to account for the lower daily meal equivalents. The FSMC child nutrition director stated the MPLH goal of OPAA (the FSMC) is 13.93 and her calculations indicated HPS was operating at 17.26 MPLH. Her calculations were not based on the recommended SDE guidelines.

---

[4] For brevity, the snack and a la carte sales are not shown in this or the next exhibit. They were included in the calculations that led to the daily meal equivalents and ultimately the MPLH.

Exhibit 5-7
Hennessey Cafeteria Meals per Labor Hour
2019-20

Month	Lunches Served	Breakfasts Served	Meal Equivalents	School Days	Daily Meal Equiv.	Daily Labor Hours	MPLH
August	9,888	4,111	12,900	17	759	92.5	8.2
September	12,579	4,710	16,120	20	806	92.5	8.7
October	14,147	4,911	18,233	21	868	92.5	9.4
November	10,942	3,951	14,245	16	890	92.5	9.6
December	10,116	3,520	13,120	15	875	92.5	9.5
January	11,912	4,332	15,391	18	855	92.5	9.2
Total	**69,584**	**25,535**	**90,009**	**107**	**5,053**	**555**	**54.6**
Daily Average	**650**	**239**	**841**		**841**	**92.5**	**9.1**

Source: HPS and Prismatic calculations, January 2020

Exhibit 5-8 shows the trend in Hennessey's MPLH. As shown, the district did not achieve SDE productivity levels in any recent year, which would have been around 19.

Exhibit 5-8
Trend in HPS Meals per Labor Hour
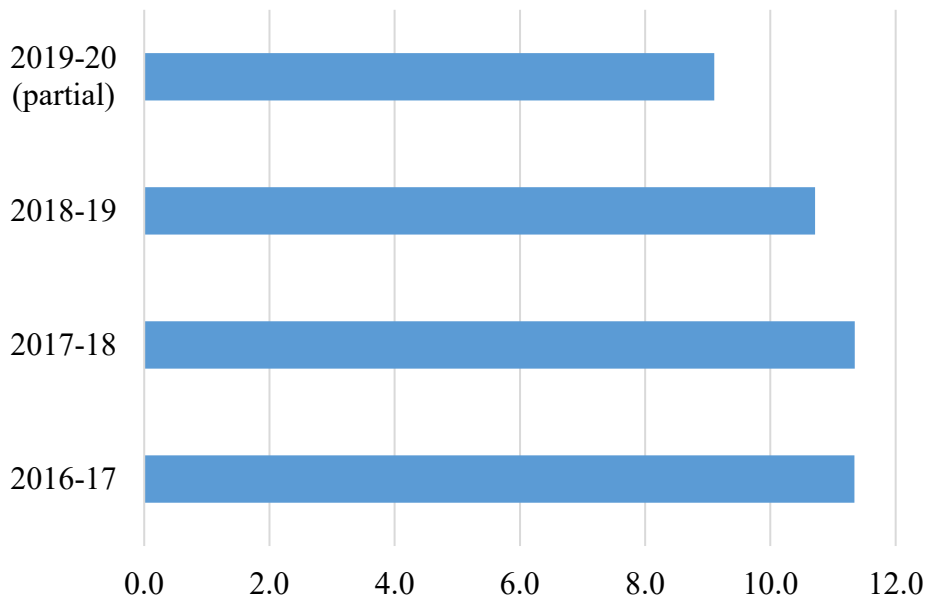
Source: HPS and Prismatic calculations, January 2020

The *2004 Performance Review* of HPS child nutrition program noted the same issue of staff productivity being lower than national standards. The report noted an excess of 3.4 labor hours per day. At the time of the 2004 review, total daily labor hours was 65 and the daily meal equivalents served was 1,011. Rather than implementing measures to either increase meal

participation (the numerator in the MPLH calculation) or to decrease daily labor hours (the denominator in the MPLH calculation), between 2004 and 2020 the district saw meal participation decrease while also increasing labor hours.

Costs for labor and benefits are a major expenditure for child nutrition programs. To maintain a sound financial position, goals for staffing must be established based upon industry standards. SDE has established guidelines for districts to calculate meal equivalents and assign labor hours. MPLH must be calculated and evaluated on a regular basis to ensure that the kitchen has adequate labor hours but is not overstaffed.

RECOMMENDATION

Staff the kitchen using the Oklahoma State Department of Education staffing standards and MPLH calculations.

There are two ways to increase the productivity rate and produce more meals per hour of paid labor:

- decrease the number of labor hours – the number of staff in the school could be reduced or the number of staff hours worked daily can be reduced by adjusting work schedules; or

- increase the number of meal equivalents – implement measures to increase participation and à la carte sales. Unless the child nutrition program is feeding all the students, faculty, and staff every day, there are possibilities for increasing participation. Every student who is enrolled and every adult who is employed by the school is a potential customer.

HPS should implement a combination of decreasing labor hours and efforts to increase meal equivalents. Staff who retire or resign should not be replaced. Staffing hours should be reduced. Closing the high school campus so that student cannot leave during lunch to eat offsite should be considered.

FISCAL IMPACT

This recommendation can be implemented with existing resources and should result in either a decrease in costs from reduced labor hours or an increase in revenues from increased meal participation. Assuming that at least half of the increased productivity comes from reducing staff hours, the district would need to eliminate 21 daily labor hours. The district could either eliminate full positions to reach a 21-hour reduction or could trim hours of existing staff. At an average base salary (without benefits) of $14,349 per employee and a seven-hour workday, eliminating 21 hours of daily labor would save the child nutrition fund $43,047 per year. The consulting team recommends a phased reduction in labor hours over the course of the 2020-21 school year of one position in 2020-21 and two more the following year.

As the district's contract with the FSMC provides for billing based on a unit price per meal type (e.g., $2.58 for each student lunch served in December 2019), the district will need to work with the FSMC to achieve the desired staffing levels.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Reduce kitchen staffing.	$21,524	$43,047	$43,047	$43,047	$43,047

FINDING 5-4

The duties of the district child nutrition director are not sufficient to warrant a full-time position. When the district contracted with a FSMC, many of the duties of this position such as ordering, inventory, daily supervision of employees, daily oversight of production and service, menu development, nutritional analysis, and recordkeeping and reports development were taken over by the FSMC.

When the district contracted with the FSMC, the district's child nutrition director remained a district employee and her office was relocated away from the high school lunchroom. She was assigned new duties, which included to act as the liaison with the FSMC and provide monitoring of the program. She continued to perform certain past duties, including processing meal applications, and preparing meal claims for reimbursement. She was assigned the same work hours and kept her same salary and benefits. The current scope of work of this position is not adequate to merit a full-time position with total cost allocation to the child nutrition fund.

USDA provides guidance for school districts when they decide to outsource their food service program to a FSMC. Some duties related to school food service programs must continue to be performed by a district employee and cannot be delegated to an FSMC. HPS is in compliance with the specific duties that must be performed by a district employee. However, these duties are typically performed by clerical staff; often the duties are added to an existing position within the district, rather than hiring a new full-time employee.

RECOMMENDATION

Evaluate and select one of two options for the position of district child nutrition director:

1. **Assign additional district duties and charge half the salary and benefit costs to the general fund.**

2. **Adjust the position to be half-time.**

Either option would reduce expenditures for the child nutrition fund. The superintendent and the district child nutrition director should evaluate the two options and determine which best meets the needs of the district. The job description should be revised. Changes should take effect at the beginning of school year 2020-21.

FISCAL IMPACT

The child nutrition director works 7.5 hours and her work year is 172 days. Her total salary is comprised of $25,999 base, $2,276 fringe, and $3,115 other for a total of $31,390. Half of this compensation would be $15,695. The selection of either option would result in a savings to the

child nutrition fund of $15,695. The selection of option one would result in an additional cost to the general fund of this same amount.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Reassign district nutrition director to a half-time potion in the child nutrition program.	$15,695	$15,695	$15,695	$15,695	$15,695

FINDING 5-5

The child nutrition department maintains a self-sufficient financial operation. Revenue has exceeded expenditures for the past three years. The child nutrition program has a healthy fund balance.

Exhibit 5-9 shows the HPS child nutrition program revenues and expenditures over time. The program was self-operated during 2016-17, 2017-18, and 2018-19. The program was contracted out in 2019-20. This table shows that over the past three years, the child nutrition program recorded an excess of revenue over expenses. The business manager indicated that as of February 2020, 2019-20 data indicates a similar pattern. It should be noted the excess has decreased from $36,362 to $20,431 over the three-year period, a decrease of 43.8 percent. If this trend continues, the district could be at risk of having to provide from the general fund to support child nutrition operations.

Another determinant of a fiscally sound program is the fund balance. While child nutrition programs want to maintain some fund balance in order to support daily operations, the USDA established limits on how large a balance a program can maintain. The *2004 Performance Review* noted the fund balance exceeded the maximum allowed by federal regulations, which is three month's average expenditures. As indicated in the exhibit, the current fund balance is now within the maximum allowed.

Exhibit 5-9
HPS Child Nutrition Revenues and Expenditures Over Time

	2016-17	2017-18	2018-19	Percent Change
Beginning Balance	$115,502	$152,312	$158,815	37.5%▲
Revenues				
Return of Assets (Local Sources)	$67,970	$71,739	$71,066	4.6%▲
State Reimbursement	$5,883	$5,626	$5,177	(12.0%)▼
Federal Reimbursement	$572,069	$546,960	$520,728	(9.0%)▼
Total Revenues	**$688,309**	**$664,080**	**$641,461**	**(6.8%)**▼
Expenses				
Salaries and Benefits	$230,537	$224,728	$267,114	15.9%▲
Food and Supplies	$401,783	$395,517	$345,609	(14.0%)▼
Other Expenses	$245	$245	$290	18.4%▲
Total Expenses	**$651,947**	**$633,694**	**$621,030**	**(4.7%)**▼
Revenues - Expenses	**$36,362**	**$30,386**	**$20,431**	**(43.8%)**▼
Beginning Balance + Revenues – Expenses (Fund Balance)	**$151,864**	**$182,698**	**$179,246**	**18.0%**▲

Source: State Department of Education, School District Revenue and Expenditure Reports 2016-19
Note: Totals may not reconcile completely due to rounding

COMMENDATION

The HPS child nutrition program is financially self-sufficient.

FINDING 5-6

The district is not directly certifying many students for meal benefits. Students directly certified are included in a district's Identified Student Percentage (ISP).

As shown in **Exhibit 5-10**, Hennessey's ISP is substantially lower than the average of all peer districts. Students identified through direct certification are not required to submit an application for free meals.

Exhibit 5-10
HPS and Peer Free/Reduced Meal Eligibility and ISP Rates, 2019

District	Eligibility %	ISP Rate
Hennessey	**89.47%**	**18.35%**
Atoka	73.37%	41.35%
Chouteau-Mazie	76.33%	34.54%
Pawhuska	67.40%	39.74%
Tishomingo	74.17%	37.31%
Watonga	67.90%	37.72%
Peer Average	**71.83%**	**38.13%**

Source: State Department of Education, Community Eligibility and Low-Income Reports, 2019

The federal direct certification program requires state and local educational agencies to automatically enroll students from households already participating in the Supplemental Nutrition Assistance Program (SNAP) or the Food Distribution Program on Indian Reservations, without an additional application from the child's family to assist low-income households with children eligible for free meals at school. School districts receive names of students who are directly certified from the Oklahoma Department of Human Services using the WAVE System.

The HPS child nutrition director sets up a table with meal applications at enrollment day, which is one week before school starts. Principals indicated the director requires all parents to fill out the meal application form at this time. Applications are sent home with any students whose parents do not attend the enrollment event.

The ISP is used to determine eligibility for the Community Eligibility Provision (CEP). CEP was established in 2010 as a provision of the *HHFKA*.

CEP offers districts a number of benefits:

- CEP schools can offer breakfast and lunch to all students at no charge. Because all students can eat for free, there is no potential stigma associated with school meals.

- CEP schools do not have to collect meal applications. This reduces paperwork for parents and schools no longer have to spend time processing applications.

- CEP schools do not collect payments for meals, so money-handling processes are eliminated, including the operation of a cash register in the meal line and the tracking of unpaid accounts.

RECOMMENDATION

Analyze the process used to determine which students are eligible for free meals through direct certification to ensure the maximum number of students are captured.

The district should evaluate their process to directly certify students for free meals. They should determine if their match engine with WAVE can be improved by looking at potential errors due to nicknames, errors in birthdates, or addresses. They should make sure they are expanding the search beyond the mandatory SNAP and Temporary Assistance for Needy Families (TANF) and capturing students who are homeless, migrant, foster, and Head Start eligible. They should increase the match frequency and ensure the total number of students directly certified is frequently updated so accurate numbers are sent to SDE. They should contact peer districts about the process they use in order to determine additional ideas for increasing the HPS ISP.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-7

HPS does not participate in available programs such as Provision 1, 2, or 3 which allows for all student meals to be served at no charge and no meal applications collected after the first year. These Provision programs eliminate the burden for families to submit meal applications and decreases administrative paperwork. The SDE *Low Income Report for 2019* shows that, district-wide, 89.5 percent of HPS students are eligible for free and reduced meals. Schools with high percentages of low-income students, 75 percent or more, are able to use the Provision programs for both breakfast and lunch and still achieve financial breakeven.

In their *2018 Operations Report* the School Nutrition Association states:

> Use of the Community Eligibility Provision (CEP) has increased a notable amount since 2016, rising from 24.3 percent of the districts with at least one school using CEP to 30.8 percent.

With a healthy fund balance, the HPS child nutrition program can afford to absorb the cost of all student meals. The advantages are numerous: increased participation, streamlined meal service and decreased administrative work. And it would provide an excellent benefit to the Hennessey community.

RECOMMENDATION

Contact the SDE to evaluate the feasibility of participating in a Provision program to provide free meals to all students.

Determine which of the three Provision programs would be best for the district. This new program should be implemented for school year 2020-21. The district should prepare a news release and communicate the parameters to parents. The district should provide free meals to all students starting with a Provision program and work toward the goal of implementing CEP which is more commonly implemented in schools nationwide.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-8

Student breakfast participation rates the past several years have trended downward and are experiencing a further decrease during the current school year. The breakfast participation rates are below the national HealthierUS School Challenge (HUSSC) benchmarks.
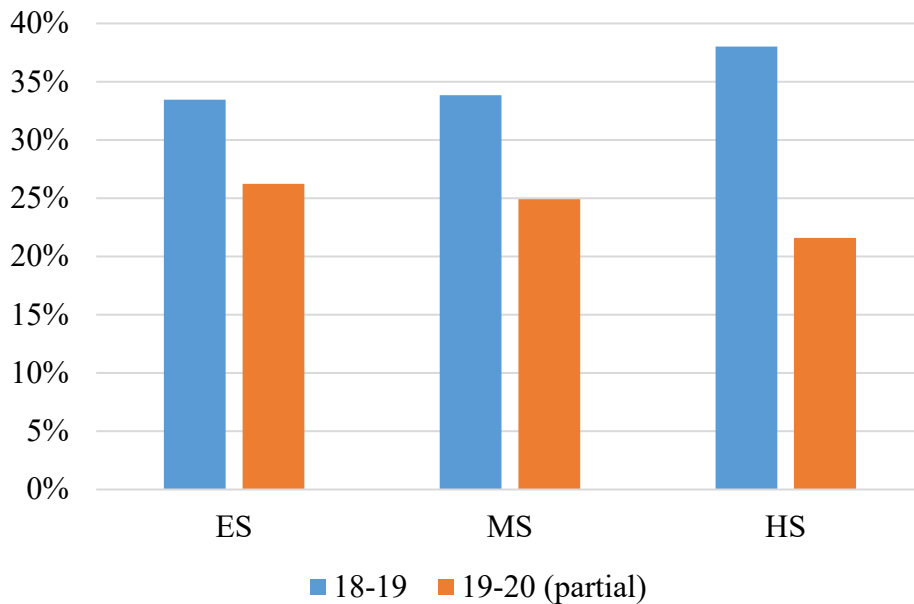
Exhibit 5-11 shows participation rates in HPS from August 2016 through December 2019. Data prior to 2018 were not available by grade level. **Exhibit 5-12** provides the averages by grade level for 2018-19 and the August through December portion of 2019-20.

Exhibit 5-11
Trend in HPS Breakfast Participation Rates
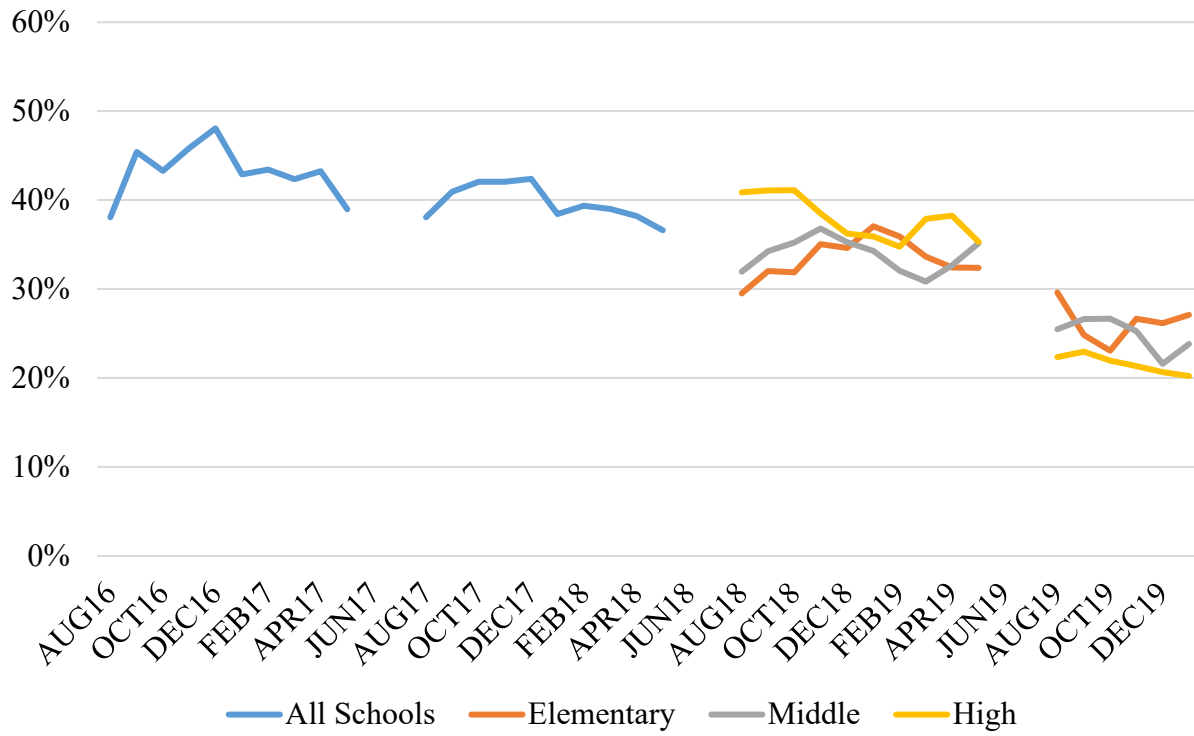
Source: HPS, January 2020

Exhibit 5-12
Average HPS Breakfast Participation Rates by Grade Level

Source: HPS, January 2020

Industry best practices exist for breakfast to compare a district's participation rates to those established as a benchmark. **Exhibit 5-13** shows best practice rates for breakfast. These benchmarks are the recommended percentage of participation of membership. Prior to 2019-20 the HPS program was self-operated. During that time, breakfast participation was closer to the industry standards – for the high school, 2018-19 participation well exceeded the best practice level. Beginning in 2019-20, meal service was contracted to an FSMC. Through December 2019, breakfast participation has dropped by 11 percentage points and is well below industry standards.

Exhibit 5-13
Best Practice Breakfast Participation Rates

School Level	Best Practice
Elementary	35%
Middle	35%
High	25%

Source: HealthierUS School Challenge Criteria, 2014

During breakfast, the consulting team observed numerous choices and a self-serve bar containing fresh and canned fruit as well as juice. Cinnamon rolls were made from scratch. Lines moved at a good pace and students had enough time to eat. There was enough seating. There were no apparent reasons to account for decreased participation. Changes from prior years, such as an increased number of choices, including made from scratch items, and the self-serve bar should have resulted in higher participation. There have not been any student focus groups or advisory panels organized during the current school year to gather feedback and ideas for changes.

There are several alternative meal service models for breakfast that show promising results toward increased participation. These include:

- Breakfast in the classroom after the bell is an approach that brings meal components to students in hallways or in their classroom. Students eat in their classrooms during first period. Breakfast carts located near main doors is another option for a grab and go meal.

- Second Chance Breakfast is a model where breakfast is served during a break in the morning usually after first period.

In its *2018 Operations Report*, the School Nutrition Association stated that nearly half of school districts offer an alternative service venue other than the cafeteria line:

- 44 percent offer breakfast through direct delivery to classrooms;

- 61.8 percent offer breakfast through grab and go kiosks outside the cafeteria;

- 48.8 percent offer breakfast using grab and go kiosks inside the cafeteria; and

- 4.0 percent offer breakfast through reimbursable vending machines.

The *2004 Performance Review* recommended that HPS increase breakfast participation by using alternative methods of serving. The district did not choose to implement the recommendation at that time.

RECOMMENDATION

Determine factors that may be negatively impacting breakfast participation and take corrective action.

The FSMC child nutrition director should organize focus groups of students at all three grade levels to determine why they are not participating in breakfast and ways to increase participation. Then, the FSMC child nutrition director should evaluate alternative service models and determine which would best service each of the three grade levels. A different approach may be needed for each level.

Once a specific service model is selected by grade level, child nutrition should purchase appropriate carts or kiosks and implement as quickly as possible. The child nutrition department should develop training for teachers on the new service models and demonstrate to parents at enrollment day and communicate on the district website.

FISCAL IMPACT

This recommendation can be implemented initially with existing resources. The specific costs of alternative services models will vary depending upon which service models are selected. Increasing participation will have a positive impact on the department's finances. It will also improve its productivity levels (MPLH). Increasing productivity through increased meal participation could eliminate the need to reduce staff to achieve recommended productivity levels.

FINDING 5-9

Student lunch participation rates the past several years have trended downward and are experiencing a further decrease during the current school year among secondary students. The lunch participation rates are below the national HUSSC benchmarks.
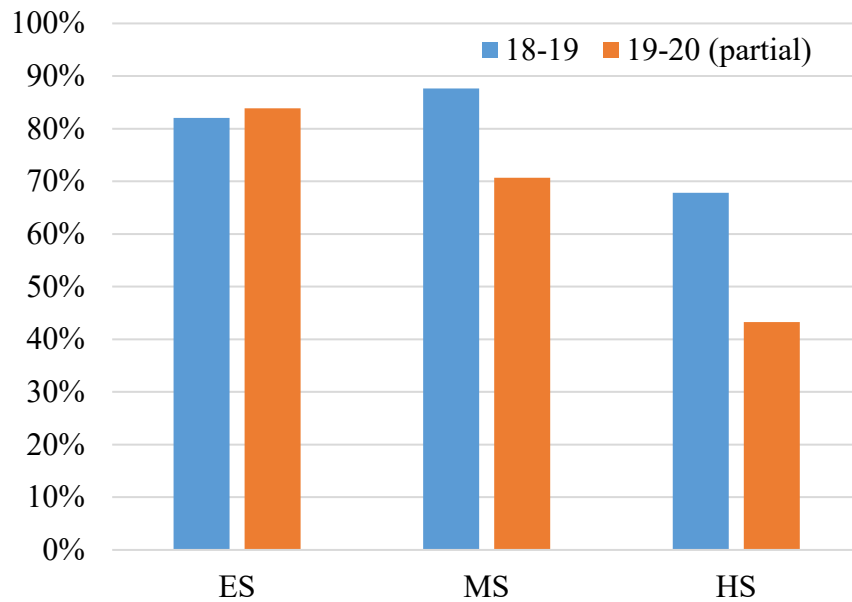
Exhibit 5-14 shows participation rates in HPS from August 2016 through December 2019. Data prior to 2018 were not available by grade level. **Exhibit 5-15** provides the averages by grade level for 2018-19 and the August through December portion of 2019-20.

Exhibit 5-14
Trend in HPS Lunch Participation Rates
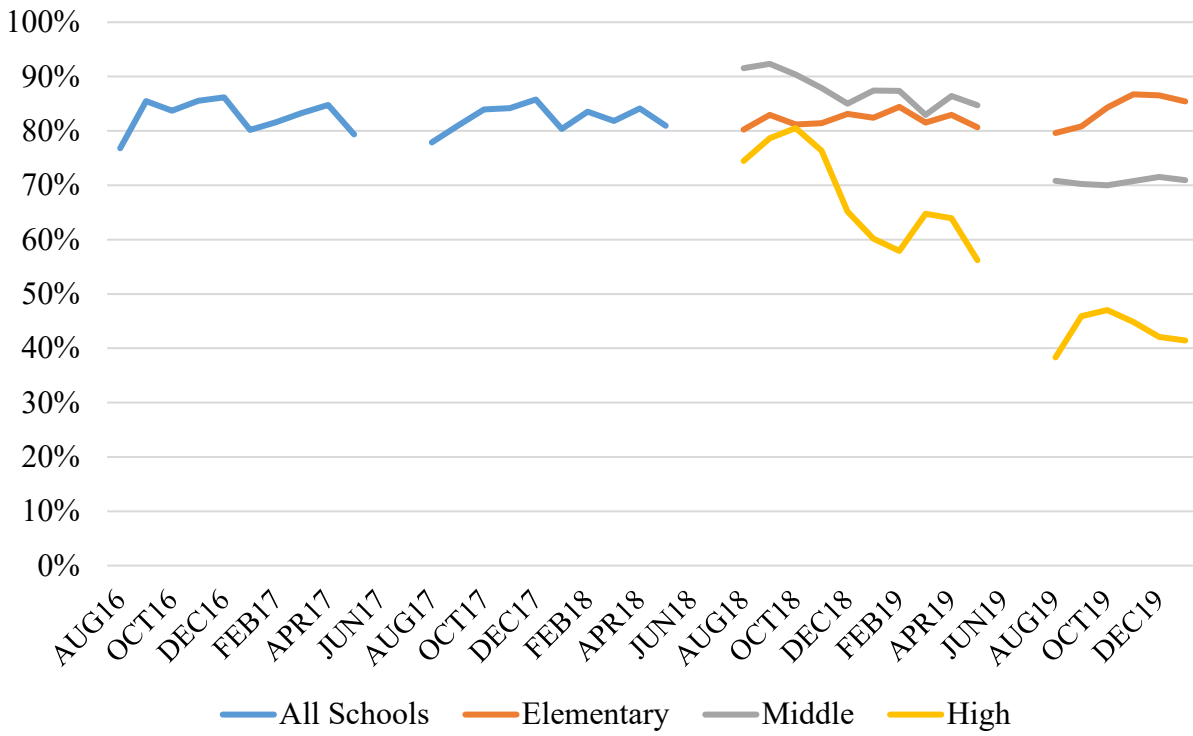
Source: HPS, January 2020

Exhibit 5-15
Average HPS Lunch Participation Rates by Grade Level

Source: HPS, January 2020

Industry best practices exist for lunch to compare a district's participation rates to those established as a benchmark. **Exhibit 5-16** shows best practice rates for lunch. These benchmarks are the recommended percentage of participation of membership. Prior to 2019-20 the program was self-operated and lunch participation exceeded best practices at all three grade levels. Beginning in 2019-20, meal service was contracted to an FSMC. Through December 2019, lunch participation has dropped by nine percentage points overall and is below industry standards for middle and high school students. Elementary lunch participation has increased slightly and remains above the best practices level.

Exhibit 5-16
Best Practice Lunch Participation Rates

School Level	Best Practice
Elementary	75%
Middle	75%
High	65%

Source: HealthierUS School Challenge Criteria, 2014

During lunch the consulting team observed many entrée options and an attractive fruit and vegetable bar. There was a salad bar that could be selected as a meal option and items were fresh, colorful and looked appealing. At the high school, student time in line was under ten minutes but once students made their selections at the fruit and vegetable bar there were traffic flow problems and a bottleneck occurred at the point-of-sale (POS).

Interviews with principals, the superintendent, and the district child nutrition director indicated problems with some options not being available for the last classes of students. This problem was especially prevalent in the elementary. At this grade level teachers take a count by option and turn it into the kitchen. The FSMC director stated students change their minds and select a different option at lunchtime. She said they prepare an additional 30-40 of each option to resolve the problem but sometimes it still occurs.

Exhibit 5-17 shows the results of student surveys regarding questions about the food. Only secondary students were surveyed. Only one-third (34 percent) liked the food and 40 percent were neutral. One-fourth (26 percent) did not like the food. A larger number (45 percent) felt there was a good variety of food, but one-fourth (23 percent) did not agree. These survey results indicate students think there is a good variety of food but many do not like it. On the third question, two-thirds (66 percent) of students do not feel there is enough time to eat lunch – this could be leading students to pack a lunch from home so they can avoid time otherwise spent in the lunch line.

Exhibit 5-17
Student Survey Results on Lunches

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I like the food served in the cafeteria.	11%	23%	40%	17%	9%
The cafeteria serves a good variety of food.	17%	28%	32%	17%	6%
I have enough time to eat my lunch each day.	13%	11%	11%	40%	26%

Source: Prismatic Survey Results, February 2020

Exhibit 5-18 shows the results of parent surveys regarding questions about the food. A majority of parents (72 percent) do not think that the lunch period is long enough for their child to eat. Often in situations like that, parents will begin sending their children to school with a lunch so that the child does not have to spend time waiting in line. While a majority of parents indicated that their children likes the school food and that a good variety is served, substantial portions of parents *disagreed* or *strongly disagreed*.

Exhibit 5-18
Parent Survey Results on Lunches

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The school lunch period is long enough for my child to eat.	0%	16%	11%	44%	28%
My child likes the food served in the cafeteria.	7%	44%	14%	18%	17%
The cafeteria serves a good variety of food.	8%	44%	27%	12%	8%

Source: Prismatic Survey Results, February 2020

RECOMMENDATION

Determine factors that may be negatively impacting lunch participation and develop strategies for increasing it.

The FSMC child nutrition director should organize focus groups of students at all three grade levels to determine why they are not participating in lunch and ways to increase participation. In addition to other recommendations made in this report that will likely improve meal participation, the district should consider recess before lunch in the elementary school. A 2004 study conducted by the National Food Service Management Institute (NFSMI) Division of Applied Research found that schools that allowed students to have recess before, rather than after lunch, experienced reduced waste and consumed more healthy nutrients such as calcium and Vitamin A.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-10

The district has implemented a number of menu improvements with the FSMC contract. These improvements include:

- Menus are designed to offer a wide variety of options for both breakfast and lunch.

- Most items are made from scratch.

- There are many choices of fresh fruits and vegetables for students selecting meals from the main line as well as an attractive salad bar option.

Multiple menu options were frequently mentioned as the main benefit of using the FSMC compared to previous years when there were limited choices.

For the week in which the consulting team was onsite in the district, the high school menu options included a wide variety (**Exhibit 5-19**). The same was true of other weeks, with few entrée options appearing more than once a month.

Exhibit 5-19
HPS High School Menu, February 2020

03 Mon	04 Tue	05 Wed	06 Thu	07 Fri
Opaa! Classic	**Opaa! Classic**	**Opaa! Classic**	**Opaa! Classic**	**Opaa! Classic**
Beef Quesadilla	General Tso Chicken with Rice	Chicken Patty with Hot Roll	Stromboli Pinwheel	Beef Burrito
Eagles Choice	**Eagles Choice**	**Eagles Choice**	**Eagles Choice**	**Eagles Choice**
Turkey Club Sub	Spicy Chicken Sandwich	Ham and Cheese Sub	Cheeseburger	Pepperoni Pizza
Cheeseburger	Hot Dog on Bun	Popcorn Chicken with Italian Bread	Chicken Patty on Bun	Hot Dog on Bun
Corn Dog	Chicken Strips with Italian Bread	BBQ Rib on Bun	Roasted Chicken Sandwich	Chicken Nuggets with Italian Bread
Fresh Daily	**Fresh Daily**	**Fresh Daily**	**Fresh Daily**	**Fresh Daily**
Salad Bar	Salad Bar	Salad Bar	Salad Bar	Salad Bar
Opaa! To Go	**Opaa! To Go**	**Opaa! To Go**	**Opaa! To Go**	**Opaa! To Go**
Bacon Turkey Avocado Club	Buffalo Chicken Wrap	Club Sandwich	Crispy Chicken Wrap	Chicken Salad Sandwich
Hawaiian BBQ Pork Wrap	Cottage Cheese w. Fruit and Muffin	Egg Salad Sandwich	Thai Chili Noodle Salad	Turkey Chef Salad with Italian Bread
Roasted Veggie Pita	Seven Layer Dip	Strawberry, Cucumber, and Chicken Salad with Blueberry Muffin	Chicken Caesar Salad with Hot Roll	Pesto Chicken Pasta Salad with Focaccia Bread
Sides	**Sides**	**Sides**	**Sides**	**Sides**
Fresh Garden Salad	Fresh Garden Salad	Fresh Garden Salad	Fresh Garden Salad	Fresh Garden Salad
Cheesy Cauliflower Popcorn	Honey Baked Beans	Green Beans	Tater Tots with Ketchup	Tomato Soup
Fresh Fruit	Fresh Fruit	Mashed Potatoes with Gravy	Fresh Fruit	Fresh Fruit
Peaches	Orange Pineapple Mix	Fresh Fruit	Applesauce	Strawberry Banana Mix
Milk	Milk	Pears	Milk	Milk
French Fries	French Fries	Milk	French Fries	French Fries

Source: https://hpsk12ok.nutrislice.com/menu/high-school/lunch/2020-02-29?mode=browse

Offering students a variety of options and using the self-serve concept results in more satisfied customers, less plate waste, and increased participation. In a discussion about food and beverage trends, The School Nutrition Association's (SNA) *2019 Operations Report* states "Customizable menu options are the norm, offered by nearly 85 percent of the districts." As in 2017, the most common option was a salad/produce bar or made-to-order salad, cited by nearly 70 percent of the respondents as being available on a consistent basis in any school in their district.

In *Keys to Excellence*, the SNA recommends concepts such as self-service and food bars as a best practice. The SNA *2011 Operations Report* stated that more than 75 percent of school districts offer bakery items made from scratch-cooking methods, and more than 20 percent make at least half of all entrée items from scratch.

COMMENDATION

Contracting with the FSMC has resulted in numerous menu improvements that offer more options and are attractive and healthful.

FINDING 5-11

The district provides limited nutrition education to its students. Nutrition promotion is one of the requirements of the *Healthy Hunger Free Kids Act (HHFKA) of 2014* in addition to the wellness policy requirement for nutrition education as outlined in the *Child Nutrition Reauthorization Act*. **Exhibit 5-20** provides a comparison of the 2004 and 2010 federal requirements. Among other things, the current USDA guidelines add a requirement for nutrition promotion.

Exhibit 5-20
Comparison of Local School Wellness Policy Requirements

Area	2004 Requirements	2010 Requirements
Overview	Direct local education agencies (LEAs) to have a local wellness policy (LWP) in place for each school under its jurisdiction.	Strengthens LWPs and adds requirements for public participation, transparency, and implementation.
Elements of the Local School Wellness Policy	LWP to include, at a minimum, goals for nutrition education, physical activity, and other school-based activities to promote student wellness, as well as nutrition guidelines for all foods available on school campus.	**In addition to the 2004 requirements, the LWP is also to include goals for nutrition promotion.**
Stakeholder Involvement	LEAs are required to involve parents, students, and representatives of the school food authority, the BOE, school administrators, and the public in the development of a LWP.	In addition to the 2004 requirements, LEAs are now required to permit teachers of physical education and school health professionals to participate in the development of a LWP.
Stakeholder Participation	The stakeholders named above are required to participate in the development of the LWP.	In addition to the 2004 requirements, LEAs are now required to permit all stakeholders named above and in 2004 to participate in the implementation and periodic review and update of LWP.
Local Discretion	LEAs can determine the specific policies appropriate for the schools under their jurisdiction, provided that those policies include all required elements specified in the Act.	Same as 2004 requirement.
Public Notification	None.	LEAs are required to inform and update the public (including parents, students, and others in the community) about the content and implementation of the LWP.
Measuring Implementation	LEAs are required to establish a plan for measuring implementation of the LWP.	LEAs are required to periodically measure and make available to the public an assessment on the implementation of LWP, including the extent to which schools are in compliance with LWP, the extent to which the LWP compares to model LWP, and a description of the progress made in attaining the goals of the LWP.
Local Designation	LEAs are required to establish a plan for measuring LWP implementation to include delegating one or more persons with the responsibility for ensuring LWP compliance.	LEAs are required to designate one or more LEA officials or school officials to ensure that each school complies with the LWP.

Source: USDA Food and Nutrition Service: http://www.fns.usda.gov/tn/local-school-wellness-policy

HPS BOE policy contains the following statement "Students and staff will receive consistent nutrition messages throughout schools, classrooms, gymnasiums, and cafeterias." The consulting team found minimal evidence of implementation of this policy.

During the onsite review, the consulting team observed minimal nutrition education materials posted in the cafeteria. The menu is shown on a TV screen in the HS lunchroom, but there is no

nutritional information shown. The TV screen is located in the lunchroom and students see it after they come through the line. There was no menu posted outside the serving area in the elementary lunchroom. **Exhibit 5-21** is an example of a menu board used in other districts that provides nutritional information as well as shows the daily menu to students. It is an example of nutrition education that is colorful, educational, and attractive to students.

Exhibit 5-21
Sample Menu Board Used in Other Districts

Source: Prismatic, February 2020

The FSMC uses Nutrislice where students and parents can access menus. At the time of the onsite review the district's Nutrislice app provided information such as allergens and carbohydrate count but no other nutritional information. There is no nutritional information on the main child nutrition section of the website and none on the printed menus. However, students and parents can click on individual items in the online menu to obtain more complete nutritional information, such as that shown in **Exhibit 5-22** for one item offered on February 3, 2020. The district does not currently track how frequently this information is accessed, so it is not known if students or parents frequently use it.

Exhibit 5-22
Menu Item Nutritional Information Available Through Nutrislice Website

Serving Size: 1quesadilla
Calories: 373

Total Fat: 13g	**Vitamin A:** 653IU
Saturated Fat: 6g	**Calcium:** 364mg
Trans Fat: 0g	**Iron:** 3mg
Cholesterol: 47mg	**Vitamin C:** 5.90mg
Sodium: 834mg	
Total Carbs: 39g	
Dietary Fiber: 2g	
Sugar: 2g	
Protein: 25g	

Beef Quesadilla

Roast Beef and Cheese stuffed in a whole wheat tortilla, warmed until melted. Assortment of condiments offered on the side.

Milk   Wheat   Soy

How would you rate this food?

★★★★★

Source: HPS Website, March 2020.

Since the passage of the *National School Lunch Act,* there has been an expectation that nutrition education should be a strong component of the program. It has been anticipated that child nutrition programs would become the schools' learning laboratory for effective nutrition education in their communities. The contract with the FSMC states the following expectation in the General Information section as one of the program objectives to be performed by the FSMC: *To promote nutritional awareness whenever the food service can interface with the district programs.*

Most child nutrition programs use the many free posters available from manufacturers and organizations to decorate their cafeterias, while also providing messages about good nutrition. Many districts use menus and the district website to provide nutrition information to both parents and students. There are a number of resources available to assist child nutrition programs in providing nutrition education information.

Most are provided at no cost, such as:

- *USDA My Plate*, which has graphics, materials for educators such as lesson plans, and other

printable materials that can be downloaded at no cost;[5]

- *USDA Team Nutrition*, which has nutrition education materials for the preschool, elementary, middle, and high school levels;[6]

- *Fuel Up to Play 60,* which is a school nutrition and physical activity program sponsored by the National Dairy Council and the National Football League that has nutrition education materials;[7]

- *ICN*, which provides professionals working in child nutrition with training materials on the topic of nutrition education;[8] and

- *SNA, the Oklahoma SNA*, and the *Oklahoma SDE Child Nutrition Unit*, which provide nutrition education training materials for staff working in child nutrition.[9]

RECOMMENDATION

Provide nutrition education to students using a variety of venues.

The FSMC child nutrition manager and the FSMC regional manager should evaluate the nutrition education materials available and determine which will be most appropriate for HPS students at all grade levels. Posters should be displayed in the cafeteria and changed often to maintain interest and continue to provide new information. Nutrition resources and information for parents and students should be added to the child nutrition section on the district website and kept updated. Menus should contain different nutrition messages every month. The digital signage in the cafeterias should be used to provide nutrition education messages.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-12

The high school cafeteria lacks sufficient meal-purchasing equipment. There is just one pin pad at the point-of-sale (POS) for the main line resulting in congestion. There is no POS at the salad bar resulting in a hand-written system and potentially compromised accountability.

Students who select their meals on the main line then advance to the fruit and vegetable station use both sides of the bar. The two lines then move the short distance to the POS where each student inputs their six-digit number into the one pin pad. The consulting team observed poor traffic flow and congestion at the POS as the two lines tried to merge into one. The problem could be alleviated with an additional pin pad which would better service the two lines and speed

---

[5] http://www.choosemyplate.gov
[6] http://www.fns.usda.gov/tn/team-nutrition
[7] http://www.fueluptoplay60.com
[8] http://www.nfsmi.org
[9] https://schoolnutrition.org, http://www.snaofok.org; http://ok.gov/sde/child-nutrition-programs

PRISMATIC
SERVICES, INC.

up the POS process. The consulting team has observed this successful method used in several other districts with no need for an additional cashier.

There is no POS at the salad bar. Students and adults who select a meal at the salad bar write their names on a sheet of paper and the cashier inputs them into the POS after the meal service. This is not an accurate system as no one is assigned to monitor that all customers sign the sheet. The salad bar location is not ideal as it is close to the fruit and vegetable station compounding the problem of congestion.

RECOMMENDATION

Purchase additional meal-purchasing equipment:

- **an additional pin pad for the main line POS; and**

- **an additional POS and pin pad for the salad bar, then relocate it to another area of the cafeteria to minimize congestion.**

HPS should contact the software provider Wen-GAGE for assistance in setting up its main line POS to accommodate two pin pads. The salad bar should be relocated to an area of the lunchroom where students are not in the same traffic area as the main line and fruit/vegetable station. This new area should be set up with a dedicated POS and pin pad at the end of the salad bar. The salad bar should be moved, and the district should position the sign in sheet at the end of the bar where it is monitored by a dedicated staff person. Then, the additional POS and two pin pads should be purchased for use at the beginning of the 2020-21 school year.

FISCAL IMPACT

The consulting team estimates the cost of the additional POS and two additional pin pads at $2,000. This would be a one-time cost. Increasing participation will have a positive impact on the department's finances. It will also improve its productivity levels (MPLH). Increasing productivity through increased meal participation could eliminate the need to reduce staff to achieve recommended productivity levels.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Purchase additional POS and two pin pads.	($2,000)	$0	$0	$0	$0

FINDING 5-13

The child nutrition department is not maximizing the use of technology. Parents are not able to apply online to complete the Free and Reduced-Price School Meals Application. Using readily available technology would reduce the current manual labor required to process the applications.

Meal applications are distributed to HPS parents when they come to the schools on enrollment day and most fill them out at this time. Applications are sent home with those students whose parents did not attend. The child nutrition district director processes the applications using the

Municipal Accounting System (MAS) application processing software. Applications are not available for parents to download online and they have no opportunity to apply online. MAS does, however, have an online application available.

Parents and students have a keen understanding of technology, use it in their daily lives, and come to expect it when they participate in the school meals program. Parent surveys indicated that 78 percent of them *agreed* or *strongly agreed* that they regularly use technology to keep up to date on their child's education (**Exhibit 5-23**).

Exhibit 5-23
Parent Survey Results on Technology

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I regularly use technology to keep up-to-date on my child's education (emailing teachers, online gradebook, etc.).	16%	62%	11%	7%	4%

Source: Prismatic Survey Results, February 2020

Putting the application on the district website for easy access and giving them the ability to apply online is an effective way to help ensure all eligible students are enrolled in the free and reduced program. It also has the added benefit of reducing the amount of time staff spends on the meal application process and the process should be completed more quickly.

RECOMMENDATION

Implement the available component of the current software provider to automate the process of online meal applications.

The district should work with their automated software provider to enable parents to fill out their applications for meal benefits online. Once an online process is available, the district should include a prominent link on its website for families to access. This should be implemented for the beginning of the 2020-21 school year. In addition, at pre-enrollment time a computer should be available in the schools for parents who would like to immediately apply online.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-14

The secondary cafeteria, located in a series of adjacent spaces in the high school, is undersized for the number of students served. In addition, its location requires middle school students to journey to the high school for meals.

Hennessey middle and high school students eat in the high school cafeteria. There is seating for 200. Enrollment is approximately 195 at the middle school and 230 at the high school. All

middle school students are released at one time and their lunch period is 28 minutes. The same is true for the high school students and their lunch period is 29 minutes. There is no break between the end of the middle school lunch and the beginning of the high school lunch. The consulting team observed substantial congestion and poor traffic flow during both meal periods. With the current number of seats, there are not enough seats for all high school students to sit during lunch.

Exhibit 5-24 shows student responses to the question whether they have enough time to eat. As shown, 66 percent of them *disagreed* or *strongly disagreed* that they have sufficient time to eat; only 24 percent indicated they had sufficient time.

Exhibit 5-24
Student Survey Results on Time to Eat

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I have enough time to eat my lunch every day.	13%	11%	11%	40%	26%

Source: Prismatic Survey Results, February 2020

The district does not currently make use of reimbursable vending machines or food kiosks to address seating and congestion issues. Vending machines that offer reimbursable meals can reduce line waits and congestion areas in cafeterias. An example of such a machine is shown in **Exhibit 5-25**. These vending machines are integrated into the POS computer system and dispense reimbursable meals. They can dispense both breakfast and lunch reimbursable meals. A student enters his/her pin number at the keypad and then selects items from the machine. The machine will not dispense any food product until at least three of the five lunch meal components have been selected (which is required for the meal to be considered reimbursable). The pin number of the student is locked out for a 20-minute period to preclude additional dispensing on that pin number. In one school the consulting team worked with, the school recorded a 16 percent increase in average daily meal participation after launching the meal vending machine.

Exhibit 5-25
POS-integrated Vending Machine at a High School

Source: Prismatic file photo, April 2011

In other districts, portable kiosks are used to provide alternative meal service points. **Exhibit 5-26** provides examples the consulting team has found in use in other school districts. In some districts, the kiosks are placed each morning where students alight from the school bus then moved to another location where students have lunch seating, such as a commons area.

Exhibit 5-26
Kiosk Services Found in Other School Districts

Breakfast Cart with Hot and Cold Items

Exhibit 5-26 (continued)
Kiosk Services Found in Other School Districts

Portable Cart Option Capable of Maintaining Temperatures

Source: Prismatic, 2013

Providing sufficient time to eat lunch is crucial for promoting healthy eating behaviors among children. Organizations such as the American Academy of Pediatrics and the National Alliance for Nutrition and Activity recommend that students have at least 20 minutes to eat, beginning from the time they are seated with their meal.[10] Because students often wait for several minutes to receive their lunch, scheduled lunch periods of longer than 20 minutes may be needed to provide adequate time for eating.

RECOMMENDATION

Explore options to expand space for student eating.

The district should look for solutions to alleviate the problem of insufficient space in the high school cafeteria for the number of students served. Solutions should include both short-term (for school year 2020-21) and long-term remedies. Short-term remedies can include:

- lengthen the lunch period for both middle and high school students;

- split up middle and high school students into two periods each;

---

[10] American Academy of Pediatrics: American Academy of Pediatrics, National Association of School Nurses. Health, Mental Health and Safety Guidelines for Schools. 2005.
National Alliance for Nutrition and Activity: National Alliance for Nutrition and Activity. Model Local School Wellness Policies on Physical Activity and Nutrition. 2005.
Changing the Scene - Improving the School Nutrition Environment. A Call to Action. 2000.
www.fns.usda.gov/sites/default/files/CalltoAction.pdf

- set up cart service outside the cafeteria that provides a reimbursable grab and go meal in an area that has adequate seating; and/or

- provide vending machines that dispense a reimbursable meal in an area that has adequate seating.

Long-term remedies can include:

- hire a design firm to determine the feasibility of remodeling the middle school to provide a dedicated cafeteria and finishing kitchen similar to what is in the elementary school; and/or

- hire a design firm to determine the feasibility of expanding the current cafeteria in the high school.

FISCAL IMPACT

This recommendation can be implemented with existing resources. Expanding resources will most likely result in increased student participation.

B.   TECHNOLOGY

The International Society for Technology in Education (ISTE) has created standards for the use of technology to enhance education. Part of preparing students for the digital age includes helping them become responsible consumers and curators of online content. For this reason, digital citizenship is a benchmark integrated into the ISTE Standards for Students, ISTE Standards for Education Leaders and ISTE Standards for Coaches. Oklahoma has adopted the International Society for Technology in Education's Student Standards for the Oklahoma Academic Standards.[11] These standards are designed to empower student voice and promote learning as a student-driven process and have evolved from just using technology learn to transformative learning with technology. **Exhibit 5-27** the seven key standards for students to follow.

ISTE student standards are:

- Empowered learner.

- Digital citizen.

- Knowledge constructor.

- Innovative designer.
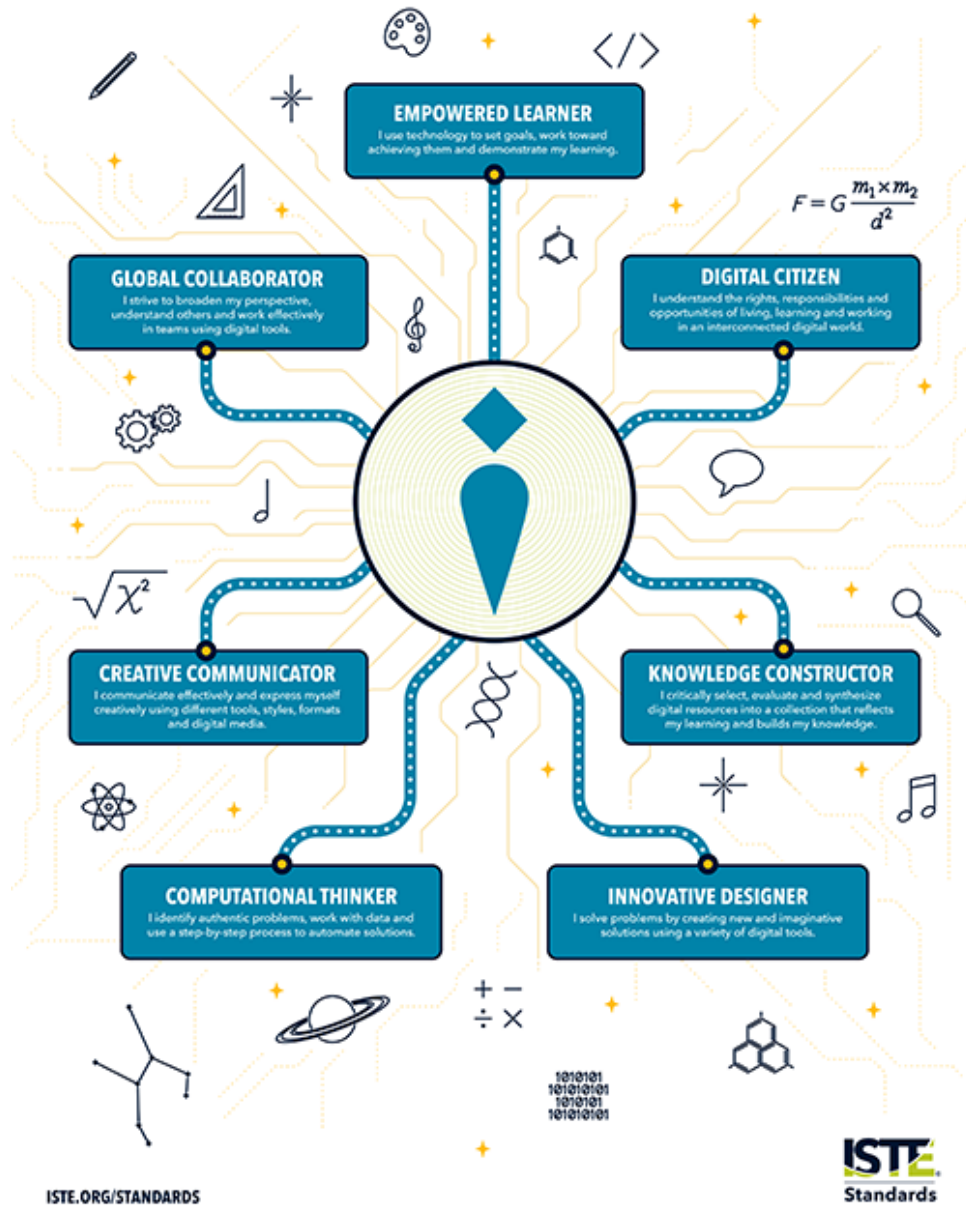
- Computational thinker.

---

[11] https://www.iste.org/standards/for-students

- Creative communicator; and

- Global collaborator.

Exhibit 5-27
ISTE Standards for Students

The implementation of technology in schools follows a broader societal trend — teens' tech 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.[12] 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.[13] Oklahoma continues to make advances in online assessment practices and in the use of instructional technology in the PK-12 classroom. Despite the heavy focus the state has placed on transformational learning with technology, Oklahoma's overall score earned on the Chance-for-Success Index in Quality Counts 2020 was a C[14] (**Exhibit 5-28).** The purpose of this report card is to rank states on educational opportunities and performance

---

[12] https://www.commonsensemedia.org/sites/default/files/uploads/research/census_researchreport.pdf
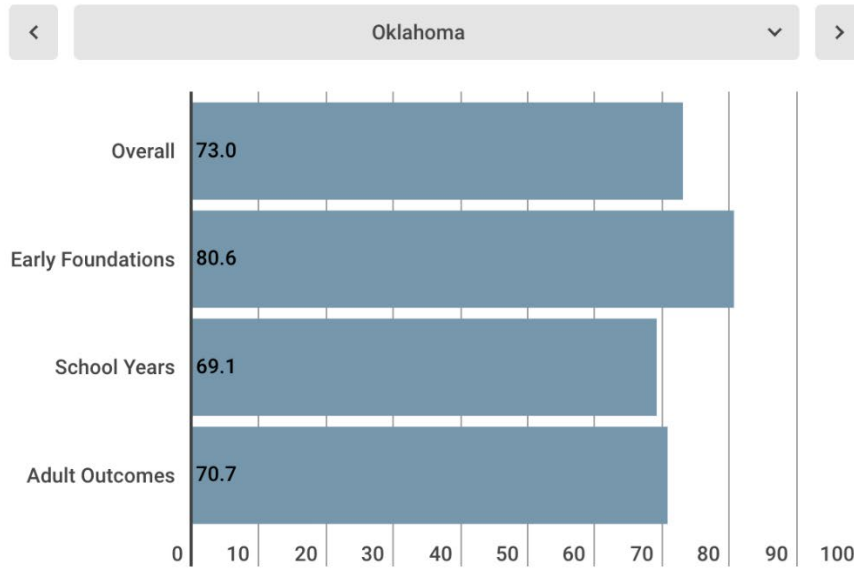[13] https://sde.ok.gov/sites/default/files/documents/files/Fast%20Facts%20July%202019.pdf
[14] https://www.edweek.org/ew/collections/quality-counts-2020/state-grades-on-chance-for-success-2020.html

Exhibit 5-28
Chance-for-Success Results by State

> The bar charts below provide results for each of the 13 indicators making up the Chance-for-Success Index. **Use the top bar to navigate to the states that interest you.**

| < | Oklahoma | ⌄ | > |

Indicator	Score
Overall	73.0
Early Foundations	80.6
School Years	69.1
Adult Outcomes	70.7

U.S. Score

Indicator	Score
Overall	79.2
Early Foundations	83.0
School Years	77.6
Adult Outcomes	77.2

Source: https://www.edweek.org/ew/collections/quality-counts-2020/state-grades-on-chance-for-success-2020.html
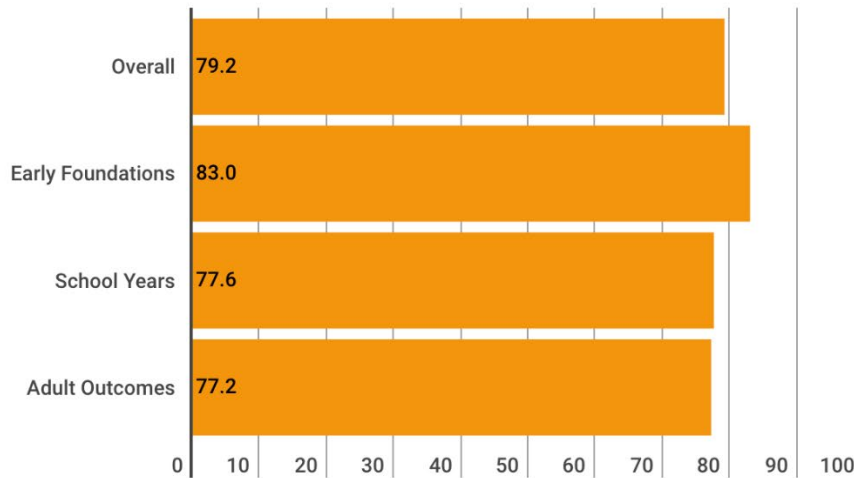
Oklahoma was previously one of 22 states and one territory to create K-12 assessments aligned to Common Core State Standards through the Partnership for the Assessment of Readiness for College and Careers (PARCC).[15] A major impact of PARCC's Common Core assessments, and

---

[15] http://www.parcconline.org/

a concern of many Oklahoma school districts, involved technology. Oklahoma transitioned to a new vendor, Measured Progress, now called Cognia, for the Online Oklahoma School Testing Program (OSTP) to assess student mastery of the Oklahoma Academic Standards rather than the Common Core Standards; however, technology remains a major component of the assessment process. The State Department of Education (SDE) has released technology guidelines for the Cognia assessments for schools so they will be properly equipped and ready to administer the tests.[16]

Exhibit 5-29 illustrates the most current assessment technology specifications that districts in Oklahoma must consider as they administer assessments in 2019-20 and beyond. Unlike specifications provided in previous years, the technology guidelines are required. In the past, there were minimum and recommended specifications. These specifications provide the levels of computer and network capacity that are required to provide a smooth testing experience for students. Android devices will not be supported.

The stated technology requirements further illustrate the importance of an adequate technology infrastructure and effective long-range planning to accommodate an increasing number of students participating in online testing in the coming years.

---

[16] https://oklahoma.onlinehelp.cognia.org/

Exhibit 5-29
Oklahoma Spring 2020 Assessment Technology Specifications[17]

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[18,19] (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) [20]

Source: https://oklahoma.onlinehelp.cognia.org/guides/

HPS has an Internet Use Policy in place, as well as backup system servers onsite. The district has maintenance for servers and switches outsourced to Interworks. HPS utilized E-rate funding for wireless. The district has Newline Interactive Touchscreen boards in place. Staff has received initial training on the interactive boards. In addition, HPS has implemented a one-to-one

---

[17] Windows is a registered trademark of Microsoft Corporation. Firefox is a registered trademark of the Mozilla Foundation. Safari, Mac, and iPad are registered trademarks of Apple Inc. Chrome and Chromebook are registered trademarks of Google Inc. Fedora is a trademark of Red Hat, Inc. Linux is the registered trademark of Linus Torvalds in the U.S. and other countries. The Bluetooth is a registered trademark owned by Bluetooth SIG, Inc.

[18] Text-to-speech on browsers is partially supported.

[19] As new operating system and browser versions are released, eMetric will update technology guidelines following successful compatibility testing.

[20] Windows 10 S is not supported.

technology initiative in grades one through twelve. Students in Pre-K and Kindergarten all have access to iPads in the classroom.

The current technology organization for HPS is shown in **Exhibit 5-30**. The district has a full-time technology director and receives additional technology support from a part-time IT technician who serves as the student information specialist. Additionally, within the last few years, the district has hired a technology integration specialist. This position was created to provide instructional coaching with technology and to facilitate the purposeful use of technology in the current one-to-one initiative.

Exhibit 5-30
HPS Technology Organizational Structure
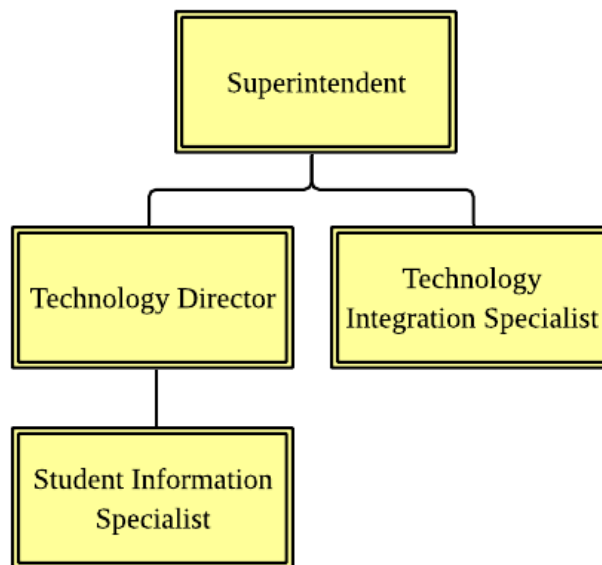
Source: Created by Prismatic, February 2020

FINDING 5-15

The district has successfully initiated a one-to-one technology environment for students. HPS is currently in the second year of implementing a one-to-one technology initiative. Students in 1st through 12th grades have Google Chromebooks to utilize at school (**Exhibit 5-31**). Pre-K and Kindergarten students have access to iPads in the classroom to expand their instructional opportunities. In addition, each classroom is equipped with an interactive touchscreen panel that allows teachers to incorporate engaging learning experiences for students.

Exhibit 5-31
Students Using Chromebooks in Class

Source: Prismatic, February 2020

Teachers have the opportunity to utilize technology to access the curriculum and enhance learning experiences for students. Research indicates that to ensure student success, education must move from a teacher-centric to a learner-centric approach. One-to-one technology programs create the opportunity for authentic personalization of teaching and learning for each student and extend learning environments for students. With access to personal portable technologies in a wireless environment, students can learn at their own pace, ability levels, and take advantage of the worldwide experiences and resources available online-and just in time. Teachers become facilitators of powered up learning experiences – meaningfully linking technology to curriculum and instruction. The concept has gained momentum at a rate of four percent a year as a key to

transforming education, enhancing economic goals and preparing students to succeed in a global marketplace.[21]

A 2017 survey from the Consortium for School Networking reported 40 percent of districts in the U.S. were one-to-one, which is nearly twice as many as in 2014.[22] According to Medlin, 2019, "Although some schools use iPads or other laptops, Chromebooks outpace every other device. Chrome OS made up a reported 60 percent of K-12 school institutional purchases in 2018. That's up from 16 percent in 2013."[23] Chromebooks are easier for technology directors to manage and are also much cheaper than other devices. They do not require regular updates or antivirus protection. They provide students with access to many different tools through the Google Suite, as well as online resources.

COMMENDATION

HPS has implemented a one-to-one technology initiative for all grades.

FINDING 5-16

The district provides adequate technology support for the number of devices within the district. A full-time technology director, along with a part-time student information specialist, increases efficiency in addressing technology-related issues.

The technology director conducts needed troubleshooting and maintenance, addresses networking and access issues, assists in technology planning for the district, and works collaboratively with the technology integration specialist to conduct training sessions for staff. Additionally, he leads a student internship program where seven to eight high school students work alongside him to support teachers with their technology devices. The students can also troubleshoot Chromebook problems, fix broken screens, and support other maintenance requests as needed.

Staff in focus groups and interviews noted that the technology director is accessible and responds in a timely manner to work orders. Teachers note that the technology director's experience as a teacher is beneficial in understanding their needs specific to the instructional technology that they are currently using. As shown in **Exhibit 5-32**, 86 percent *agreed* or *strongly agreed* that equipment was quickly repaired or serviced.

---

[21] http://www.one-to-oneinstitute.org/index.php/becoming-a-one-to-one/why-one-to-one/
[22] https://www.northernpublicradio.org/post/rapid-growth-11-technology-and-how-its-changing-classroom
[23] Ibid.

Exhibit 5-32
Staff Survey Results Regarding Technology Servicing

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
When necessary, the district's technology equipment is quickly repaired or serviced.	33%	53%	8%	5%	0%

Source: Prismatic Survey Results, February 2020

A 2015 nationwide survey of 173 district officials, principals, and teachers found that 71 percent believed a specific office or department should be dedicated to technology in their district. The survey also found that 53.9 percent of those surveyed felt the technology training available was insufficient.[24] An article in Edutopia Magazine, "Technology Integration Research Review: Avoiding Pitfalls," points to the most common complaints teachers make about technology integration. Specifically, sited 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."[25]

COMMENDATION

HPS is commended for supporting technology with adequate staffing: a full-time technology director, a part-time student information specialist, and trained high school students.

FINDING 5-17

The culture of the district supports risk-taking and experimenting with technology. This includes teachers taking initiative to learn about new software and integration into instruction.

HPS has implemented a one-to-one technology initiative. The 2019-20 school year was the second year for all students to have access to devices in the classroom. Students in grades one through twelve utilize Chromebooks, while Pre-K and Kindergarten students all have access to iPads.

In order to enhance learning opportunities for students, teachers must embrace both the technology available within the district and its possibilities for engaging students in meaningful work in the content areas, and the way in which interviews with staff indicate promising practices in willingness to take risks and learn about new possibilities with technology in order to support learning goals. For example, several teachers in grades 6th through 12th grade piloted the use of Google Classroom during the first year of the one-to-one technology initiative to facilitate student learning, and this school year, many teachers in secondary grades are using this application with fidelity. Classroom is a new tool in Google Apps for Education that helps teachers create and organize assignments quickly, provide feedback efficiently, and easily

---

[24] https://s3.amazonaws.com/dive_assets/rlpsys/State_of_EdTech_Survey_2015.pdf
[25] https://www.edutopia.org/technology-integration-research-avoiding-pitfalls

communicate with their classes.[26] Similarly, in elementary grades, teachers have worked to learn new strategies for the available technology in their classrooms. They have researched and learned new ideas from one another, including applications for the interactive touchscreens, Chromebooks, and iPads.

In **Exhibit 5-33**, Pre-K students are engaged in an interactive activity using QR codes and iPads to read stories. Elementary students are using Chromebooks to practice reading skills. Secondary students are utilizing applications on their graphing calculator to solve mathematics problems in one classroom, while students in another classroom are using Chromebooks to work collaboratively through apps in the Google Suite.

---

[26] https://classroom.google.com/welcome

Exhibit 5-33
Technology Use in Elementary and Secondary Schools
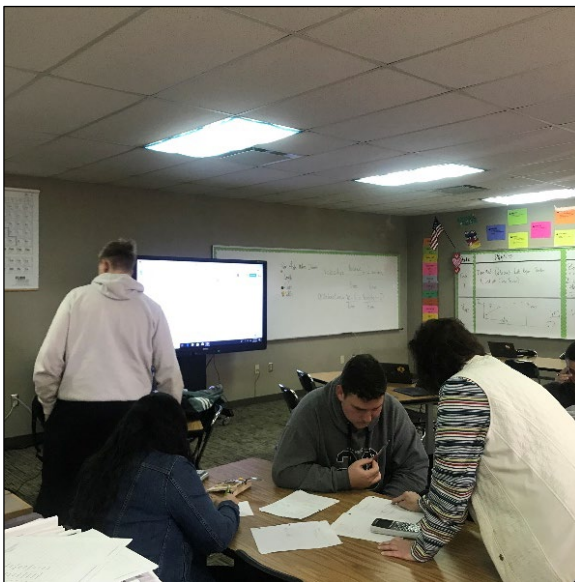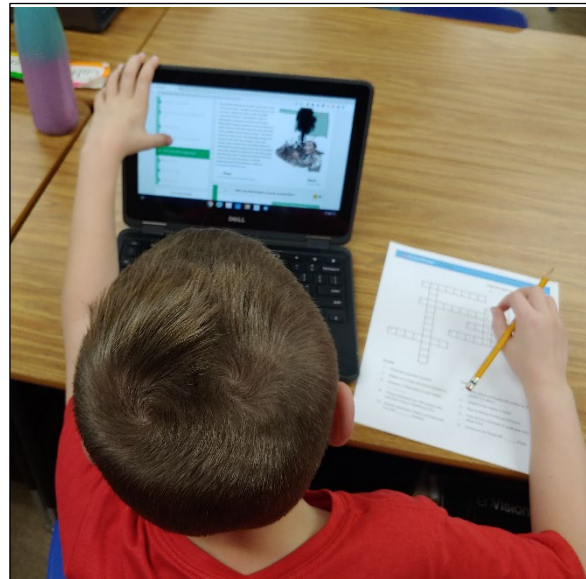
Source: Prismatic, February 2020

The desire and willingness staff exhibit to learn new strategies to better integrate technology into the classroom are a result of the culture established within the district. The superintendent and principals encourage teachers to be innovative in their practices. The technology integration specialist works directly with teachers to support them in the use of technology tools with students. The environment supports learning and collaboration rather than punitive measures when new strategies may not work the first time. This culture helps facilitate new and more effective learning experiences for students.

Often, when implementing new initiatives, and in particular those involving new technology, which may be unfamiliar, there can be apprehension on the part of staff and a tendency to shy away from risk-taking. The most successful implementation of technology programs takes place in schools where the superintendent and/or principal see him themselves as a technology leader. In particular, in a recent article in which many of the ideas were also included in a presentation made at the International Society for Technology in Education, seven key attributes are mentioned as critical for a technology leader to demonstrate. They include:

- create an atmosphere that inspires innovation;

- foster collaboration;

- be open to new ideas;

- be a connected learner yourself;

- locate and provide adequate resources;

- take risks; and

- have a visionary focus.[27]

In a recently published article, these habits are extended into specific guidelines to help school leaders embarking on a mission of technology reform. Derived from conversations with teachers, students, and parents from around the country and on behalf of the National Association of Secondary School Principals, a former principal and one of the current moderators of the Association for Middle Level Education's MiddleTalk Listserv, developed these ten guidelines to help principals and other school leaders succeed in integrating technology in their schools:

1. Principals must effectively and consistently model the use of the same technology tools they expect teachers to use in their classrooms with the students.

2. Principals must be consistent in their decisions and expectations about integrating learning technology in the school.

3. The principal's communication about the pace and process of integrating learning technology needs to be clear and reasonable.

4. The principal must provide appropriate professional development time and resources to support effective classroom implementation of technology.

5. The principal must support early adopters and risk takers.

6. The principal must do whatever it takes to ensure that all staff has early access to the same digital tools that students will be using in their classrooms.

---

[27] http://thejournal.com/Articles/2012/06/07/7-habits-of-highly-effective-tech-leading-principals.aspx?Page=1

7. As the educational leader, the principal must make it clear to the technology leader that all decisions relating to learning technology will be made by the educational leaders with input from the technology leaders, not the other way around.

8. The principal must set and support the expectation that student work will be done and stored using technology.

9. Principals must ensure that families and the public are kept informed about the school's goals and progress relating to its use of technology as a learning resource.

10. The principal must be an active and public champion for all students, staff members, and the school in moving the vision of fully integrating learning technology for the second decade of the 21st century.[28]

COMMENDATION

HPS is commended for establishing and encouraging a culture of risk-taking and experimenting with technology.

FINDING 5-18

HPS employs a full-time technology integration specialist to support teachers with instructional technology use. The district hired a technology integration specialist in May 2018 to prepare for the implementation of a one-to-one technology program. This newly created position would be an essential one in planning for and implementing effective use of technology in the classroom.

In the first year of HPS's one-to-one initiative (2018-19), the technology integration specialist provided professional development for all staff, as well as trainings in small group settings that were focused on a particular application. In **Exhibit 5-34**, HPS technology integration specialist provides training for teachers in which each teacher chooses an application they wanted to find out more about and were able to explore that app and discuss ways of implementing it in their curriculum.

---

[28] http://thejournal.com/Articles/2012/06/07/7-habits-of-highly-effective-tech-leading-principals.aspx?Page=4

Exhibit 5-34
HPS Tech Talk Tuesday Training Session
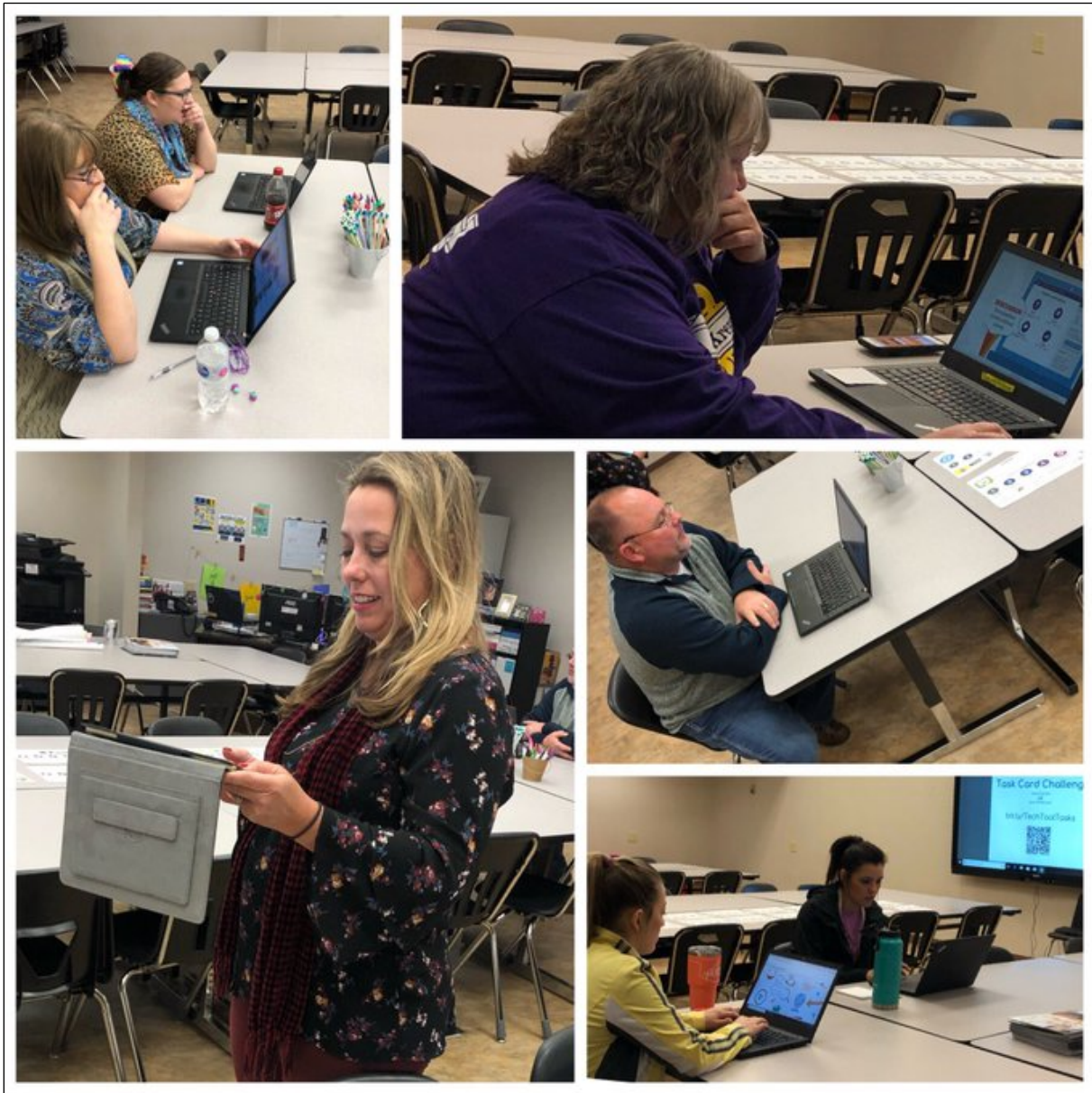
Source: Prismatic, February 2020

At the conclusion of Year One of the one-to-one initiative, the technology integration specialist worked with the superintendent, technology director, and principals to determine staff needs in technology integration. In Year Two, during the back to school PD, all staff received training on the use of Google Drive, including how to organize files, location information shared, and how to share documents and files collaboratively across teams. In **Exhibit 5-35**, the district's technology integration specialist presents Google Drive to the staff.

Exhibit 5-35
Back to School Professional Development Session on Google Drive
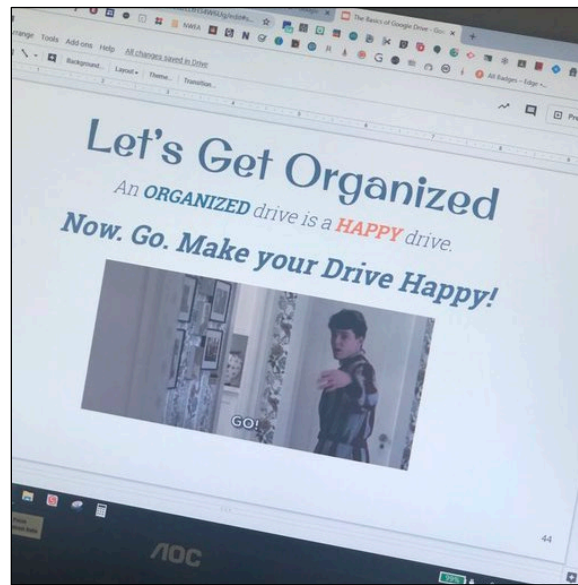
Source: Prismatic, February 2020

Introducing digital tools requires a growth mindset. Teachers may determine that certain strategies they have utilized over time are effective, but students continually require new approaches to solving problems, particularly with technology. Schools must prepare students for jobs that do not even exist yet, and it is important to provide them opportunities to build skills so that they are better prepared for college, careers, and real-world application of their learning.

Technology is constantly changing, and new applications are readily available for students to use. Teachers face the challenge of finding what technology tools are out there and learning how to use them effectively to integrate them seamlessly into their curriculum to maximize learning experiences for students. This can be a daunting task. A model that has been utilized in some districts involves the collaboration between teachers and a technology integration specialist. The role of the technology integration specialist can vary depending on the needs of the teacher, students, and school. Teachers can identify concepts and skills they will teach in upcoming units, and the technology integration specialist can offer suggestions for effective ways to enhance the learning experiences using available technology tools and applications. Technology integration specialists can serve as coaches to help teachers reflect on their lessons and effectiveness of the technology used with students. They often provide professional development for staff in learning how to use technology in their instruction.[29] Through the use of a technology integration specialist, HPS has addressed each of these needs.

---

[29] https://districtadministration.com/voices-in-tech-how-edtech-coaches-aid-classroom-instruction/

COMMENDATION

HPS is commended for employing a technology integration specialist to provide coaching and training for staff in implementing technology in the classroom.

FINDING 5-19

The district has initiated a student internship program to assist with technology support. Onsite interviews with staff indicated that technology support is nearly immediate. In addition to the technology director working to address support issues, the district utilizes a student internship program. The recently implemented internship program allows students to gain practical, real-world technology skills while also fulfilling a critical need for the district.

In the program, seven to eight secondary students work during the instructional day for one class period at a time. Additionally, one student works three hours a day in an internship capacity. These students can troubleshoot problems with wireless access, Chromebook issues, screen repair, or individual teacher devices in the classroom. Students apply to the internship program, receive minimum wage for their work by the hour, and the district pays for the students to take industry certification examinations, including A+, Network Plus, and Security Plus. Students have the opportunity to earn income and also obtain certifications that will benefit them in future careers.

The growth of technology use in schools can provide many benefits for students and staff. Among those benefits are increased opportunities for students to be a part of virtual expeditions and labs that would not otherwise be possible without the use of technology. For example, students have ability to participate in DNA extraction virtual labs to test a newborn for genetic diseases, analyze forensic evidence, or study a gene involved in cancer.[30] Such opportunities would not be possible for students without the use of technology.

In addition to the instructional benefits, HPS students can also work as interns to learn more about the technology, how it works, and how to troubleshoot issues that arise. In this, HPS is among other districts who recognize the power of leveraging students' technological abilities and interests. Indian Prairie School District in suburban Chicago recently implemented a student intern program for technology support. As their assistant superintendent explains, "We're starting to see the students become more of an instructional resource. They're recommending apps and helping each other. It fosters teamwork and leadership; and empowers the kids."[31]

Not only has this initiative provided students with an opportunity to learn about the technology and gain skills for future careers, it has also helped the district manage numerous types of technology support issues. With many districts facing budget cuts and personnel shortage, utilizing student talent to provide technology support is a practical solution.

---

[30] https://learningcenter.nsta.org/mylibrary/collection.aspx?id=ldPT0QtbY/w_E
[31] https://edtechmagazine.com/k12/article/2017/10/schools-tap-students-provide-enough-it-help-desk-support?amp

COMMENDATION

HPS has integrated a student internship program to assist with technology support.

FINDING 5-20

HPS has successfully secured funding sources and grants to support long-range planning in technology.

In the past several years, the district has cultivated a grant-seeking environment, successfully identifying and securing additional funding for technology purchases and upgrades, as well as technology oriented professional development. The district encourages staff to write grants for technology and other instructional supports through DonorsChoose.

COMMENDATION

HPS is commended for seeking and successfully acquiring external funds for district technology purchases, upgrades, and teacher professional development.

Moving forward, and given the current needs in technology and professional development and the impact of decreasing school funding, HPS should 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.[32] Some specific grants that are available to supplement the district's funding for technology are:

- Walmart Community Grants.[33]

- Best Buy Community Grants-Helping Teens Build 21st Century Technology Skills.[34]

- Chesapeake Energy Corporate Giving Program.[35]

FINDING 5-21

HPS lacks a disaster recovery plan. In the event of a natural disaster or severe power surge, the district does not have procedures documented to ensure that critical data, systems, and programs can be brought back to pre-disaster status. The district utilizes a student information system that contains student data stored on a remote server hosted by a vendor. Additionally, financial information is backed up automatically to the vendor's server.

Even though several backup systems are in place, the district lacks the policies, procedures, and assigned personnel needed to mitigate the damage and reestablish critical data. By failing to document a backup and recovery plan, system knowledge, recovery information, and

---

[32] 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. Links to major grants and educational resources can be found at http://www.edutopia.org/grants-and-resources.
[33] http://foundation.walmart.com/apply-for-grants/local-giving-guidelines
[34] http://www.bby.com/community-grants/
[35] http://www.chk.com/Corporate-Responsibility/Community/Corporate-Giving/Pages/How-To-Apply.aspx

responsibility are left to the technology director. A disaster recovery plan would aid the district in reloading data, programs, and systems, as well as recovery of hardware and software, in the event of a loss.

Onsite interviews indicate a desire for a more reliable and comprehensive data backup system. The file server does not have an offsite backup. Onsite interviews indicated that there is a need to backup data, and the risk of losing files stored only on the district servers was a possibility in the event of a disaster. Teacher files that have been created by teams are particularly vulnerable unless the individual teachers use flash drives, Google Drive, or another cloud-based system for back-up. The use of Google Drive is increasing among staff in the district, but it is currently not being used by all staff.

A disaster recovery plan would aid the district in reloading data, programs, and systems, as well as recovery of hardware and software, in the event of a loss. **Exhibit 5-36** defines the process of developing an effective disaster recovery plan.

Exhibit 5-36
Key Elements of a Disaster Recovery Plan

Step	Details
Build the disaster recovery team.	Identify a disaster recovery team that includes key policy makers, building management, end-users, key outside contractors, and technical staff.
Obtain and/or approximate key information.	Develop an exhaustive list of critical activities performed within the system.
	Develop an estimate of the minimum space and equipment necessary for restoring essential operations.
	Develop a timeframe for starting initial operations after a security incident.
	Develop a list of key personnel and their responsibilities.
Perform and/or delegate key duties.	Develop an inventory of all computer technology assets, including data, software, hardware, documentation, and supplies.
	Set up a reciprocal agreement with comparable organizations to share each other's equipment or lease backup equipment to allow the system to operate critical functions in the event of a disaster.
	Make plans to procure hardware, software, and other equipment as necessary to ensure that critical operations are resumed as soon as possible.
	Establish procedures for obtaining off-site backup records.
	Locate support resources that might be needed, such as equipment repair, trucking, and cleaning companies.
	Arrange with vendors to provide priority delivery for emergency orders.
	Identify data recovery specialists and establish emergency agreements.
Specify details within the plan.	Identify individual roles and responsibilities by name and job title so that everyone knows exactly what needs to be done.
	Define actions to be taken in advance of an occurrence or undesirable event.
	Define actions to be taken at the onset of an undesirable event to limit damage, loss, and compromised data integrity.
	Identify actions to be taken to restore critical functions.
	Define actions to be taken to re-establish normal operations.
Test the plan.	Test the plan frequently and completely.
	Analyze the results to improve the plan and identify further needs.
Deal with damage appropriately.	If a disaster actually occurs, document all costs and videotape the damage.
	Be prepared to overcome downtime on your own; insurance settlements can take time to resolve.
Give consideration to other substantial issues.	Do not make a plan unnecessarily complicated.
	Make one individual responsible for maintaining the plan, but have it structured so that others are authorized and prepared to implement if it is needed.
	Update the plan regularly and whenever changes are made to your system.

Source: National Center for Education Statistics, "Safeguarding Your Technology," April 2003

RECOMMENDATION

Develop and test a disaster recovery plan that includes the district's critical data, systems, and programs.

The district should address this problem immediately. The district should develop and test a disaster recovery plan that includes the district's critical data, systems, and programs. The superintendent should consult with the technology director regarding the process for implementing a disaster recovery plan. 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. Necessary hardware and software are already in place. The needed policies and procedures can be developed by existing staff.

FINDING 5-22

The district does not regularly assess staff, student, or parent satisfaction and use of technology; there is no formal process in place for evaluating technology implementation and use. HPS is not ensuring that it is maximizing its technology use. Additionally, based upon onsite observations, interactive touchscreen panels and other technology are not being used to their full potential or as frequently as intended in all classrooms.

HPS has made some substantial technology investments in infrastructure, hardware, and software, and continues to invest in technology. The district is in the second year of implementing a one-to-one technology initiative with Chromebooks and iPads, and all classrooms are equipped with interactive touchscreen panels. Many classrooms also have document cameras and access to online applications and resources. However, after initial purchase and setup, the district does not employ a monitoring system to evaluate the use of the technology, thereby limiting data to support continuous improvement. The district has not put into place the mechanisms to ensure that all teachers are maximizing the resources they have available. As the district prepares to add additional devices to the network and expand the way in which teachers utilize technology with students, it will be important to determine the impact of the technology in the classroom.

Exhibit 5-37 shows student survey results regarding computer use at school and home. Nearly 90 percent of students surveyed indicated that they regularly use computers at school, and 90 percent indicated they have Internet access at home. However, only 21 percent of students felt that teachers know how to use the technology in the classroom.

Exhibit 5-37
Student Survey Results Regarding Technology

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I regularly use computers at school.	47%	40%	6%	6%	0%
I have regular Internet access at home.	47%	43%	2%	2%	6%
Teachers know how to use technology in the classroom.	17%	4%	11%	17%	51%

Source: Prismatic Survey Results, February 2020

Onsite interviews with students indicate that often computers are used just for note taking and research. Students expressed a desire to learn additional technology skills and utilize a variety of applications in class.

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. In order for students to develop and build the necessary skills and comfort level, students must have reliable, consistent access and integrated use. In addition to providing access to students, it is critical that the district identify what technologies are being used, provide teachers with the tools and training to integrate those technologies into instruction, and evaluate whether or not these strategies result in student achievement gains.

RECOMMENDATION

Establish a systematic method to regularly assess technology placement, use, and effectiveness to ensure the district is maximizing its technology investments.

The district should expand collaboration among leadership, teachers, and students in order to ensure effective utilization of technology resources. It should also frequently gauge user satisfaction and make adjustments in order to ensure optimal technology service. With the substantial costs associated with implementing a one-to-one initiative, it is important to regularly assess staff and student needs, current practices, and future plans to ensure continuous growth in the effective use of technology.

Given the importance of online testing to Oklahoma's student testing program, efforts should be made to address any district shortcomings immediately. The district should track and analyze technology use in classrooms and the library media center in order to ensure it has used its technology resources most effectively. This will also identify whether additional supports, such as training or improved infrastructure are needed. The district could also implement a method to assess staff, student, and community satisfaction with technology-integrated classes and instruction. This knowledge could help inform future planning in technology acquisition and implementation.

A number of survey instruments and checklists are available free of charge. Survey examples may be found at the Wufoo Form Gallery, including technology support surveys, website content

surveys, and student satisfaction surveys. [36] Additionally, the International Society for Technology in Education (ISTE) has developed a Classroom Observation Tool that provides districts with a mechanism to record and analyze technology use in classrooms. [37] This free tool is built into Microsoft Excel and allows district personnel to record information on classroom groupings, teacher roles, time, types of technology used, and compliance with the ISTE for Students. 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 5-23

The district lacks an instructional technology plan. In conjunction with the overall professional development plan, the district would benefit from implementing an instructional technology plan. The district has successfully encouraged all staff to attend basic training in use of Chromebooks, iPads, and interactive panels. The district could further benefit from a tiered professional development plan which focuses on the use of technology in the classroom and improving instructional practices beyond initial professional development experiences.

Onsite interviews indicated a desire by staff to try new strategies which utilize technology. With the ever-changing capabilities of technology in the classroom, it is important to engage in sustained professional development to support technology use with students over time. It is equally important to provide varied professional development opportunities to address the different levels of expertise teachers across the district currently possess.

While HPS teachers have received some initial professional development in the use of technology in the classroom, staff interviews indicate a desire to become more specialized in the use of certain devices in the classroom. In some cases, the technology tools are still primarily being used as a teacher-centered device for imparting information to students. If teachers are not innovative in integrating student-centered use of technology, they will be unable to use technology effectively to support instructional delivery and student achievement.

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 devices in classrooms but also providing the resources needed to incorporate technology into lesson plans and other educational activities. Professional development provided at regular intervals in a systematic fashion that emphasizes both technology applications and its integration into curriculum and classroom instruction is necessary in HPS.

Exhibit 5-38 shows classroom teachers' self-reported comfort levels with the use of technology in the classroom and for communication. While staff members indicated an understanding of technology and its utilization, the consulting team found in onsite observations that this

---

[36] http://www.wufoo.com/gallery/
[37] http://www.iste.org/about/permissions-and-reprints

knowledge is inconsistent across HPS classrooms. Moreover, the student survey results indicated that at least some of the secondary teachers are not demonstrating high technology proficiency day-to-day in the classroom. Implementing technology effectively into classroom instruction requires a teacher to have a higher level of understanding, redirected teaching methodology, substantial practice, and training at regular intervals.

Exhibit 5-38
Teacher Survey Results Regarding Comfort with Technology
(n=46)

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I understand how to use technology as it relates to my job functions.	15%	74%	4%	7%	0%
Technology is readily accessible and easy to use in the performance of my job duties.	30%	57%	2%	11%	0%
District staff and administrators often use email to communicate with one another.	35%	65%	0%	0%	0%

Source: Prismatic Survey Results, February 2020

Teachers were observed teaching reading, math, science, and social studies using interactive whiteboards, but this was often only as a display device (**Exhibit 5-39**). During the onsite interviews and focus groups, teachers and administrators indicated a need for additional professional development or training focused on the instructional use of technology. Specifically, a need for subsequent and follow-up training on iPads for early childhood and web-based applications was noted, along with training that is content-specific in utilizing computers and interactive touchscreen panels.

Exhibit 5-39
Interactive Touchscreen Panel Use in Elementary and Secondary Classrooms
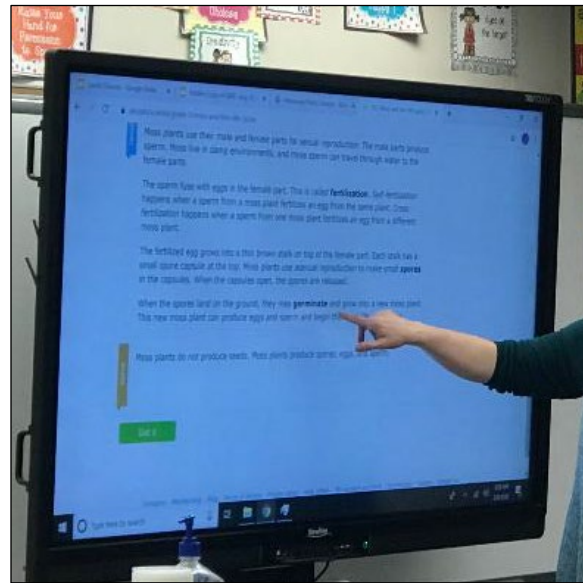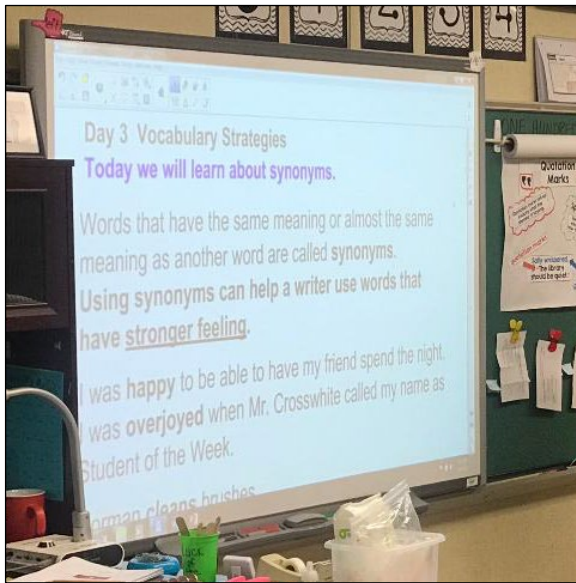
Source: Prismatic, February 2020

According to the Florida Center for Instructional Technology, the Technology Integration Matrix (TIM) illustrates how teachers can use technology to enhance learning for K-12 students (**Exhibit 5-40**). The TIM incorporates five interdependent characteristics of meaningful learning environments: active, constructive, goal directed (i.e., reflective), authentic, and collaborative.[38] The TIM associates five levels of technology integration (i.e., entry, adoption, adaptation, infusion, and transformation) with each of the five characteristics of meaningful learning environments.

---

[38] Jonassen, Howland, Moore, & Marra, 2003

Exhibit 5-40
Technology Integration Matrix

	Levels of Technology Integration Into the Curriculum				
	Entry	**Adoption**	**Adaptation**	**Infusion**	**Transformation**
	The teacher begins to use technology tools to deliver curriculum content to students.	The teacher directs students in the conventional and procedural use of technology tools.	The teacher facilitates students in exploring and independently using technology tools.	The teacher provides the learning context and the students choose the technology tools to achieve the outcome.	The teacher encourages the innovative use of technology tools. Tech tools are used to facilitate higher order learning activities that may not have been possible without them.
Active — Students are actively engaged in using technology as a tool rather than passively receiving information from the technology.					
Collaborative — Students use technology tools to collaborate with others rather than working individually at all times.					
Constructive — Students use technology tools to connect new information to their prior knowledge rather than to passively receive information.					
Authentic — Students use technology tools to link learning activities to the world beyond the instructional setting rather than working on decontextualized assignments.					
Goal Directed — Students use technology tools to set goals, plan activities, monitor progress, and evaluate results rather than simply completing assignments without reflection.					

Characteristics of the Learning Environment

Increasing Levels of Technology Integration into the Curriculum
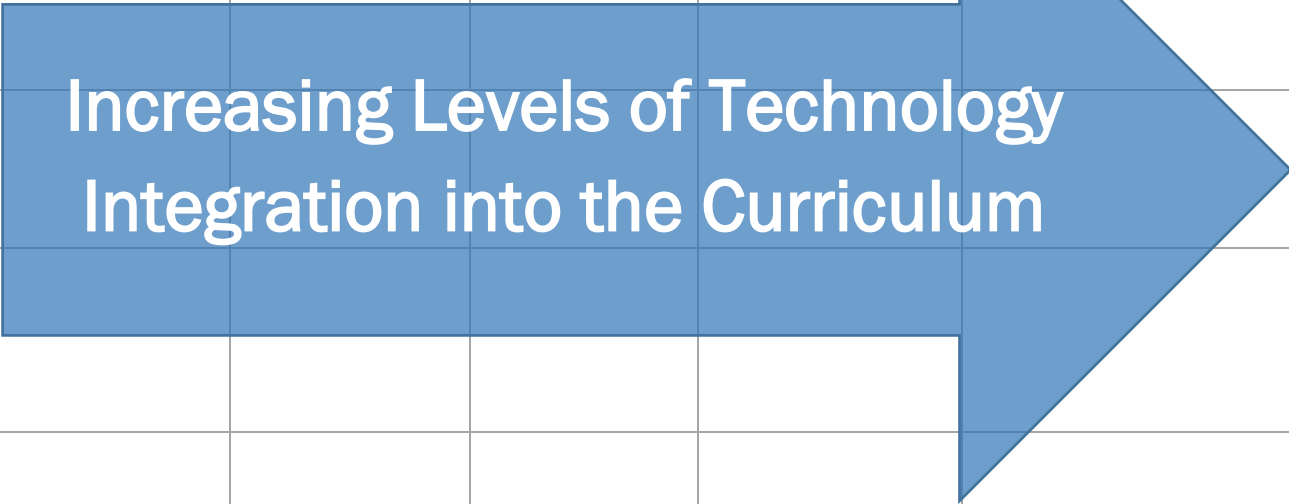
Source: http://fcit.usf.edu/matrix/matrix.php, November 2014

Data from the National Science Foundation (NSF) indicates that the actual impact technology has on classroom instruction is directly related to the amount of quality professional development an educator receives in a targeted context.[39] NSF studies indicate that at least 80 hours of professional development provided over a period of time were needed to develop, enhance, and change the practices of teachers. Ongoing opportunities for professional development should be available to teachers, administrators, and support personnel at all levels.

RECOMMENDATION

Develop and implement an instructional technology plan in conjunction with the district's professional development plan.

Professional development should focus on the specific needs of individual staff and be sustained through coaching and periodic updates. A tiered technology training plan should outline the opportunities afforded to district staff for learning job specific technology skills. This information should be considered in developing the technology professional development plan that meets the needs of HPS and is aligned with data-driven goals supported by long-term professional development activities. The district should move beyond technology acquisition and basic level integration and ensure that the hardware and software tools are being used in ways that result in ongoing improvement of classroom instruction and improved student achievement. This includes differentiated support according to the type of device utilized in the classroom and according to the level of experience each teacher has in implementing technology-based instruction. While individual teachers are encouraged to attend professional development that meets their needs, the staff could benefit from a consistent, tiered professional development plan that is tailored to meet the collective needs of the school staff.

Conducting a needs assessment to determine which stages teachers are currently in with their technology instruction should be an initial activity before designing a tiered system of professional development. The Technology Integration Matrix can provide a tool for facilitating this process. Once this is determined, the superintendent, principals, technology integration specialist, and other lead teachers or staff responsible for supporting professional development should analyze the data and make appropriate recommendations for addressing instructional technology training needs.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-24

The district has not established a technology committee. Although the district is relatively small, including teachers and outside stakeholders such as parents, students, community members, and businesses or partners in technology discussions periodically could provide additional perspective in planning, implementation, and evaluation.

---

[39] http://www.nsf.gov/statistics/seind06/c1/c1s3.htm - c1s3l2

There is no evidence of committee participation by parents or community members. The district is lacking a plan for the implementation or evaluation of technology. The addition of these components, along with specific stakeholders, could further enhance the existing technology plan.

Some budgetary information is included in the current technology plan, including projected and budgeted costs. The plan is lacking some details about how the district will use assessment data to determine subsequent areas of need or administrator observation and evaluation of technology use. A technology survey is referenced, but during the onsite review, staff was not clear on this survey specifically and the resulting data that had been generated.

The National Center for Technology Planning recommends five phases for an effective planning model:

- **Phase 1: Recruit and organize the planning team.** It is important that the planning team consists of all stakeholder groups, and members should excel in planning and communication skills. Stakeholders may include technology specialists, district leaders, parents, students, community members, and business leaders.

- **Phase 2: Research.** This phase consists of a needs assessment and an effort to identify the technologies that can be applied to those needs and ascertain how they can be applied.

- **Phase 3: Construct the technology plan.** This phase focuses on applying the research to establish the district's vision/mission and to define the goals and objectives that will lead to fulfilling that vision and mission.

- **Phase 4: Formalize the planning.** This phase culminates into a comprehensive document that analyzes the present state of the district with respect to technology, articulates specific goals and objectives, incorporates clearly defined strategies and budgetary plans to realize the desired state of technology in the district, and includes a process for evaluation.

- **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 little evidence that HPS has created a formalized plan to adequately address each phase in the planning process. A comprehensive needs assessment is also not readily apparent. Key to the planning process is conducting periodic needs assessments and structuring the plan around the results. Additionally, while it is clear that the superintendent and technology director have engaged in substantial planning over the last couple of years, there are no parents, students, community members, or business leaders on the planning team.

At the state level, the SDE identifies the following 13 minimum requirements for district technology plans in order to receive state Ed Tech funds:

1. strategies for improving academic achievement and teacher effectiveness;

2. goals for using advanced technology to improve academic achievement;

3. steps to increase accessibility;

4. promotion of curricula and teaching strategies that integrate technology;

5. professional development;

6. technology type and costs;

7. coordination with other resources;

8. integration of technology with curricula and instruction;

9. innovative delivery strategies;

10. parental involvement;

11. collaboration with adult literacy service providers;

12. accountability measures; and

13. supporting resources.

The U.S. Department of Education released a National Education Technology Plan in 2010 (**Exhibit 5-41**) that detailed five goals and subsequent recommendations and strategies. The Plan emphasizes a strategic shift toward technology integration and the focus on learners and accessibility. While this specific plan is not a requirement, the process is beneficial in planning for strategic technology integration.

Exhibit 5-41
USDOE National Education Technology Plan 2010

Goal	Recommendation
Learning: Engage and Empower	All learners will have engaging and empowering learning experiences both in and out of school that prepare them to be active, creative, knowledgeable, and ethical participants in our globally networked society.
Assessment: Measure What Matters	Our education system at all levels will leverage the power of technology to measure what matters and use assessment data for continuous improvement.
Teaching: Prepare and Connect	Professional educators will be supported individually and in teams by technology that connects them to data, content, resources, expertise, and learning experiences that enable and inspire more effective teaching for all learners.
Infrastructure: Access and Enable	All students and educators will have access to a comprehensive infrastructure for learning when and where they need it.
Productivity: Redesign and Transform	Our education system at all levels will redesign processes and structures to take advantage of the power of technology to improve learning outcomes while making more efficient use of time, money, and staff.

Source: http://www.ed.gov/sites/default/files/netp2010.pdf

RECOMMENDATION

Improve the technology planning process and create a long-term strategic plan for technology with input from a variety of stakeholders.

The National Center for Technology Planning explains that technology planning is an activity that provides direction and helps users understand clearly where they are now and imagine where they want to be in the future.[40] The most common technique used to formalize technology planning is the creation of a document; however, effective technology planning is not just producing a document but is also creating and maintaining a "technology-rich" educational environment. Technology planning involves identification of the needs of organizational users and prioritization of those needs based upon district requirements, cost, maintenance, and available internal technology resources.

Technology purchases, upgrades, and applications should be part of a comprehensive plan, as should be the case with all school district operations. The most effective plans contain clear goals, objectives, and action plans for technology projects, assign individual responsibility for implementation steps, and identify milestone dates for completion. Technology planning should include the following areas:

---

[40] http://www.nctp.com/

- hardware and software standards to facilitate ease of maintenance and eliminate potential integration problems;

- infrastructure standards to ensure that all areas of the organization have access to software and information resources, such as email and the Internet;

- professional development for all types of positions and levels of proficiency; and

- technical support standards based upon available resources.

In a school district, these main areas must be further refined to cover the three types of users:

- instructional personnel, who use software in the classroom to support learning, use productivity software to reduce manual processes (i.e., grade book, attendance), and have varying capabilities of using software in their jobs;

- administrative personnel, who work in the financial, student services, transportation, child nutrition, and other non-instructional areas of the district; and

- students, who use all aspects of school technology to enhance, extend, and support learning in classrooms and online.

The district should formalize and utilize a process for including multiple stakeholders on the technology committee. 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 a clearly articulated vision statement and mission statement, 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:

- establish a list of stakeholders, including external stakeholders, who will participate on the technology committee;

- periodically review the district's technology plan for accuracy and make necessary additions and deletions;

- develop hardware and software standards, and review them with all personnel;

- conduct a thorough needs assessment to identify specific needs among staff;

- articulate measurable objectives to support overarching goals; and

- formalize a process for measuring and evaluating technology implementation.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-25

The district does not currently have minimum technology standards or protocols. District and building leaders indicated that teachers have varying skill levels in using technology in the classroom and integrating technology into the learning process. The district lacks explicit, written expectations as to what teachers should be able to do in the classroom with technology. Some teachers have expressed a need for clarity in what is expected with respect to instructional technology. The review team completed walkthroughs of classrooms to observe technology use in the classroom. While a majority of classes were using some form of technology at the time of observation, it was often a low-level type of use.

The use of classroom technology enhances the teaching process and helps students to learn course material and how to function in technologically dependent workplaces. A curriculum that incorporates technology improves instructional material and familiarizes students with technology. The ISTE has recently revised its Standards for Educators. The revised ISTE Standards for Educators define the fundamental concepts, knowledge, skills, and attitudes for applying technology in educational settings that all teachers should be able to demonstrate. The recently revised Standards for Educators to define these roles for teachers in using technology:

- Learner – learn from and with others and explore promising practices that leverage technology to improve student learning;

- Leader – seek opportunities to support student empowerment, help shape a shared vision and advocate for student equity;

- Citizen – inspire students to contribute responsibly in the digital world and guide them to be curious, wise, empathetic, safe, and ethical;

- Collaborator – collaborate with others to improve practice, discover, and share resources, and solve problems with others around the globe;

- Designer – design authentic, learner-driven activities and environments that recognize and accommodate leaner variability;

- Facilitator – model creative expression, empower students to take ownership of their learning and create opportunities for students to innovate and solve problems; and

- Analyst – use data to drive instruction and provide alternate ways for students to demonstrate competency and use assessment data to guide progress.

RECOMMENDATION

Adopt explicit expectations for teacher and administrator competencies in technology.

Together, the superintendent and principals should adopt the same standards for all HPS teachers. They should then develop systems to evaluate whether all teachers are meeting those expectations. The superintendent and principals should communicate the standards and expectations to teachers and staff, with a timeline for expected implementation.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-26

HPS has implemented a wireless access system throughout the district to increase Internet access for students and increase opportunities for hands-on learning. Students and staff access the network and Internet by utilizing district-owned technology, including Chromebooks and iPads. Students were observed utilizing the network in the library, hallways, and in classrooms. Additional access points and increased infrastructure have been added as needed.

Schools reap a number of 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

HPS has implemented a districtwide wireless access system to increase Internet access.

FINDING 5-27

The district has not yet developed a procedure and a disposal plan for obsolete equipment. On the time of the onsite work, there was surplus hardware in storage rooms within the district. **Exhibit 5-42** shows some of the surplus, obsolete, or inoperable equipment.

Exhibit 5-42
Surplus Equipment

Source: Prismatic, February 2020

School districts typically struggle with inventory disposal. Compounding the disposal problem, the resale value of obsolete equipment is typically quite low. This provides little incentive for districts to dispose of obsolete equipment in a timely manner.

The *School Laws of Oklahoma* do not provide direction for the disposal of surplus school district computer equipment, except during district annexation. In response, some districts have adopted their own policies, such as this one from Moore Public Schools:

> The superintendent shall be authorized to dispose of all obsolete, excess, and unusable equipment as prescribed by Oklahoma School Law and shall report all such transactions to the BOE. A public auction shall be conducted at times designated by the BOE for such purpose. Other disposal methods allowed by law include sale, exchange, lease, lease-purchase, and sale and partial lease back. One of these disposal methods may be used if a greater financial benefit can be gained.

RECOMMENDATION

Develop policies, procedures, and a disposal plan for surplus, obsolete, and inoperable equipment.

Moving forward, HPS 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:

---

[41] http://www.publicsurplus.com/sms/browse/home

- provides a detailed audit record of all activity.

- automatically reallocates surplus items internally.

- provides a dynamic bid auction for those items not internally reallocated.

FISCAL IMPACT

This recommendation can be implemented with existing resources. Once the disposal plan is developed, the district may need to schedule public auctions or locate a computer disposal company.

FINDING 5-28

The district consistently uses a variety of technological tools to enhance communication with internal and external stakeholders. Ongoing communication is important to developing quality relationships with parents and other stakeholders in the community.

The superintendent and principals have established an expectation for increasing communication with internal staff and with external stakeholders. For example, administrators and technology staff have encouraged teachers to utilize Google Drive to store and share documents to increase collaboration. Teachers utilize web pages, newsletters, emails, and text messages to inform parents about classroom specific events, news, and requirements.

HPS uses apps such as Class Dojo and Remind to communicate with external stakeholders. These technology-based communication tools allow the district to communicate with parents about everyday information, as well as emergency announcements. Class Dojo is a free online behavior management system intended to foster positive student behaviors and classroom culture. Students earn 'Dojo Points' based on their classroom conduct. Teachers use Class Dojo to keep parents up to date on student progress and classroom happenings.[42] Teachers use Remind to efficiently reinforce communication systems already in place. In addition to a class blog, learning management system, or student agendas, teachers can send or schedule a text message (including attachments) to remind students and families about important due dates, upcoming tests and quizzes, schedule changes, field trips, or other pertinent information.[43]

Communication is vital within a school district. Providing information and soliciting feedback from external stakeholders is also a critical component to the success of a school. Utilizing a variety of tools for communication enhances effectiveness and efficiency by which information is received and processed.

COMMENDATION

HPS uses technology tools to communicate with staff, students, parents, and community members to ensure that information is disseminated in a timely manner.

---

[42] https://www.edsurge.com/product-reviews/classdojo
[43] https://www.commonsense.org/education/website/remind

FINDING 5-29

The district's website lacks currency and completeness.

Upon review, the consulting team found several incomplete or blank areas in the website, as well as dead links. Inconsistency and the lack of depth in information and not updating frequently might be an issue with the website.

Exhibit 5-43 reflects specific input from parents. While parents indicated they regularly use technology to state updated on their children's academic progress, they were less positive regarding the utility of the HPS website.

Exhibit 5-43
Staff and Parent Survey Responses Regarding Website Communication

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Parent	I regularly use technology to keep up to date on my child's education (emailing teachers, online grade book, etc.).	16%	62%	11%	7%	4%
Parent	The district website is a useful tool for me and/or my child.	7%	48%	20%	20%	5%

Source: Prismatic Survey Results, February 2020

Exhibit 5-44 illustrates a rubric which has been designed to assess school websites.[44] In a number of areas, the HPS website is not at the exemplary level.

---

[44] http://www.alicechristie.org/edtech/webeval/r2_k-12.html

Exhibit 5-44
School Website Evaluation Rubric

0-5 Not Satisfactory	6-12 Needs Improvement	13-20 Exemplary
Site Content		
• Site content is minimal and lacking important information. • Information tabs are missing key/relevant information needed by the public. • Evidence of school and student activities is not present. • Mission or philosophy are not present. • Link to Student Handbook is not present. • Teacher's name, email address, contact phone number, and photo are not present. • Teacher statement is not present • School newsletter is not present. • Many links do not work and those that do connect the reader to irrelevant or outdated information. • Spelling and grammar errors are evident. • Wording is not concise and clear.	• Site content is rudimentary. • Information tabs are current and relevant. • Evidence of school and student activities are present but not current. • Mission or philosophy statement included. • Link to Student Handbook included. • Teacher name, email address, and contact phone number present but photo is missing. • Teacher statement included but not current. • School newsletter is present but not current. • Most links work. Some links connect the reader to irrelevant or outdated information. • No spelling or grammar errors. • Wording is readable.	• Site is content is comprehensive. • Information tabs are current and relevant to secondary, elementary, or charter status. • Evidence of school and student activities are present and current. • Mission or philosophy statement included. • Link to Student Handbook included. • Teacher name, photo, email address, and contact phone number are present. • Teacher statement is present and current. • School newsletter is present and current. • All links work and connect the reader to relevant and current information. • No spelling or grammar errors. • Wording is concise and readable.
Design		
• Text is difficult to read. • Graphics are excessive and distracting. • Site does not work in some browsers • Page design changes throughout the site.	• Text is mostly legible but not entirely consistent. • Consistent use of colors, backgrounds, fonts, or icons. • Site works in all browsers but formatting is incorrect in some.	• Text is easy to read in all instances. • All Text and colors are clear and easy to read. • Site looks good in multiple browsers.
Navigation		
• Navigation is missing or inconsistent. • User feels lost or stranded; buttons or links do not act predictably. • Frames (if used) are not targeted correctly and create confusion.	• Some inconsistency with navigation conventions. • Buttons and text links usually work predictably. • Frames (if used) are mostly consistent but do not contribute to navigation and user experience.	• Navigation is consistent and clear. • Buttons and links work predictably. • Frames (if used) are targeted correctly and aid in navigation and user experience.

0-5 Not Satisfactory	6-12 Needs Improvement	13-20 Exemplary
Timeliness		
• Pages are rarely updated. • Old projects are presented as new or current. • Email addresses or home pages of staff no longer at the school are present. • Published dates for upcoming projects are already past. • Staff not listed in directory or have broken links to class pages.	• Pages are updated infrequently. • Some "under construction" messages persist. • Email and home page addresses are mostly current. • Some project dates are past. • Teachers identified in a specific grade /subject /department may have moved to another.	• Pages are updated regularly. • All content is current. • Email addresses or home pages for staff is current. • Ongoing projects are truly current. • Staff directory current, complete, and functional.
Parents		
• School link for parents is not present or does not provide methods for parental input or contact. • No PTA/PTO links. • No parental input options present. • No Newsletter present.	• School link for parents is not prominent on overview page (main page) or not current. • PTA PTO represented. • Minimal parental input options are present (i.e., phone numbers). • Newsletter is not published consistently.	• School link for parents is present (either in parent drop down menu or section heading, i.e. PTA/PTO) and current. • PTA/PTO pages present complete. • Parental involvement is encouraged with multiple methods for input. • Newsletter published consistently.
School Calendar		
• No school calendar is present or calendar receives district feed but has no school events posted.	• School calendar is mostly up to date but may omit some events. • If a separate sports calendar is used, it is mostly up to date.	• School calendar is always up to date and reliable. • If a separate sports calendar is used, it is up to date and reliable.
Staff Directory		
• No staff list is present or existing staff list does not provide ways to contact staff (i.e., email, phone).	• Staff list is present, but not current. (still contains names of people no longer working) • Staff list is lacking some pieces of information such as position, email, and contact phone. • Some teachers' names don't link to the individual teacher webpage.	• Staff list is present and current. • Staff list contains name, position, email, and contact phone. • Name on list links to individual Teacher page. (not required for classified support staff)
Student Work		
• Few, if any, student projects are published. • Projects are limited to basic home pages. • Projects show limited editing or proofing. • Permission to publish student pictures/ artwork/intellectual property is not cited.	• Some student activities and/or work is present. • Teacher-created information about student projects (rather than actual student work) predominates. • Student projects are limited to only a few classes or individuals (i.e., only a few teachers or classes are involved).	• Exemplary student activities and/or projects are a substantial feature. • Projects are from a variety of classes, levels, or individuals. • Projects feature original exemplary student work, including drawings, writing, photographs, videos, etc.

0-5 Not Satisfactory	6-12 Needs Improvement	13-20 Exemplary
	• Projects show some evidence of editing and proofing • Permission to publish student pictures/ artwork/intellectual property is sometimes cited	• Projects are related to curriculum • Projects show strong evidence of editing and proofing • Permission to publish student pictures/ artwork/intellectual property is cited
Legal Guardians		
• Copyrighted images are used without permission • Published work or media embedded in published work is not original, not public domain, nor referenced with permission. • Permission to publish student pictures/ artwork/intellectual property is not cited	• Copyrighted images are used with permission but not always clearly credited • Most published work or media embedded in published work is original, public domain, or referenced with permission. • Permission to publish student pictures/ artwork/intellectual property is sometimes cited	• Copyrighted images are used with permission and clearly credited • All published work or media embedded in published work is original, public domain, or referenced with permission. • Permission to publish student pictures/ artwork/intellectual property is cited

Source: https://docs.google.com/a/piedmontschools.org/document/d/13WOEvzVsFulxkRVs-vK1xfyc-bT36ULmobV0lhL7Xu0/edit

RECOMMENDATION

Continue to update and expand the district website.

The district should consider allowing its class of high school student technicians to monitor and, in limited cases, to update the HPS website content. The technology director should develop a list of priorities where content should be kept up-to-date and comprehensive. From there, a timeline should be established for providing updates and establishing information on the website. Teachers and administrators should be encouraged to update and use the website as a communication device with parents and students.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

C.   *TRANSPORTATION*

The primary objective of school transportation is to provide safe, timely, and efficient transportation services to students. Oklahoma's 7,600 school buses travel more than 67 million miles a year, carrying nearly 369,000 children every day.

The Oklahoma School Code (OSC) authorizes school districts to provide student transportation services between school and home, from school to career and technology location, and for approved extracurricular activities. The federal *Individuals with Disabilities Education Act* (*IDEA*) requires districts to provide transportation services to students who must travel to receive special education services, if they provide regular school transportation services.

The Oklahoma State Department of Education (SDE) provides some funding for regular transportation of students who live more than a mile and a half 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 a mile and a half from school (considered the average daily haul or ADH). These factors are multiplied by a state funding figure of $1.39 (transportation factor), a figure that has not been updated since 1988.

This level of funding does not begin to support all transportation expenses in a typical Oklahoma school district. In general, the state transportation supplement provides just 16 percent of the funding needed to operate a district transportation program. Thus, every dollar saved in a school district's transportation program can instead be spent in other district programs, including classroom instruction.

The Oklahoma Department of Public Safety (ODPS) requires bus drivers to obtain a specialized bus driver's license. The SDE requires bus drivers to obtain bus driver certification and training and to pass a license history review. HPS conducts criminal background checks on all new employees and annually evaluates the motor vehicle records of the personnel who drive school vehicles. New bus drivers also must pass an alcohol and drug test for pre-employment and

submit to random drug tests that are administered throughout the year, as defined by the Federal Motor Carrier Safety Administration's *regulation § 382.305*.

The HPS transportation department provides route and extracurricular transportation for its students. With approximately 243 square miles to cover, the district has six regular bus routes. **Exhibit 5-45** provides a breakdown of the fleet, support vehicles, and equipment. Of the 13 buses, one has been placed out of service and is not being used due to needed repairs. Currently special needs students are transported on the regular school buses. The district owns all the vehicles in its fleet and does not lease any.

Exhibit 5-45
HPS Bus Fleet, Support Vehicles, and Equipment

Inventory #	Year	Make/Model
Bus 2	2021	Bluebird
Bus 3	2014	Thomas
Bus 4	2010	Freightliner
Bus 5	2010	Freightliner
Bus 6	2012	Freightliner
Bus 7	2001	Chevrolet
Bus 8	2015	Thomas
Bus 9	2012	Freightliner
Bus 10	2014	Thomas
Mini Bus 11	2017	Chevrolet
Bus 12	2014	Thomas
Mini Bus 13	2019	Chevrolet
Bus 14	2014	Thomas
Van 1	2012	Chevrolet
Van 2	2013	Chevrolet
Suburban 3	2017	Chevrolet
Suburban 4	2017	Chevrolet
Brown PU	2000	GMC
White Panel PU	2014	Chevrolet
Ag PU	2017	Dodge Ram
Equinox	2005	Chevrolet
Escape	2014	Ford
Cooks Van	1994	Ford
Patrol Car	2002	Ford

Source: HPS, February 2020

After morning routes and in the evenings, the buses are parked in an enclosed covered area (**Exhibit 5–46**). The doors are locked each evening and unlocked each morning.

Exhibit 5-46
HPS Bus Parking Area

Source: Google Maps and Prismatic, February 2020

The district has 24 Oklahoma Commercial Driver's License (CDL) certified drivers to operate school buses. Of the 24, five are regular route drivers while the other 19 are utilized on an as-needed basis. Currently, the transportation director is covering the sixth route daily. Drivers maintain a current Oklahoma CDL, with the proper endorsements and must report any moving violations to the transportation director. Before the start of each school year and before any drivers are permitted to drive a school bus, drivers must submit to a full license review. HPS then reviews the licenses for proper endorsement and infraction history. HPS transportation policy mandates that any traffic infraction must be reported to the transportation director immediately. The district maintains and files driving records that comply with the ODPS. The department maintains these records for the duration of the school year.

Exhibit 5-47 provides a seven-year comparison of HPS transportation expenditures as a percent of total expenditures as well as the annual transportation expenditures per student. Over that time, transportation expenses have ranged from 1.4 percent to 5.6 percent of all expenditures. Transportation dollars per student have varied from $122 per student to $483.

Exhibit 5-47
Trend in HPS Transportation Expenses
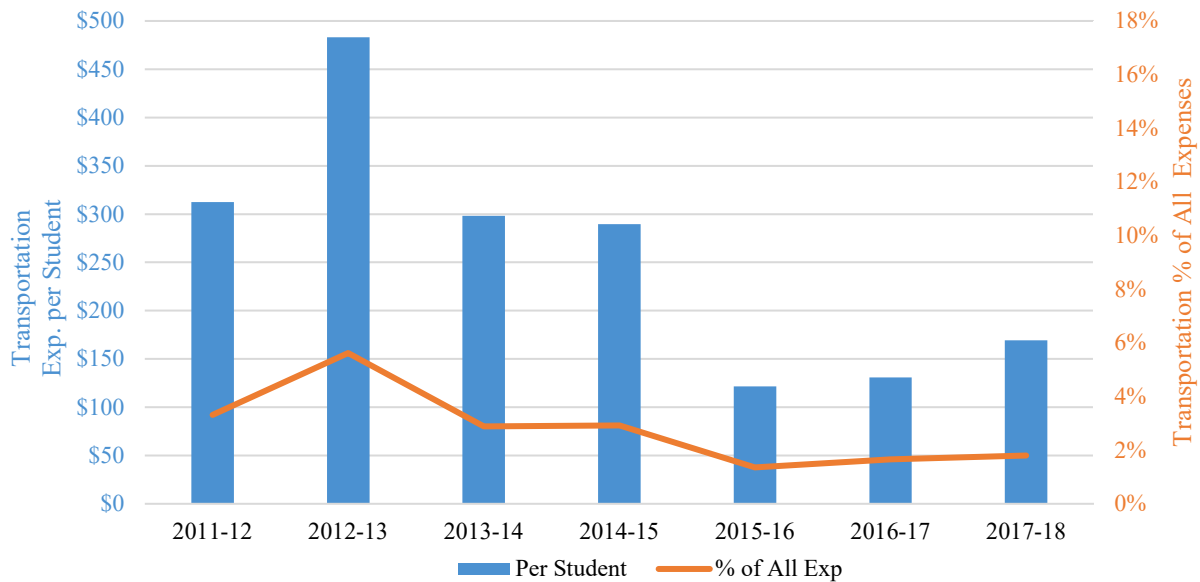
Source: Oklahoma Cost Accounting System (OCAS) and Prismatic calculations, February 2020

Exhibit 5-48 compares HPS' transportation costs over time. In the past five years, salaries, benefits, and other costs increased while purchased services, supplies, and property decreased. The overall total expenditures have decreased over the past five years, largely due to lack of spending in the property category for the most recent three years.

Exhibit 5-48
Trend in HPS Transportation Operating Costs

Expenditure Category	2013-14	2014-15	2015-16	2016-17	2017-18	Percent Change
Salaries	$45,641	$48,966	$52,262	$52,838	$52,594	15.2%▲
Benefits	$5,749	$6,712	$7,267	$7,106	$6,979	21.4%▲
Purchased Services	$43,254	$21,469	$19,011	$23,512	$39,196	(9.4%)▼
Supplies	$54,644	$26,622	$32,545	$35,816	$53,297	(2.5%)▼
Property	$114,068	$159,524	$0	$0	$0	(100.0%)▼
Other	$163	$119	$52	$568	$176	8.0%▲
Total	**$263,518**	**$263,412**	**$111,137**	**$119,841**	**$152,242**	**(42.2%)▼**
Annual Percent Change		**(0.0%)●**	**(56.9%)▼**	**145.5%▲**	**(26.4)▼**	

Source: SDE, OCAS, School District Expenditures and Prismatic calculations

Exhibit 5-49 compares the change in HPS and the peer districts' transportation costs over time, excluding property expenses, which are typically for school bus purchases – an often infrequent activity for smaller school districts.

As shown, HPS' transportation expenses have been the second lowest among its peers each year.

Exhibit 5-49
Comparison of Transportation Over Time (Excluding Property Expenses)

Entity	2013-14	2014-15	2015-16	2016-17	2017-18	Percent Change
Hennessey	**$149,450**	**$103,888**	**$111,137**	**$119,841**	**$152,242**	**1.9%▲**
Atoka	$294,595	$259,070	$211,637	$185,559	$204,716	(30.5%)▼
Chouteau-Mazie	$344,233	$275,798	$288,898	$266,596	$239,381	(30.5%)▼
Pawhuska	$190,558	$139,747	$153,788	$158,498	$165,313	(13.2%)▼
Tishomingo	$236,292	$398,761	$362,078	$398,065	$364,693	54.3%▲
Watonga	$135,986	$102,220	$86,567	$107,417	$122,499	(9.9%)▼
Peer Average	**$240,333**	**$213,247**	**$202,351**	**$205,996**	**$208,141**	**(13.4%)▼**

Source: State Department of Education, Oklahoma Cost Accounting System, School District Expenditures, All Funds, 2013 through 2018, and Prismatic calculations

Exhibit 5-50 provides a comparison of cost per rider per day in HPS and the peers for 2018-19. As shown, HPS is the third highest among its peers.

Exhibit 5-50
Comparison of Cost per Rider per Day, 2018-19

Entity	Total Annual Operating Cost	ADH	Attendance Days	Overall Cost per Rider per Day
Hennessey	**$152,242**	**427**	**166**	**$2.15**
Atoka	$111,137	791	160	$0.88
Chouteau-Mazie	$364,693	627	146	$3.98
Pawhuska	$263,412	367	163	$4.40
Tishomingo	$119,841	650	157	$1.17
Watonga	$122,499	342	169	$2.12
Peer Average	**$196,316**	**534**	**160**	**$2.30**

Source: OCAS, School District Expenditures, All Funds, 2013-18, and Prismatic calculations, March 2020

The HPS transportation organizational structure is represented in **Exhibit 5-51**. In addition to all aspects of transportation, the director is also responsible for all the district's grounds keeping.

Exhibit 5-51
HPS Transportation Organization
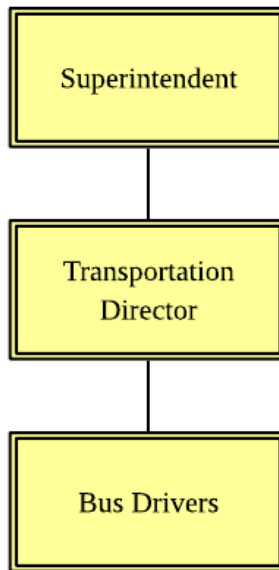
Source: Created by Prismatic, February 2020

FINDING 5-30

The district has allowed buses to enter private property to pick students up, and then make a turn-around on private property. The district does not maintain agreements between the district and the respective landowners to limit the liability of the district while turning around on private property.

In some cases, a turn-around on private property is the safest method. None of the current HPS bus stops appear to violate SDE regulations. Nevertheless, turn-arounds take additional time and increase the risk of property damage. A sample turn-around agreement is shown in **Exhibit 5-52**.

Exhibit 5-52
Sample Bus Turn-Around Agreement

[ ] PUBLIC SCHOOLS
Address, City, State
Phone: Fax:

SCHOOL BUS TURN-AROUND APPLICATION FORM
(For School Bus Turn-Around on Private Property)

Name of Parent(s)/Guardian(s): _____ Date: _____

Legal Land Description: _____ Address: _____

City/Town: _____ Postal Code: _____

Home Phone: _____ Work Phone: _____ Email: _____

We request that [ ] Public Schools consider turn-around service for the following students:

Name of Student(s)	Grade	School

Parent Comments:_____

The Board retains the right to review and change the conditions on an ongoing basis.

Please return the "SCHOOL BUS TURN-AROUND AGREEMENT FORM" to the bus driver, who will forward to the Transportation Office for approval.

TURN-AROUND SERVICE WILL ONLY BE OFFERED IF PRIVATE ROAD IS MAINTAINED (GRADED AND PLOWED) AND A SUFFICIENT TURN-AROUND IS PROVIDED.

SCHOOL BUS TURN-AROUND AGREEMENT FORM

I/We, _____and _____, acknowledge that we are the own

of the property hereinafter described: _____
(LEGAL LAND DESCRIPTION)

_____
(ADDRESS/ BOX)   (TOWN)   (STATE)   (POSTAL CO

I/We, acknowledge that we have granted permission to the Board to operate a school bus or school busses on our property for the purpose of pick-up/drop off child(ren) who are students in the [ ] Pu Schools division.

WHEREAS the Parent/Guardian has requested that the board provide School Bus Turn-Around Servi the above noted Legal Land Description upon the terms and subject to the conditions herein stated.

WITNESSESED that the Parent/Guardian/Owner agree as follows:

1. To sign a school Bus Yard Turn-Around Agreement on a yearly basis;

2. To ensure that the private road is developed and maintained to a standard to accommodate regu school bus travel;

3. To ensure that a proper turn-around exists;

4. Failure to maintain the road and turn-around in an acceptable condition can result in withdrawal service;

IN CONSIDERATION of the Agreement of the Board to transport the forenamed child(ren), we/I agre indemnify and to save harmless _____ Public Schools, its agents, administrators, and employees from and against all claims, demands, losses, costs, damages, actions, and causes of action of any na whatsoever arising out of any act or omission, in relation to any damage to the real property describ herein or any personal property on the said real property, if any of such damages arise from the operation of any matter related to operation of the said school bus or school busses.

Signed this _____ day of _____ , A.D. 20 _____ .

_____   _____   _____
Parent/Guardian   Witness   Owner if different from Parent/Guar

Source: Created by Prismatic, April 2013

While the SDE does not address the turn-arounds on private property, these decisions are left to the school district. All routing and stop placement are at the discretion of the school district. It is the SDE recommendation the district evaluate all bus stop areas for safety, convenience, traffic, and road conditions.

RECOMMENDATION

Develop a school bus turn-around agreement form and develop a district policy.

The district should not allow any new turn-arounds to be developed without the superintendent's prior approval. An acknowledgment/approval document that holds the district harmless should be developed between the landowners and the district for the current turn-arounds.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-31

The HPS transportation department does not have a Standard Operation Procedures (SOP) manual for the drivers. Drivers are dependent on the information they receive at the start of each year.

During the focus group and interviews it was determined the district did not have a Standard Operations Manual for the department. HPS is relying on the current employees to know their duties and on the *SDE's School Bus Driver Manual* (**Exhibits 5-53** and **Exhibit 5-54**).

Exhibit 5-53
SDE School Bus Driver Manual Table of Contents

Table of Contents

Source: SDE Handbook, 2019

Exhibit 5-54
SDE School Bus Driver Manual Excerpt

CHAPTER 3
Danger Zones and Mirror Adjustment

Danger Zones
School bus drivers and the students they transport must be aware of the danger zone that extends 15 feet in all directions from the bus. This is the area where injuries and deaths can occur when students pass around and through the danger zone to load and unload.

This area around the bus is dangerous because the shape and size of the bus creates blind spots. The most dangerous blind spots are the areas directly in front of the rear wheels and the area just in front of the front bumper. These areas are hard to see and require special equipment and procedures to keep students safe.

Other danger zones include the left and right side of the school bus. In these areas traffic is a considerable hazard for students who are loading and unloading. Although traffic is required by law to stop when a school bus activates the red flashing lights and stop sign, this does not always happen. Since the driver is not in a position to make these drivers stop, the driver must use the mirror system to monitor traffic and then provide guidance to the students.

Although it is easy to see the danger reckless drivers pose to our students who are loading and unloading on our buses, the fact remains that the number of students killed by their own bus is about equal to the number of students killed by reckless drivers. This can happen when drivers overlook any step in their loading and unloading procedures.

FIGURE 3.1
DANGER ZONES SURROUNDING THE SCHOOL BUS

Source: SDE Handbook, 2019

As an example, Edmond Public Schools (EPS) has a robust training program for new drivers and a retraining program for existing drivers who need it. This surpasses state requirements and contributes to a safer working environment. EPS also 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 5-55** provides the table of contents for the *Edmond Handbook*.

Exhibit 5-55
EPS Transportation Handbook Table of Contents

Table of Contents

Source: EPS Transportation, October 2013

PRISMATIC
SERVICES, INC.

RECOMMENDATION

Develop a transportation SOP manual which will provide sufficient direction for all transportation employees in procedures and processes.

The transportation director should develop and distribute a driver's information notebook, specific to SDE Guidelines. General topics covered in the manual should include:

- Mission Statement / Vision / Goals
- Organizational Chart
- School Bus Operator Qualifications
- Driving Record Standards
- Driver Duties and Responsibilities
- Disciplinary Guidelines
- Student Conduct Form
- Student Management Techniques
- Cellular Telephone Use
- School Bus Idling
- Student Management Techniques

- Dress Code
- School Bus Crash/Accidents
- Incident Reporting Procedure
- Student Injuries and Illnesses
- Bus Stops and Walk-to-Stop Distances
- Field Trips
- Loading and Un-loading Students
- Certificate of Absence
- Leave Request
- Employee Agreement Form
- Payroll Schedule

Distribution of the notebook should be given during the mandated in-services held each school year. The transportation director should also set aside time during the in-service to brief and instruct employees on the driver's notebook.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-32

The district does not have a policy or procedure to check for sleeping children after each route. The new buses are equipped with an automatic child check system for students that require the driver to check the length of bus after finishing the route.

Currently, the HPS driver is instructed to check the bus, while the new buses are equipped with an automatic child check system for students. Incidents across the country are reported every year regarding children getting left behind on their bus rides. Most recently, a student was left on

a bus in Somerville, Texas.[45] Preventing a potentially tragic situation begins with driver training and requires regular reinforcement of the important "walk-backs" after every trip.

Most of the district's buses have electronic devices to assist drivers in this essential task. Any tool that contributes to passenger safety is an asset to an operation.

In the SDE *School Bus Driver Manual* under Preventative Maintenance, it addresses the importance of the driver's role in the safe operation of the school bus. In describing post-trip responsibilities, the manual notes:

> **Post-Trip Inspection and Report** – Conduct a post-trip inspection at the end of trip or route on each vehicle you operate. This may include completing a vehicle condition report listing any problems you find. The inspection report helps the transportation department know when the vehicle needs repairs. Drivers of school buses have another important reason for conducting post-trip inspections. This step is crucial to determine if a child has fallen asleep on the bus. A child left on a bus is a dangerous situation. Performing the post-trip inspection with a check for sleeping children is required.[46]

RECOMMENDATION

Develop a policy and procedure to check for children after routes.

One of the easiest and least expensive systems is the placard system (**Exhibit 5-56**). The system usually consists of designing a flyer/placard that is laminated with Velcro attached so that it can hang in the rearview window following an inspection. Once the driver finishes the route, he or she walks to the back of the bus looking for any children that may have fallen asleep. At the back of the bus, he or she places the placard in the rear window. When the driver returns to drive the next route, he or she walks to the back of the bus, removes the placard, and places it in the front driver's compartment.

---

[45] Falls, Clay. (2019). Somerville school bus driver faces felony for leaving student on bus. KBTX-TV. Retrieved from https://www.kbtx.com/content/news/Somerville-school-bus-driver-facing-felony-for-leaving-student-on-bus-505084572.html
[46] Oklahoma School Bus Driver Manual, 2020. Retrieved from https://sde.ok.gov/documents/2015-01-12/oklahoma-school-bus-drivers-manual

Exhibit 5-56
Examples of Sleeping Children Placards

Source: Prismatic, February 2020

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-33

The consulting team found a lack of Safety Data Sheets (SDS) in the shop area where chemicals are used. The Occupational Safety and Health Administration (OSHA) require SDS sheets be provided by the chemical manufacturer and made available to employees.

Currently there are chemicals on shelves that are accessible to anyone who enters the transportation garage. There are two identified areas where chemicals are stored. One is on the shelf by the director's office, and the other is in and around a fire-resistant cabinet (**Exhibit 5-57**).

Exhibit 5-57
Storage Area for Chemicals

Source: Prismatic, February 2020

Companies are required to make SDS sheets available to all employees who use them. This can be on a computer or in a notebook. Each year, employees must be trained on reading and understanding the sections of the SDS sheet and review the district's Hazard Communication Plan.

RECOMMENDATION

Identify the chemicals used in the shop area, contact the vendors to collect the SDS and make them available to anyone in the shop. The district will need to train all employees on reading and understanding the SDS sheets.

HPS should assign a person to get a list of all chemicals in the district and contact the manufacturer or the selling vendor for the SDS sheets. Once the chemicals have been identified and the SDS sheets received, they will need to be placed in a notebook by the front door of the transportation garage for easy access (**Exhibit 5-58**). At the start of each school year, the transportation director should review the SDS with drivers, custodians, and any other staff members who frequent the transportation garage.

Exhibit 5-58
SDS Notebook Access and Sample of SDS Sheet
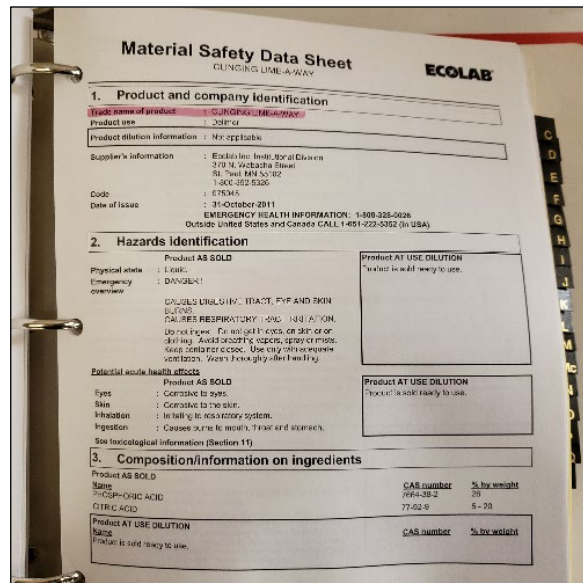
Source: Prismatic, February 2020

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-34

HPS has not formalized a school bus replacement policy. With no guidelines, the ability to keep quality buses on the road is limited.

Currently, the district has 13 buses and they range from 19 years old to the current year. The district has purchased a bus every two years since 2010 apart from years 2014 and 2015. This has provided the district with the oldest route bus being a 2010 Freightliner (**Exhibit 5-59**). The current average age of HPS buses is six years.

Exhibit 5-59
Buses Purchased by Year Model
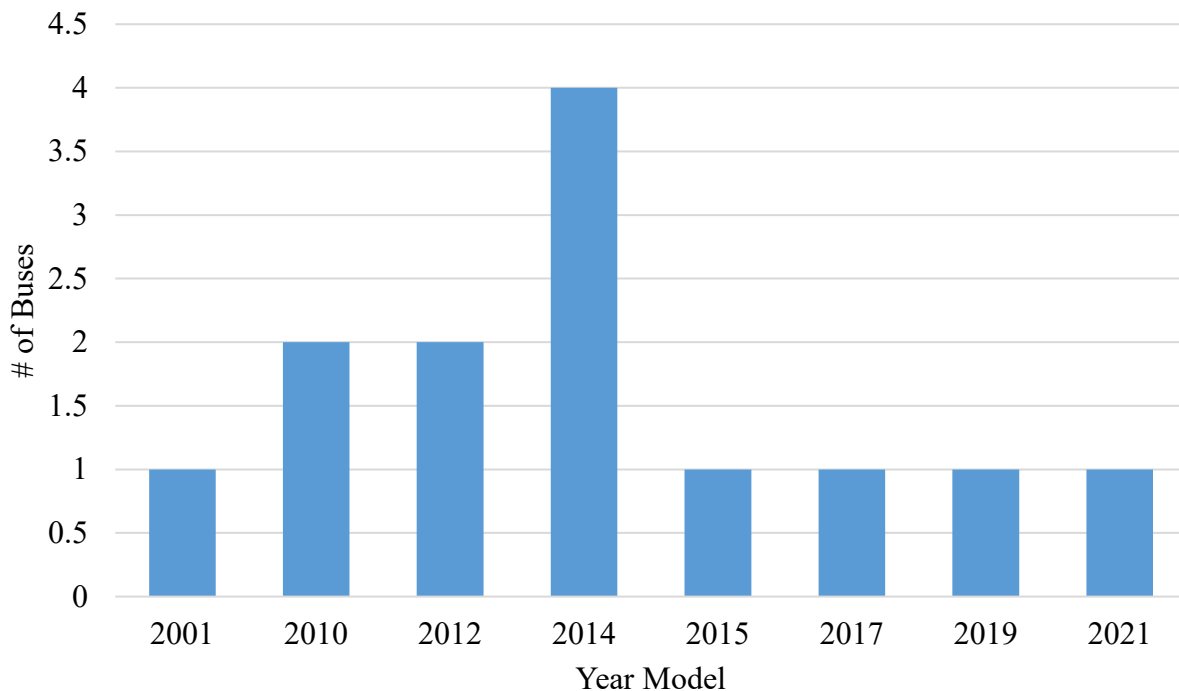
Source: Prismatic, February 2020

School buses are a high-dollar capital expense. For a district to be successful in providing safe, reliable, and fiscally responsible transportation, a long-term comprehensive plan is critical. This includes planning for the regular acquisition of school buses. Not planning for the regular acquisition of school buses to refresh the fleet results in years where a district is forced to make a large purchase of buses at once, thereby squeezing the general or capital fund budgets.

Bus replacement is one of the most important transportation policies a school board can establish to maintain a sound fleet and stable budgeting. Oklahoma does not mandate that districts adhere to school bus replacement timelines or mileage limits, but 11 other states have maximum ages for school buses. As noted in one of its white papers, "the National Association of State Directors for Pupil Transportation Services believes the timely replacement of school buses must be a planned process." The association further recommends a replacement cycle of 12-15 years, mitigated by local operational conditions and the extent of preventive maintenance. Buses older than 16 years are often not compliant with evolving regulations and policies. An aging fleet with substantial mileage generally has a higher cost of operation, in the form of lower gas mileage, more frequent repairs, and higher repair costs.[47]

---

[47] Source: SDE, OCAS, School Bus Replacement Considerations

RECOMMENDATION

Develop a BOE policy on a school bus replacement cycle.

HPS should develop a policy for replacing the districts buses to assist the superintendent and transportation director in their evaluation of needs. There are conditions which should be considered in the district's evaluation. Because the district travels country roads in all types of weather, this should be the number one consideration. These roads will cause the maintenance cost of the buses to be higher than districts who drive city routes. The operating expenses on a bus or group of buses will reach a point where it is more cost effective to purchase a new bus than maintain the existing bus.

FISCAL IMPACT

HPS can adopt a school bus replacement policy with no immediate fiscal impact, but the adoption of a policy will dictate future expenses. The exact fiscal impact will depend on the replacement schedule selected. Currently the average age of the district's buses is six years. To keep the current average age, it will require the district to purchase two buses every two years. The consulting team recommends a replacement policy that will not put the district in the position of needing to replace more than three buses in a given year.

FINDING 5-35

The district does not have a video recording system on its buses to aid in management of both driver and student. The consensus of the driver focus group was in favor of the purchase of a video recording system.

Charged with transporting millions of children to and from school each year, it is only natural that safety is an essential element of a school bus. Video surveillance is a great safety tool for school buses; the benefits include:

- protecting children – surveillance cameras allow them to keep children in check while navigating the route to or from school;[48]

- protecting buses – surveillance cameras pointed outside buses can help identify motorists who illegally pass buses or identify erratic and dangerous driver behavior;[49] and

- protecting bus drivers – surveillance cameras placed inside the bus can protect the driver from any false accusations, thereby also protecting the district.

RECOMMENDATION

Evaluate the cost of a video recording system for use on HPS buses.

---

[48] https://www.videosurveillance.com/school-buses.asp
[49] Ibid.

School bus safety continues to be a top concern, and a video surveillance system can be an important part of a school's safety plan. A school bus video surveillance system can increase student and driver safety and can deter bad behavior. The consulting team recommends adding the purchase of the video system in all new bus purchases, enabling the district to potentially use bond money instead of general funds.

FISCAL IMPACT

To place a video surveillance system in the bus would require a DVR recorder and at least two cameras. The consulting team recommends, upon speaking to video system vendors, a minimum of four cameras per bus. Three cameras would be pointed inside the bus to get the best coverage possible and one camera pointed out the front windshield to monitor driver behavior and driving patterns of other vehicles. The team recommends the purchase of the equipment for the six route buses immediately and purchasing equipment for the substitute buses and activity buses in the following years. This pricing is for the purchase of a four-camera system at $2,800 per system.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Purchase bus video surveillance system.	($16,800)	($5,600)	($5,600)	($2,800)	($2,800)

FINDING 5-36

The district is solving its driver shortage by using school staff members to drive the route buses. This helps with driver retention and absenteeism. The employees are paid extra for the additional time they are on the bus. The focus group participants stated they did not mind the extra duty of driving.

By using school staff, the district is not constantly looking for outside drivers which can be difficult. There is a nationwide shortage for bus drivers which affect nearly every school district. *School Transportation News* surveyed school districts and bus companies and found that 80 percent of the respondents needed drivers.[50]

COMMENDATION

HPS is solving their driver shortage by using school staff members to drive route buses.

FINDING 5-37

The transportation department uses SDE forms pertaining to pupil transportation (Pre-Trip, Bus Evacuations, and Annual Inservice Verification Form), as part of the ongoing pupil transportation records management.

The transportation bus drivers are consistent in using the required forms for their pre- and post-trip inspections (**Exhibit 5-60**). The transportation department is managing the SDE forms to

---

[50] https://stnonline.com/partner-updates/navigating-the-school-bus-driver-shortage-today/

make certain they meet all SDE regulations. The district passed the transportation requirements required by the SDE in their fall audit for this year.

Exhibit 5-60
SDE Pre-Trip Forms Completed by Drivers
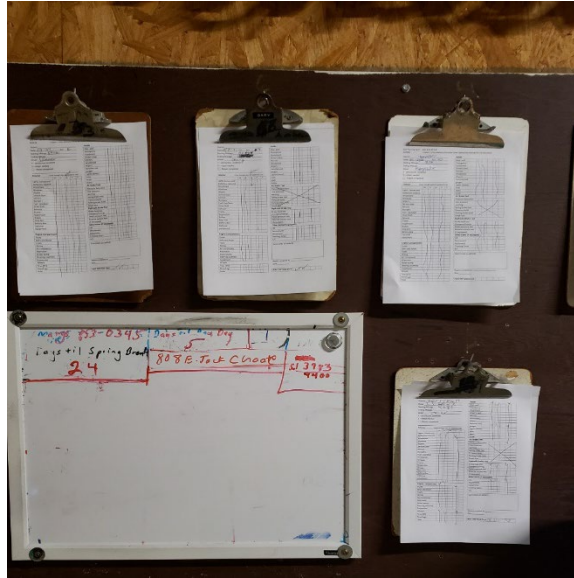
Source: Prismatic, February 2020

COMMENDATION

The HPS transportation department is effectively managing the records required by the SDE auditors.

FINDING 5-38

The HPS transportation director is a long-tenured district employee and, to date, no succession planning has been undertaken. In addition, the consulting team and focus group see the need for additional help for the transportation director. He currently oversees routing, activity trips, bus maintenance and cleanliness, ground equipment maintenance, and district grounds care.

Currently the transportation director is responsible for all aspects of the transportation department and its vehicles. The director is required to maintain athletic fields and the equipment being used for the fields. This has led to the director ranking these jobs as to importance. **Exhibit 5-61** shows how these decisions can potentially result in an unsafe bus.

Exhibit 5-61
Excess Dirt on the Emergency Door and Windows

Source: Prismatic, February 2020

The SDE *Bus Driver Manual* and the *Commercial Driver's License Manual* state the windshield and the emergency door glass should be clean, not broken and secure. It is the transportation department's responsibility to adhere to these policies. This is only an example of the ranking process the director is required to make each day.

RECOMMENDATION

Hire a full-time person to assist in the director's duties and drive a bus.

HPS should hire a full-time person to assist the director in all duties and to free the director from driving a bus every day. The person hired should be trained sufficiently to be able to succeed the current director when he retires.

FISCAL IMPACT

The cost for hiring such a person is dependent on the market in Hennessy at the time of employment. The cost below is based on the current market cost in the Tulsa Metro Area. The beginning salary is $33,067 for eight hours per day for 245 workdays. The salary plus fringe benefits paid by HPS at approximately 35 percent is $44,640.

Recommendation	2020-21	2021-22	2022-23	2023-24	2024-25
Hire individual to train for future director.	($44,640)	($44,640)	($44,640)	($44,640)	($44,640)

FINDING 5-39

The transportation director is evaluating ways to save money on transportation expenses.

Currently, all school bus inspections are done off site in El Reno at Midwest Bus Sales. The district is driving 45 miles and one hour each way to deliver the buses to Midwest Bus Sales.. These bus inspections cost the district in time, fuel and wear and tear on the buses.

HPS is evaluating the cost effectiveness of a vendor doing inspections on site. The potential savings of time, fuel, and wear and tear on the buses could make onsite inspections cheaper for the district. The transportation director has contacted a local vendor to provide local inspections and repair of all defects not meeting inspection criteria. The onsite inspection should enable the district to complete the bus inspections in a shorter time.

COMMENDATION

HPS is evaluating ways to save district monies on yearly bus inspections.

FINDING 5-40

The district has two locations for the transportation department. One is used to park buses, and the other is for bus maintenance and washing. With the two locations, the director goes to the location where the buses are parked and transports the bus to the maintenance garage for repairs and/or wash. This takes the director time to move the bus for minor repair or wash. This is a time drain on the director who also is needed to drive bus routes in the morning and afternoon. The current facility only has one bay available to make repairs on buses or grounds equipment and one wash bay as shown in **Exhibit 5-62**.

Exhibit 5-62
Maintenance and Bus Wash Area Garage

Maintenance Area   **Bus Wash Bay**

Source: Prismatic, February 2020

The Chandler (Ariz.) Unified School District was featured in the trade magazine *School Bus Fleet* sharing the lessons learned in making the decision to move from three locations to a single location. Even though this school district is a large district, the lessons learned are relevant to the needs of HPS.[51]

RECOMMENDATION

Research the feasibility of finding a single location for the transportation department.

The transportation director should meet with the superintendent to start drafting ideas for the new facility and location. A bond issue may be required to further proceed with the plans.

FISCAL IMPACT

HPS can develop a scope of work for the facility with no immediate fiscal impact. The exact fiscal impact will depend on the lot, building and tools selected. The consulting team recommends a feasibility study to move transportation to a single lot and building.

FINDING 5-41

The consulting team found most of the district's buses to be in good condition, but there were some safety and mechanical issues which needed to be addressed. Bus drivers are required to clean and inspect buses for mechanical malfunctions daily. However, the consulting team found

---

[51] https://www.schoolbusfleet.com/article/737481/transitioning-to-a-new-school-bus-facility-what-you-need-to-know

several defects, repairs and cleaning that had not been done. The most serious is the emergency door sticking on three buses. These doors were not able to be opened from the outside.

As a requirement for operating a school bus in the State of Oklahoma, drivers must complete a daily record (**Exhibit 5-63**) of the condition of the bus and report any defects on the pre-trip form. During the site visit, the consulting team conducted bus inspections. Several buses were found to have missing or damaged equipment.

Exhibit 5-63
SDE Pre-Trip Form

Source: Oklahoma State Department of Education, December 2018

Exhibit 5-64 show the deficiencies the consulting team found. As shown, several repairs are needed to prevent future safety issues. Buses 6 and 14 were not onsite for inspection.

Exhibit 5-64
HPS Fleet Inspection

Bus #	2	3	4	5	6	7	8	9	10	11	12	13	14
Mirrors	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	
Glass	N/R	N/R	✓	✓		✓	✓	N/R	N/R	✓	N/R	✓	
Tires	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	
Body Damage	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	
Seats	N/R	N/R	✓	✓		✓	✓	✓	✓	✓	✓	✓	
Flooring	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	
Emergency Door	✓	N/R	N/R	✓		N/R	✓	✓	✓	✓	✓	✓	
Clean Inside	✓	N/R	N/R	N/R		✓	N/R	N/R	✓	✓	✓	✓	
Clean Outside	N/R	N/R	✓	✓		N/R	✓	N/R	N/R	✓	N/R	✓	
Fire Ext.	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	
First Aid	✓	✓	✓	✓		N/R	✓	✓	✓	✓	✓	✓	
Body Fluid Kit	✓	✓	N/R	✓		N/R	✓	✓	N/R	✓	✓	✓	
Triangles	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	
Alarm (Sleeping Kids)	✓	✓	✓	✓		N/R	✓	✓	✓	✓	✓	✓	
Lights	✓	✓	✓	✓		N/R	✓	✓	✓	✓	✓	✓	

Source: Prismatic, February 2020
Index: ✓ = OK, N/R = Needs Review

Exhibit 5-65 provides documentation of some of the deficiencies found.

Exhibit 5-65
Observed Bus Deficiencies

Stuck Emergency Door a Safety Hazard   **Seat Repair**

Exhibit 5-65 (continued)
Observed Bus Deficiencies

Empty Bodily Fluid Kit

Side Panel Loose

Trash on Floor
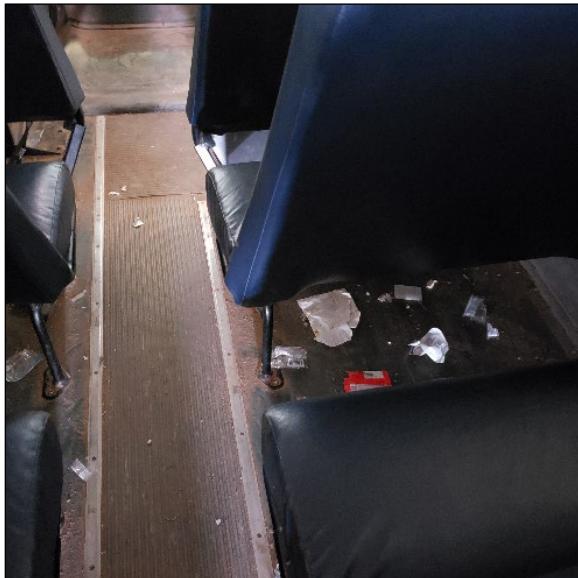
Hole in Seat Back

Exhibit 5-65 (continued)
Observed Bus Deficiencies

Inside View of Dirt on Windows   **Outside View of Dirt on Windows**

Source: Prismatic, February 2020

RECOMMENDATION

Address the conditions of some of the buses.

The transportation director should ensure that all standards of performance on vehicle readiness and required documentation is complete before and after a vehicle is placed into service. HPS should ensure that each bus is repaired to original specifications of that bus and review the *SDE Oklahoma School Bus Driver Manual* with the drivers. This manual will give each driver the policies and procedures that regulate the inspection of the bus and proper safety guidelines for pupil transportation until the district can develop their own driver's manual.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Appendix A:

Staff Survey Results

_____

Staff Survey

Surveys Completed: 80
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	51%
6 – 10 years	17%
11 – 15 years	8%
16 – 20 years	6%
21 years or more	18%
What is your role in the school district?	
School Administrator	8%
Classroom Teacher	64%
Other Certified (Librarian, Guidance Counselor)	6%
School Aide/Nurse	3%
Instructional Aide	13%
Other Support Staff (Cafeteria, Office, Custodial)	7%

Survey Questions

	Survey Questions	Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
1	The district has a long-range strategic plan that guides the decision-making process.	8%	38%	32%	19%	3%
2	I understand the district's policies and procedures.	14%	68%	10%	9%	0%
3	I have an accurate, written job description to guide me in my work.	21%	57%	6%	13%	3%
4	I understand the district's organizational structure.	14%	50%	21%	11%	4%
5	I know to whom I report for all my job functions.	38%	54%	4%	3%	3%
6	I understand the district's salary schedule and justification for paying extra-duty stipends.	16%	57%	11%	10%	5%

	Survey Questions	Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
7	I receive adequate training overall to perform my job functions.	29%	54%	5%	10%	1%
8	I received an annual personnel evaluation last year.	21%	40%	21%	14%	4%
9	District staff works well together.	14%	49%	9%	22%	5%
10	The district has an adequate number of staff to carry out its operations.	16%	57%	5%	19%	3%
11	The district actively recruits high quality staff to fill vacant positions.	13%	53%	12%	18%	4%
12	The district has a pool of quality substitutes to fill positions when necessary.	4%	51%	18%	21%	6%
13	The district effectively communicates with parents and community members.	12%	55%	16%	13%	5%
14	The central office effectively communicates with district staff.	22%	57%	11%	11%	0%
15	The superintendent effectively communicates with district staff.	25%	49%	10%	14%	1%
16	The principal effectively communicates with his staff.	27%	40%	10%	16%	6%
17	The teachers effectively communicate with students and parents.	16%	58%	17%	9%	0%
18	The district effectively uses volunteers to assist with meeting district goals.	4%	44%	29%	19%	4%
19	The district gives student needs a high priority when making major decisions.	13%	47%	17%	18%	5%
20	School board members listen to the opinions of parents and the community members.	8%	51%	34%	6%	1%
21	The school board understands the needs of the district.	5%	47%	27%	17%	4%
22	The superintendent is accessible to district staff.	30%	53%	9%	5%	3%

	Survey Questions	Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
23	The principal is accessible to staff.	31%	47%	5%	12%	5%
24	The teachers are accessible to students and parents.	28%	68%	3%	1%	0%
25	Teachers often collaborate on projects related to the curriculum.	25%	47%	16%	10%	3%
26	Teachers know what is to be taught and when because they have access to a district-adopted Pacing Calendar that reflects the current Oklahoma Academic Standards OAS.	10%	47%	19%	14%	9%
27	The district's curriculum is aligned from grade to grade and from class to class.	10%	32%	23%	25%	9%
28	Teachers have scope and sequence documents that determine what is taught and when.	9%	39%	21%	25%	6%
29	Test data from district-adopted benchmarks and mandated end-of-year tests are used to improve the district's curriculum.	4%	55%	18%	21%	1%
30	Teachers effectively use student data to improve instructional practices.	7%	58%	17%	17%	1%
31	The principal is an effective instructional leader.	23%	49%	13%	9%	5%
32	There is adequate high quality professional development for the principal and teachers.	21%	57%	11%	7%	4%
33	Non-teaching staff has opportunities for professional development relevant to their responsibilities.	11%	46%	32%	11%	1%
34	At least some of the required annual professional development is offered online.	25%	68%	3%	4%	0%

	Survey Questions	Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
35	The needs of the special education students are being met.	7%	39%	16%	36%	3%
36	The needs of the gifted and talented are being met.	0%	26%	26%	27%	22%
37	Teachers adequately prepare students for state mandated tests.	9%	69%	15%	5%	1%
38	Students are adequately prepared for college, if they choose that path.	4%	28%	30%	34%	4%
39	Students receive timely information on college entrance requirements and scholarship offers.	4%	30%	47%	14%	5%
40	Students receive adequate vocational training to prepare them for the workforce, if they choose that path.	8%	41%	36%	11%	4%
41	The district provides students with adequate counseling services.	9%	61%	12%	12%	5%
42	The school library meets the needs of the teachers and students.	23%	64%	7%	7%	0%
43	District stakeholders provide input into the budgetary process.	1%	15%	78%	3%	3%
44	I understand the district's budgetary process.	1%	19%	49%	19%	12%
45	The district actively applies for competitive state and federal grants.	27%	53%	19%	1%	0%
46	I complete an annual inventory of the equipment in my work area.	32%	51%	11%	5%	0%
47	The district wisely manages its revenues and expenditures.	14%	38%	43%	5%	0%
48	The district has a long-range plan to address facility needs.	11%	31%	51%	7%	0%
49	The district's facilities are well-maintained.	15%	59%	7%	18%	1%

	Survey Questions	Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
50	The district's facilities are kept clean.	22%	54%	8%	15%	1%
51	The district has an energy management program in place to minimize energy consumption.	0%	13%	76%	7%	4%
52	There are facility and/or equipment concerns throughout the campus.	7%	33%	36%	25%	0%
53	The district's facilities are secure from unwanted visitors.	10%	61%	4%	22%	3%
54	I know what to do during a crisis or an emergency.	16%	78%	1%	3%	1%
55	Student discipline is well-maintained.	1%	42%	15%	26%	15%
56	Drugs are a problem in this district.	23%	41%	22%	14%	0%
57	Bullying is a problem in this district.	7%	38%	21%	34%	0%
58	I often purchase a meal from the cafeteria.	12%	36%	10%	23%	19%
59	Students seem to like the cafeteria meals.	15%	52%	14%	15%	4%
60	I find the cafeteria meals appealing and appetizing.	8%	47%	27%	14%	4%
61	I understand how to use technology as it relates to my job functions.	18%	73%	5%	4%	0%
62	District staff and administrators often use email to communicate with one another.	32%	68%	0%	0%	0%
63	The district has adequate technology to support its operations.	30%	67%	3%	0%	0%
64	When necessary, the district's technology equipment is quickly repaired or serviced.	33%	53%	8%	5%	0%
65	Technology is readily accessible and easy to use in the performance of my job duties.	33%	55%	5%	7%	0%

	Survey Questions	Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
66	The district's technology equipment is often used past its useful lifespan.	5%	19%	32%	42%	1%
67	The district website is a useful tool for staff, parents, and students.	19%	72%	7%	1%	0%
68	Buses arrive and depart on time each day.	27%	62%	10%	1%	0%
69	There are enough working buses to meet the needs of the district.	14%	48%	25%	14%	0%

Written Responses

If you would like to provide any additional comments on the school district, please do so here. Where is the district doing well? In what areas could it be improved?

- We have strengths and weaknesses in several areas so the questions are difficult to answer accurately, but overall this is a good environment for students and staff. Our administration (Supt/HS/MS) is relatively new and our school has experienced significant changes since their arrival, however despite some growth pains they have worked hard to understand the needs of the school and community and make improvements as needed.
- I believe that our district does a great job of looking out for each student and actively trying to make sure as many needs are met as possible. It is clear that HPS loves their students and wants them to succeed. We could use improvement when it comes to discipline. While I don't think there is any "right" answer, I do think that we need to adopt a clearer policy about punishments based on the level of the offense and make sure to consistently implement it.
- I would like to see more accountability of students who continue to not do work.
- [redacted] The people that are making these brash decision, like the principal and athletic director, are not invested in the community; they don't even live here. They live in other towns.
- I believe we are in transition to develop each classroom with a teacher who uses and understands data to better serve our students.
- We have plenty of materials and the latest in technology and by in large a good staff. However, we don't get rid of the few staff who don't do their job and this causes problems. We also don't work well with the other buildings.
- There is no communication between the HS and MS buildings. The MS needs its own principal so that we can operate in a timely and effective manner. There are many times the principal cannot be reached or is too busy to be concerned with the problems in the middle school. In the MS we usually work together to figure out any issues that we have, but in return we are reprimanded for not going through the principal first even though the principal couldn't be contacted or the issue needed to be dealt with immediately. There are too many teachers mainly coaches that are not being held accountable for classroom rigor. There are

far too many classes that students have where they don't have to do anything but sit and be on their phones. It's not fair to those teachers that plan, review data, and spend hours of their own time getting prepared. What's really frustrating is that the admin is aware. All teachers should be held to the same standards, not just a select few. [redacted] I believe if one teacher was written up so should the other. The inconsistency with teachers and students is off putting. [redacted] There isn't much punishment and reprimand to students in the HS. There are too many parents that dictate what happens in the school. A lot of students that are just lazy and don't want to put an effort out are taken out a regular classes and put into Odysseyware. I've heard many students say they don't want to do the research report in their English class so they'll do Odysseyware instead so that they don't have to do it. We are supposed to be preparing these kids for the real world but I feel when they leave HS they aren't even close to ready. The way the HS is functioning now, I would be very skeptical of sending my own children.

- Why does the district have high school classes with only three students enrolled in them? Why are there so many high school students roaming the building throughout the entire day? Why are there so many coaches for a small district and why are all of them gone for EVERY sport which in return makes teachers have to cover classes? When teachers cover classes, they should be paid for that coverage rather it be during their plan, or even when students are added to their regular classes making class sizes larger. Paying teachers to cover during the planning period would help with the substitute shortage. Parents have requested soccer for more than 6 years. Why is there no soccer? District should mandate that all 6th and 7th grade students attend physical education class daily. The effects of physical education is research-based. What is the high school doing with their non-English speaking students other than just placing them in all regular education classes? Do something about the bullying. Perhaps have a counselor for just that as it is rampant across the district. The high school counselor needs an assistant. WHY is there not a middle school counselor????
- I think we have a great district overall! I think communication can be improved.
- There needs to be a principal in the middle school just for that building. Drug dog needs to be brought to school on a frequent basis.
- We have the technology in place for both our teachers and students, but it is not being used to its full capacity (particularly for students). At all grade levels, they need to learn the basics of computers, keyboarding, and using this wonderful tool they have been given (ex: google docs, creating slide presentations, excel docs, websites, email, etc.). Without having a dedicated class time or resource to teach them these tools, it's landed on the teachers to fulfill that role. I feel like we are missing an opportunity, especially with younger students to educate them in this area & further enhance their education.
- Discipline in the Middle School is totally out of hand.
- There is always room for improvement in any area of the school district. Hennessey strives to do their best. It takes a team not an I to run a district.
- Our district has the technology that most don't have. We have the resources for meaningful professional development that fit teachers' needs. The communication in our district is terrible from the top down. There are many times when assumptions have been made that certain people have been informed of something but in actuality that person has no idea what's happening. We are a small district and communication should be easy. In my position, there is not a clearly defined chain of command. There is a lot of back biting behind the scenes. Our curriculum is all over the place and there isn't enough vertical planning

happening. We have a lot of holes Grade to grade because pacing guides, curriculum guides, lesson plans etc. are not required or completed.

- Drugs are bad in our school!
- Due to people being spread thin, it would greatly benefit the middle school if we had our own principal and operated as a separate building in the same way it did a couple years back. Having the same principal is not doing anyone, teachers or students, any good.

Appendix B:

Parent Survey Results

_____

Parent Survey

Surveys Completed: 74
Totals may not add to 100 percent due to rounding.

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.	7%	23%	38%	21%	11%
2	School board members know and understand the educational needs of students in the district.	5%	25%	34%	25%	11%
3	The superintendent is a respected and effective leader.	19%	33%	27%	15%	5%
4	District and school staffs are accessible to parents.	14%	53%	11%	22%	0%
5	I feel welcome at my child's school.	22%	58%	8%	7%	4%
6	My child feels welcome and accepted at school.	19%	59%	8%	7%	7%
7	I receive timely communications from my child's teachers regarding his/her progress in school.	19%	38%	5%	26%	11%
8	My child's school encourages parents to volunteer, if they are able.	21%	35%	18%	24%	3%
9	Parents play an active role in decision-making in our school.	7%	13%	18%	35%	28%
10	Education is the main priority in our school district.	6%	26%	14%	39%	15%
11	Students learn the necessary material to be prepared for the next grade.	7%	40%	10%	31%	13%
12	I am satisfied with the education my child receives.	10%	31%	10%	39%	11%

PRISMATIC
SERVICES, INC.

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
13	Teachers are held accountable for ensuring that students learn.	7%	24%	17%	38%	14%
14	I receive enough information from the district regarding academic expectations for my child (i.e. student testing, retention, etc.).	3%	25%	20%	37%	15%
15	Our school can be described as a "good place to learn."	6%	38%	17%	32%	8%
16	The district spends its money wisely.	6%	26%	19%	28%	21%
17	The district asks the community for input when developing its budget.	3%	10%	40%	26%	21%
18	My child's school is clean.	21%	72%	4%	1%	1%
19	My child's school is attractive and welcoming.	14%	63%	6%	17%	1%
20	My child's school is well maintained.	13%	64%	11%	10%	3%
21	District facilities are open for community use.	3%	35%	40%	14%	8%
22	My child feels safe and secure at school.	15%	56%	10%	13%	7%
23	Bullying is a problem in this district.	26%	29%	26%	15%	3%
24	Drugs are a problem in this district.	30%	32%	32%	7%	0%
25	The school buildings and grounds are safe and secure.	11%	55%	12%	19%	3%
26	Discipline is fairly and equitably administered in my child's school.	1%	26%	26%	29%	17%
27	The district website is a useful tool for me and/or my child.	5%	48%	21%	21%	5%
28	I regularly use technology to keep up-to-date on my child's education (emailing teachers, online gradebook, etc.).	17%	63%	10%	7%	4%
29	My child regularly uses technology at school.	36%	54%	10%	0%	0%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
30	Teachers know how to use technology in the classroom.	15%	50%	29%	6%	0%
31	Discipline and order are maintained in the school cafeteria.	7%	35%	46%	8%	4%
32	The school lunch period is long enough for my child to eat.	0%	14%	11%	45%	30%
33	My child likes the food served in the cafeteria.	7%	44%	14%	18%	18%
34	The cafeteria serves a good variety of food.	7%	44%	28%	13%	8%
35	My child's school bus runs on time nearly every day.	9%	20%	69%	1%	1%
36	My child feels safe riding the bus.	1%	17%	69%	10%	3%
37	Bus drivers effectively handle discipline issues on the bus.	0%	15%	75%	3%	7%
38	The length of my child's bus ride is reasonable.	1%	18%	70%	6%	4%

Written Responses

If you would like to provide any additional comments on the school district, please do so here. Where is the district doing well? In what areas could it be improved?

- Communication from the school to parents used to be much better than it currently is. Parents used to receive all-call phone calls frequently and messages on the school way messaging system and/or text messages. This is no longer used or rarely used. If there is a new system that is being used for text messages or that messages such as school way then more information needs to be sent to parents for them to sign up. Also the school website is not easy to read for sports and events schedules. The kids sports and extracurricular schedules should be posted and most importantly they should not list starting times for activities unless they are going to begin at those times! Parents may leave work early to attend basketball games, only to find out that the game already started and is in the 3rd quarter when it was scheduled to be just starting. So do not start basketball or football games before the scheduled time. This is very frustrating for parents who have planned to attend and the time the schedule reflects and this happens frequently with middle school events

- I would like the principals to spend more time in the auditorium classrooms. My child feels most at threat in those rooms. The disrespect the students are shown is angering. A teacher and or a classroom aide should never call a student or class of students foul names. It is my understanding that is occurring in those locations. I also believe the students tend to be

disrespectful towards the teachers in those classrooms. A regular visit from a drug dog would be great. Drugs are a huge problem. It should be allowed to search every classroom, car, locker, and facility. The weight rooms, locker rooms, field house, ag building and so on. It would be nice if parents had some input in decisions that are made. We often don't know anything that is going on. When the school added Chromebooks and Laptops, we were told our students would be using them instead of books. We were not given the opportunity to go over the pros and cons of that with the school administration or school board. It was voted on and passed without asking for any parent input.

- Lunch time is excessively short - not sure of the solution but this needs to be addressed. Hennessey needs work in onboarding new students to the district. My student was new this year and it was not an easy nor welcoming process and created much anxiety and stress for the student AND the parents. (I even had to help a couple of other new students who were confused and terrified.) I would be happy to discuss this and provide some input toward solutions - I have several ideas [deleted]. The faculty and staff have been, for the most part, responsive to my requests for information, however I must initiate the discussions. I have yet to be proactively approached with concerns, but rather stumble upon them myself and initiate the discussions toward solutions. I must say when I put issues forward, the response is always prompt and courteous. We love Hennessey and want it to be the best it can be! It could be that some of my answers reflect a lack of knowledge being new to the district...but that in itself says something.

- The buildings are nice and we have great technology. Communication is lacking. The website is hard to navigate and not all items are on the calendar. Teachers should be hired on teaching qualifications and not coaching qualifications. Coaches should not be placed in classes to fill spots if they are not going to be effective teachers. Priorities should be on academics.

- Academics are not a priority at HHS. Students are not made to do the work required in classes. In many cases, they are allowed to do "online classes" if they don't want to do the work of a core class, which does not prepare the student for the ACT test or for the next grade level. Plagiarism is rampant, or most students just don't turn any work in at all. Also, drug use is a MAJOR problem among students at HHS. It's going on at lunch and in the bathrooms during the school day. There is also major vandalism happening in the restrooms with property being destroyed as well as theft of teacher's property from classrooms occurring. Discipline is lacking to nonexistent. In addition, parent involvement is almost nonexistent as well, unless you consider attacking teachers on Facebook and gossiping as parent involvement. The superintendent and school board make no effort to familiarize themselves with all programs in the school, only athletics. They have no interest or concern with anything else. One board member questioned why the school was paying the entry fees for an extracurricular activity at the high school "when it wasn't even an OSSAA-sanctioned activity," clearly ignorant of the fact that this activity is on the same par as OSSAA athletic events.

- Lack of communication. I do not receive communication on how my child did on state testing. Grades are not always kept up to date by some teachers.

- Communication from the middle and high schools needs improvement. Concerns with girls athletics.

- That the teachers are held just as accountable as the students when it comes to make up work from any length of absences specifically if it is a grade that carries more weight than a

regular assignment so that the students don't get additional points docked if the make up assignments are late. Also if an entire class is struggling with making passing grades in a particular test even the smart ones that don't normally have a problem making a passing grade. Then it needs to be taken into account that it's not the students not paying attention, it is the teachers teaching method for that particular subject. Also seems to be a vape problem among students.

- Some teachers are the shining light in the district. There are those that are not & they aren't held accountable.
- Our school needs to have drug testing done on all JH & HS athletes no excuses. Juuling in school or on school grounds should not be allowed and if caught needs to be punished. Coaches should not only be allowed to play their favorite players each play should participate in practices, scrimmages, & team camps not player should be left out. Last, bullying is not acceptable the bully should be punished, no matter who they are. Hennessey needs to put a stop to drugs and juuling on campus this is a major problem in our school system.
- Gifted & talented -- both of my children have been in this program and neither have received extra work or projects (that I have been made aware of) in the 6 years they've been in the program. I feel like this would be a huge help in keeping them motivated in school & want to achieve higher than what is asked of them. Currently, they feel bored and grades have also suffered as a result of their motivation. Also, there is very little communication with parents once they hit the middle school level. It would be wonderful if they were encouraged & taught how to keep online calendars through google that could also be shared with parents. That way they could see & be reminded of what assignments are due, tests are scheduled, events are coming up, etc. This is something that they will need as adults and there's no reason to not start at a young age especially when technology is in place to do so.
- We spend money on new buildings but really we could invest in a better IEP Program. I feel like handing my child a calculator instead of one on one teaching is not helping. They need to understand the problems and how to work them. My oldest is home schooled because of how bullying is handled (it's not).
- I feel like the buildings and facilities are nice. There is a lack of communication between the school and parents. I should not have to search Facebook to know what is going on. Sometimes, the calendar on the website doesn't have all the events on it in a timely manner. It would be nice to have a bi-monthly e-mail of events and/or teachers sending out more information pertaining to activities.
- The district needs to have a principal in the middle school.
- The school lock system is a good idea, but it needs some tweaking. As I understand students are locked out of buildings during class time. I have a concern with the students being locked out of all facilities if they are tardy, or have to talk to a teacher, etc. I am told that the campus officer is not walking around the outside premises. I would like to see the outside security looked into further as the middle school students are walking all over campus all day long.
- It's ridiculous that they enforce Chrome books. My son's eyesight has gotten worse and his wrist keeps hurting.
- Middle school and high school parents need to be informed about meetings, practices, etc... (not just depending on students to tell parents everything
- The teachers do an amazing job of being engaged with the kids. The elementary school principal does an amazing job!

- I believe the school board and district employees want to do what is right for the students. However, there are several leadership issues that need to be corrected in order to accomplish fair treatment to all staff, students, sport, and extracurricular activities. It appears that the information being received by the school board is a minor (almost rose colored) overview of what is actually occurring in the high school. I can only offer an opinion of the high school, as that is the only building I have a child. There seems to be unfair disciplinary actions for the same action based on the student and the "clout" of their family. There was an instance of a student being caught with a vape pen, her parents are of influence in the school/community, she did not receive any punishment. However, another student who gave her the pen received in-school suspension. That doesn't seem like fair treatment. One student was expelled for having drugs in their vehicle, while another student was only suspended for three days. These are major issues of apparent favoritism, but there are minor ones that occur everyday, such as who is expected to follow the dress code and who isn't or which activities get to be publicized/encouraged to attend/facility going to and which ones don't. I completely understand that this is "small town America" and Friday night lights bring in more money than a choir concert or speech and debate tournament, but to the students involved the support of the smaller activities mean the world. It's difficult to have the same conversation with my child year after year about "why does our school only care about boy's sports and nothing else". We are in 2020 and should not still need to have the conversation of gender equality with our daughters. At what point did it become okay for teachers to dictate what political views are allowed to be discussed in their classrooms? How is it allowed for a teacher, a person of strong authority and influence, to tell their students they are not allowed to express their own political views if they differ from the adult's? Vaping is still a large problem in our schools, that is based off of student's who have knowledge of it occurring but are not willing to come forward due to lack of confidentiality in where the information came from.
- If not computer literate you are out of luck in knowing what's going on.
- Maybe better communications with the community at large.
- I think too much emphasis is put on sports (football). I feel like we spend a lot of money on aesthetics and football when we could funnel more of that money into the teachers' classrooms. It feels like the school sends something home every couple of weeks asking for parents to send money for one thing or another. Many of the activities in the elementary school costs money, and every year that amount increases -- basically meaning that only the children whose parents have disposable income are allowed to participate in these activities, further fueling social division, not to mention the hardship those fees put on parents with multiple children in school. I do appreciate the added security measures that our schools have put to use to keep our children safe from outside threats. However, I feel there are teachers at our schools who have no business teaching children. And even though our community has spoken up about that, very little has been done.
- I have seen teachers overlook dress codes and be oblivious to take action and discipline students. They just go sit in the office, they know they get out of work and that nothing will be done to them. A lot of bullying goes on even in the elementary level. I understand hands are tied most of the times and I don't have a solution.
- School needs to teach you how to do daily things in life not y=Mx+B crap teach them how to do banking or anything that you use daily

- I've talked with many other parents and they feel and so do I that the algebra 1 class is completely unreasonably hard
- Discipline is based on who you are. My child tells me all the time when I say you can't wear that it's against dress code, it's ok mom all the teachers like me so they won't say anything! Discipline needs to be based on what you did not who you are or what sport you play. We should be teaching our kids ever negative action has consequences not you can do whatever you want as long as you are good at sports or we don't want to deal with those parents because they will throw a fit and disagree with us. When they graduate the legal system isn't going to care how upset their parents will be or if the play sports the will not be punished for their crime! Same goes for jobs their boss is not going to care what their parents say or how good they are at sports, they don't follow the policy's or dress code for a company they will be fired! We are setting these kids up for failure by not holding them accountable for their actions. Technology is good but the lessons need to be taught. We have teachers that just have them do the lesson on the computer but don't teach the lesson. Whether you are using a computer or text book you are there to teach our children not have google do it for you. Political views should never be voiced in a classroom and I don't care What party you are. It is never ok to teach our kids to hate the President. You are there to teach our kids about the government not tell them what their beliefs and opinion should be. We should be teaching them it ok to voice their opinion and stand up for what they believe. As parents and teachers it is our job to teach our kids to respect authority and having a teacher teaching hate and disrespect toward our President makes it very difficult for the parents teaching our kids to respect people in authority. We also teach our kids not to bully but it is ok for a teacher to call them names and bully them if they stand up for their beliefs and it is not in line with the teacher! This teacher not only voices her opinion about our government but also about religion, gays, and abortion. Teaching kids to debate is not telling them what they can say. How would you feel as a parent if your child care home and said my teacher told us abortion is better than adoption because that child doesn't have to grow up wondering why they weren't wanted. She has said it in her classroom. The brainwashing in the classroom needs to stop. Teach our kids what they need to be successful not everything you hate about our country and government. Not all the teachers at Hennessey Public Schools are doing these things. We are blessed with some wonderful teachers that love our kids and teach them as if they were their own kids. The celebrate with them in their success, comfort them in difficult times, help with things that sometimes we as parents don't even know they are going through, cheer them on in all kinds of activities outside of their regular school day, make sure they have food, clothes, hygiene product, the list goes on. It breaks my heart when the actions of the bad apples over shine the amazing teachers that our giving up time and taking money from their own families to help our students become successful! We need to work on getting rid of the teachers who aren't here for our kids and make our community look bad.
- Quit asking parents for money and teacher supplies. Especially after spending an ungodly amount of money on a sports facility. Education is first, sports (while I think they are important in school) are a bonus to my kids education. Focus time and money on education and teacher supplies. Quit putting the financial burden on parents so that the school can show off some stupid dome shaped sports complex.
- I wish the school would do away with fast Fridays and use that time to allow the elementary student to have a longer lunch period.

- The buildings are always clean but even after the new roofs were put on, they continue to leak which is a health and safety concern. More communication with the parents and community would be nice before new programs are implemented. A parent/community panel might be something to consider so the school can get feedback on how we collectively feel about changes in programs, education, sports, and so on.
- School district needs to thoroughly look through the Special Ed program. It's being highly abused and the children are the ones being harmed in the long run. Look at the other school districts nearby, none even come close to the percent in Special Ed as Hennessey.
- More educational opportunities available with the addition of new classes being offered. Starting to do more where girls athletics are concerned. Better quality educators, be it their knowledge or how they connect with their students and teaching them. There are some good ones and some that need to go on or do better.
- Please remember that these are children. Teachers who yell, roll their eyes, intimidate, and bully should have to learn better classroom management or move on. Students have to be at school and are powerless in most situations. It is the adults' responsibility to provide a safe learning environment. Technology should NEVER take the place of teaching. If it hasn't been taught, then demanding a minimum of 90 on IXL is incredibly frustrating and unfair. Most educators in this district are fantastic. Give equal time and money to ALL extracurricular activities not just sports.
- I would like for the school to have more sports and not take them away.

Appendix C:

Student Survey Results

_____

Student Survey

Surveys Completed: 50
Totals may not add to 100 percent due to rounding.

Survey Questions

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1	Education is the main priority in our school district.	26%	44%	14%	14%	2%
2	Students learn the necessary material to be prepared for the next grade.	24%	44%	20%	12%	0%
3	I am being academically prepared for life after high school.	13%	46%	23%	17%	2%
4	Our schools can be described as "good places to learn."	18%	40%	28%	6%	8%
5	I knew what to expect on the state tests.	16%	36%	28%	16%	4%
6	There is at least one adult at school to whom I can go when I have a problem.	68%	28%	2%	2%	0%
7	I feel welcome and accepted at school.	30%	47%	17%	4%	2%
8	The school library meets my needs for books and other resources.	45%	34%	17%	2%	2%
9	I have received sufficient college and/or career counseling.	13%	45%	28%	13%	2%
10	My teachers communicate regularly with my parents about my academic progress.	13%	38%	23%	15%	11%
11	My school is clean.	23%	47%	11%	17%	2%
12	My school is attractive and welcoming.	28%	43%	19%	9%	2%
13	My school building is well maintained.	32%	57%	4%	2%	4%
14	I feel safe and secure at school.	19%	57%	13%	4%	6%
15	Bullying is a problem in this district.	19%	9%	26%	30%	17%
16	The school buildings and grounds are safe and secure.	28%	53%	15%	2%	2%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
17	Discipline is fairly and equitably administered in this school.	9%	49%	17%	13%	13%
18	Teachers and staff respect students in this school.	26%	34%	23%	11%	6%
19	Drugs are a problem in this school.	26%	28%	22%	13%	11%
20	Discipline and order are maintained in the school cafeteria.	17%	47%	28%	6%	2%
21	I have enough time to eat my lunch each day.	13%	11%	11%	40%	26%
22	I like the food served in the cafeteria.	11%	23%	40%	17%	9%
23	The cafeteria serves a good variety of food.	17%	28%	32%	17%	6%
24	The district has made online classes available to students.	38%	43%	9%	6%	4%
25	I regularly use technology to keep up-too-date on schoolwork (emailing teachers, using online gradebook, etc.)	47%	40%	6%	6%	0%
26	I regularly use computers or other technology at school.	47%	40%	6%	6%	0%
27	The district's technology is new enough to be useful to me.	43%	43%	11%	2%	2%
28	Teachers know how to use technology in the classroom.	17%	4%	11%	17%	0%
29	Teachers effectively integrate technology-based resources into instruction, such as online videos.	30%	48%	20%	2%	0%
30	I have regular Internet access at home.	47%	43%	2%	2%	6%
31	My bus runs on time nearly every day.	9%	9%	83%	0%	0%
32	Students feel safe riding the bus.	2%	19%	74%	2%	2%
33	Bus drivers effectively handle discipline issues on the bus.	9%	15%	72%	2%	2%
34	The length of my bus ride is reasonable.	6%	11%	83%	0%	0%

Written Responses

If you would like to provide any additional comments on the school district, please do so here. Where is the district doing well? In what areas could it be improved?

- The State Test is random every time.
- I believe that we should have more different electives. I also think that we should be able to have mental health days. It way should help students a lot and we could be better in school if we had mental health days. It would be great for kids.
- There is too much emphasis on using the newest technology.
- I think that the school should have a Dance elective and I could run it because I am in Dance class. It is really easy to teach.
- It seems like all the district cares about is sports, specifically football, and they only allow other competitive and extracurriculars because they don't want to seem biased.
- love It here
- The school is nice but I think we should get new bathrooms.
- Having a study period. I would rather be able to study than have an eagle advisory because I do nothing in that class.
- I think the district itself is doing well. I think our school has problems about treating everyone the same and following the discipline procedures regularly. It seems some people don't get the same degree of punishment as others do for the same thing. I think our new AD is great, but our sports are still being shown favoritism. Some sports are treated better than others, and those neglected sports struggle to stay functioning. As an athlete who's played a "minor sport" for six years now, it's not fair when another sport gets treated so much better than ours, even when our record is almost double theirs. I think it's great that we have an athletic trainer now, but I think she needs to be able to go to more. She should be able to go to all sports where she's needed because that's her job. So far, it's been shown that she's been made to stay in primary sports, like football, and she hasn't been able to go to other sports, like softball and volleyball. How is our athletic trainer supposed to do her job correctly if she can't attend all sports fairly? She isn't just an athletic trainer for one sport, she's for all.
- Kids still vape in the bathrooms that should be monitored. and kids still get picked on bullied, drama all the time.
- There isn't enough variety or flavor in the food served, let alone time to eat it. The teachers also do not think about what they are about to say and often say rude things about students, in front of their students.
- the bullying
- The bullying should be treated fairly and the bully shouldn't get special treatment because he or she is popular or well known or liked by the teachers or principal.
- More time to get to class and change eagle time back to how it was

Appendix D:

Community Needs Survey Results

_____

Community Needs Survey

Surveys Completed: 73
Totals may not add to 100 percent due to rounding.

Statistical Data

Which of the following best describes your relationship to the school district?	
Parent of a current student	49%
Former Student	41%
Community member without children in the school district currently	19%
Employee of the district	18%
Other (please specify)	4%

Those that selected "Other" gave the following responses:

- Grandparent of students

- Student

- Business Owner

Survey Questions

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The school district is moving in the right direction.	12%	51%	23%	12%	2%
The school district communicates frequently with the entire community, not just families with students in the district.	5%	41%	23%	23%	9%
The school district communicates effectively with the entire community, not just families with students in the district.	2%	39%	36%	16%	7%
I hear about the school district often in local newspapers.	2%	20%	30%	30%	18%
I hear about the school district often on social media.	26%	57%	10%	7%	0%
I mostly hear about the school district when students are doing fundraisers.	5%	38%	21%	31%	5%
I mostly hear from the school district when the district wants to pass a bond.	10%	37%	24%	24%	5%

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The entire community has many opportunities to provide input on the future direction of the school district.	2%	24%	32%	39%	2%
The school district actively seeks input from the community.	0%	22%	32%	32%	15%
When the school district says it is going to do something, I know it will happen.	2%	32%	32%	32%	2%
I am pleased with the construction of the Dome thus far.	17%	56%	17%	7%	2%
The school district has kept me well-informed about the construction of the Dome.	15%	44%	22%	17%	2%
I have unanswered questions about the funding or construction of the Dome.	5%	15%	39%	32%	10%
The community is vital partner in the school district.	27%	41%	15%	15%	2%
Local businesses are vital partners in the school district.	29%	51%	7%	7%	5%
Language barriers in some sections of the community prevent some community members from being fully involved in the school district.	24%	29%	24%	20%	2%
The partnership between the community and school district is strong.	7%	41%	32%	17%	2%
The school district is a point of pride for this community.	27%	39%	17%	15%	2%
I would be interested in taking adult interest classes like software applications, quilting, or automotive repair if the school district offered them.	20%	29%	24%	22%	5%
I would be interested in taking adult education classes like GED, English as a Second Language, or college prep if the school district offered them.	15%	12%	37%	32%	5%
The school district should be doing more to meet the education needs of adults in this community.	17%	27%	24%	24%	7%

In what areas can the relationship between the school and the community improve?	
Communication	67%
Opportunities for input	61%
Partnership/Collaboration	45%
Other (please specify)	0%
To continue to improve, the school district needs to	
Better prepare students for success	69%
Keep the community more informed of activities and achievements	41%
Hire more qualified teachers	38%
Be more active in the community	28%
Provide a safer environment for students	22%
Other (please specify)	16%
Which social media platform(s) do you regularly use?	
Facebook	97%
Instagram	18%
Twitter	3%
Linkedin	3%
TikTok	3%
I do not use any social media	3%
Other (please specify)	0%

Written Responses

From where do you get most of your information regarding the school district?

- All about Hennessey (multiple responses)

- Facebook (multiple responses)

- Social Media (multiple responses)

- Kingfisher Paper (multiple responses)

- Hennessey Happenings

- At other meetings and friends

- Word of mouth

- My children

- School web page

- Other people

- Online/Internet/Computer

What are some ways that the school district can improve its partnership with the community?

- more interaction and communication not about academics NOT only sports

- Showing they actually care about the teachers their students! Not allowing the students to run the school! Teach them there are rules and consequences if broken. This generation is entitled!

- Anyone interested has opportunities

- More jobs for the community.

- Ask for community involvement and advice when making changes to the school. Business owners are bombarded with students and the school requesting money for fundraisers. There are better ways to appropriate funding than asking the community every month to donate to various groups.

- More involved

- Community Service

Appendix E:

Sample Demographic Study

_____

Durant Independent School District

Learn from Yesterday…
Understand Today…
Plan for Tomorrow

Demographic Summary

Spring 2018

TEMPLETON DEMOGRAPHICS

hanley▲wood | metrostudy

Economic Conditions

County Unemployment Rate, February 2018

Percent Unemployed
Statewide = 4.1%

- 2.1% - 3.6%
- 3.7% - 5.0%
- 5.1% - 7.2%

- Oklahoma's statewide unemployment rate was 4.1% in February 2018

- This is down roughly 0.5% from February 2017

- Bryan County's unemployment rate is below the state, at 3.5%, down 0.7% year-over-year

Source: Bureau of Labor Statistics and Oklahoma Employment Security Commission

2

PRISMATIC
SERVICES, INC.

Economic Conditions
State Employment Change by Industry, 2016 - 2017

Oklahoma Employment Change by Industry, 2016-2017
Annual Averages (Not Seasonally Adjusted)
Source: Current Employment Statistics (CES), U.S. Department of Labor, Bureau of Labor Statistics

Industry	Change
Mining and Logging	3,800
Construction	-200
Manufacturing	-600
Trade, Transportation, and Utilities	-2,900
Information	-700
Financial Activities	400
Professional and Business Services	3,900
Education and Health Services	900
Leisure and Hospitality	2,700
Other Services	3,800
Government	-2,200

- Statewide nonfarm employment reached 1.681 million in February 2018

- The mining sector added jobs within the state after 20 consecutive months of declines through August 2016 due to depressed oil prices

- The largest year-over-year job losses were seen in the trade, transportation, and utilities sector as retail trade lost 4,600 jobs

Source: Oklahoma Employment Security Commission

3

Economic Conditions
Active Rotary Rigs and WTI Price

Oklahoma Active Rotary Rigs & Cushing, OK WTI Spot Price
January 2011 to March 2018
SOURCES: U.S. Department of Energy, Energy Information Administration and Baker Hughes Rig Counts

- Drilling for Oil
- Cushing OK WTI Spot ($/bbl)

- In November 2017, monthly US crude oil production reached 10.07 million barrels per day, the highest monthly record in US history

- Oklahoma's total crude production reached the highest level in 37 years in January 2017, producing 16.29 million barrels in the month

- In 2017, statewide crude production rose 7.9% over 2016

- WTI prices climbed over $60 a barrel in early 2018 for the first time since 2014

4

PRISMATIC
SERVICES, INC.

Durant Housing Activity

District Home Sales by Transaction Type, 2010 - 2017

- Since 2010, existing home sales have risen 42% within the Durant ISD
- The district had averaged 5 new home sales a year through 2016, but saw an increase to 15 new home sales in 2017
- REO Sales and foreclosures dropped between 2016 and 2017

Source: Metrostudy and Bryan County Deed Transactions

7

Durant ISD Home Sales

2017 Home Sales by Transaction Type

- Within the district there were roughly 340 home sales in 2017, and 4% were of new homes
- The average sale price in 2017 for a new home within the district was $170,080
- The average sale price in 2017 for an existing home within the district was $127,071

Source: Metrostudy and Bryan County Deed Transactions

8

Durant ISD Housing Overview

- Within Durant ISD there are more than 65 lots currently available to build on
- Within the district there are roughly 75 planned future lots

SF Development
- Active
- Future

Residential Activity

Redbud Estates
16 total lots
Final home under construction

Terra Bella
- 58 total lots
- 28 futures
- 23 homes occupied
- 4 under construction
- Groundwork underway on Phase 2 with 28 lots, delivering summer 2018
- Building 10 homes a year
- 1 current student

Multi-Family Yield Analysis

MF Yield
- < 0.25
- 0.25 - 0.50
- 0.50 - 0.75
- > 0.75

NORTHWEST HEIGHTS/IRVING

IRVING

NORTHWEST HEIGHTS

- Durant ISD has more than 440 students currently residing in 1,350 existing multi-family units
- The average district multi-family complex yield is 0.33
- This represents 14% of all students that reside within the district boundary

15

Durant ISD Student Density (April 2018)

- Durant ISD has 599 students residing outside the district
- This represents 15.94% of the total student body
- The majority of out of district students reside within the Silo Public Schools District, with 317 or 53% of all out of district students

NORTHWEST HEIGHTS/IRVING

NORTHWEST HEIGHTS

IRVING

*Out of District – Students whose addresses mapped outside of the district boundaries

16

Historical Enrollment

By Grade Level

Year (Oct.)	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2013/14	253	289	302	315	264	235	245	262	247	223	266	244	211	178	3,534		
2014/15	269	324	346	272	275	262	231	245	270	252	242	237	215	199	3,639	105	3.0%
2015/16	293	331	344	292	252	252	261	235	243	274	274	237	210	197	3,695	56	1.5%
2016/17	241	356	347	278	296	259	248	252	240	251	294	236	233	187	3,718	23	0.6%
2017/18	263	354	346	310	280	281	245	244	251	242	248	273	210	203	3,750	32	0.9%

*Yellow box = largest grade per year
*Green box = second largest grade per year

	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Growth
Roll-up	354	354	346	310	280	281	245	244	251	242	248	273	210	3,901	151
Prev Cohort	352	344	309	312	266	266	241	243	253	239	230	243	183	3,744	-6
3-Year Cohort	365	364	294	305	270	274	242	245	256	254	229	251	187	3,798	48

17

Ten Year Forecast

By Grade Level

Year (Oct.)	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2013/14	253	289	302	315	264	235	245	262	247	223	266	244	211	178	3,534		
2014/15	269	324	346	272	275	262	231	245	270	252	242	237	215	199	3,639	105	3.0%
2015/16	293	331	344	292	252	252	261	235	243	274	274	237	210	197	3,695	56	1.5%
2016/17	241	356	347	278	296	259	248	252	240	251	294	236	233	187	3,718	23	0.6%
2017/18	263	354	346	310	280	281	245	244	251	242	248	273	210	203	3,750	32	0.9%
2018/19	263	348	371	299	307	274	275	242	249	256	259	223	240	187	3,793	43	1.1%
2019/20	263	367	375	330	298	303	266	269	240	254	276	232	194	212	3,879	86	2.3%
2020/21	263	364	383	324	334	290	292	262	277	245	271	251	206	171	3,933	54	1.4%
2021/22	263	374	381	335	324	327	282	287	275	280	263	244	221	185	4,041	108	2.7%
2022/23	263	373	395	333	336	317	317	277	284	280	300	237	215	196	4,123	82	2.0%
2023/24	263	356	392	343	335	328	307	312	283	288	299	271	209	191	4,177	54	1.3%
2024/25	263	379	374	342	344	328	318	302	319	287	308	270	239	187	4,260	83	2.0%
2025/26	263	377	399	326	344	336	318	313	305	324	307	278	238	213	4,341	81	1.9%
2026/27	263	379	396	347	328	336	326	313	319	310	347	277	245	212	4,398	57	1.3%
2027/28	263	387	399	346	349	321	326	321	318	324	332	313	244	218	4,461	63	1.4%

*Yellow box = largest grade per year
*Green box = second largest grade per year

- Durant ISD may enroll more than 3,800 students by 2019 and more than 4,000 students by 2021

- 5 year growth = 373 students

- 2022/23 enrollment = 4,123

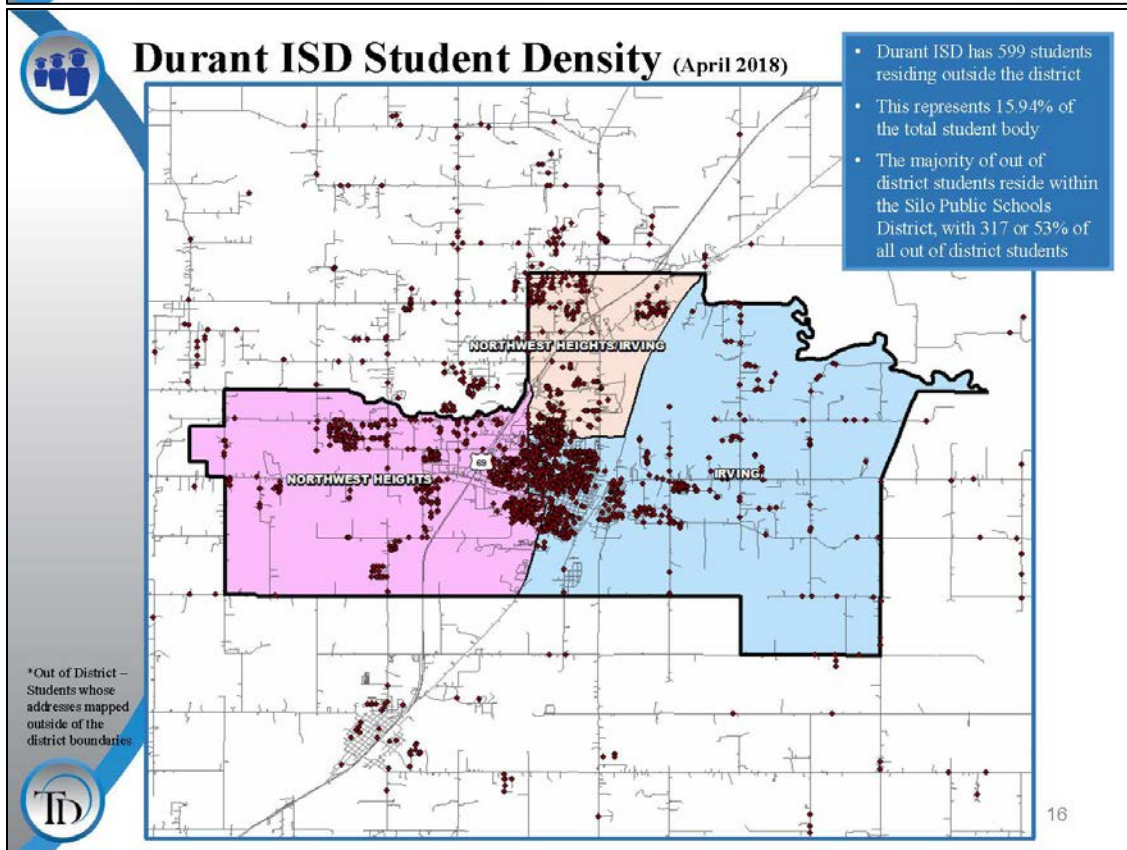- 10 year growth = 711 students

- 2027/28 enrollment = 4,461 students

18

Ten Year Forecast

By Campus

Campus	Capacity	HISTORY 2016/17	Current 2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
				ENROLLMENT PROJECTIONS									
Irving Elementary	660	629	668	693	711	724	724	741	732	741	751	755	772
Lee Early Childhood	240	262	263	263	263	263	263	263	263	263	263	263	263
Northwest Heights Elementary	660	627	622	632	659	681	690	696	694	698	695	695	709
ELEMENTARY SCHOOL TOTAL		1,518	1,553	1,588	1,633	1,668	1,677	1,700	1,689	1,702	1,709	1,713	1,744
Elementary Absolute Change		6	35	35	45	35	9	23	-11	13	7	4	31
Elementary Percent Change		0.40%	2.31%	2.25%	2.83%	2.14%	0.54%	1.37%	-0.65%	0.77%	0.41%	0.23%	1.81%
Durant Intermediate School	700	759	770	791	838	844	896	911	947	948	967	975	968
INTERMEDIATE SCHOOL TOTAL		759	770	791	838	844	896	911	947	948	967	975	968
Intermed. Absolute Change		11	11	21	47	6	52	15	36	1	19	8	-7
Intermed. Percent Change		1.47%	1.45%	2.73%	5.94%	0.72%	6.16%	1.67%	3.95%	0.11%	2.00%	0.83%	-0.72%
Durant Middle School	850	491	493	505	494	522	555	564	571	606	629	629	642
MIDDLE SCHOOL TOTAL		491	493	505	494	522	555	564	571	606	629	629	642
Middle School Absolute Change		-26	2	12	-11	28	33	9	7	35	23	0	13
Middle School Percent Change		-5.03%	0.41%	2.43%	-2.18%	5.67%	6.32%	1.62%	1.24%	6.13%	3.80%	0.00%	2.07%
Durant High School	1,200	950	934	909	914	899	913	948	970	1,004	1,036	1,081	1,107
HIGH SCHOOL TOTAL		950	934	909	914	899	913	948	970	1,004	1,036	1,081	1,107
High School Absolute Change		32	-16	-25	5	-15	14	35	22	34	32	45	26
High School Percent Change		3.49%	-1.68%	-2.68%	0.55%	-1.64%	1.56%	3.83%	2.32%	3.51%	3.19%	4.34%	2.41%
DISTRICT TOTALS		3,718	3,750	3,793	3,879	3,933	4,041	4,123	4,177	4,260	4,341	4,398	4,461
District Absolute Change		23	32	43	86	54	108	82	54	83	81	57	63
District Percent Change		0.62%	0.86%	1.15%	2.27%	1.39%	2.75%	2.03%	1.31%	1.99%	1.90%	1.31%	1.43%

*Yellow box = enrollment exceeds stated campus capacity

19

Summary

- Bryan County's unemployment rate is below 4%.

- In January 2017 Oklahoma's total crude oil production reached the highest level in over 35 years, producing over 16 million barrels in the month.

- The district experienced 340 homes sales in 2017, 4% of which were new homes.

- Country Estates has approx. 230 total lots, 41 of which were delivered in early 2018 to begin construction on Phase 6 of subdivision.

- Durant ISD may add 373 students in the next 5 years, for a fall 2022 enrollment of 4,123.

- DISD is projected to enroll 4,461 students for the 2027/28 school year.

20

PRISMATIC
SERVICES, INC.

**Office of Educational
Quality &Accountability**