

Oklahoma

School Performance Review

June 2023



Lone Wolf Public Schools



OKLAHOMA
Educational Quality
and Accountability

June, 2023

Fellow Oklahomans:

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

Lone Wolf Public Schools (LWPS) 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 LWPS 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 LWPS board, administration, staff, parents, and students for their input into this review. The administration and staff are also to be commended for their dedication toward improving educational opportunities for all students.

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

Respectfully yours,



Ms. Renee Launey- Rodolf
Interim Executive Director

Oklahoma School Performance Review

Lone Wolf Public Schools

June 2023



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



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Executive Summary

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

The Office of Educational Quality and Accountability initiated the performance review of Lone Wolf Public Schools (LWPS) in February 2023. The Office of Educational Quality and Accountability contracted with Prismatic Services to perform the review. The Prismatic consulting team conducted individual and focus group interviews with district personnel. The team also reviewed operations by touring facilities, observing cafeteria operations, and riding along on school bus routes. Administrators, teachers, support staff, parents, community members, and secondary students completed confidential surveys. The consulting team tabulated the surveys and used the results in this review. Survey results are contained in **Appendices A** through **C**. Prismatic held a focus group with a selection of community members; those results are contained in **Appendix D**.

For comparison purposes, Prismatic selected five Oklahoma school districts as peer districts based upon size, geography, and demographics. They are Buffalo Valley, Gracemont, Panola, Wanette, and Wynona. These districts are called peer districts throughout this report.

For further comparison, a Community Group average is also used throughout the report. LWPS falls into community group H2, which includes districts with an Average Daily Membership (ADM) of less than 250 students. The “2” indicates that the percentage of LWPS students eligible to receive free or reduced-price meals is above the state average.

During this review, Prismatic developed 70 recommendations; they were designed to improve operations and support increased academic performance. In some cases, these recommendations should result in a net savings to the district, in some cases a net cost, and in some cases they should have no fiscal impact but should improve district efficiency or effectiveness. A detailed list of costs and savings by recommendation appears in **Exhibit 6**.

ACKNOWLEDGMENTS

The Office of Educational Quality and Accountability and Prismatic wish to express their appreciation to the Board of Education of Lone Wolf Public Schools, its superintendent, Ms. Nicole Price, its principal, Ms. Cassie Risley, and the many district employees, students, parents, and community residents who supported and provided input for this review.

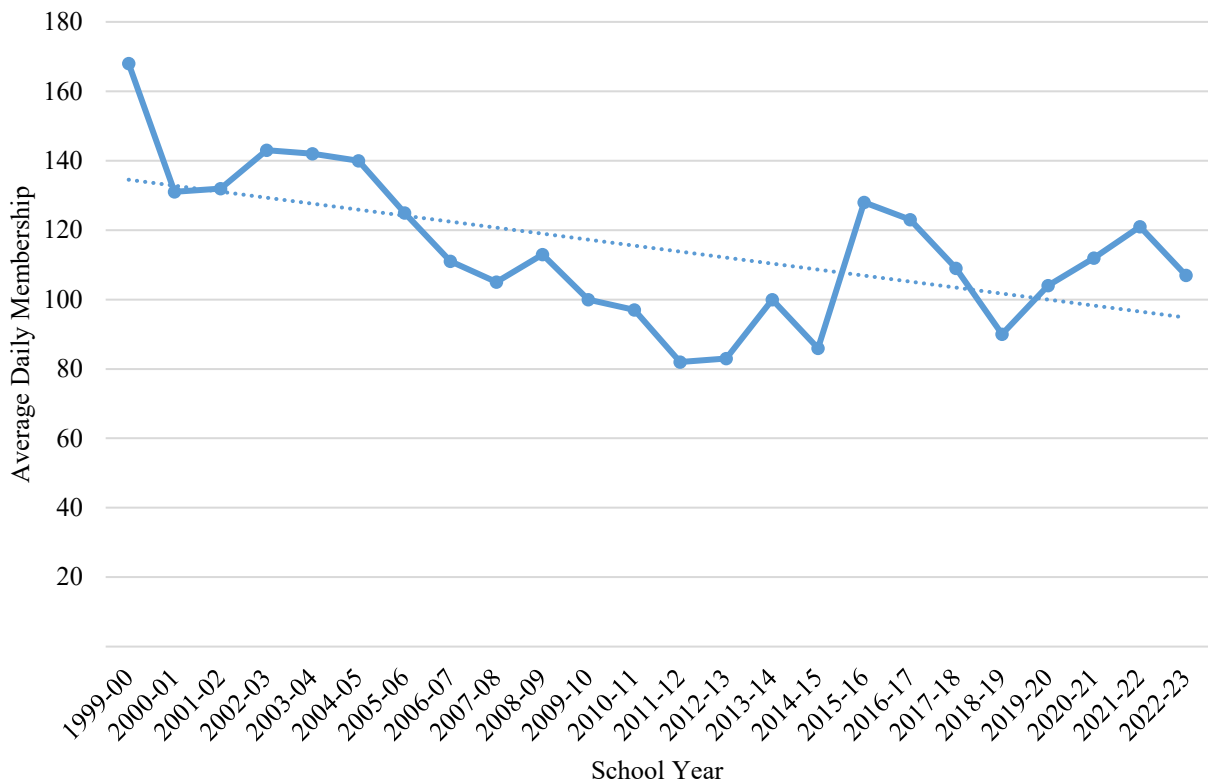
LONE WOLF PUBLIC SCHOOLS

Lone Wolf is an independent school with one campus that serves students from Pre-K through 12th grade. Located in the town of Lone Wolf in Kiowa County in southwestern Oklahoma, Lone

Wolf is approximately 10 miles southwest of the town of Hobart, which is the county seat of Kiowa County. Lone Wolf has a population of approximately 438. The school district covers 161 square miles. In 2022-23, the fall enrollment in LWPS was 109, with most identifying as Caucasian. Most students, 69 percent, were eligible for free and reduced-price meals.

Exhibit 1 shows trends in average daily membership (ADM) at LWPS. ADM experienced a recent peak in 2015-16, dropped for several years, and climbed again until this fall when it experienced a slight dip. Based on demographic projections prepared as part of this review, enrollment in LWPS is not projected to increase in the next five years.

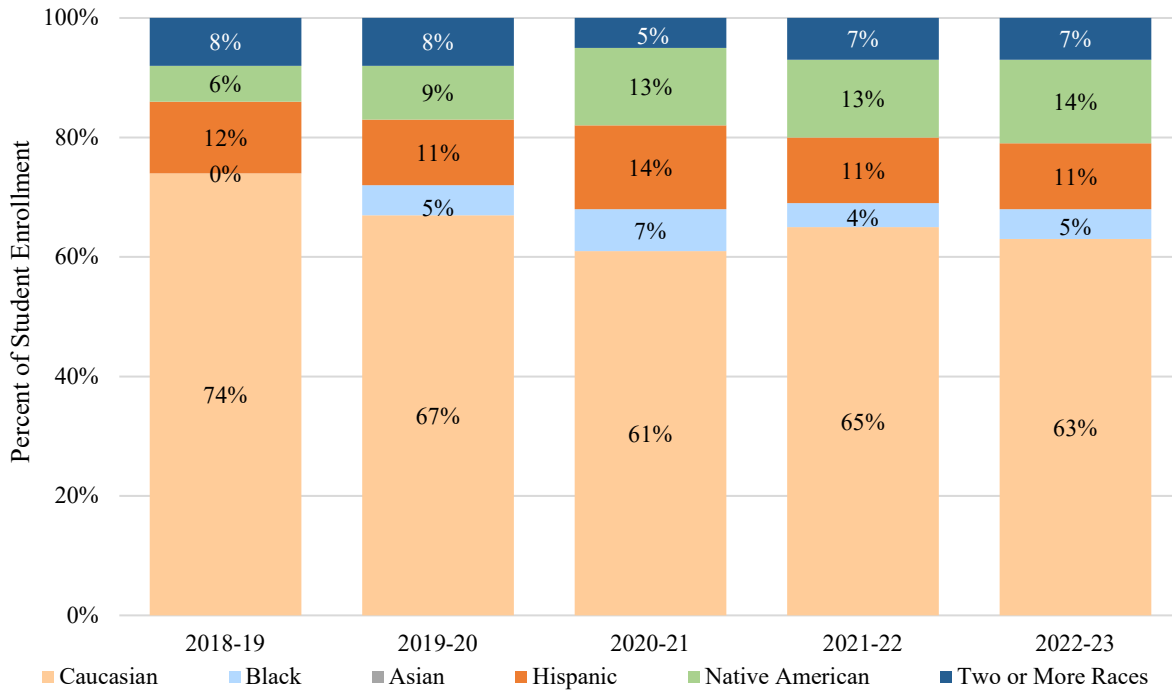
**Exhibit 1
Trend in Lone Wolf ADM**



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2 illustrates changes in LWPS student demographics over the past five years. The largest portion of students has been Caucasian each year, with little fluctuation.

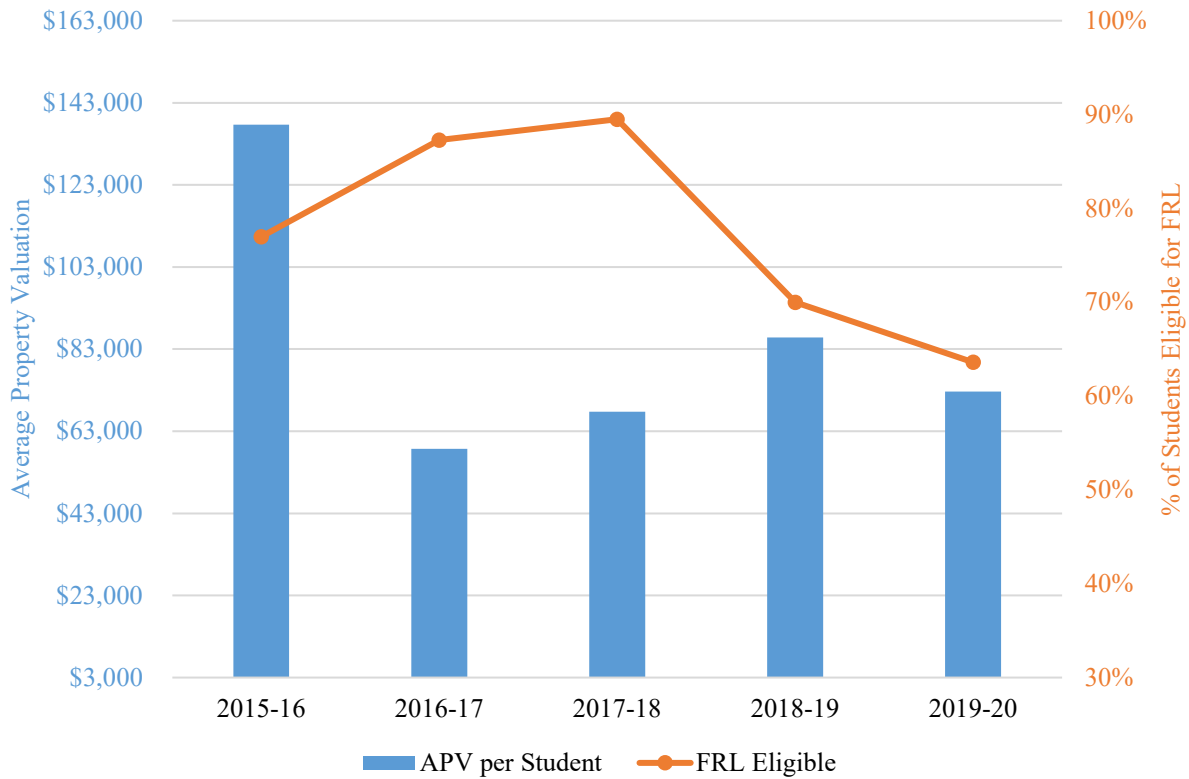
**Exhibit 2
Trend in LWPS Student Demographics**



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

Exhibit 3 shows the trend in LWPS assessed property value per student and the percent of students eligible for free/reduced-price meals over the last five years. Over that period, assessed property valuation has decreased by 47 percent, while eligibility for free/reduced-price meals decreased by 17 points.

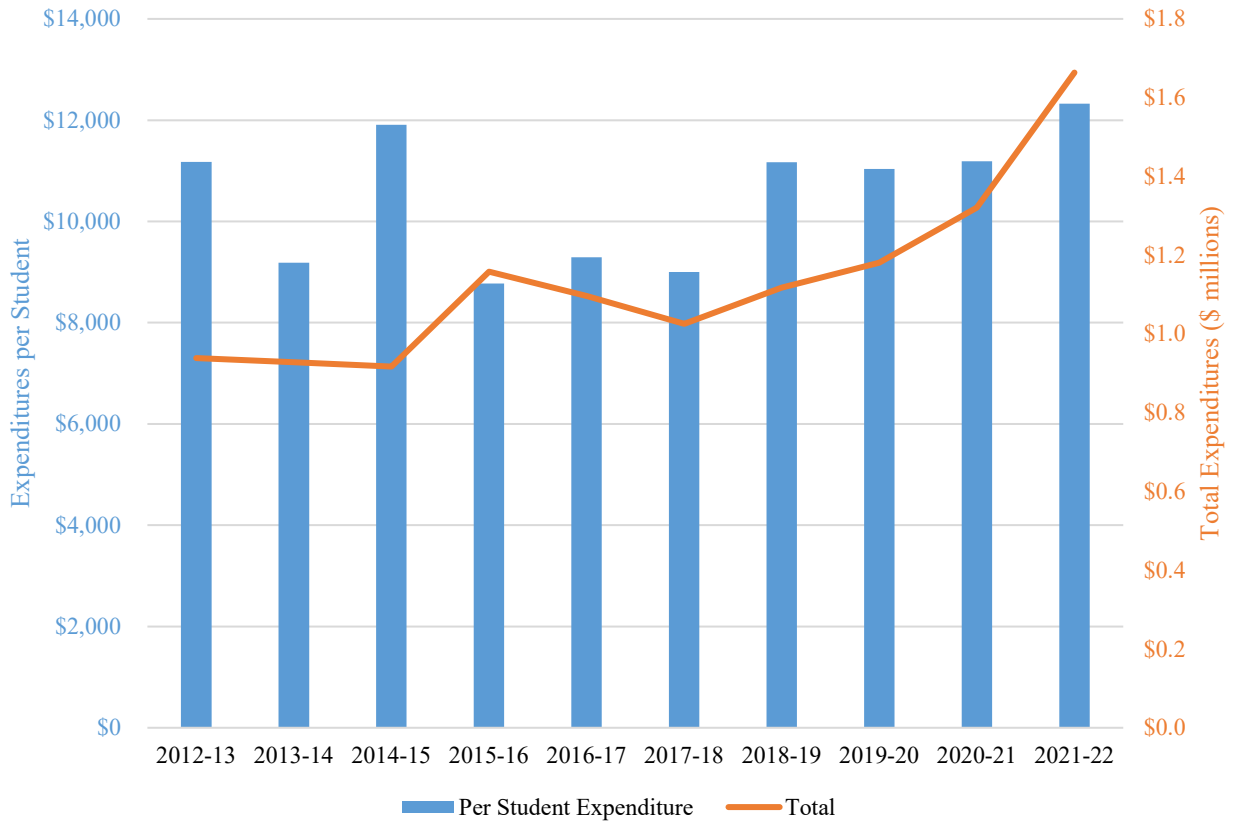
Exhibit 3
Trend in Assessed Property Value and Student Eligibility for Free/Reduced Meals



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 4 shows the trend in LWPS expenditures per student and overall, for the past 10 years. Over that time, total expenditures have fluctuated between \$1.0 million and nearly \$1.7 million. Per-student expenditures have also fluctuated and reached a high of \$12,323 in 2021-22.

Exhibit 4
Trend in LWPS Expenditures per Student, All Funds



Source: Oklahoma Cost Accounting System and Prismatic calculations

Exhibit 5 shows the recent trend in LWPS math, reading, and science scores. Prior to the pandemic, LWPS’s scores were improving, but still trailed the state’s overall. In 2018-19, LWPS trailed the state by 13 points in math, 11 points in reading, and four points in science. OCCTs were not taken in 2019-20 due to the pandemic. In 2020-21, both LWPS and state scores dropped; however, LWPS’s scores were closer to the state’s – LWPS trailed the state by 12 points in math, only four points in reading and only one point in science.

**Exhibit 5
Three-year Data Trend in State Assessment Proficiency**

	Math		Reading		Science	
	LWPS	State	LWPS	State	LWPS	State
2017-18	8%	31%	18%	35%	24%	40%
2018-19	19%	32%	22%	33%	31%	35%
2020-21	10%	22%	21%	25%	29%	30%

Source: Oklahoma School Report Cards

COMMENDATIONS

Prismatic identified “exemplary” or “best practices” in Lone Wolf Public Schools that led to 11 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 CFO is commended for providing financial reports and information at board meetings that clearly describes the district’s finances.

The superintendent and CFO are commended for creating efficiencies by implementing software applications for online enrollment, lunchroom collections, and financial records.

Chapter 2: INSTRUCTIONAL DELIVERY SYSTEM

LWPS has dedicated and committed teachers and tutorial staff who create a positive learning environment in their classrooms.

The district is commended for the 2022-23 superintendent’s instructional leadership efforts to improve student achievement and lead teachers in learning of and applying best instructional practices.

The district’s teachers are commended for their intentional efforts to support the social emotional learning needs of LWPS students.

Chapter 3: BUSINESS OPERATIONS

The district is commended for having written responsibilities for each of the key functions of the Chief Financial Officer.

Chapter 4: FACILITIES USE AND MANAGEMENT

LWPS is commended for joining the Oklahoma initiative to place all WPA buildings in Oklahoma on the National Register of Historic Places of the National Parks Service of the U.S. Department of the Interior.

LWPS has low energy consumption and utility utilization, which helps keep costs lower.

Chapter 5: SUPPORT SERVICES

The LWPS child nutrition program has been operating without financial loss for the past two years.

LWPS is commended for implementing an Esports program for students.

LWPS operates a low-cost, effective transportation program.

RECOMMENDATIONS AND PROJECTED COSTS AND SAVINGS

A list of recommendations with their associated costs or savings is provided in **Exhibit 6**. In each chapter, implementation strategies and the estimates of fiscal impact follow each recommendation in this report. Many of the recommendations have no costs or savings associated with them, but are designed to formalize, improve, and streamline operations. In some cases, the consulting team has made recommendations that will likely generate savings for the district, but in an effort to be conservative, no specific savings were estimated.

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

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

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

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2023-24	2024-25	2025-26	2026-27	2027-28	
Chapter 1	Management, Personnel, and Communications						
1	Build upon training that encompasses the overarching roles of board members and improves the development of board and superintendent relations.						\$0
2	Establish processes for the regular review of LWPS policies and maintain the updated policies on the district website to allow access to all stakeholders.	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)	(\$20,000)
3	Implement an ongoing, board-led strategic planning process involving community and faculty stakeholders to provide facilities management, bond planning, focus, and direction through short-term and long-range goals.	(\$20,000)	(\$10,000)	\$0	\$0	\$0	(\$30,000)
4	Develop personnel policies, job descriptions, extra duty assignments, and scales for all positions within the district.						\$0
5	Consider incentives and processes to increase the applicant pool and recruit quality candidates for leadership and teaching positions.	(\$50,000)	(\$50,000)	(\$50,000)	(\$50,000)	(\$50,000)	(\$250,000)
6	Establish a volunteer involvement program that includes written guidelines for schools and volunteers in addition to recruitment strategies.						\$0
	Subtotal	(\$74,000)	(\$64,000)	(\$54,000)	(\$54,000)	(\$54,000)	(\$300,000)
Chapter 2	Instructional Delivery System						
7	Develop and implement with fidelity core content Pre-K-12 horizontal and vertical standards-based curriculum frameworks and pacing guides to monitor OAS.						\$0
8	Develop and implement district-wide processes and procedures for administering formative assessments and summative assessments to monitor student progress and measure mastery of OAS, then use the data to pace and adjust curriculum, instructional practices, and inform targeted remediation and interventions.	(\$3,000)	\$0	\$0	\$0	\$0	(\$3,000)
9	Implement combined grade levels Pre-K and Kindergarten, and first grade and second grade.	\$105,000	\$105,000	\$105,000	\$105,000	\$105,000	\$525,000

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2023-24	2024-25	2025-26	2026-27	2027-28	
10	Review and implement with fidelity a strategically planned, accurate, and student-driven class schedule that expands middle school and high school elective offerings through concurrent enrollment, vo-tech, and virtual learning vendors.						\$0
11	Implement regularly scheduled, structured release time opportunities for administrators and teachers to collaborate vertically regarding aligning and pacing core content, high-impact instructional strategies, and interventions that drive improved learning for all students.						\$0
12	Implement a comprehensive evaluation process to ensure textbooks, software, and supplemental instructional materials/resources improve student achievement, are cost effective, developmentally appropriate, relevant, consistent across grade levels and content areas, and aligned vertically and horizontally with Oklahoma Academic Standards (OAS).						\$0
13	Implement a district-wide comprehensive review of all aspects of the district’s special education program to better meet the needs of IEP students and keep the program in compliance.						\$0
14	Strengthen all aspects of the gifted program.						\$0
15	Explore all options for improving counseling services for LWPS students.						\$0
Subtotal		\$102,000	\$105,000	\$105,000	\$105,000	\$105,000	\$522,000
Chapter 3	Business Operations						
16	Create a leave policy for employees in the newly created board policy manual that includes sick leave, personal leave, and vacation leave that includes the amounts earned, the allowed accrual, and guidelines for how it can be used.						\$0
17	Create a list of expenditure reductions to implement over the next year to help align the district’s expenditures with the reduced available revenue.						\$0
18	Eliminate the three-year-old program as an expenditure reduction measure to assist in aligning the district’s budget with its declining enrollment and revenue.	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$100,000
19	Research and apply for available grant opportunities to assist in providing additional funding sources to LWPS.						\$0

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2023-24	2024-25	2025-26	2026-27	2027-28	
20	Establish a general fund balance policy to provide guidance on how to achieve the minimum required balance, provide a desired fund balance range, and require fund balance status reports to the board of education.						\$0
21	Invest in professional development for the business office staff that is available from the Oklahoma State Department of Education or state education associations such as OKASBO and prioritize the need for accurate financial reporting.						\$0
22	Develop a written activity fund procedures manual to ensure funds are properly administered.						\$0
23	Declare specific facilities as surplus property and list them to the public for sale to help the district pay for needed one-time improvements to existing utilized buildings.						\$0
24	Develop a district facilities improvement plan and work with all community stakeholders to identify improvement projects along with equipment and technology needs to be placed on a potential bond issue.						\$0
25	Create a purchasing policy and written procedures for the purchasing process.						\$0
26	Implement the electronic purchasing requisition module in Wengage.						\$0
27	Create a written lease agreement with terms that are mutually beneficial for both the renter and the school district.						\$0
		\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$100,000
Chapter 4	Facilities Use and Management						
28	Develop and maintain a comprehensive facilities plan.	\$0	(\$9,000)	\$0	\$0	\$0	(\$9,000)
29	Address the pool, bus barn, music building, and unused acreage in the facilities master plan.						\$0
30	Develop a comprehensive maintenance program.	\$760,016	(\$219,624)	(\$219,624)	(\$219,624)	(\$219,624)	(\$118,480)
31	Select a digital work order and purchase order software that can be employed district-wide, including with contractors on retainer.						\$0
32	Prepare a code compliance task order for the electrical, plumbing, and HVAC contractors under their respective retainer contracts.						\$0

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2023-24	2024-25	2025-26	2026-27	2027-28	
33	Ensure that the roof has been made durably watertight, then repair the damage to ceilings, walls, floors, and other parts of the main building and the gymnasium.						\$0
34	Make the roof of the 3-year-old building durably watertight.						\$0
35	Continue the facilities clean-up during summer and holiday breaks until no unjustifiable, unwarranted storage and no likely health hazards remain.						\$0
36	Hire a pool of responsible high school students as junior custodians to complete daily custodial activities.	(\$6,163)	(\$6,163)	(\$6,163)	(\$6,163)	(\$6,163)	(\$30,815)
37	Replace lights with LEDs.						\$0
38	Pursue energy conservation opportunities.						\$0
39	Seek new energy conservation opportunities constantly during the facility planning process.						\$0
40	Implement the mobile emergency management plan furnished to all Oklahoma School districts.						\$0
41	Invite the OSSI to perform a Risk and Vulnerability Assessment and make written recommendations.						\$0
	Subtotal	\$753,853	(\$234,787)	(\$225,787)	(\$225,787)	(\$225,787)	(\$158,295)
Chapter 5	Support Services						
42	Develop an annual training calendar and log to ensure compliance with child nutrition professional standards requirements.						\$0
43	Obtain training for the child nutrition manager on USDA regulations regarding menu components, meal service, menu planning, recipes, and nutritional analysis.						\$0
44	Ensure the child nutrition manager is proficient in automation as well as the typical variety of program-required tasks.						\$0
45	Implement a combination of a reduction in labor hours and efforts to increase meal equivalents to yield higher productivity rates.	\$11,505	\$11,505	\$11,505	\$11,505	\$11,505	\$57,525
46	Improve management of the child nutrition program by preparing child nutrition financial reports that will provide meaningful data in a format that can be used for analysis and decision-making.						\$0
47	Notify OK SDE of the district's intent to apply and implement CEP beginning in 2023-24.						\$0
48	Improve lunch menus by: developing lunch menus by age groups utilizing student advisory groups; offering a variety of choices and						\$0

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2023-24	2024-25	2025-26	2026-27	2027-28	
	incorporate self-serve for these options; and adjusting portions to follow USDA meal pattern guidelines.						
49	Incorporate the fruit/vegetable bar as part of the reimbursable meal.	\$1,908	\$1,908	\$1,908	\$1,908	\$1,908	\$9,540
50	Ensure adequate teacher supervision during breakfast mealtime.						\$0
51	Improve the use of technology in the child nutrition program.	(\$799)	\$0	\$0	\$0	\$0	(\$799)
52	Address problems with technology support by contracting with a technical support vendor and developing teacher leaders to supplement technology support at the sites.	(\$7,000)	(\$7,000)	(\$7,000)	(\$7,000)	(\$7,000)	(\$35,000)
53	Create a long-term strategic plan for technology with input from a variety of stakeholders.						\$0
54	Develop and implement a disaster recovery plan that includes the district's critical data, systems, and programs.						\$0
55	Expand and utilize more extensively online learning opportunities for curriculum expansion and student courses.						\$0
56	Provide technology professional development focused on increasing staff technology skills and understanding.						\$0
57	Develop policies, procedures, and a disposal plan for surplus, obsolete, and inoperable equipment.						\$0
58	Adopt expectations for teacher and administrator competencies in technology.						\$0
59	Develop formal written technology standards, procedures, and processes for inventory, administrative tasks, equipment and software purchases, implementation, and upgrades.						\$0
60	Seek additional funding sources and grants to support long-range planning in technology.						\$0
61	Develop transportation policies and regulations that require LWPS to be in compliance with federal and state laws and regulations regarding pupil transportation, and that fit local, reasonable expectations for its school busing program.						\$0
62	Require the transportation supervisor to join and participate in OAPT activities regularly.	(\$100)	(\$100)	(\$100)	(\$100)	(\$100)	(\$500)
63	Improve site safety by minimizing trip hazards on sidewalks, backing out of parking spaces, crossing of the streets by students, and traffic by the school.						\$0

	Recommendation	Estimated (Costs) or Savings					Total Five-Year (Costs) or Savings
		2023-24	2024-25	2025-26	2026-27	2027-28	
64	Review past gasoline and diesel fuel purchases to ensure that LWPS is not paying state and federal taxes on gasoline and diesel fuel.	\$896	\$896	\$896	\$896	\$896	\$4,480
65	Review daily driving behaviors by Lone Wolf bus drivers and correct them as needed to adhere to federal and Oklahoma school bus driving requirements and recommended practices.						\$0
66	Assess the district’s transportation needs and develop an appropriate fleet replacement schedule.						\$0
67	Continue to provide the Lone Wolf school community with activities and athletic trips, and access to learning beyond Lone Wolf’s borders.						\$0
68	Research the possibility of acquiring an under 14-passenger capacity school van to replace the 29-passenger van for daily home to school bus service, and more efficient operations.						\$0
69	Purchase and use a power washer and shop-vac to clean the inside and outside of school vehicles at least weekly during the school year.	(\$1,170)	\$900	\$900	\$900	\$900	\$2,430
70	Develop and maintain a system to track maintenance and repair costs of each individual school vehicle.						\$0
	Subtotal	\$5,240	\$8,109	\$8,109	\$8,109	\$8,109	\$37,676
	Total quantifiable savings	\$899,325	\$140,209	\$140,209	\$140,209	\$140,209	\$698,975
	Total quantifiable costs	(\$92,232)	(\$305,887)	(\$286,887)	(\$286,887)	(\$286,887)	(\$497,594)
	Total net quantifiable savings and costs	\$807,093	(\$165,678)	(\$146,678)	(\$146,678)	(\$146,678)	\$201,381

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

Of the 70 recommendations made, Prismatic believes these seven recommendations to be the most critical:

- **Implement an ongoing, board-led strategic planning process.** The district has not previously engaged in strategic planning. It is currently faced with substantial challenges, including declining student enrollment, substantial facilities needs, and staff turnover. In order to survive, the district should consider a number of potential paths, including: becoming a K-8 district; becoming a charter school; developing a co-op with other nearby districts for athletics and extracurricular activities; developing a co-op for a virtual program; and, developing an alternative school.
- **Implement combined grade levels: Pre-K with Kindergarten, and first grade with second grade.** The district already has combined third and fourth grades, as well as various upper grades for core subjects, the Art elective, and the Publishing elective. Given the dwindling enrollment and the financial constraints that will bring, combining Pre-K/Kindergarten and first/second grades is the next logical step. This would free up funds to expand instructional support. A variety of research on the topic concludes that students can learn just as well in a combined classroom as in a single-grade classroom.
- **Eliminate the three-year-old program.** The district offers a tuition-free early childhood program for three-year-olds. Of the ten students in 2022-23 only one lived within district boundaries. The district receives no revenue for any of these students. The local belief that having a three-year-old program leads families to keep their children in LWPS in later grades is not supported by enrollment data. Given the district’s financial situation, it cannot afford to keep the program.
- **Develop and maintain a comprehensive facilities plan.** The district’s facilities are in generally poor condition. Maintenance has been haphazard – for example, at the time of the onsite visit, pigeons were living in the walls of the gymnasium. The district has a number of unused and unsightly facilities and spaces, including: an unused pool with a puddle of discolored water at its bottom; a bus barn that is disorganized and unsanitary; a music building filled with generally worthless surplus; and, unused and deteriorating athletic fields. Recognizing that LWPS must compete with neighboring districts to even retain its current student population, the consulting team recommends that the district’s facilities plan include:
 - the sale of the unused football and baseball fields;
 - the sale of the transportation building and the relocation of the weight room;
 - the repurposing of the building currently used by the three-year-old program into a duplex whose units can be rented to teachers in the district;

- the repurposing of the old music building into a community library;
 - either the sale of the annex or the repurposing of the annex into multi-unit housing whose units can be rented to teachers in the district; and
 - regular bond votes to provide the funds to keep the main, historic building and gymnasium in acceptable condition.
- **Apply and implement the Community Eligibility Provision (CEP) in the child nutrition program.** CEP is a USDA initiative that allows districts that meet eligibility requirements to offer meals to all students at no charge. Meals that are free to all students could potentially be an incentive for families to enroll in LWPS. Implementing CEP would eliminate the problem of unpaid charges having to be absorbed by the district – for 2022-23, those charges exceeded \$7,000. As part of this change, the district should be focused on implementing further improvements in the child nutrition program so that it operates at a financially self-sustaining level. The district cannot afford to subsidize the child nutrition program with general funds.
 - **Address problems with technology support by contracting with a technical support vendor and developing teacher leaders to supplement technology support.** Investments in technology are for naught if the technology is not kept in operable condition. As a small district with budget constraints, hiring dedicated technology staff is not feasible. To assist with basic troubleshooting, LWPS should implement a cross-training program for teacher technicians. The district should also contract with a local vendor to provide technology support either through a contracted service agreement or on an as-needed basis.
 - **Make use of the district’s new 54-passenger bus to provide more substantial enrichment opportunities.** LWPS should develop a “learning beyond the classroom” program that takes students regularly from their school building to learning sites outside of Lone Wolf. Within a two-hour bus ride (100-mile radius) there are likely many sites deserving attention and with relevance to STEM education, the arts, culture, and athletics. Offering trips on weekends would potentially open them to parents as well, who could be asked to cover some of the trip costs. An active trips program could help to attract and retain students.

Chapter 1:

*Management, Personnel, and
Communications*

Chapter 1

Management, Personnel, and Communications

This chapter addresses the management, personnel, and communications of Lone Wolf Public School (LWPS) in the following sections:

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

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

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

Background

The mission of LWPS as provided in the student handbook is:

The staff at Lone Wolf Schools recognizes that all students learn differently and that all students deserve an equal opportunity to learn. With the help of parents and community, we will be able to provide an equal opportunity environment to maximize academic, emotional, and social growth which will in turn maximize students' potential, to create in students a love of learning so they can be successful members of the community.

Lone Wolf is an independent school with one campus that serves approximately 100 students from Pre-K through 12th grade. LWPS is in the town of Lone Wolf in Kiowa County in southwestern Oklahoma. Lone Wolf has a population of approximately 438.

In 2022-23, the fall enrollment in Lone Wolf was 109, with most identifying as Caucasian (**Exhibit 1-1**). About 69 percent of the student population is eligible for free or reduced-price meals.

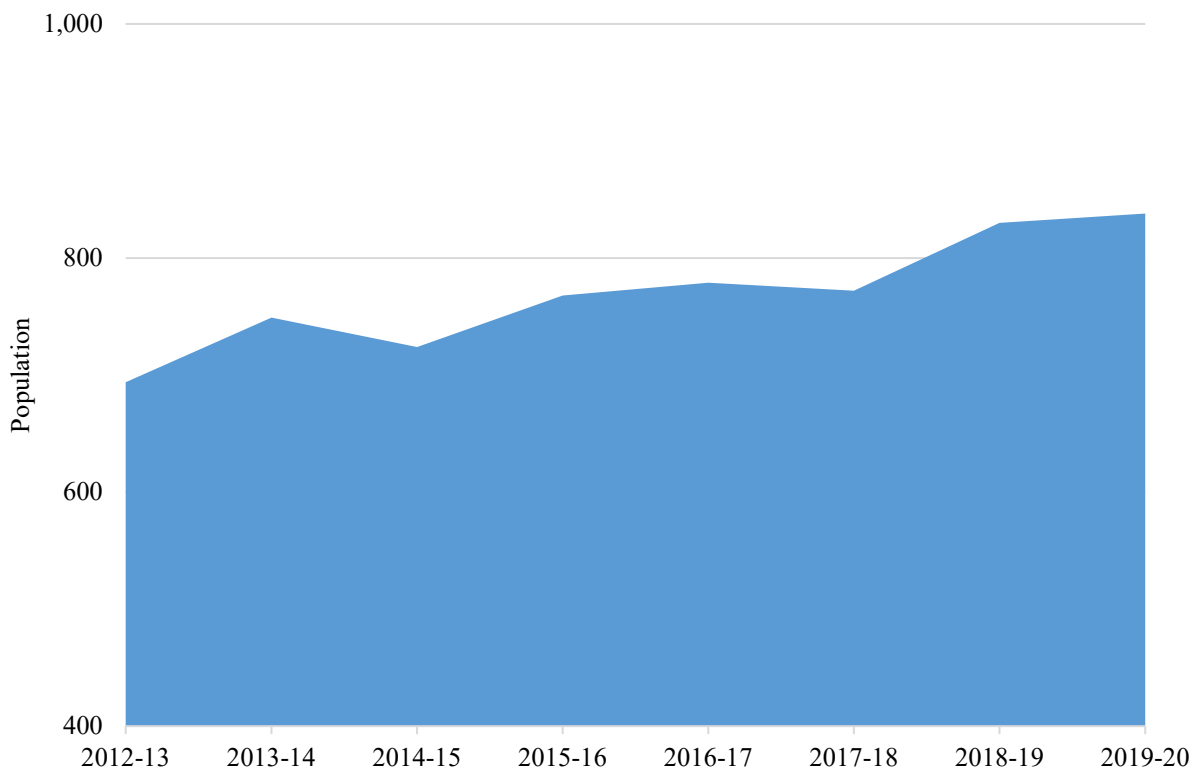
**Exhibit 1-1
Lone Wolf Student Enrollment and Socioeconomic Characteristics, 2022-23**

School	Grade Span	Fall Enrollment	Caucasian	Black	Asian	Hispanic	Native American	Two or More Races	Eligible for Free or Reduced-Price Meals
Lone Wolf	PK-12	109	63%	5%	0%	11%	14%	7%	69%

Source: Oklahoma State Department of Education, State Public Enrollment Totals 2022-23

Exhibit 1-2 displays the population trend for the Lone Wolf community. There has been a 21 percent increase in the overall population since 2012-13.

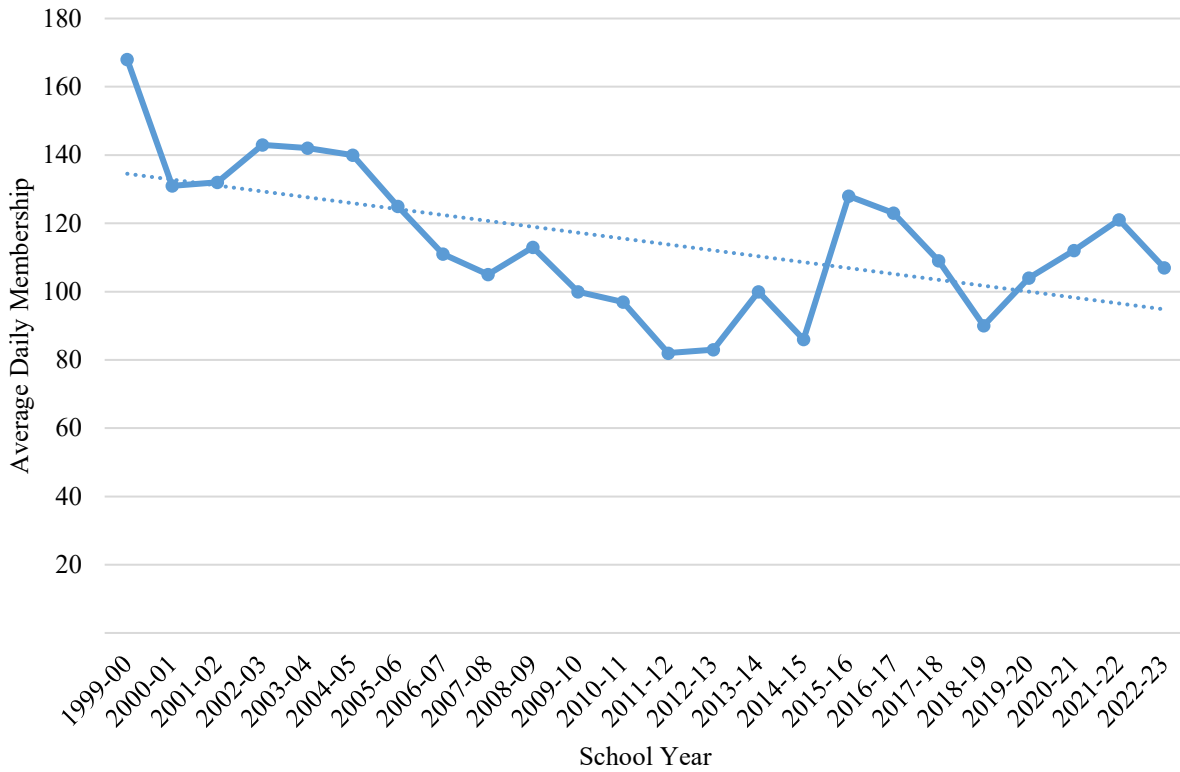
**Exhibit 1-2
Population Trend for Lone Wolf Community**



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-3 shows trends in average daily membership (ADM) at LWPS. ADM experienced a recent peak in 2015-16, dropped for several years, and climbed again until this fall when it experienced a slight dip. As shown in **Appendix E**, enrollment in LWPS is not projected to increase in the next five years.

**Exhibit 1-3
Trend in Lone Wolf ADM**



Source: Office of Educational Quality and Accountability, Profiles Database

The data in **Exhibit 1-4** reflect ADM trends compared to the peers, community group, and state. Community group data were not yet available for the more recent years. The state ADM was generally flat. Lone Wolf and half of its peer districts experienced growth, while the other three decreased in enrollment.

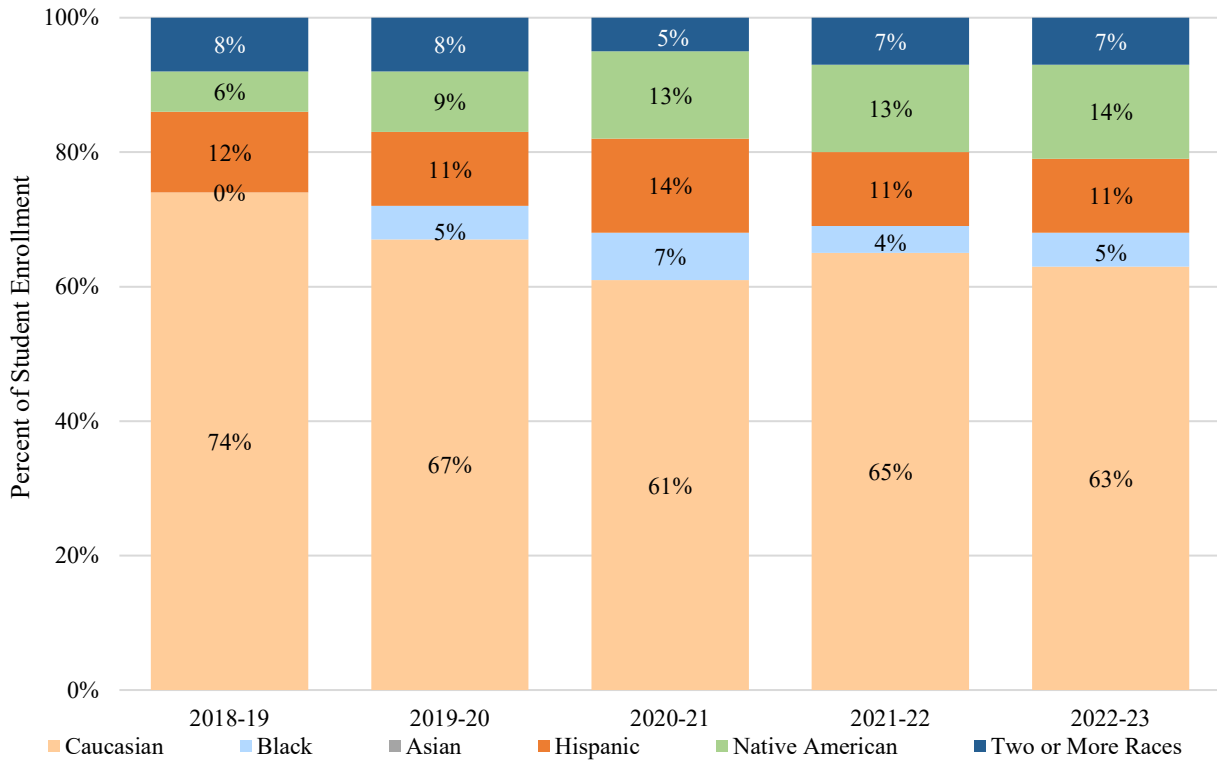
**Exhibit 1-4
Lone Wolf, Peer Districts, and State Student ADM Trends**

Entity	ADM					Percent Change
	2018-19	2019-20	2020-21	2021-22	2022-23	
Lone Wolf	90	104	112	121	107	19%▲
Buffalo Valley	149	132	123	179	231	55%▲
Gracemont	147	123	134	128	123	(16%)▼
Panola	153	92	67	57	59	(61%)▼
Wanette	152	135	122	128	133	(13%)▼
Wynona	101	93	99	105	126	(25%)▼
Community Group	153	149	N/A	N/A	N/A	N/A
State	1,289	1,304	1,272	1,286	1,294	0.4%▲

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-5 illustrates changes in LWPS student demographics over the past five years. The largest portion of students was Caucasian each year, with little fluctuation.

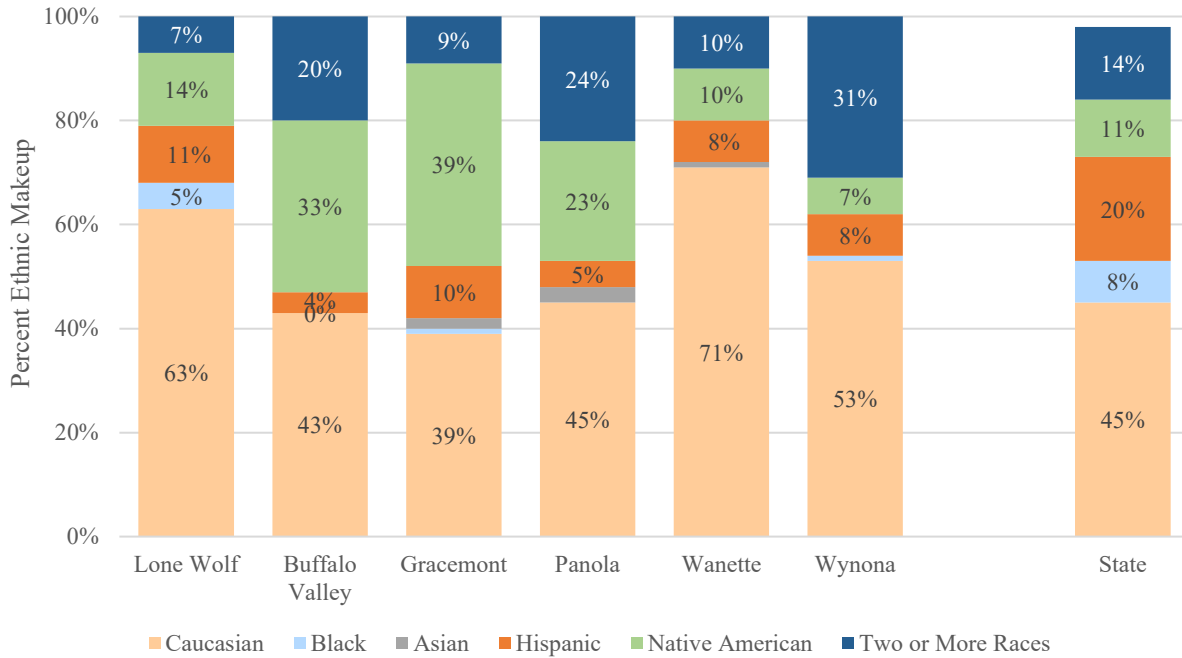
**Exhibit 1-5
Trend in LWPS Student Demographics**



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

Exhibit 1-6 compares LWPS’ demographics with its peers, the community group, and the state for 2022-23. LWPS and its peers all have demographics that are similar to those of the state.

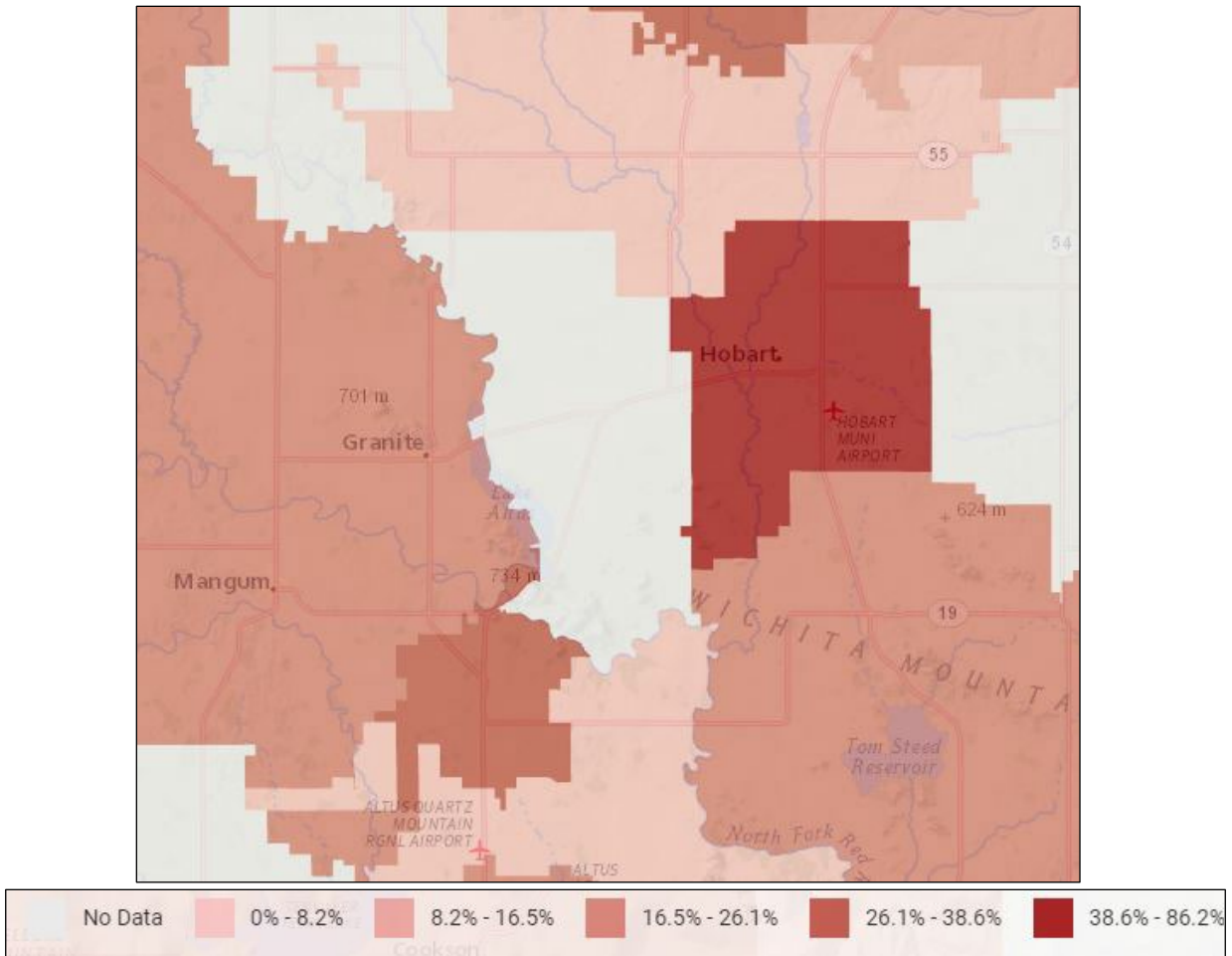
Exhibit 1-6
Comparison of Student Demographics, 2022-23



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

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

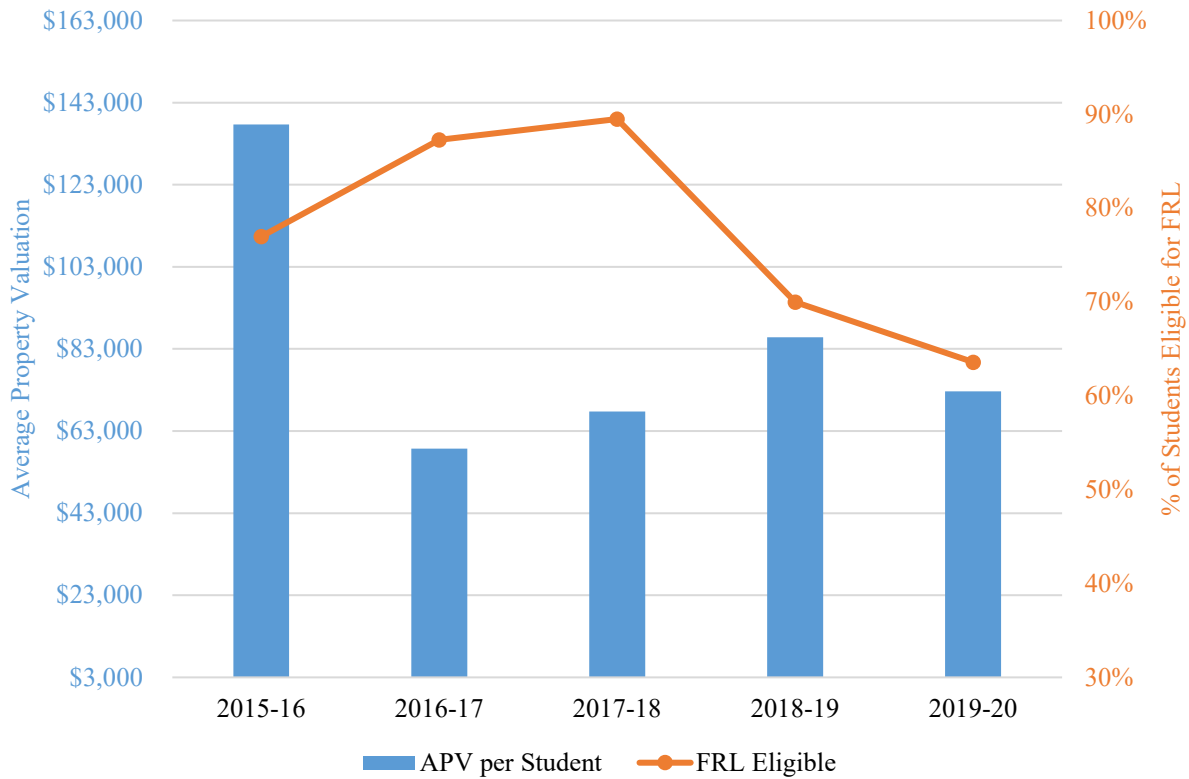
Exhibit 1-7
Rate of Child Poverty in Lone Wolf Area



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

Exhibit 1-8 shows the trend in LWPS-assessed property value per student and the percentage of students eligible for free/reduced-price meals over the last five years. Over that period, assessed property valuation has decreased by 47 percent, while eligibility for free/reduced-price meals decreased by 17 percent.

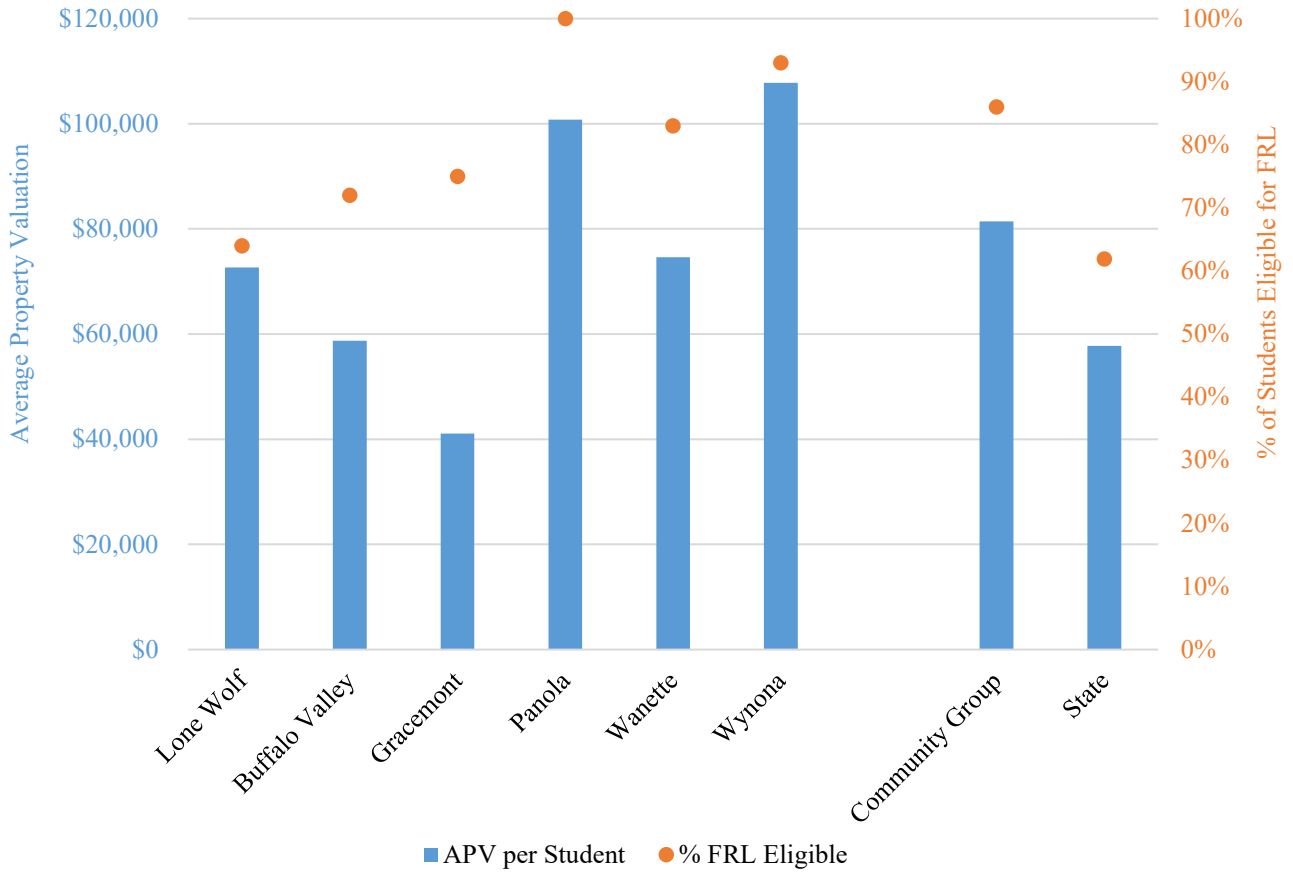
Exhibit 1-8
Trend in Assessed Property Value and Student Eligibility for Free/Reduced Meals



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-9 shows the comparison of LWPS Assessed Property Value (APV) and percent of student eligibility for free/reduced-price meals to its peer districts, community group, and state. LWPS was right in the middle of its peer group in APV and had the lowest percentage of students qualifying for free/reduced-price meals.

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



Source: Office of Educational Quality and Accountability, Profiles Database

A. GOVERNANCE

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

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

Topic	Section
School District – Definition	8
School System – Administered by State Department of Education, etc.	17
Positions in School System – Definitions	18
General Fund – Definition	22
Building Fund – Definition	23
State Board of Education – Powers and Duties	32
Governing Body of School District	123
Independent and Dependent School Districts – Board of Education – Members Election	125
Expansion of Board	126
Workshops for New Board Members – Expenses of Members Attending	127
Relation by Affinity or Consanguinity Prohibition	129
Employment of Relative of Member of Board of Education	130
Excluding Litigious Board Member from Proceedings	131
School District Treasurer – Assistant Local Treasurer	132
Local Treasurer – Surety Bond – Duties – Cash Investment Ledgers	133
Oath of Office	135
Requirements for Bonds for Employees and Officers	136
Powers and Duties	138
Meetings of Board – Executive Sessions – Compensation of Members of Boards of Districts with ADA Exceeding 15,000 or Population Exceeding 100,000	148
Officers of Board	149
President – Duties	150
Vice President – Duties	151
Clerk – Duties	152
Oklahoma Open Meeting Act	787
Executive Sessions	793

Source: Oklahoma School Law Book, 2021

The powers and duties of the local board of education are contained in Sections 125 and 138 of the School Law Book. These powers and duties cover all activities related to operating public school districts. Key powers and duties include:

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

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

Exhibit 1-11
Lone Wolf Board of Education Members

Board Member	Board Position	Year of Election or Appointment	Term Expires
Dr. Neil Vitale	President	2019	2024
Bill Lazenby	Vice President	2021	2026
Nickie Straub	Clerk	2023	2028
Amanda Rodgers-Prince	Member	2022	2025
Ronnie Weber	Member	2022	2027

Source: LWPS, May 2023

The district holds school board elections each February unless otherwise changed by state directives. The board of education members swear in elected members and vote on officers at the next meeting. A contract is in place for an annual audit of district finances. For the past several years, board members have run unopposed or were appointed to their seat on the board.

The Lone Wolf Board of Education meets monthly at 7:00 pm in the Auditorium. The meeting place and time may be changed by agreement of a majority of the board members. They are open to the public. Special meetings are held as needed, and board members receive agendas and any supporting information in advance of the meeting.

Section 127 outlines the training requirements for school board members. Within 15 months following the election, new board members are required to complete 12 hours of instruction on education issues in the areas of:

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

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

Reelected board members are required to complete six hours of instruction within 15 months of reelection. Included in these six hours is one hour of instruction in the following:

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

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

FINDING 1-1

The LWPS school board members do not have a clear understanding of their roles and responsibilities. This lack of understanding could be due to a lack of recent training.

Board members are typically the bridge between the community and the school. They are responsible for developing the policies that guide the district’s legal functions. However, two of the three board members interviewed at LWPS stated that it was not their role to know what is going on in the school. They further stated that if they were required to hear a case, they should not have any prior knowledge.

In addition, the board had not evaluated the prior long-term superintendent for several years. Due to the request of the new superintendent, the board began a process for evaluating their superintendent. The board and superintendent worked together to develop the evaluation. However, the evaluation presented to the superintendent was different than what was originally agreed upon.

Parents were asked to complete a survey that included questions about board relations. Less than 50 percent of parents surveyed “agreed” or “strongly agreed” that board members understand the educational needs of students or that board members listen to the opinions or desires of parents and community members (**Exhibit 1-12**).

Exhibit 1-12
Parent Survey Results Regarding Board Relations

Survey Question	Strongly Agree	Agree	Don’t Know/No Opinion	Disagree	Strongly Disagree
School board members listen to the opinions and desires of parents and community members.	6%	35%	35%	6%	18%
School board members know and understand the educational needs of students in the district.	18%	29%	35%	6%	12%

Source: Prismatic Survey Results, March 2023

In addition to meeting state-mandated requirements, school board training is designed to provide pertinent information for overall board member effectiveness and board member and superintendent relationships.

An effective school board plays an important role in representing the values of the community and setting policies that affect all students. The following study identifies characteristics of effective boards and can be used as a filter for determining additional training needs and best practices:

- **Effective Boards Focus on Student Achievement.** Policies and resources are targeted to promote achievement for all students. All school policy is targeted to high standards, a rigorous curriculum, and high-quality teachers.
 - **Effective Boards Allocate Resources to Needs.** Not all students have the same needs. Good school boards recognize this fact and allocate resources of time, money, and personnel and adjust practices to reach all student-learning priorities.
 - **Effective Boards Watch the Return on Investment.** Productive school boards are mindful of their own accountability to their communities. They routinely measure and report the return on investment. As effective policy makers, they recognize the importance of being good stewards of tax dollars.
 - **Effective Boards Use Data.** Informed policy making is complex and requires using data. Data assures that all students are progressing and reaching high standards. Accountability and reports about return on investments are unconvincing without data.
 - **Effective Boards Engage the Communities They Serve.** There are established mechanisms for community
 - in setting the district's vision, representing the values of the community, and identifying the
- Research published by the National School Boards Association (NSBA) Center for Public Education makes it clear that school boards in high-achieving districts exhibit habits and characteristics that are markedly different from boards in low-achieving districts. LWPS board members were clear in their intent to govern with the focus of raising the achievement level of all students. The board can use the information in **Exhibit 1-13** as an operational guide and filter for adopting policy that supports strategic overall school improvement planning.

¹ <https://www.edutopia.org/five-characteristics-effective-school-board>

Exhibit 1-13
Eight Characteristics of an Effective School Board

1. Effective school boards commit to a vision of high expectations for student achievement and quality instruction and define clear goals toward that vision.
2. Effective school boards have strong shared beliefs and values about what is possible for students and their ability to learn, and of the system and its ability to teach all children at high levels.
3. Effective school boards are accountability driven, spending less time on operational issues and more time focused on policies to improve student achievement.
4. Effective school boards have a collaborative relationship with staff and the community and establish a strong communications structure to inform and engage both internal and external stakeholders in setting and achieving district goals.
5. Effective boards are data savvy; they embrace and monitor data, even when the information is negative, and use it to drive continuous improvement.
6. Effective school boards align and sustain resources, such as professional development, to meet district goals.
7. Effective school boards lead as a united team with the superintendent, each from their respective roles, with strong collaboration and mutual trust.
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.

Source: cpe-eight-characteristics-of-effective-school-boards-report-december-2019.pdf (nsba.org)

In addition, a strong, effective relationship between the superintendent and the board is the foundation that supports a successful district. Productive collaboration between the superintendent and board requires frequent diplomatic communication and clear definitions of goals and responsibilities. Utilizing a formative evaluation process that allows the board to give feedback based on goals and expectations supports a healthy board-superintendent partnership. Oklahoma statute 70 O.S. § 6-101.10 mandates an annual evaluation of superintendents; however, the evaluation process should do more than meet the statute. It should foster meaningful communication and encourage growth and opportunities for improvement.^{2,3}

² Hanover Research. (2014). Effective board and superintendent collaboration. Retrieved from: www.hanoverresearch.com/media/Effective-Board-and-Superintendent-Collaboration-Featured.pdf

³ Oklahoma State School Boards Association. Teamwork: The superintendent evaluation. Retrieved from: www.ossba.org/events/teamwork-the-superintendent-evaluation/

RECOMMENDATION

Build upon training that encompasses the overarching roles of board members and improves the development of board and superintendent relations.

The superintendent and board members should explore all options available to meet state requirements and provide members with relevant training for being a productive and responsible board of education. The Oklahoma State School Boards Association (OSSBA) has training specific to board and superintendent relations that includes developing and utilizing an evaluation tool.

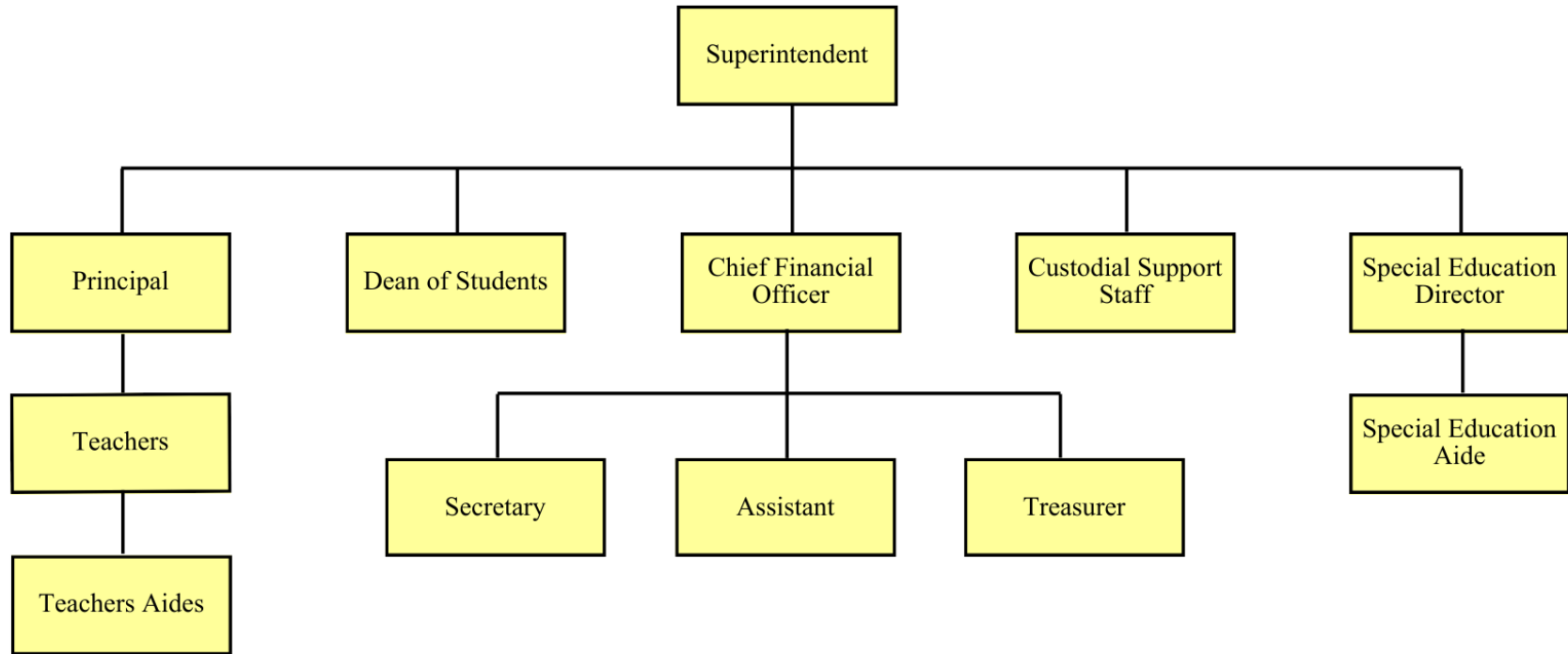
FISCAL IMPACT

This recommendation can be implemented with existing resources. OSSBA has specialized training for boards and superintendents that includes a superintendent evaluation tool. There is a minimal cost for the specialized training.

B. ORGANIZATION AND MANAGEMENT

The superintendent of a school district serves as the chief executive officer and is the administrative leader responsible for policy implementation and day-to-day operations. An effective organizational structure is essential to the efficient delivery of services in a school district. Effective structures encourage communication at all levels. **Exhibit 1-14** reflects the current organizational chart for LWPS.

**Exhibit 1-14
LWPS Organizational Chart**



Source: Created by Prismatic, March 2023

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various LWPS functional areas. **Exhibit 1-15** provides the results for central office administration and the superintendent. A majority (80 percent) of staff members gave the superintendent an A or B grade and 62 percent gave the central office administration an A or B grade. School-level administrators also earned high marks.

Exhibit 1-15
Staff Survey Results Regarding Central Office Administration and Superintendent

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Superintendent’s work as the educational leader of the district.	40%	40%	10%	10%	0%	0%
Superintendent’s work as the chief administrator of the district.	40%	40%	10%	10%	0%	0%
Principal’s work as manager of the staff and teachers.	30%	20%	30%	10%	10%	0%

Source: Prismatic Survey Results, March 2023

Parent responses were not similar to staff responses. Only 47 percent of parents gave the superintendent high marks (**Exhibit 1-16**).

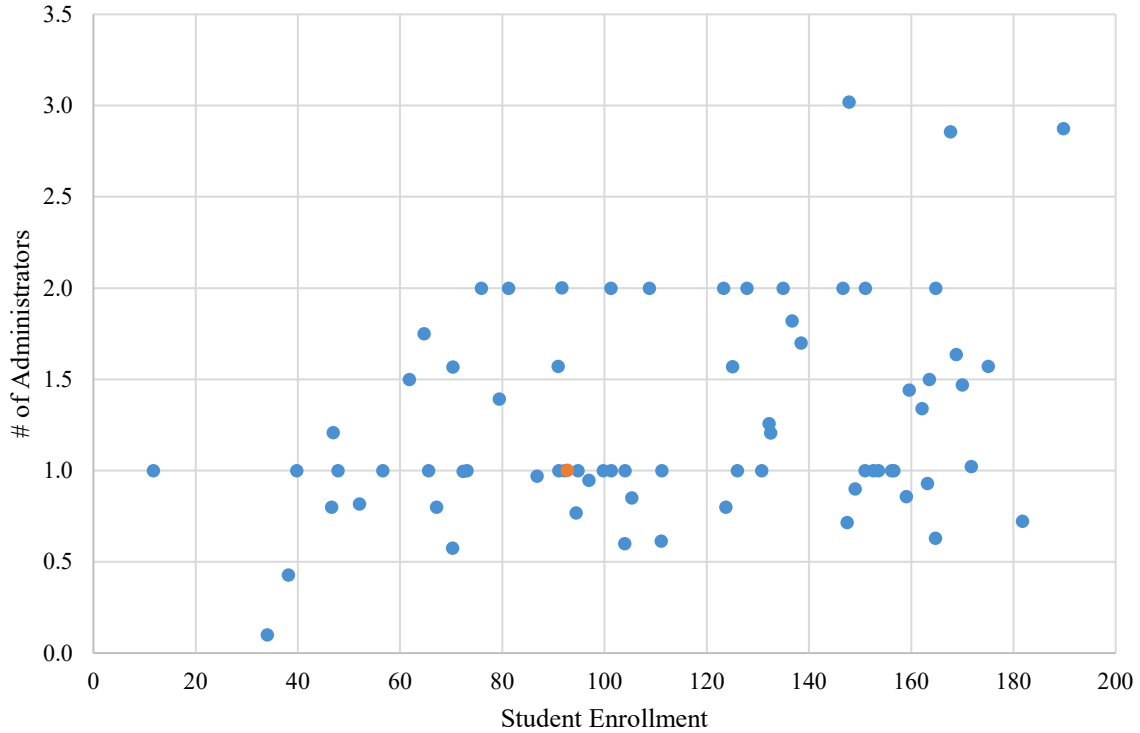
Exhibit 1-16
Parent Survey Responses Regarding School Board Members

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
The superintendent is a respected and effective leader.	18%	29%	18%	0%	35%

Source: Prismatic Survey Results, March 2023

Considering all districts in the H2 Community Group and the current enrollment of LWPS, having one-and-a-half administrative positions is comparable to similarly sized Oklahoma districts. **Exhibit 1-17** compares the number of administrative positions with student enrollment for the 73 smallest H2 districts. The LWPS data point is shown in orange. As shown, LWPS’ 2019-20 administrative staffing was on par to slightly lower than peers its size.

Exhibit 1-17
Administrative Staffing as a Function of Enrollment
F2 Oklahoma School Districts, 2019-20



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 1-18 compares the LWPS ratio of administrators to teaching staff with the five comparison districts. With the current 1.0 LWPS administrators, LWPS has a ratio of 11 teachers per administrator, which is among the highest of its peers.

**Exhibit 1-18
Comparison of Teacher and Administrator Staffing, 2019-20**

Entity	ADM	Number of Administrators (FTE)	Number of Classroom Teachers (FTE)	Ratio of Teachers to Administrators
Lone Wolf	104	1.0	10.8	11:1
Buffalo Valley	132	1.3	9.5	8:1
Gracemont	123	2.0	12.5	6:1
Panola	92	2.0	7.5	4:1
Wanette	135	2.0	11.3	6:1
Wynona	93	1.0	9.7	10:1
Peer Average	115	1.7	10.1	7:1

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

Exhibit 1-19 compares LWPS’ per-student spending on administrator salaries with that of its peer districts. As shown, LWPS’ administrator cost per student was among the lowest of its peers.

**Exhibit 1-19
Administrative Expenditures Comparison, 2019-20**

Entity	ADM	Number of Administrators (FTE)	Average Salary	Administrator Cost per Student
Lone Wolf	104	1.0	\$30,000	\$288
Buffalo Valley	132	1.3	\$103,510	\$784
Gracemont	123	2.0	\$102,374	\$832
Panola	92	2.0	\$8,596	\$93
Wanette	135	2.0	\$167,876	\$1,244
Wynona	93	1.0	\$91,228	\$981
Peer Average	115	1.7	\$94,717	\$787

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

FINDING 1-2

The district prepares comprehensive financial reports for each board meeting. This helps board members to understand the financial status of the district.

The consulting team reviewed financial reports and information provided each month at the board meetings. The financial packet included multiple reports providing a variety of income and expense information that gives a clear and encompassing review of the financial status of the district.

These reports are included in the board packet and provided to board members prior to the board meeting. The reviewed board documents and interviews indicated the CFO presents an oral presentation of the reports at each meeting.

Effective board meetings lead to informed decision-making, community transparency and trust, and improved student achievement.⁴ Transparency is essential to build trust. “Removing the mystery can help everyone see why the district does what it does. That includes being clear with students about what the goals are and where the district is going so that they can be part of the transparent culture too.”⁵

COMMENDATION

The CFO is commended for providing financial reports and information at board meetings that clearly describes the district’s finances.

FINDING 1-3

The superintendent who started with the district in 2022-23 found that policies had not been updated and there was not a policy book to guide the district’s functions and activities. Updated policy manuals are required to be available to the public and placed for easy access at district locations for use by employees and the public. The board and superintendent have begun updating board policies and have contracted with OSSBA to develop board policy. They are in step two of a three-step process.

Policies adopted by the board of education provide direction, control, and/or management of its legal functions. The goals of all policies are to present clear, concise, and specific directives to the staff and to serve as a primary communication tool with the general public, students, and parents. Regulations state that procedures and rules developed by board policy are to guide and direct the administration in the implementation of all school board policies. Adoption of new policies or revision of existing policies is solely the responsibility of the school board. The updated policy manuals must be made available to the public and placed for easy access at district locations for use by employees and the public. Many school districts post computerized versions of the policies on the school website. This provides a convenient and effective venue for keeping all stakeholders informed.⁶

RECOMMENDATION

Establish processes for the regular review of LWPS policies and maintain the updated policies on the district website to allow access to all stakeholders.

⁴ <https://insights.diligent.com/meeting-management-public-education/how-run-school-board-meeting-effectively>

⁵ <https://www.kqed.org/mindshift/35763/how-transparency-can-transform-school-culture>

⁶ An example can be found here: https://www.nctq.org/dmsView/PolicyManual_75079

The school board and superintendent should continue working with OSSBA for regular policy updates. The board can use the support of OSSBA to follow new legislation and provide guidance on which policies may need to be updated. Once policies have been updated and approved, the superintendent should direct the inclusion of the policies on the district’s website.

FISCAL IMPACT

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

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

FINDING 1-4

Prior to the current superintendent and CFO, many of the accounting, personnel, enrollment, and lunchroom processes were manual and paper-based. Sick leave records were maintained in a notebook with no organization or supporting documents. Employees were not following any formalized processes and policies had not been updated for vacation or sick leave.

Companies that focused on manual processes increased the probability of errors and the time spent on financial statements, according to the study conducted by the Association of Accountants and Financial Professionals in Business and Blackline. Streamlining accounting and personnel processes optimizes time and minimizes errors.⁷ To be productive, organizations must leverage technological trends and ensure efficient applications are in place to process financial, personnel, and resource records.

COMMENDATION

The superintendent and CFO are commended for creating efficiencies by implementing software applications for online enrollment, lunchroom collections, and financial records.

C. PLANNING AND EVALUATION

Planning, evaluating, correcting weaknesses, and supporting strengths through practice and re-teaching are common in the lexicon and repertoire of educators. However, planning and evaluation take on a different meaning when it involves planning for change and improvement in

⁷ <https://leasequery.com/blog/efficiency-in-accounting-improve-productivity-with-these-6-tips/>

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

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

According to Cook (2000), strategic planning requires total concentration of the organization’s resources on mutually pre-determined measurable outcomes.⁸ Strategic planning allows an organization to have a clear focus on what it is doing and what it intends to do based on established and monitored goals. A strategic plan will include long-term goals, which typically can be achieved in five to ten years. Short-term goals, which typically can be achieved in a year, support the attainment of long-term goals.

FINDING 1-5

As a district, LWPS has not historically engaged in strategic planning, nor is it currently engaged in it. Based on the onsite review, facilities had several maintenance and upkeep issues. Funds were limited to manage these needs. Several buildings were unused and not being kept up. In addition, student enrollment and staff retention were down.

Based on staff responses, over 50 percent rated the questions related to board member knowledge of educational and operational needs of the district (**Exhibit 1-20**) below a grade of C or had no opinion.

Exhibit 1-20
Staff Survey Results Regarding School Board Members’ Knowledge on District Needs

Department/Topic	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
School Board members’ knowledge of educational needs of students	17%	8%	25%	17%	17%	17%
School Board members’ knowledge of operational needs in the district	17%	8%	25%	8%	17%	25%

Source: Prismatic Survey Results, March 2023

⁸ Cook, Jr., W. (2000). *Strategics: The art and science of holistic strategy*. Westport, Connecticut: Quorum Books.

Only 14 percent of student responses agreed or strongly agreed that buildings were well maintained. In addition, 78 percent of student responses agreed or strongly agreed that their school buildings need a lot of repairs (**Exhibit 1-21**).

**Exhibit 1-21
Student Survey Results Regarding Facilities**

Survey Question	Strongly Agree	Agree	Don't Know/ No Opinion	Disagree	Strongly Disagree
My school building is well maintained.	2%	12%	31%	33%	21%
My school building needs a lot of repairs.	45%	33%	12%	7%	2%

Source: Prismatic Survey Results, March 2023

The staff survey responses related to providing input for budgeting and facility planning were minimal. As shown in **Exhibit 1-22**, only 33 percent of staff responses agreed or strongly agreed that the budgeting process effectively involves administrators and staff. Only 25 percent of staff responses agree or strongly agree that parents, citizens, students, faculty, and staff have opportunities to provide input into facility planning.

**Exhibit 1-22
Staff Survey Results Regarding Budget and Facility Planning**

Survey Question	Strongly Agree	Agree	Don't Know/ No Opinion	Disagree	Strongly Disagree
The budgeting process effectively involves administrators and staff.	8%	25%	33%	25%	8%
Parents, citizens, students, faculty, and staff have opportunities to provide input into facility planning.	8%	17%	42%	25%	8%
There are facility concerns throughout the campus.	25%	50%	17%	8%	0%

Source: Prismatic Survey Results, March 2023

Based on Ralph Jasparo’s qualitative research on strategic planning, the major benefit of strategic planning was the “change in the way people worked.” The superintendents interviewed

in Jasparro's research stated the main reason for implementing strategic planning in their school district was to "establish a focus and direction of the district".⁹

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

- monthly monitoring of student performance, teacher strategies, and leadership practices;
- continued self-evaluation by teachers and administrators regarding every program initiative and strategy; and
- attribution by teachers and leaders that their work is the fundamental cause of student growth rather than demographics.¹⁰

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 how 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:

- analysis or assessment, where an understanding of the current internal and external environments is developed;
- strategy formulation, where high-level strategy is developed, and a basic organization-level strategic plan is documented;
- strategy execution, where the high-level plan is translated into more operational planning and action items; and

⁹ Jasparro, Ralph, "Strategic planning: Is it worth the effort? the superintendent's perspective" (2006). *Higher Education*. 17. <https://scholarsarchive.jwu.edu/highered/17>

¹⁰ Reeves, D.B. (2007). Leading to change/making strategic planning work. *Educational Leadership*, 65(4).

- evaluation or sustainment/management phase, where ongoing refinement and evaluation of performance, culture, communications, data reporting, and other strategic management issues occur.¹¹

The graphic in **Exhibit 1-23** explains the logic of the balanced scorecard approach to strategic planning.

Exhibit 1-23
The Balanced Scorecard Nine Steps to Success™ Model



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

A strategic planning process starts with communicating the purpose of the strategic plan. This can start with a report to the school board detailing all facets of the school system. The basic steps for a strategic planning effort are:

- convene an internal administrative staff planning group. They decide who will chair the main committee and/or serve as liaison to the group;
- establish a board of education approved strategic planning committee heavily weighted to include teachers, students, community members, and parents. As many as two of the board

¹¹ <http://balancedscorecard.org/Resources/Strategic-Planning-Basics>

members can serve if so desired. The committee should also represent the diversity of the community and district;

- collect survey data on perceived strengths and weaknesses of the district from the community, students, parents, and other community stakeholders;
- develop a committee meeting schedule and open the meetings to the public. Develop agendas and reports that provide detailed data regarding strengths and weaknesses of the district to the committee and the public. Each operational and instructional area should be included;
- provide the committee with demographic studies;
- establish sub-committees to dig into data as necessary and have them report back to the main committee with findings;
- revise the existing vision statement, as needed;
- develop short- and long-range goals for the district. Convert these goals into action steps;
- assign staff to implement action steps;
- determine how to evaluate the progress; and
- develop follow-up and review procedures.

Once a strategic plan is established, the board and key administrative staff should communicate the goals of the plan and provide ongoing updates on the district's progress. The board, superintendent, and key committee members should perform an annual review of the district's progress and adjust goals accordingly. Such a review may include creating more specific short-term goals that support established long-range goals. Short-term goals should be "SMARTIE": Specific, Measurable, Achievable, Relevant, Time-bound, Inclusive, and Equitable. The recent challenges facing education with the pandemic and other factors require goals to address not only the "SMART" attributes but also equity and inclusion.

RECOMMENDATION

Implement an ongoing, board-led strategic planning process involving community and faculty stakeholders to provide facilities management, bond planning, focus, and direction through short-term and long-range goals.

The district should begin by communicating the purpose and benefits of developing a strategic plan. Based on some of the consulting team's recommendations, the plan should include goals for facility planning, bond planning, and defining focus. The district should consider alternative programs and partnerships that will encourage increased enrollment, student engagement, staff

recruitment, and staff retention. Examples of possible programs or partnerships that can support the district's needs may include:

- Become a K-8 school district. Many of the larger cost inefficiencies currently come from trying to maintain a high school with less than 40 students. Moreover, it is difficult to efficiently offer high school students the breadth of coursework options with such a small student base.
- Become a charter school. Charter schools can reduce compliance requirements and district regulations that take up time and resources in an already small staff. Charter school regulations are written to allow flexibility for an independently operated school and regulations for public schools are written for a broader group that may not consider the needs of rural schools.¹²
- Develop a co-op with other local districts for LWPS students to play sports or participate in other extracurricular activities which the district is unable to provide. Extracurricular activities offer students an opportunity to learn teamwork, gain a sense of community, and increase student engagement. According to the National Center of Education Statistics, Extracurricular participation was positively associated with several success indicators including increased attendance, higher GPA, continuing education beyond high school, and higher student achievement.¹³
- Develop a co-op for a virtual program. Newcastle Public Schools is currently providing a coop for their virtual program. Surrounding districts send their students to Newcastle for this program and the sending district pays Newcastle a per semester cost. This has been a successful program for the district. The district currently shares how they implemented the program at some of the leadership conferences in the State. If the district and community are interested, they could reach out to the Newcastle superintendent for more information on the program.
- Develop an alternative school. This was a suggestion from one of the interviewers stating that the students they serve would benefit from the flexibility an alternative school offers. LWPS enrollment includes an increased number of students who have transferred in throughout the year. An alternative program may allow the school to adapt the curriculum for each student more appropriately.

These examples are for the district to consider and depending on the focus, not all would work together.

¹² Michael Q. McShane and Andy Smarick are the editors of *No Longer Forgotten: The Triumphs and Struggles of Rural Education in America*, Rowan & Littlefield Publishers (November 8, 2018)

¹³ NCES: Eileen O'Brien of Policy Studies Associates and Mary Rollefson of the National Center for Education Statistics; <https://nces.ed.gov/pubs95/web/95741.asp>

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

FISCAL IMPACT

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

D. PERSONNEL MANAGEMENT

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

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

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

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

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

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

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various LWPS functional areas. **Exhibit 1-24** provides the results for personnel areas. A majority of staff (60 percent) gave personnel management an A or B grade. Only 50 percent gave staff development an A or B.

Exhibit 1-24
Staff Survey Results Regarding Central Office Administration and Superintendent

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Personnel Management	30%	30%	20%	0%	10%	10%
Budgeting	40%	30%	10%	10%	0%	10%
Staff Development	40%	10%	30%	20%	0%	0%

Source: Prismatic Survey Results, March 2023

FINDING 1-6

The district does not have defined salary scales for support employees. Support employees were not aware of the annual step raises or other benefits they receive, based on the focus group responses. In addition, certified teachers did not understand their benefits and leave policies. Support staff are not evaluated and, because of vacant staff positions, the teachers did not have all of their evaluations.

Only 42 percent of staff survey respondents agreed that their salary level was competitive and no respondents strongly agreed (**Exhibit 1-25**).

Exhibit 1-25
Staff Survey Results Regarding Staff Compensation

Survey Question	Strongly Agree	Agree	Don't Know/ No Opinion	Disagree	Strongly Disagree
Salary levels in this district are competitive.	0%	42%	50%	0%	8%
My salary level is adequate for my level of work and experience.	17%	33%	8%	33%	8%

Source: Prismatic Survey Results, March 2023

LWPS does not have local unions for certified or support staff. Information on processes for salary scale placement and other personnel processes that are normally found in a negotiated agreement is therefore not present. Much of the personnel documentation was recorded in handwritten manual documents without supporting documentation. Focus groups relayed a lack of control or understanding of policies and processes that affect their employment. There were no defined support salary schedules. Formal channels for staff to improve their school environment as it relates to personnel policy and practices did not exist.

According to the National Education Association survey (2022), approximately 55 percent of educators are thinking of leaving the profession.¹⁴ This high turnover rate costs substantial amounts of money when a district must then recruit and train new teachers and ultimately hinders the district’s success and bottom line. Research recommends focusing on teacher retention to overcome these challenges. A study on school district working conditions found that providing a supportive context in which teachers can work appears to contribute to improved retention and student achievement.¹⁵

RECOMMENDATION

Develop personnel policies, job descriptions, extra duty assignments, and scales for all positions within the district.

Developing a consistent salary and personnel policy for all positions is necessary to provide transparency and ensure fair and consistent compensation practices. Effective policies and

¹⁴ <https://www.nea.org/sites/default/files/2022-02/NEA%20Member%20COVID-19%20Survey%20Summary.pdf>

¹⁵ Johnson, S.M., Kraft, M. A., & Papay, J.P.(2012) *How context matters in high-need schools: The effects of teachers’ working conditions on their professional satisfaction and their students’ achievement.* <http://www.tcrecord.org/content.asp?contentid=16685>

procedures are living documents that should grow and adapt with the district. Fostering open communication by developing a personnel committee will support a positive culture and increase the retention of staff. It will also help to protect the district from potential EEO or discrimination complaints.

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

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

Members of the personnel policies committee should serve a two-year term. If a member of the Committee is unable to complete his/her term of service, the committee will appoint a successor from that member's building to serve until the next personnel policies committee election. If the term of the elected member has not expired, a teacher or staff from that member's building shall be elected to serve the remainder of the term. **Exhibit 1-26** is an example of a personnel policies committee.

**Exhibit 1-26
Sample Personnel Policy Committee for Van Buren Schools**

3.3 – PERSONNEL POLICY COMMITTEE

General

It shall be the policy of the Van Buren Board of Education to encourage employee participation in decision-making for the school district. The Superintendent is authorized to establish committees as necessary to recommend policies and rules for the proper functioning of the district.

The classroom teachers of the Van Buren School District shall be represented by the Personnel Policies Committee. It shall be composed of the following equal voting members: the superintendent or designee, one teacher from each elementary school; two teachers from each middle school; one teacher from the Freshman Academy; two teachers from the senior high school; and one secondary administrator and one elementary administrator seated annually and appointed by the superintendent.

Election of members of the Personnel Policies Committee shall be held during the first month of school. The teacher members of the Personnel Policies Committee shall be elected by a majority vote of the classroom teachers employed by the district. The election shall be conducted by the classroom teachers and shall be by secret ballot.

The current Personnel Policies Committee will post in each building a Nomination Form listing open position(s) for the purpose of securing nominees for the Personnel Policy Committee. Any teacher may nominate himself/herself or his/her fellow teacher to serve on the Personnel Policies Committee by placing the teacher's name on the Nomination Form. The names of all consenting candidates will appear on the District ballot in the appropriate nominated position. All certified staff will vote in all candidate races. A member shall be elected to the committee when he/she receives a majority of the votes cast. If more than two candidates run for a given position and no candidate receives a majority of the votes cast, a run-off election will be held among the candidates receiving the greatest number of votes after the candidates receiving the lowest numbers of votes are dropped from the ballot. This process will continue until a simple majority is reached.

Election Procedure

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

Members of the Personnel Policies Committee will serve two-year terms. If a member of the Committee is unable to complete his/her term of service, the Personnel Policies Committee will appoint a successor from that member's building to serve until the next

Personnel Policies Committee election. If the term of the elected member has not expired, a teacher from that member's building shall be elected to serve the remainder of the term.

The Personnel Policies Committee shall organize itself in the first quarter of each school year; elect a chairperson, a co-chairperson (optional), and secretary (optional). The PPC shall also develop a calendar of meetings throughout the year to review the district's personnel policies and determine if additional policies or amendments to existing policies are needed. The Personnel Policy Committee shall review any proposed distribution of a salary underpayment from previous years. The review of the personnel policies and the resulting report shall be completed by the end of the year. The report shall be filed with the Superintendent of Schools and presented to the Board of Education by the chairman of the Personnel Policies Committee or his/her designee for consideration in accordance with the Arkansas law.

Minutes of the committee meetings shall be promptly reported and distributed to members of the Board of Directors and posted in the building of the school district including the administrative offices.

Approved by Board of Education 04/04/06
Amended by Board of Education 05/19/09
Amended by Board of Education 06/12/12
Amended by Board of Education 04/12/16
Amended by Board of Education 04/11/17

Source: <https://www.vbsd.us/assets/uploads/2017/04/20170421133013-33-personnel-policy-committeepdf.pdf>

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 1-7

The district is struggling to fill its teacher positions. Recruiting and hiring qualified employees is a common challenge facing rural schools.

Rural schools are important to the communities they serve and have their own unique challenges and needs. As noted by McShane and Smarick, “Research from the School Improvement Grant program highlighted the particular struggles of rural schools in finding effective teachers.”¹⁶ LWPS is facing these common challenges.

The district is losing some of its key positions for the upcoming school year. The current superintendent and principal have submitted resignations. Another eight staff members have indicated they will likely resign at the end of the school year. The community has limited housing to support new teachers coming into the community; lack of housing was a barrier to the hiring of a coach in 2022-23.

Beyond the school district, the town of Lone Wolf is fighting for survival as people move away. A 2022 article by KOCO Five News quoted Don Godfrey about his hometown “We’ve got one business left, and that’s CJ’s down here on the corner.”¹⁷ The community itself is fighting to go from surviving to thriving.

According to an article by the Economic Policy Institute “the teacher shortage is real, large and growing, and worse than we thought.”¹⁸ Rural and high poverty schools like LWPS are suffering the most. The number of enrollees in teacher preparation programs between 2008-09 and 2015-16 decreased by 37.8 percent. Schools unable to fill vacancies tripled between 2011-12 to 2015-16. Working conditions were noted as being one of the detractors for current and new teachers to remain in the profession.

Less than a third of LWPS staff surveyed responded that teachers and other staff who did not meet expected work standards were reprimanded (**Exhibit 1-27**). School reform in general has seen a tremendous amount of effort to identify teacher effectiveness and remove minimally effective teachers from the classroom. However, this strategy does not work well when the labor market for teachers is limited, and rural schools typically have more struggles attracting teachers than urban or suburban schools.

¹⁶ McShane, M. & Smarick, A. (2018). *No longer forgotten: The triumphs and struggles of rural education in America*. Rowman & Littlefield.

¹⁷ <https://www.koco.com/article/oklahoma-towns-lone-wolf-moving/39040860>

¹⁸ <https://www.epi.org/publication/the-teacher-shortage-is-real-large-and-growing-and-worse-than-we-thought-the-first-report-in-the-perfect-storm-in-the-teacher-labor-market-series/>

**Exhibit 1-27
Staff Survey Results Regarding Work Expectations**

Survey Question	Strongly Agree	Agree	Don't Know/ No Opinion	Disagree	Strongly Disagree
Teachers who do not meet expected work standards are reprimanded.	0%	17%	58%	8%	17%
Staff (excluding teachers) who do not meet expected work standards are reprimanded.	0%	27%	55%	9%	9%

Source: Prismatic Survey Results, March 2023

RECOMMENDATION

Consider incentives and processes to increase the applicant pool and recruit quality candidates for leadership and teaching positions.

To implement this recommendation, LWPS should:

- Offer competitive salary and benefits. However, offering higher wages may reduce funds in other areas. The district can do more fundraising, apply for grants, or pass a bond issue to gain additional funds and offset the deficit that may occur from offering these higher salaries.

The district may want to consider combining the principal and superintendent positions. In many of the smaller rural districts, the superintendent will serve as principal and superintendent. In this position, the person is paid partly as principal and partly as superintendent, which allows the district to offer a more competitive salary and stay within the administrative cost requirements of the State.

- Seek higher education partnerships. Building partnerships with university educator preparation programs supports the district in possibly gaining effective teachers and provides experiences for new teachers to gain the skills necessary to be successful¹⁹
- Develop programs to help paraprofessionals become certified teachers. Oklahoma has a para-to-teacher program at the State Department that allows paras to complete certification. The district may want to provide stipends for paras going through the program to offset any fees

¹⁹ Miller, S., Duffy, G., Rohr, J., Gasparello, R., & Mercier, S. (2005). Preparing teachers for high-poverty schools. *Educational Leadership*, 62(8), 62-65. Retrieved from: http://www.ascd.org/publications/educational_leadership/may05/-vol62/num08/Preparing_Teachers_for_High-Poverty_Schools.aspx

or reduce some of their duties to allow for time to complete assignments and prepare for tests.

- Create a supportive working environment. Research shows that the school climate and positive work environment are greater motivators than starting salary to attract teachers. Creating an open work environment with strong communication, trusting relationships, and teacher support will be one of the district’s greatest recruitment strategies. Leverage volunteers to reduce some of the teacher’s duties and responsibilities; allowing them time to prepare for their classes. Ensure teachers have the resources they need to be successful and consider ways to foster collaboration with peers.

FISCAL IMPACT

Total salaries from 2021-22 were approximately \$1.4 million dollars. A five percent increase in salaries would cost the district between \$40,000 and \$60,000. A five percent raise for a beginning teacher would be approximately \$1,800. The other recommended strategies can be implemented with minimal or no additional costs to the district.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Offer competitive salaries.	(\$50,000)	(\$50,000)	(\$50,000)	(\$50,000)	(\$50,000)

E. COMMUNICATIONS/PUBLIC RELATIONS

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

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various LWPS functional areas. **Exhibit 1-28** provides the results for communications and community relations.

**Exhibit 1-28
Staff Survey Results Regarding Communications**

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Community relations and communication.	42%	8%	33%	17%	0%	0%

Source: Prismatic Survey Results, March 2023

FINDING 1-8

Currently, LWPS does not have any volunteer programs. However, volunteers could be a key resource for the district.

Volunteers provide significant contributions and play a vital role in supporting students and the schools they help. Whether it is the Garden Club volunteering to help with a landscape area or mentors helping students with homework, volunteers are a valuable resource for the district. Recent events in the nation have made it more difficult for schools to develop volunteer programs. The pandemic and multiple school shootings have diminished many of the volunteer programs across the state.

According to a policy brief from the National Education Association (NEA), “When schools, parents, families, and communities work together to support learning, students tend to earn higher grades, attend school more regularly, stay in school longer, and enroll in higher level programs.”²⁰

Henderson and Mapp (2002) confirmed a growing amount of evidence supporting the impact of volunteers on the success of schools and student achievement. Volunteers can help create a supportive and welcoming environment at schools. Their presence in the school shows students they value education and support their school. When families and communities are involved in their school they have a better understanding, more trust, and further support for the school. Therefore, maintaining and increasing community involvement programs/opportunities should be a consistent goal for schools and school districts.²¹

RECOMMENDATION

Establish a volunteer involvement program that includes written guidelines for schools and volunteers in addition to recruitment strategies.

According to Campioni in her work with the national center for Mental Health in Schools at UCLA, to effectively create a volunteer program “school staff must value volunteers and learn how to recruit, train, nurture, and use them effectively.”²²

Initially, the district will need to identify a lead person for the volunteer development. This lead person will then recruit additional staff for the effort. The following links provide steps for implementing a volunteer program and roles for volunteers in the classroom and throughout the school.

²⁰ http://www.nea.org/assets/docs/PB11_ParentInvolvement08.pdf

²¹ Henderson, A. & Mapp, K. (2002). A new wave of evidence: The impact of school, family, and community connections on student achievement. Austin, TX: National Center for Family and Community Connections with Schools, SEDL. <http://www.sedl.org/connections/resources/evidence.pdf>

²² <https://www.smhp.psych.ucla.edu/pdfdocs/vols.pdf#:~:text=Henderson%20and%20Mapp%20%282002%29%20report%20evidence%20that%20volunteers,in%20school%2C%20graduating%2C%20and%20going%20on%20to%20college>

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

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 2:
Instructional Delivery

Chapter 2

Instructional Delivery System

This chapter addresses the instructional delivery of Lone Wolf Public Schools (LWPS) in the following sections:

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

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

A. THE INSTRUCTIONAL DELIVERY SYSTEM

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

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

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

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

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

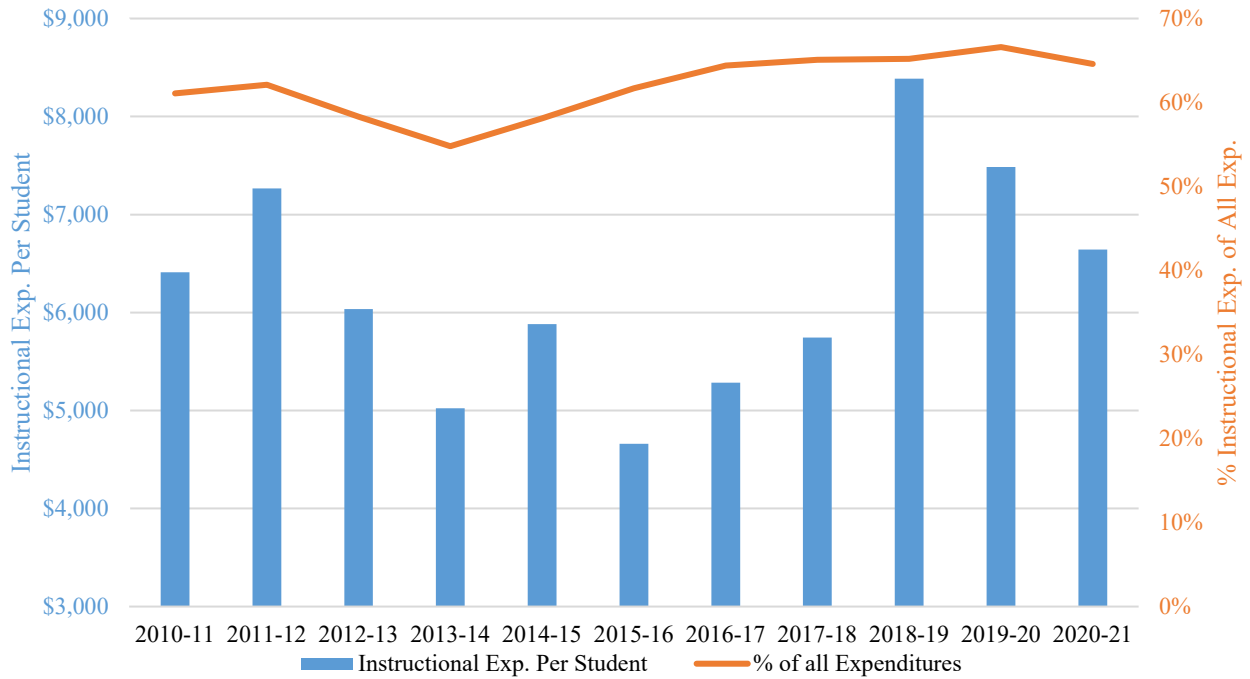
**Exhibit 2-1
Oklahoma Academic Standards**

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

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

Exhibit 2-2 provides a ten-year comparison of LWPS instructional expenditures as a percentage of total expenditures as well as the annual instructional expenditures per student. Over that period, instructional expenses have ranged from 55 percent to 67 percent of all expenditures. Instructional dollars per student have varied from \$4,661 in 2015-16 to \$8,386 in 2018-19.

**Exhibit 2-2
Trend in LWPS Instructional Spending**



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

On the stakeholder survey conducted for this review, staff members were asked to assign a letter grade to various LWPS functional areas. **Exhibit 2-3** cites the results for the regular education programs and education generally in LWPS from district educators (administrators, classroom teachers, other certified, and instructional aides). Elementary education was given an A or B by 75 percent of educators, and no one gave it a D or an F. Middle school education received an A or B from 50 percent of educators. High school education received an A or B from 50 percent of educators. High school was the only level given an F, which came from 17 percent of educators surveyed. Overall quality of education received an A or B from 42 percent of educators surveyed.

**Exhibit 2-3
Educator Survey Results Regarding LWPS Education**

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Elementary Education	67%	8%	25%	0%	0%	0%
Middle School Education	33%	17%	42%	8	0%	0%
High School Education	42%	8%	33%	0%	17%	0%
Overall quality of education in this district, compared to other districts in Oklahoma	17%	25%	17%	25%	0%	17%

Source: Prismatic Survey Results, March 2023

FINDING 2-1

No district-wide curriculum frameworks or pacing guides direct or monitor when OAS (Oklahoma Academic Standards) are taught, tested, and students have met grade level and content area OAS requirements. The district provides no common process to assist teachers in pacing when OAS are revisited for review and maintenance instruction and the curriculum needs adjustment.

Interview dialog reported teachers primarily make their own decisions regarding what and when curricula are taught. No pacing processes based on student performance data are implemented for all content, skills, assessments, learning activities, instructional strategies, and digital resources.

LWPS has single-grade, self-contained classrooms for grades Pre-K through second. Third and fourth grades are a combined, self-contained classroom. Grades five and six, seven and eight, nine and 10, and 11 and 12 are combined grade levels and departmentalized for Math, English, Science, and Social Studies. In all classrooms, each individual teacher determines the horizontal sequence and pacing of when skills and content are taught and paced. No process guides teachers in classrooms in pacing OAS content either horizontally or vertically.

In grades five through 12 combined departmentalized classrooms for Math, Science, and English, teachers reported trying to adjust the focus of OAS content, increasing rigor, and using different supplemental resources to minimize content repetition as students cycle into the second year. The combined History and Social Studies grade level and subject area classes need OAS content diversified and adjusted to avoid repeating the content each year. No common accountability process and vertical pacing process is in place for ensuring vertical continuity of OAS and when students have mastered grade level and content area OAS requirements.

The district's curriculum is primarily textbook-driven – some of which are outdated and may not be aligned with the latest OAS. Teachers also have autonomy in making decisions when OAS are taught and what software and supplemental resources are used. The teachers have no guiding process to determine which skills and content need to be revisited for maintenance and review. The district provides no direction to help teachers assess the quality and alignment of digital programs. Without frameworks and processes for intentional review and pacing of skills and OAS, improving student academic performance is unlikely to occur. A written framework must guide the alignment and pacing of each grade level or subject area taught and tested curriculum.

Best practice calls for pacing guides that outline a sequential order in which material is taught in academic subjects and grade levels. They also guide teachers to revisit or review taught, tested, and mastered key skills and concepts to ensure retention for the next grade or higher level of study. In grade-combined classrooms, the pacing guide can include links to additional exemplary curriculum materials, lessons, and instructional strategies for study in the subsequent year. Guides chunk skills and content and put them in a sensible order, determine the resources to utilize, and develop a good sense of the length of time normally required to teach different elements. Curriculum frameworks and pacing guides allow for differences in teacher instructional delivery and student learning styles while identifying a window of time

and sequential structure for content delivery and mastery. Frameworks and pacing guides must be revised routinely based on student performance data and input from teachers.¹

Vertical and horizontal curriculum alignment is the first step to improved student performance. Standards-based horizontal curricula alignment details what students learn in each grade level content area. For example, what standards and skills taught and learned in one fourth-grade math class are mirrored in all other fourth-grade math classes. Horizontal curriculum alignment takes place collaboratively with all grade levels or subject teachers. Each classroom provides the same written, taught, and tested curricula standards. Content and instruction are equitable horizontally across each classroom. Horizontal alignment of curricula standards ensures each grade level and subject area classroom receives equitable OAS instruction.

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

As part of the curricula alignment, the district lacks a common focus for leveraging the key components of digital learning. Effective technology integration includes “active engagement, participation in groups, frequent interaction and feedback, and connection to real-world experts.”²

There is no indication of district-wide processes to ensure how technology is appropriately integrated vertically and horizontally into all aspects of the K-12 grade curriculum frameworks. 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 and pacing guide detail both how and when technology is used for learning. It ensures that technology is applied:

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

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

¹ <https://www.ascd.org/el/articles/pacing-guides>

² <https://www.edutopia.org/video/introduction-technology-integration>

based curriculum framework bridges the gap between overall curriculum goals and the use of technology for supporting learning and teaching.³

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

The state of Oklahoma has developed comprehensive curriculum frameworks. Because many of LWPS's textbooks are out of date, adopting curriculum frameworks that include pacing guides will be a natural segue for teachers to evolve toward a standards-driven curriculum and stop trying to follow textbooks. These frameworks vertically align and pace OAS for teachers. Available on the SDE website, there are frameworks in Mathematics, English Language Arts, and Science. A portion of the Learning Progression for the Algebra 1 curriculum framework is provided in **Exhibit 2-4**.

³ <https://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.469.1189&rep=rep1&type=pdf>

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

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

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

LWPS has not vertically and horizontally aligned OAS in grades K-12 nor implemented frameworks and routine processes and procedures for pacing and monitoring the curriculum, technology, and instructional resources.

RECOMMENDATION

Develop and implement with fidelity core content Pre-K-12 horizontal and vertical standards-based curriculum frameworks and pacing guides to monitor OAS.

District leaders should begin by introducing teachers to various local, state, and national frameworks and pacing processes. There is no need to reinvent the wheel. The district should consider the SDE frameworks along with documents from other Oklahoma districts. In adopting and implementing curriculum frameworks and guides, the district should standardize the curriculum Pre-K-12 through the use of these frameworks and pacing guides. In combined grade-level classrooms, implementing OAS standards-based frameworks and pacing guides eliminates trying to follow grade-level and subject-area textbooks.

Along with adopting the frameworks and pacing guides, teachers need a support and accountability system to ensure the framework is taught with fidelity. The district's leadership should provide training if needed and release time for teachers to develop or adopt frameworks. The frameworks should enable teachers to manage and pace their respective curriculum in combination classrooms and support them with the integration of appropriate resources and technology.

With combined classrooms, there should be regularly scheduled meetings with focused agendas, so teachers have time to analyze formative and summative student performance data and make needed framework and pacing adjustments. The district should consider restructuring Fridays as possible release times, focusing on summer professional development days, and reordering the beginning of the year professional development days as possible venues for framework and pacing guide adoption.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 2-2

Formative and summative student performance data are not routinely used to inform and adjust content, instructional practices, and drive targeted remediation and interventions. Teachers reported limited and random use of formative and summative assessments to plan instruction for remediation and intervention.

The district has no process to guide and support teachers in using formative and summative assessments across all grade levels. No comprehensive efforts or expectations were in place, so formative and summative student performance data were not uniformly used to inform and adjust content, instructional practices, or drive targeted remediation and interventions. No training was provided to help teachers administer, analyze, and use results to improve instruction.

For the first time this year, formative benchmarking has been implemented districtwide. The current administration supported teachers in administering benchmarks. STARR data and some teacher-made formative assessment data were reviewed and analyzed to inform instruction. Data use is still limited and sporadic, as teachers need release time and additional instructional leadership to effectively use formative data. Common processes for analyzing vertical student formative performance data are not in place. Teachers reported Study Island was difficult for LWPS students. Most teachers reported end-of-chapter textbook tests and teacher-created formative assessments were administered. There were minimal, isolated efforts reported of using formative data to plan, adjust, pace, and design instruction or to close skill gaps and inform direct instruction and remediation. There is no process to routinely use student performance data to vertically align and pace curricula and make adjustments in re-teaching, remediation, and maintenance of specific concepts and skills.

On the staff survey conducted for this review (**Exhibit 2-5**), 50 percent of staff indicated benchmark and state-mandated data were used to improve curricula. Of the respondents, 60 percent said they used data to improve instructional practices. However, the Oklahoma School Testing Program (OSTP) student test scores, consulting team interviews, and onsite work found these efforts to be neither consistent, uniform, nor supportive of the survey.

**Exhibit 2-5
Staff Survey Results Regarding the Use of Student Performance Data**

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Test data from district-adopted benchmarks and mandated end-of-year tests are used to improve the district’s curriculum.	20%	30%	30%	20%	0%
Teachers effectively use student data to improve instructional practices.	10%	50%	30%	0%	10%

Source: Prismatic Survey Results, March 2023

Interviews reflected marginal understanding and expectations for using either summative or formative data to re-design instruction, change instructional practices, and determine if reteaching or remediation is needed. No evidence indicated student performance data were collected at the end of a grading period and then routinely revisited over time to maintain mastery. The district has not routinely provided teachers with their respective OSTP data and then provided leadership in using the OSTP data to inform targeted instruction, form flex groups for targeted remedial instruction, and identify and then close vertical and horizontal learning gaps. No evidence was presented to demonstrate that the district has supported teachers in using student data to identify district-wide, site-based, grade-level, or subject-area reoccurring curricula redundancies caused by pacing gaps. Select teachers reported doing some of this on their own.

Long-standing research contends effective teachers use both formative and summative data to identify patterns of success and failure and then determine next steps in instruction. One of the longest-standing bodies of research is the “effective schools” research. One of the original correlates of effective schools research is the “frequent monitoring of student progress.” The foundational correlates are being used to incorporate recent research and school improvement findings and continue to offer challenging developmental stages to which schools can aspire in the Learning for All mission.⁴

As stated in the original research on effective schools, “The effective school frequently measures academic student progress through a variety of assessment procedures. Assessment results are used to improve individual student performance and improve instructional delivery. Assessment results will show that alignment must exist between the intended, taught, and tested curriculum.”⁵

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

- make data part of the ongoing cycle of instructional improvement;
- 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.⁶

RECOMMENDATION

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

The purpose for LWPS administrators and teachers to analyze classroom data is to determine what the students have learned, what they need help to learn, and how they should revise instruction to ensure that they all do learn. Administrative instructional leaders should lead teachers in the use of student performance data. It is essential to identify LWPS content and skill student learning gaps. The learning and skill gaps should be addressed through re-teaching or

⁴ <https://www.hwdsb.on.ca/secondaryarc/files/2011/01/L4All-Summary.pdf>

⁵ <https://static1.squarespace.com/static/57c4731c893fc047731cea43/t/5946db3b2994cac227699178/1497815867695/Correlates+of+Effective+Schools.pdf>

⁶ http://www.naesp.org/sites/default/files/Student%20Achievement_blue.pdf

remediation. The use of data also guides improvements in the rigor, pacing, and vertical articulation of curriculum and instruction. This is particularly important in combined classrooms.

As LWPS teachers monitor performance data, patterns of teaching and individual student learning successes and challenges become evident. It is essential for teachers to have ongoing formative data to measure learning at the end of each instructional segment. This allows LWPS teachers to make informed, collaborative decisions to address gaps or mastery in learning. In combined classrooms, the teachers need support, training, intentional administrative instructional leadership, and expertise on how teachers assess students in both grade levels and ensure they are progressing appropriately in their respective grades.

Working with the teachers, the superintendent and principal should develop a timeline that details which student assessment data are required throughout the school year. Staff meetings and release time should focus on determining the strengths and weaknesses of students and how the results impact the district in pacing instruction. Reviewing formative benchmark test data throughout the school year allows timely feedback on student performance, the effectiveness of teaching strategies, and any needed adjustments and alignment to the curricula. The district process should examine classroom data and ask key questions, such as:

- Which content standards are the teachers 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?
- Is re-teaching or are other interventions resulting in improved student performance?
- When comparing performance by subgroups, are any groups not performing as well as the whole group? If so, what is being done about that?
- Are there students who are not attaining proficiency across standards?
- What diagnostic information do we have about them to inform instruction?

- What interventions have we tried? What interventions do we plan to try next?⁷

For data to be used effectively, teachers should go beyond just tallying the data and diagnosing learning gaps. An important part of data discussions involves collaboratively sharing ideas about improving instructional practices based on identified student need. Conversations should also center around, “What are you doing in your class that I’m not doing in my class?” LWPS teachers should abandon teaching in isolation. They need to share and find quick, practical strategies for maximizing data analysis, including shared dialog for how to easily adjust instructional delivery practices.⁸

Administrators and teachers should consider regularly graphing data. A visual depiction of the information often yields additional insights and has proven helpful to teachers. A way for teachers to get a quick visual picture of who needs additional support is to color code the data recorded in the grading process. For example, if three categories are used to define student performance in the grade book (i.e., basic - B, proficient - P, and advanced - A), each could be assigned a different color. This would allow teachers to quickly determine who was progressing and who needed additional support.⁹

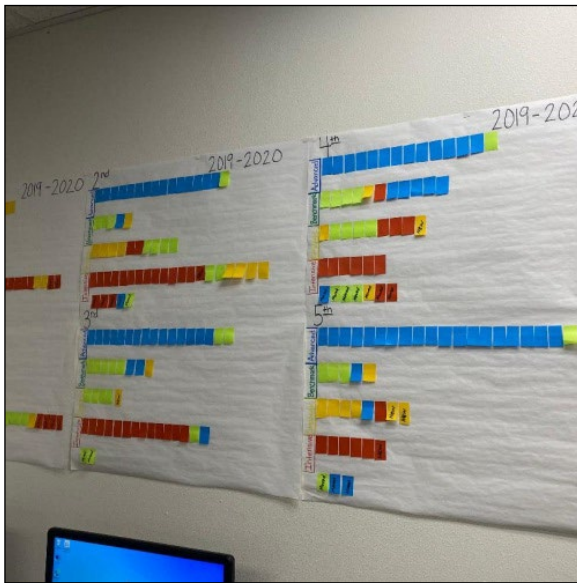
Exhibit 2-6 provides examples of dedicated data walls in other schools/districts. Data charts are color-coded and labeled for teachers to review as they work with students to make progress in reading skills.

⁷ Nichols, B. W. & Singer K. P. (2000). Developing data mentors. *Educational Leadership*, 57(5).

⁸ <https://files.eric.ed.gov/fulltext/ED536742.pdf> <https://blog.advancementcourses.com/articles/data-driveninstruction/> <https://www.edutopia.org/blog/new-teachers-how-use-data-inform-instruction-rebecca-alber>

⁹ <http://mdk12.msde.maryland.gov/instruction/progress/using.html> Instructional

Exhibit 2-6
Example Dedicated Data Walls



Source: Prismatic, 2018-20

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

Additionally, the SDE has developed the Oklahoma Family Guides for English Language Arts, Mathematics, Science, and Social Studies for Pre-K through 6th Grade. The SDE Family Guides are resources aligned with the Oklahoma Academic Standards and developed specifically for Oklahoma families to complement classroom learning. They illustrate what is expected of

students at each grade level in different content areas along with activities families can do at home to further support children’s learning experiences.¹⁰

FISCAL IMPACT

This recommendation can be implemented with existing resources. The superintendent and elementary principal have the expertise to support this recommendation. However, if an external consultant is needed, there are consultants available to guide teachers through the data analysis process. A short-term consulting engagement would cost approximately \$3,000.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Hire a consultant to teach the use of formative and summative data, if needed.	(\$3,000)	\$0	\$0	\$0	\$0

FINDING 2-3

The district is facing dwindling enrollment and financial constraints but has not yet considered combining the remaining grade levels across the district. In the 2022-23 school year, third and fourth grades were combined due to attrition. Currently, only Pre-K, kindergarten, first grade, and second grade remain as self-contained, single-grade classrooms. Fifth and sixth, seventh and eighth, ninth and 10th, and 11th and 12th are already departmentalized and combined for core subjects of Math, English, Science, and Social Studies. The Art elective is already combined for seventh and eighth grades, and Publishing is also combined for 11th and 12th grades.

For the 2023-2024 school year, Pre-K and kindergarten, and first and second grades could be combined grade classrooms. All combination classrooms at LWPS are below the Oklahoma class size limit of 20 students per class in grades one through six and 140 students per teacher in grades seven through twelve over a six-hour period.

The consulting team learned that LWPS has a wealth of expertise among the teachers that are already successfully teaching combination classrooms. These teachers reported that initially, the transition to a combined classroom involved a steep learning curve because classroom management adjustments had to be made, the curriculum reorganized, and parents needed clear and direct communication regarding the move. However, with planning and focused intent the majority of teachers with combination classrooms have made the transition and implement healthy learning environments for LWPS. Notably, interviews found three LWPS teachers exhibiting best practice strategies, teaching with positive enthusiasm, and implementing pragmatic organizational skills. These skills and practices merit sharing and replicating throughout the district. These teachers exemplified vision, professional skills, and the desire for teaching all students to mastery.

Combination classrooms consist of two grade levels in the same classroom. If a school does not have enough students to make a full class in two different grades, the two classes are combined

¹⁰ <https://sde.ok.gov/oklahoma-family-guides>

in one room. If a school has a shortage of staff or there are budget cuts, the school may be forced to create combination classrooms. Teaching two grade levels in one classroom can be challenging for the teacher; however, thinking outside of the box will make instructing and managing a combination class a success.¹¹

Teachers may have concerns if assigned to teach a split-grade classroom because they are not able to predict how parents will respond. However, many experienced split-grade teachers say parents' worries subside once they see their children bringing home quality work or if they volunteer in the class and see it is well-managed. Still, meeting multiple curriculum expectations and responding to increased student needs—often with limited resources—is a challenge. But teachers, and students, can thrive in these classes.

In combined classrooms, teachers cover two sets of curriculum expectations, but they do not always need to teach two completely different sets of lessons. Lessons can be planned around common themes that will fulfill both curriculum expectations. Brown-Robson cuts out the expectations from curriculum documents and groups common ones together. Sometimes, teachers can deliver one lesson to everyone, but assess each grade differently. Curriculum standards and expectations are often similar for subjects like languages (English and French) and Math, with students in the higher grade learning more advanced concepts. A teacher may teach the same poem to all students, but students may be required to focus on different literacy devices depending on their grade level. A writing standard in fourth grade may expect students to write sentences of varying length, while a fifth-grade standard may expect students to write simple, compound, and complex sentences. Students can learn all of these skills in one carefully planned lesson. These subjects also lend themselves to teaching in smaller groups based on student's abilities, not on their grade levels.¹²

Typically found in rural areas, multigrade classes range from one-room schools spanning five or more grades, to more typical elementary schools with combination classes of two grade levels. Studies of instruction in multigrade classrooms across rural America reveal that teachers use various methods to juggle the wide levels of student needs. Six key variables affecting successful multigrade teaching identified in the research were:

- classroom organization that facilitates student learning, independence, and interdependence;
- classroom management and discipline that emphasize student responsibility for their own learning;
- instructional organization and curriculum that allow for a maximum of cooperative and self-directed student learning;
- instructional delivery and grouping that improve the quality of instruction;

¹¹ <https://www.theclassroom.com/teach-combination-classroom-8298003.html>

¹² <https://teachmag.com/archives/9279>

- self-directed learning strategies; and
- peer tutoring.¹³

Veenman's studies also show that student attitudes toward learning, school, self-concept, and personal and social adjustment were higher in the students who had participated in combination and multi-age classes. Students in the combination classes were able to form relationships with a wider variety of students than is possible in the traditional same-age classroom.^{14,15}

Academically, children usually perform better or equivalently in multi-age classrooms rather than in traditional classrooms.¹⁶ Miller writes "In terms of academic achievement, the data clearly support the multigrade classroom as a viable and equally effective organizational alternative to single-grade instruction."¹⁷ Miller also notes that academically gifted children seem to especially benefit from multi-age instruction.

Hattie studied split classrooms across the Western world, including Australia and America. He argues teachers have concerns about split classrooms. However, "I (Hattie) would argue that if you give me a Year 4 class and that teacher is only teaching Year 4 material to that Year 4 class, I think you've got a very, very serious problem," Hattie said. "This is because in a Year 4 class you are going as to find kids working at years 2, 3, 4, 5 and 6 [levels]." An upside of split classrooms is that teachers can identify students who are making the same mistakes and work with them together. "It's very, very hard for teachers in a class of 25–30 to work on an individual one by one and that typically doesn't happen, they work them in groups," he said. "They work them in groups not just because it is easier for the teacher, but the kids learn from each other, and so to have those different abilities in the same classroom can obviously sometimes be a very marked positive."¹⁸

LWPS can benefit financially from combined classrooms as a viable option for keeping the school in the community. Currently, the district has some combined grade-level classrooms serving as evidence that sound instruction and student learning still occur. If combining grades is implemented with care and intent, the district will find engaged students will learn whether the class is structured by age, grade, ability, or as some form of mixed-grade class.¹⁹ The district's administration has not demonstrated strong instructional leadership and support for teachers in transitioning to combined classrooms.

¹³ <https://eric.ed.gov/?id=ED342563>

¹⁴ Veenman, S. (1995). Cognitive and noncognitive effects of multigrade and multi-age classes: A best-evidence synthesis. *Review of Educational Research*, 65, 319-381.

¹⁵ Veenman, S. (1996). Effects of multigrade and multi-age classes reconsidered. *Review of Educational Research*, 66(3), 323-340.

¹⁶ Anderson, R., & Pavan, Barbara N. (1993). *Nongradedness: Helping it to happen*. Lancaster, PA: Technomic Publishing Company, Inc.

¹⁷ Miller, BA. (1990). A review of the qualitative research on multigrade instruction. *Journal of Research in Rural Education* 1991, 7(2), 3-12.

¹⁸ <https://www.theeducatoronline.com/k12/news/the-pros-and-cons-of-split-classrooms/259825>

¹⁹ <https://theconversation.com/are-mixed-grade-classes-any-better-or-worse-for-learning-38856>

RECOMMENDATION**Implement combined grade levels Pre-K and Kindergarten, and first grade and second grade.**

This should include strong instructional leadership and support for all district teachers in instructional practices for combined classrooms. Teachers need on-going support and professional development in best practice instructional strategies, classroom management and organization, and curricular frameworks for teaching combined grade levels.

In the 2023-24 school year, the BOE should combine Pre-K and kindergarten, and first and second grade. This will place all grade levels, Pre-K through 12, in combined grade classrooms. This would free up funds for the BOE and superintendent to reinvest in such things as expanding the Special Education Director to half day, adding two hours to the counselor schedule, hiring teacher's aides for the three early elementary combined classrooms, hiring part-time or full-time teachers to serve as instructional resource teachers, teach electives, supervise on-line students, or if certified, fill in the middle school and high school core content.

The BOE and administration should provide clear, transparent, and open communication with all district stakeholders as combination classrooms continue to be implemented. The BOE and superintendent should provide teachers with on-going support, professional development, and scheduled, dedicated release time for transitioning to combined or split-grade classrooms. Teachers need time to share techniques as they adapt to teaching developmentally varied students and curriculum overlaps.

In the elementary school, if the OAS content is highly grade-specific, the district should strongly consider hiring an aide to cover alternate recess times. This would allow time for the teacher to instruct grade-specific content and provide each grade with time to study and plan with their peers. At the middle school and secondary level, teachers should also have access to a resource room teacher to supervise and help students who need extra time, need additional instruction, or need to make up tests or homework. This allows the classroom teacher time for content-specific instruction, small group skills instruction, or implementing grade and content-specific activities.

Exhibit 2-7 has practical tips and pragmatic questions from teachers who have taught combined classrooms and found teaching is really no different than a single grade. When combined classrooms are implemented with intent and forethought, students and teachers can thrive and be successful. LWPS teachers should ask similar questions of the BOE and superintendent when transitioning to combined classrooms.

Exhibit 2-7
Planning a Combination Classroom

1. **Talk to your administrator to find out what is required of you.** Do you have to teach two separate curriculums? What subjects can you combine? How can your teammates support you?
2. **Think of your class as a range of abilities rather than two different grade levels.** The reality is a straight grade can have just as big of an ability spread as a combination classroom.
3. **I recommend a balanced literacy format.** Teach reading and writing lessons as a whole group, and then break up into small groups for guided reading or individual conferences. This is where you will meet the needs of your students.
4. **Typically, you will have to teach two separate math curriculums.** I highly suggest you look at the **Guided Math** format. This will solve how to teach two math curriculums and gives you a chance to individualize math instruction.
5. **Be prepared before the school year begins with information for parents.** When those class lists go up, you are bound to have questions from parents. Being prepared to show them how you are going to effectively handle two grades will ease their fears. Create a brochure or newsletter with your teaching schedule, what curriculum you are going to cover, and details of how you are going to meet the needs of your students.
6. **Stay positive!!** Get in the mindset that this is going to be a great experience, not just for the students but for you as well!

Source: <https://truthforteachers.com/combined-classmulti-grade-classes/>

In addition, to support the issues cited above, teachers should have an open opportunity to identify needs, request resources, and have the flexibility to monitor and adjust processes. It is vitally important that the teachers teach to both grade level OAS. There should be strong instructional leadership supporting and guiding teachers in how to teach students in both grade levels and not focus on only one grade. As research cited earlier, the BOE should be intentional in seeking administrative leadership and support and professional development for combined classroom teachers in:

- classroom organization that facilitates student learning, independence, and interdependence;
- classroom management and discipline that emphasize student responsibility for their own learning;
- instructional organization and curriculum that allow for a maximum of cooperative and self-directed student learning;
- instructional delivery strategies and grouping that improve the quality of instruction;
- self-directed learning strategies; and

- peer tutoring.²⁰

OAS overlap at grade levels in both content and skills. As OAS spiral upward, content is scaffolded sequentially and the rigor and depth of knowledge increases. This lends itself well to the combination classroom settings and enables students to thrive and be successful. Below are links to videos and articles that provide information on combined-grade classrooms.

- <https://www.google.com/search?q=teaching+combined+grades>
- <https://www.youtube.com/watch?v=aT1wjk--2tM>
- <https://theconversation.com/are-mixed-grade-classes-any-better-or-worse-for-learning-38856/>
- <https://teacherbuddyhelps.com/how-to-teach-combination-classes/><https://www.youtube.com/watch?v=ii2okPa-1G>

FISCAL IMPACT

The average teacher salary at LWPS is approximately \$52,718. Combing grades Pre-K and kindergarten and first and second allows the district to gain approximately two salaries. As much as fiscally possible, these monies should be re-invested to provide additional instructional personnel and academic services such as a half-day Special Education Director, three instructional aides, two additional hours for the counselor, and middle school and high school resource teachers.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Combine grades Pre-K/Kindergarten and first/second	\$105,000	\$105,000	\$105,000	\$105,000	\$105,000

FINDING 2-4

No strategic plan exists to determine if the middle school and high school class scheduling is based on student educational best, appropriately sequenced prerequisite subjects, precise, accurate monitoring of graduation requirements, and suitable elective offerings. The district has no process or procedure for selecting and implementing high interest elective classes, concurrent enrollment opportunities, and online virtual learning opportunities.

LWPS middle school and high school course electives are limited. Due to recent financial issues, music and competitive basketball were eliminated. Tennis was recently offered by a community volunteer and Esports is offered as an afterschool activity. Art, Publishing, Service Learning, and Teacher Aide were reported as elective offerings offered on campus.

²⁰ <https://eric.ed.gov/?id=ED342563>

Seniors often have only two classes required their senior year. Several students attend Burns Flat Vo-Tech. There is one student taking online medical terminology, and two students are virtually enrolled and homebased, one of which may be taking chosen electives.

At the high school, more diversity is needed with electives that interest and challenge students. Interviews and focus groups also reported the need for job shadowing and more college/career planning. The district appeared unaware that colleges often take student electives into consideration when awarding scholarships.

Research indicates that elective classes in secondary schools allow students one or two periods a day with choice. According to education researcher Robert Marzano, choice “has also been linked to increases in student effort, task performance, and subsequent learning.”²¹

Elective courses give students choices to explore coursework outside of the required core curriculum graduation requirements. Electives allow students to study different topics, engage in acquiring new skills, participate in hands-on projects, and explore new interests.

RECOMMENDATION

Review and implement with fidelity a strategically planned, accurate, and student-driven class schedule that expands middle school and high school elective offerings through concurrent enrollment, vo-tech, and virtual learning vendors.

The district should form a stakeholder group to identify desired electives. The BOE, superintendent, principals, teachers, parents, students, and community members should be represented on the group. Additional art classes and music electives should be considerations, along with competitive sports. The hour of the day and the number of students that can populate an elective should be a major consideration. The district should purposefully explore feasible elective options that explore new interests for students, do hands-on projects, and courses of study that offer students opportunities to engage in learning new skills. In adding electives, the district should strongly consider viable online education opportunities. Online courses should be cost-effective, meet state requirements for full credit, allow only one student to enroll, and have certified teachers to grade work and be available to answer questions. The district should ensure all electives align with post-secondary career college requirements including Oklahoma Promise.

FISCAL IMPACT

This recommendation can be implemented with existing resources if online electives have a cost. The district may choose to add some staffing to monitor the online electives.

FINDING 2-5

The majority of LWPS teachers and tutorial staff are committed to create a welcoming learning environment for students. They are dedicated, assume multiple job responsibilities, are focused

²¹ <https://www.google.com/search?q=research+on+why+high+schools+need+elective+classes>

on meeting individual academic needs, encourage positive self-esteem, and foster a sense of safety and belonging.

The school culture is welcoming. Teachers and staff work as a team and are committed to making adjustments to keep the school operational. Teachers have transitioned to combination classrooms and relocated classrooms to provide an improved elementary and secondary building climate. The vast majority of teachers have chosen to remain positive, maintain a collaborative attitude, and work to support each other during these changes. Teachers supply many of their own resources, share resources, and all wear multiple hats.

Research cites a positive school culture as how teachers talk to each other and the level of respect, and honesty among staff. Staff members in a positive school environment value diversity, academic integrity, and creativity. The aspects of school culture include how education is conducted and its impact on the well-being and achievement of students and outreach to the community. School culture is determined by every member of the school community. There are three levels of school culture: values, artifacts, and basic assumptions. Artifacts are the tangible aspects of culture, basic assumptions are the assumptions made about students and other people, and values are the core philosophies that hold the school together. Ideally, administrators set a healthy culture from the start by setting up policies and values that support a healthy school culture.²²

COMMENDATION

LWPS has dedicated and committed teachers and tutorial staff who create a positive learning environment in their classrooms.

B. MANAGEMENT AND OVERSIGHT OF INSTRUCTIONAL PROGRAMS

High-achieving districts have curriculum maps that clearly define standards and learning objectives for each subject and grade level so that teachers know the content expectations and instructional timelines for student mastery of objectives. It takes strong leadership to implement the curriculum. The superintendent and teachers, working collaboratively, are responsible for consistent implementation, quality instruction in the classroom, and student performance. The superintendent's 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 2-8** describes the five core beliefs that drive the work in school leadership at the Center and **Exhibit 2-9** describes the four dimensions of instructional leadership.

²² <https://study.com/academy/lesson/school-culture-definition-examples.html#:~:text=What%20is%20an%20example%20of,creativity%2C%20honesty%2C%20or%20integrity>

**Exhibit 2-8
Core Beliefs - Center for Educational Leadership**

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

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

**Exhibit 2-9
Dimensions of Instructional Leadership**

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

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

School administrators must have pragmatic instructional 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 administrators form the core of educational leadership in school districts. The school leader is no longer simply that of a building manager who makes sure that schedules are met, the school is maintained, and that discipline is properly enforced. Today, the educational leader is responsible for the consistency of implementation of an aligned curriculum, the quality of instruction in the classroom, and student performance. Recent research contends that school

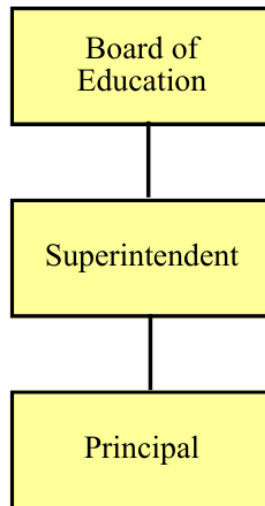
leaders influence classroom teaching, and consequently student learning, by staffing schools with highly effective teachers and supporting those teachers with effective teaching and learning environments.²³

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 2-10 provides the current organizational structure for instructional delivery at LWPS.

Exhibit 2-10
LWPS Organization Chart for Instructional Delivery

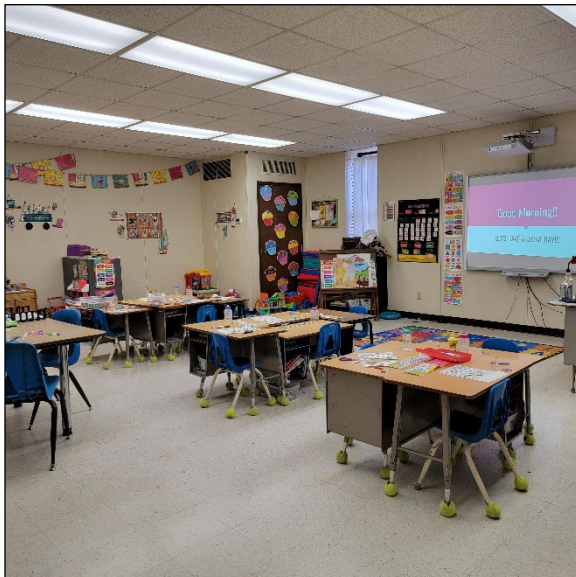


Created by Prismatic, March 2023

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

Exhibit 2-11 provides illustrations of LWPS classrooms.

**Exhibit 2-11
LWPS Classrooms**



Source: Prismatic, March 2023

Oklahoma School Testing Program

Student assessment is an integral part of measuring student performance. The OSTP for students in 3rd and 8th grades and the College and Career Ready Assessment (CCRA) for students in 11th grade continue implementation of the current standards-based tests that students must take during the school year. The OSTP consists of Criterion-Referenced Tests (CRTs) designed to measure student attainment of skills established for core subjects and helps monitor student and school

performance relative to the OAS. Currently, state assessments are administered for selected grades and courses in this manner:

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

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

The SDE uses performance level descriptors (PLDs) advanced, proficient, basic, and below basic in reporting student test scores. Also, test scores are reported in one of the following four categories:

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

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

- the OAS by subject and grade level;

- test blueprints for each grade level and subject area test that show what percentage of the test each skill will represent;
- test/item specifications highlight important points about the items’ emphasis, stimulus attributes, format, content limits, distracter domain, and sample test items;
- released test questions;
- writing samples;
- curriculum frameworks in ELA, Mathematics, and Science; and
- DOK levels and percentage weights for all OSTP test questions in test specifications.

The OAS along with the blueprints, PLDs, item specifications, DOK, writing samples, and released items define the testing requirements for 2014 through 2017.²⁴

Assessment performance of LWPS and its peers in 2020-21 is presented in the exhibits that follow. LWPS and its peers have testing populations that are small enough that they are not reported at the grade level in many cases. Therefore, the results are presented for the student body as a whole.

Exhibit 2-12 provides the results of the math OCCTs in 2020-21. LWPS had the second highest math scores among its peers but scored below the state.

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

Entity	All Students
Lone Wolf	10%
Buffalo Valley	9%
Gracemont	3%
Panola	17%
Wanette	3%
Wynona	2%
State	22%

Source: Oklahoma School Report Cards

Exhibit 2-13 provides the results of the reading OCCTs in 2020-21. LWPS was closer to the state average in reading and significantly outpaced the rest of its peers.

²⁴ <http://sde.ok.gov/sde/assessment-administrator-resources-administrators>

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

Entity	All Students
Lone Wolf	21%
Buffalo Valley	17%
Gracemont	4%
Panola	15%
Wanette	7%
Wynona	10%
State	25%

Source: Oklahoma School Report Cards

Exhibit 2-14 shows the 2020-21 science scores. LWPS and one other peer had scores that were in line with the state, and which were significantly ahead of the remainder of their peer districts.

Exhibit 2-14
Percentage of LWPS and Peer District
Full Academic Year Students Scoring Proficient or Above in Science
2020-21

Entity	All Students
Lone Wolf	29%
Buffalo Valley	28%
Gracemont	7%
Panola	7%
Wanette	12%
Wynona	16%
State	30%

Source: Oklahoma School Report Cards

Exhibit 2-15 shows LWPS math scores over a three-year period. Between 2017-18 and 2018-19, math scores improved markedly. They dropped by about the same percentage as the state’s math scores after the pandemic in 2020-21. OCCTs were not taken in 2019-20.

Exhibit 2-15
Three-year Data Trend in Math

2017-18		2018-19		2020-21	
LWPS	State	LWPS	State	LWPS	State
8%	31%	19%	32%	10%	22%

Source: Oklahoma School Report Cards

Exhibit 2-16 shows LWPS reading scores over a three-year period. LWPS's reading scores improved between 2017-18 and 2018-19 and dropped very little after the pandemic in 2020-21 when compared with the rest of the state. OCCTs were not taken in 2019-20.

Exhibit 2-16
Three-year Data Trend in Reading

2017-18		2018-19		2020-21	
LWPS	State	LWPS	State	LWPS	State
18%	35%	22%	33%	21%	25%

Source: Oklahoma School Report Cards

Exhibit 2-17 shows LWPS science scores over a three-year period. LWPS's science scores improved significantly between 2017-18 and 2018-19 and dropped very little after the pandemic in 2020-21 when compared with the rest of the state. OCCTs were not taken in 2019-20.

Exhibit 2-17
Three-year Data Trend in Science

2017-18		2018-19		2020-21	
LWPS	State	LWPS	State	LWPS	State
24%	40%	31%	35%	29%	30%

Source: Oklahoma School Report Cards

FINDING 2-6

The district's 2022-23 superintendent is an exemplary instructional leader. Upon her arrival, she clearly identified long-standing needs and has provided instructional leadership in addressing the academic needs of LWPS students. She is knowledgeable of best instructional practices and the importance of continuous school improvement.

The superintendent was instrumental in relocating elementary and secondary classrooms to increase instructional time and avoid student behavioral problems between elementary and high school students during transitions from classroom to classroom. Formative benchmarks were implemented this year. She was supportive of making special education identification and referral needs and understood the importance of aligning with statutory requirements and meeting the needs of special education students.

Research indicates that district instructional leadership provides the critical bridge between educational-improvement initiatives, and having those initiatives make a genuine difference for all students. Such leadership comes not just from superintendents but also from the supportive boards of education and the principals.²⁵

²⁵ <https://conservancy.umn.edu/bitstream/handle/11299/2035/CAREI?sequence=1>

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

- Ensuring collaborative goal setting;
- Establishing non-negotiable goals for achievement and instruction;
- Creating board alignment with and support of district goals;
- Monitoring achievement and instruction goals; and
- Allocating resources to support the goals for achievement and instruction.

The 2022-2023 LWPS superintendent exhibits research-based instructional leadership behaviors and practices.

COMMENDATION

The district is commended for the 2022-23 superintendent's instructional leadership efforts to improve student achievement and lead teachers in learning of and applying best instructional practices.

FINDING 2-7

No release time exists for LWPS teachers to address curriculum alignment and pacing, high impact instructional strategies, teaching concerns relative to combined classrooms, and how to address OAS for two grade levels. In addition to planning periods, on-going dedicated release time is needed for curricular and instructional dialog/discussion. In-house processes need to be implemented, along with capable instructional leadership, to maximize the use of release time.

Transitioning to combined classrooms requires instructional changes. The district does not provide regularly scheduled release time for all teachers to participate in dialog and discussions that address data analysis or using formative and summative data to design, adjust, and pace curricula and instruction for combined classrooms. Across the district, random and informal dialogue takes place for teachers to address instructional issues.

The district lacks time for teachers to collaborate and engage in meaningful dialog around addressing OAS learning gaps and redundancies, best common assessments for monitoring student processes, and evidence-based teaching strategies that improve achievement. The consulting team found no meetings held to provide instructional guidance and consistently articulate the district's expectations for effective lesson planning, implementing evidence-based instructional delivery strategies, standards-based, student-centered learning, and accountability for implementation. Teachers have no time for sharing and discovering best practices and positive ideas for navigating through all the organizational changes the district has incurred in the recent past. The consulting team recognized there are expertise, innovative strategies, and valuable resources among the staff, but there is no consistent structured time or process to share

their work and expertise. Staff meetings are not routinely held where teachers share successful interventions and daily remediation practices across grade levels and subject areas.

LWPS teachers are functioning at varied instructional proficiency levels. Without scheduled time to work together, administrators and teachers are unable to explore new information and the foundational knowledge base with teachers who need to improve. Interviews indicated the possible need for training teachers and instructional aides in the purpose, expectations, and essential components of successful collaboration. This is needed to address issues of accountability, monitor student progress, use data to inform instruction, and align the horizontal and vertical curriculum.

Research is clear that teacher collaboration has profound positive implications for schools. As a school improves and moves forward, every educator must engage with colleagues in the ongoing exploration of three crucial questions that drive the work of those within a professional learning community (PLC).

- What do we want each student to learn?
- How will we know when each student has learned it?
- How will we respond when a student experiences difficulty in learning?

Generally, the literature on collaboration and PLCs identifies five organizational competencies:

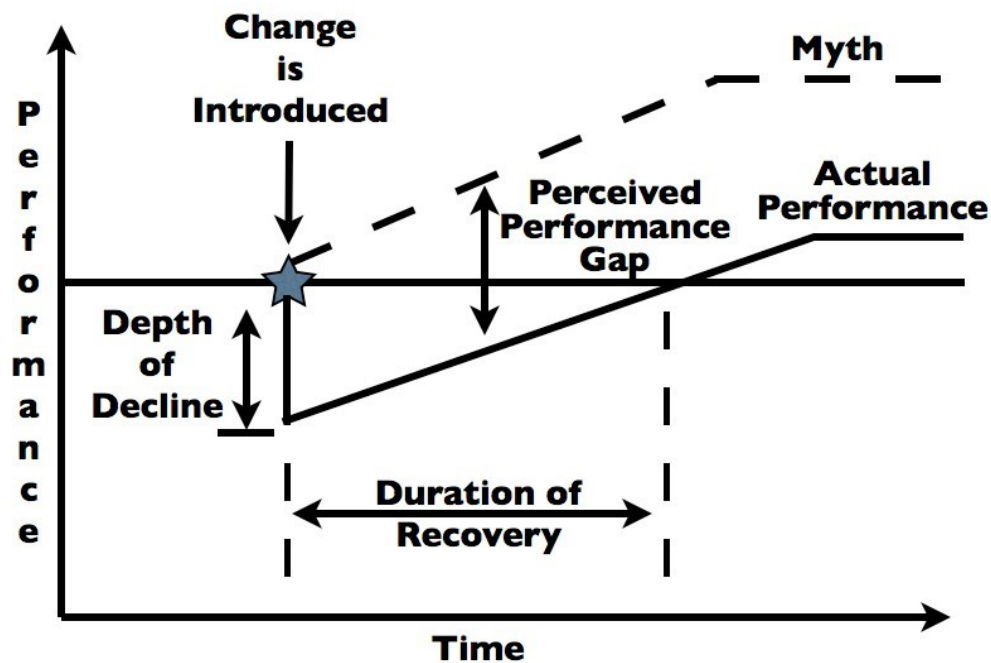
- supportive and shared leadership;
- collective creativity;
- shared values and vision;
- supportive conditions; and
- shared personal practice.²⁶

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

Exhibit 2-18 articulates change insights from Fullan’s “The Six Secrets of Change” (2008). The implementation dip is expected as change is introduced. However, after recovery, actual performance is better than before the change.

²⁶ <http://www.seidl.org/change/issues/issues61.html>

Exhibit 2-18
Change Implementation



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

A district seeking to improve must be mindful that initial capacity building is more important than accountability because the former is the route to the latter, (i.e., building the capacity of teachers is the route to being held accountable for implementing new, best practices). Clearly, one needs both. Finding the right combination and integration of the two is the trick.²⁷ Being the change agent in successful schools means that growing and learning are ongoing phenomena.²⁸ **Exhibit 2-19** summarizes Fullan's insights regarding change.

²⁷ Fullan, M. (2008). *The six secrets of change*. San Francisco, CA: Jossey-Bass.

²⁸ <http://www.sedl.org/change/issues/issues61.html>

**Exhibit 2-19
Insights on Change for Continuous Improvement**

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

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

Learning by Doing: A Handbook for Professional Learning Communities at Work provides a road map to narrow the “knowing-doing gap” regarding PLCs.²⁹ This book outlines the importance of common vocabulary and a common understanding of PLC concepts and characteristics. It provides the rationale for implementing a PLC that benefits students. DuFour, et al. (2006) lays out purposeful steps to guide leaders in assessing perceptual reality in their schools. It is a helpful guide to foundational information and the improved capacity for staff to function as a PLC.

McLaughlin and Talbert (1993) suggested that when teachers had opportunities for collaborative inquiry and the learning related to it, they were able to develop and share a body of wisdom gleaned from their experience.³⁰ Darling-Hammond (1996) cited shared decision-making as a factor in curriculum reform and the transformation of teaching roles in some schools.³¹ In such schools, structured time is provided for teachers to work together in planning instruction, observing each other’s classrooms, and sharing feedback.

For administrators and teachers to build the kind of trust needed to not only talk candidly but also to observe one another teach is a major first step. This requires instructional leadership and teacher empowerment. Expecting teachers to have conversations is an instructional practice that

²⁹ DuFour, R., DuFour, R., Eaker, R., Many, T., & Mattos, M. (2006). *Learning by doing: A handbook for professional learning communities at work*. Bloomington, IN: Solution Tree.

³⁰ McLaughlin, M. W. & Talbert, J. E. (1993). *Contexts that matter for teaching and learning*. Stanford, CA: Center for Research on the Context of Secondary School Teaching, Stanford University.

³¹ Darling-Hammond, L. (1996). The quiet revolution: Rethinking teacher development. *Educational Leadership*, 53(6), 4-10.

requires instructional leadership. With the evolving trends and patterns of increased rigor for instruction, collaboration between and among teachers and district leadership is vital.

Teaching OAS with fidelity, particularly in combined classrooms, can take place more effectively with formalized release time for discussion and collaborative planning. Without supportive time structures, teachers continue to work in isolation. Successful implementation of continuous school improvement requires cross-curricular and cross-grade level dialogue. Continuous improvement evolves successfully through collaboration, corporate thinking, and shared decision-making. Implementation of new initiatives, such as the combination classrooms, standards-based instruction, student-centered outcomes, along with the day-to-day decisions, and improvements in schools, is more robust and maximized when districts provide teachers with regularly scheduled release time for collaboration.

RECOMMENDATION

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

When implementing time for collaboration, all stakeholders should understand the importance of finding the balance between capacity building and accountability for improving instructional practice. Initially, this calls for freedom and self-direction that leads to improvement. As teachers evolve to combined grade levels, they should have support, direction, and expectations that help them develop expertise and grow the practice of professional dialogue with fellow teachers. Administrators, as instructional leaders, should guide and support teachers to move from blaming the parent or socioeconomic status for deficiencies to taking ownership of reaching the child through effective instruction and student-centered classrooms.

LWPS teachers should have dedicated release time to talk about Oklahoma curriculum standards and developing effective lesson plans based on student performance data and the content and skills students must learn. Teachers should no longer be tethered to textbook curriculum. Corporate thinking and collaboration should make teachers aware they have a wealth of expertise and options for professional learning among themselves, next door, and across the hall. Release time should provide the time for sharing and collaboration as they engage in standards-based, student-centered classrooms.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 2-8

No evaluation process exists to determine if textbooks, software, instructional materials, and resources address learning gaps, are aligned with OAS, and are cost effective. There is no inclusive evaluation process to evaluate if all instructional resources are age appropriate, align with tiered intervention learning gaps, and interface with the textbooks that are up to date.

Textbooks and/or teacher selected resources drive LWPS curriculums and many are outdated and worn.

No evidence was presented to indicate that student OSTP data are routinely disaggregated to determine if the content and skills missed in the lower quartiles are appropriately covered in the implemented textbooks, software, digital remediation resources, and instructional materials. The district does not clearly define efforts to evaluate software, programs, texts, and supplemental resources to determine relevancy and how resources directly impact improved student achievement. The consultant team was told that Study Island is too difficult and that the students do not like it, yet it was reported as a primary instructional resource. It was also learned there was no purchasing filter that determines the number of seats to purchase and that the district purchased too many enrollment seats for a digital program. There is no evaluation process to determine how core curriculum textbooks, software programs used, supplemental and remedial interventions, instructional strategies, and enrichment activities are aligned with longitudinal OSTP data results. No evidence was presented to indicate how all purchased and implemented LWPS resources align with state Blueprints, Test and Items Specifications, and Performance Level Descriptors (PLD).

Without implementing a regularly scheduled evaluation system, LWPS positions itself to fund instructional resources/programs that are misaligned with OAS, not cost effective, and not teaching to identified student needs based on student performance data. The district also does not have an evaluation and monitoring process to determine if the intent of its digital resources is implemented appropriately. The Lone Wolf community and stakeholders need assurance that the district is not spending money and time on ineffective, outdated instructional resources/programs.

Most federal and state instructional resources/programs require individual instructional resource/program evaluations. However, highly effective schools take the evaluation process to the next level and evaluate all locally implemented instructional resources/programs. This ensures instructional resources/programs work in concert and are effective for teaching state standards, remediation, or enrichment at each grade level and content area. An annual evaluation process ensures all instructional resources, programs, and software are not “busy work” but directly improve standards-driven student learning. Likewise, an annual evaluation process determines if instructional resource materials are addressing identified learning gaps or perpetuating redundant and repetitive overlaps.

Research is clear that instructional resources must be relevant, support curricula rigor, and most importantly, seamlessly align with state standards and improve student performance. Without comprehensive instructional resource/program evaluations, schools risk getting into curricular and instructional traps. They continue doing what they have always done – using instructional resources with students without focused intent and alignment.

Systematically collecting and analyzing quantitative and qualitative information regarding instructional resources provides district administrators and teachers with valuable assessment information. Ideally, evaluations measure and answer questions such as:

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

-
- Does the resource yield the intended effect on improved student learning, including all subgroups?
 - Are the resource goals still relevant to student 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?³²

High-performing districts 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 are determined. The evaluation determines the instructional impact resources have on subgroups such as gifted, struggling readers, special education and students living in poverty.

RECOMMENDATION

Implement a comprehensive evaluation process to ensure textbooks, software, and supplemental instructional materials/resources improve student achievement, are cost effective, developmentally appropriate, relevant, consistent across grade levels and content areas, and aligned vertically and horizontally with Oklahoma Academic Standards (OAS).

The BOE, superintendent, principal, and teachers should develop and implement a plan to annually evaluate curricular and instructional resources, software, enrichment, and remediation materials to ensure alignment with OAS and data-driven student performance needs. High performing districts annually evaluate all instructional resources/programs, new initiatives, grants, and district processes. The combined data determines if there is a need to add, 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.

³² http://ies.ed.gov/ncee/edlabs/regions/pacific/pdf/REL_2014007.pdf

In the long-term, instructional resource/program evaluations focus on improving student achievement. Evaluation is a tool to build upon successes and leads to ongoing improvement in practices and outcomes.

The LWPS superintendent, principals, and all teachers should develop a list of all major curricular and instructional resources routinely implemented to supplement, remediate, or enrich their instruction, and support the curriculum. Proof or justification of how the resource aligns with teaching state standards and supporting student test data results must be included. The list should include a rank ordering of total dollars spent on each implemented resource. The administration 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 principal 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 OAS and the next level of study and college and career-readiness. This evaluation and abandonment process should be simple, easily implemented, and directly focused on supporting improved student performance.

All materials can 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 whether it is adapted with fidelity. **Exhibit 2-20** presents examples of formative evaluation questions to explore.

Exhibit 2-20
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 LWPS instructional resource/program users implementing the instructional resource/program in the same way?
- Is the instructional resource/program being implemented on schedule?
- Is there enough time to implement all aspects of the instructional resource/program?
- What aspects of the instructional resource/program do not seem to be working as well as you intended?
- Do instructional resource/program implementers need additional training on the instructional resource/program?
- Are there any negative outcomes surfacing?

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

Summative instructional resource/program evaluation takes place after the instructional resource/program is implemented and routinely used. It is conducted at the end of each school year, or at another logical time, such as the end of instructional resource/programmatic intervention. **Exhibit 2-21** presents examples of summative evaluation questions to explore.

Exhibit 2-21
Summative Instructional Resource/Program Evaluation

After an instructional resource/program has been implemented ask:

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

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

In addition to asking these evaluation questions, it is also important to make certain that the instructional resources/programs align and tightly support the OAS, OSTP student performance data, Depth of Knowledge expectations, and Test and Item Specifications. Teachers cannot afford to implement instructional resources/programs and materials that do not have a high correlation for teaching the concepts and skills identified in learning gaps. The evaluation process should ensure the district has instructional resources that teach and reinforce the identified skills and concepts that students in the lower quartiles routinely miss.³³

³³ There are many free resources available to gather additional information, including:

Resources on designing and planning instructional resource/program evaluation;

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

A basic guide to instructional resource/program evaluation;

<https://managementhelp.org/evaluation/program-evaluation->

An evaluation matrix and template focused on high expectations to teach identified curriculum.

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

FISCAL IMPACT

This recommendation can be implemented with existing resources.

C. SPECIAL PROGRAMS

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

Special Education

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

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

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

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

Districts must develop an Individualized Education Plan (IEP) for each child receiving special education services under *IDEA*. The IEP must include input from the parent and regular education teachers and be aligned with education plans for children in regular education classrooms. *IDEA* requires districts to provide educational services in the “least restrictive

environment” and to include students with disabilities in state and district assessment programs. Instructional arrangements for students may include:

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

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

The reauthorization of *IDEA* in 2004, which went into effect in 2005, includes provisions substantially changing the way learning-disabled students are identified. One change in the law addresses early intervention services and creating opportunities to determine a student’s Responsiveness to Instruction (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 on 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 the use of funds for educational and behavioral assessments.

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

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

- three-year re-evaluation; and
- dismissal from the special education program.

Exhibit 2-22 shows comparison data on the percentage of special education students and the number of full-time equivalent (FTE) teachers in special education for 2019-20. LWPS’s identification rate, at 13 percent, was lower than most of its peer district rates and the community group but roughly on par with the State.

**Exhibit 2-22
Students and Teachers in Special Education Programs, 2019-20**

Entity	ADM	Special Education Percentage of All Students	Special Education Teachers FTEs	# of Special Education Students per FTE
Lone Wolf	104	13%	0.1	140
Buffalo Valley	132	0%	0.6	0
Gracemont	123	25%	0.5	62
Panola	92	22%	1.0	21
Wanette	135	30%	0.0	N/A
Wynona	93	37%	0.6	57
Community Group	149	25%	4.1	34.3
State	1,304	17%	8.5	25.3

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 2-23 compares district special education revenues and expenditures for 2021-22. At 135 percent, LWPS was one of two districts that spent significantly less money on special education than it received in revenue for that purpose.

**Exhibit 2-23
Comparison of Special Education Revenues and Expenditures, 2021-22**

Entity	Total Revenues for Special Education	Total Expenditures for Special Education	Revenues as Percent of Expenditures
Maryetta	\$29,067.22	\$21,507.02	135%
Buffalo Valley	\$40,853.50	\$39,690.00	103%
Gracemont	\$36,272.81	\$48,134.59	75%
Panola	\$25,889.68	\$12,874.26	201%
Wanette	\$47,683.98	\$92,876.31	51%
Wynona	\$24,117.16	\$63,600.73	38%
Peer Average	\$33,980.73	\$46,447.15	73%

Source: OCAS School District Financial Information

Exhibit 2-24 shows the trend in special education revenues and expenditures over time in LWPS. As shown, LWPS’ special education revenues have exceeded expenditures every year

since 2016-17. Overall, the district has been bringing expenditures up closer to revenues each year.

**Exhibit 2-24
Trend in LWPS Special Education Revenues and Expenditures**

Year	Total Revenues for Special Education	Total Expenditures for Special Education	Revenues as Percent of Expenditures
2016-17	\$17,803.75	\$18,638.27	96%
2017-18	\$18,045.34	\$9,070.00	199%
2018-19	\$28,026.83	\$14,888.94	188%
2019-20	\$29,272.13	\$21,552.76	136%
2020-21	\$29,067.22	\$21,507.02	135%

Source: OCAS School District Financial Information

On the stakeholder survey conducted for this review, staff members were asked to assign a letter grade to various LWPS functional areas. **Exhibit 2-25** provides the results for special education. As shown, most district educators (84 percent) gave special education an A or B.

**Exhibit 2-25
Educator Survey Results Regarding LWPS Education**

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Special Education	42%	42%	8%	0%	0%	8%

Source: Prismatic Survey Results, March 2023

FINDING 2-9

The special education director’s ability to optimize all aspects of the special education program is compromised due to time constraints and additional responsibilities. Curricula and instructional IEP modification are continuously in need of review and update. The director teaches first grade, facilitates online learning, and is allotted 50 minutes daily to facilitate all aspects of the special education program. It is difficult to monitor IEP modifications to ensure student educational needs are met. Much of the paperwork is completed after school and accomplished after hours.

Meeting with parents and working with classroom teachers to monitor student progress and helping with IEP accommodations is difficult. Curricula and instructional IEP modifications are continuously in need of review and updating. In the past, processes and procedures for identification, referrals, and administrative support were inconsistent. Interview dialog reported that the district outsources services for IEP students needing speech. Speech services are provided virtually, which is not best practice and not highly effective. Onsite reports also indicated that the majority special education students are transfers and enter with an existing IEP. An example was cited of how the staff implemented processes and procedures for getting paperwork for placement and then the student transferred back out of the district. This

contributes to the operational complexities of the program. It was also learned that a student categorized with severe intellectual disabilities needs facility and transportation modifications. It is difficult to keep IEPs modified and updated. The current superintendent is highly supportive and works intentionally with the director to provide the least restrictive learning environment.

The district's program is total inclusionary environments for all LWPS students. There is no time for the director to pull out students and provide extra time or specialized tiered instruction to students. Volunteers provide the pull-out interventions that exist. There are no dedicated times for intentional planning and collaboration for both the classroom teacher and the director to give input, direction, co-teach, or model adaptive instructional practices and ensure all OAS are taught and tested according to the IEPs of students.³⁴

Research cited in **Exhibit 2-26** gives an overview of steps the district can take to better serve special education students.

Exhibit 2-26 **Ten Best Practices to Improve Outcomes for Special Education Students**

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

Source: <https://www.dmgrouppk12.com/blog/10-best-practices-for-improving-special-education>

All school districts want to close the achievement gap and improve outcomes for special needs students. Best practices, implemented with a systems-thinking approach, help school districts of

³⁴ Research is clear that improving special education is challenging.
<https://www.understood.org/en/learningthinking-differences/treatments-approaches/educational-strategies/4-benefits-of-inclusive-classrooms>, <https://vittana.org/15-pros-and-cons-of-an-inclusion-classroom>

all sizes and types achieve dramatic gains in achievement and inclusion and expand services for students with disabilities.³⁵

RECOMMENDATION

Implement a district-wide comprehensive review of all aspects of the district's special education program to better meet the needs of IEP students and keep the program in compliance.

LWPS needs to review and standardize all written documents and instructional delivery adjustments to improve, maintain, and sustain compliance regarding student services. The district should give significant review and consideration to expanding the director position to half day special education. This would also help address and scrutinize the challenges of students with IEPs transferring into the district. The remaining half day could be assigned to a resource teaching assignment. Depending on certification, the teaching assignment could be an elective or even counseling.

Since IEP students are served in the regular classroom, teachers and the special education director should have designated time to work together to identify students' strengths. They need to equip the students with strategies to help them grow as independent – not dependent – learners.

The classroom teachers, special education director, and paraprofessionals should have regularly scheduled time to cooperatively plan instruction and to monitor and adjust efforts to maximize the least restrictive environment practices for all IEP students. Weekly planning times work best. Purposeful collaborative planning combines the expertise of both teachers in helping students master OAS based on IEP requirements. This time would allow teachers to develop lessons, review resource materials and digital programs, and plan remediation and instruction of OAS.

The district should require accountability for implementing compliance procedures with fidelity. Best practice changes should include clearly defined procedures for referral, identification, placement, instructional delivery, and curricular and documentation processes and procedures. This includes ongoing coordination with remediation and intervention services to maximize tiered interventions.

The district's program review should consider providing release time for collaboration and reviewing all written procedures to ensure all IEP students receive the OAS-taught and tested curricula and are supported by IEP modifications/accommodations. The administration and special education director should continue to provide all teachers with guidelines, expectations, processes, and procedures for sustaining and maintaining compliance and instructional improvements for students.

³⁵ <https://www.dmgrouphk12.com/blog/10-best-practices-for-improving-special-education>

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Gifted and Talented Education

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

School Law Book *Section 910 210:15-23-1* outlines the responsibilities of school districts and local boards of education in providing for a gifted and talented program, requiring each school district to provide Gifted and Talented educational programs and to serve those identified students who reside within the school district boundaries. The local board of education is required to submit a plan for Gifted and Talented to the State Board of Education and to provide annual program reports to the SDE.

The required components for Gifted and Talented Education programs include:

- a written policy statement which specifies a consistent process for assessment and selection of children for placement in Gifted and Talented programs in 1st to 12th grade;
- a description of curriculum for the Gifted and Talented educational program, demonstrating that the curriculum is differentiated from the normal curriculum in pace and/or depth, and that it has scope and sequence;
- criteria for evaluation of the gifted child educational program;
- evidence of participation by the local advisory committee on education for Gifted and Talented children in planning, child identification, and program evaluation;
- required competencies and duties of Gifted and Talented educational program staff; and
- a budget for the district’s Gifted and Talented educational programs.

Exhibit 2-27 shows the trend in the gifted and talented identification rates over time. LWPS’ identification rate has no consistent pattern and has been consistently significantly below both the community group and the state. However, the consulting team did not find evidence to support these numbers and how the Gifted Program was implemented and gifted services were being provided to LWPS students.

Exhibit 2-27
Trend in Percentage of Gifted and Talented Education Students

Entity	2015-16	2016-17	2017-18	2018-19	2019-20
Lone Wolf	1.5%	11.9%	1.8%	8.0%	4.7%
Buffalo Valley	13.2%	10.1%	17.2%	14.0%	11.9%
Gracemont	18.6%	13.1%	20.6%	18.2%	15.8%
Panola	2.6%	1.9%	0.9%	0.0%	0.0%
Wanette	8.5%	5.7%	3.9%	11.3%	30.1%
Wynona	13.6%	9.7%	6.5%	4.8%	3.4%
Community Group	11.9%	23.5%	11.0%	11.1%	10.7%
State	14.2%	15.8%	13.9%	13.6%	13.4%

Source: Office of Educational Quality and Accountability, Profiles Database

According to the National Association for Gifted Children,³⁶ between six and ten percent of students are gifted.³⁷ Contrary to some common misconceptions, gifted students often need a different educational approach in order to be engaged and succeed in the classroom.³⁸ In 2018-19, Oklahoma allocated \$54.4 million to support gifted education.³⁹

The district is not implementing the Gifted Talented Program and funding with fidelity. The SDE has resources available to support the administration to improve services. The *District Gifted Education Coordinator's Guide* provides a comprehensive guide to get the program updated and in compliance.⁴⁰

FINDING 2-10

No gifted and talented program is implemented in Lone Wolf. No evidence was presented to ensure the district is in compliance with state statutes.

Interview and on-site reports indicate there are no active educational services being implemented for gifted and talented students. It was unclear if gifted funding was received from the state. Teachers recognized there are children with exceptional abilities in classrooms across the district. In the past, there was no administrative leadership and/or expectations for serving gifted students or implementing a quality program as required by law. At the time of the on-site, there was no institutional memory available to report if the Gifted Program had been initially implemented, but not sustained or maintained.

In 1981, Oklahoma became the 17th state to mandate educational services for students identified as gifted and talented. This was done through the enactment of Title 70 O.S. Sections 1210.301-

³⁶ www.nagc.org

³⁷ <https://www.k12dive.com/news/identifying-gifted-and-talented-students-with-equity-proves-difficult/413434/#:~:text=According%20to%20the%20National%20Association,organization%20collects%20these%20student%20statistics>

³⁸ <https://www.nagc.org/myths-about-gifted-students>

³⁹ <https://nagc.org/state-of-states>

⁴⁰ https://sde.ok.gov/sites/default/files/District%20Coordinator%20Manual%20vs.%2020_0.pdf

308. Oklahoma's funding comes through the state aid formula and is a weight of .34 for each student identified and served in gifted and talented education.⁴¹

Research indicates that the needs of students who are gifted can be met in the inclusive classroom under certain prerequisite conditions, for example,

1. the students are appropriately grouped in clusters or other homogeneous arrangement;
2. teachers match their instructional strategies to the specific learning needs of the students; and
3. the students receive an appropriately differentiated curriculum or have access to the full range of curriculum.

Access to the full range of curriculum may be achieved in many ways -- through distance education programs, acceleration, or specially designed programs like those sponsored by Johns Hopkins University or Stanford University.

Combined and multi-aged classrooms provide a welcome environment for serving gifted students. Even though it is not easy for teachers to provide a learning environment where each child is working at his or her level of challenge, particularly in an inclusive classroom, homogeneous or cluster grouping makes it easier for teachers to differentiate curriculum and use strategies such as curriculum compacting that have proven to be effective.⁴²

RECOMMENDATION

Strengthen all aspects of the gifted program.

The students of LWPS need gifted services. The BOE, superintendent, principal, teachers, and select parents should assume the responsibility for developing and implementing the Gifted and Talented Program. They should designate a district-wide coordinator. The SDE offers all the needed resources, technical assistance, and programing options for districts to follow. These programing options adapt to the needs of rural, small schools with combined classrooms settings. The SDE also provides the needed gifted coordinator training to assist in keeping the program in compliance. SDE also has resources for supporting teachers in delivering appropriate enrichment activities for students.

The LWPS administration should use the SDE digital resources needed to get LWPS' program implemented and operational.⁴³ The website provides the necessary SDE resources and contact numbers for meeting gifted program requirements. Using these resources, the administration should become familiar with OCAS allocations, student identification and referral procedures, program options, training webinars, director support, and instructional strategies for teachers.

⁴¹ <https://sde.ok.gov/gifted-and-talented-education>

⁴² Additional strategies for providing effective differentiated instruction are discussed in the literature included in this frequently asked question: <https://www.hoagiesgifted.org/eric/faq/gt-inclu.html#:~:text=Research%20indicates%20that%20the%20needs,to%20the%20specific%20learning%20needs>

⁴³ <https://sde.ok.gov/gifted-and-talented-education>

Through this main website, there are digital links and details for all aspects of a high impact gifted program.

In addition, **Exhibit 2-28** provides pragmatic classroom instructional strategies for LWPS teachers to use in teaching gifted students.

Exhibit 2-28 **10 Most Effective Tips For Using Brain Based Teaching & Learning**

1. **Physical Education, recess, and movement support learning and are critical to education.** Support physical activity, recess, and classroom movement to raise the good chemicals for thinking, focus, learning and memory. Students need 30-60 minutes per day to lower stress responses, boost neurogenesis, and boost learning. Initially, expose students to a variety of physical activities. Later, offer choice, because voluntary activity does better than forced activity.
2. **Social conditions influence our brain in multiple ways unknown before.** Don't allow random social groupings for more than 10-20 percent of the school day. Use targeted, planned, diverse social groupings with mentoring, teams, and buddy systems. Work to strengthen teacher-to-student relationships and student-to-student relationships.
3. **The brain changes every day!** The ability of the brain to rewire and remap itself via neuroplasticity is profound. Teachers should implement 30-90 minutes a day and 3-5x per week to upgrade student skill sets. Teach attentional skills, memory skills and processing skills. There are online programs that promote student buy-in and build memory and attentional skills.
4. **Research now suggests teaching content in smaller chunk sizes of two to four chunks.** Early thinking said students had the capacity to hold seven (plus or minus) chunks in the head for working memory. The "holding tank" for content, the hippocampus, is limited and overloaded quickly, based partly on learner background and subject complexity. Teachers should teach in small chunks, process the learning, and then rest the brain. Too much content taught in too small of a time span means the brain cannot process it, and students don't learn it. The less background the learner has and the greater the complexity of the content, make the time chunk of content shorter (use 4-8 minutes). The greater the background knowledge, the less the complexity, the longer you can make the "input" stage (8-15 min. is acceptable). Under no condition should there be more than 15 consecutive minutes of content input.
5. **Schools are pushing differentiation as a strategy to deal with the differences in learners.** Make differences the rule. Validate differences. Never expect all students to be on the same page in the same book on the same day. There are variations in maturation rates and other brain differences. Allow students to celebrate diversity, unique abilities, talents, and interests.

Exhibit 2-28 (Continued)
10 Most Effective Tips For Using Brain Based Teaching & Learning

6. **Chronic stress is a very real issue for both staff and students.** Teach students coping skills, increase student perception of choice, build coping skills, strengthen arts, physical activity, and mentoring. These activities increase sense of control over one's life, which lowers stress.
7. Neuroscience departments, (Univ. of Oregon, Harvard, Univ. of Michigan, Dartmouth, and Stanford) recently completed projects studying the impact of arts on the brain. **They learned that arts boost attention, working memory, and visual spatial skills.** Arts such as dance, theater, and drama boost social skills, empathy, timing, patience, verbal memory, and other transferable life skills. Make arts mandatory, give students choice, support with expert teachers, and provide time to excel at it. Research suggests 30 to 60 minutes a day, three to five days a week.
8. **Humans have the capacity to display many emotions, but only six of them are "hard wired" or built in at birth.** Unless children are taught these emotional states early, they enter school emotionally narrow and do not understand appropriate emotional responses (e.g. cooperation, trust, shame, and humility). Most children are not taught these at home. Schools must teach appropriate emotional states as life skills or there are more discipline problems and weakened cognitive skills. It is important to offer quick, daily skill-building with blended-in daily practice. Otherwise, students will misbehave, not understand directions, fail to be respectful to teachers, and show no empathy when others are in pain. Teachers should build social skills into every lesson and use the social structures that are advocated in cooperative learning programs every day. The better the social skills, the better the academics. Kids who learn patience, attention, empathy, and cooperation are better students.
9. **Recent research contends there is rehabilitation of brain-based disorders, including Asperger's, learning delays, dyslexia, and autism.** Aggressive behavioral therapies, new drugs and revolutionary stem cell implantation can be used to influence, regulate, and repair brain-based disorders. All teachers should learn skills in dealing with special education learning delay recovery. Most children can be brought back into regular ed classes, but not with inclusion-only strategies. It takes consistent hour-a-day skill building.
10. **The brain/mind memories are not fixed.** Every time you retrieve a memory, it goes into a volatile, flex state in which it is temporarily easily reorganized. Every time students review, they may change their memory. Without review, they are less likely to recall their learning. Teachers should review the content half-way between the original learning and the test. Content taught on Monday and tested on Friday, should be reviewed on Wednesday. Teachers should structure reviews with written quizzes, group work, and strategies to strengthen memory over time. Otherwise, the material is likely to get confused and test scores drop.

Source: <http://www.jensenlearning.com/wp-content/uploads/2016/07/10MostEffectiveTips.pdf>

FISCAL IMPACT

This recommendation can be implemented existing resources.

D. STUDENT SERVICES

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

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

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

Guidance and Counseling

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

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

The SDE publishes *The School Counselor's Guide: Developing a Comprehensive School Counseling Program Using Accreditation Standard VI*. This publication is designed to assist school districts in strengthening existing programs or developing new ones. The major components of the defined guidance curriculum include Guidance Curriculum Domains

(Academic Development, Career Development, and Personal/Social Development); Student Competencies; and Guidance Curriculum Delivery.

The American School Counselor Association (ASCA) states: “School counseling programs are collaborative efforts benefiting students, parents, teachers, administrators, and the overall community. School counseling programs should be an integral part of students’ daily educational environment and school counselors should be partners in student achievement.”⁴⁴

ASCA recommends that school counselors divide time between four components:

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

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

Exhibit 2-29 provides the trend in counselor staffing over time. LWPS and most of its peers have decreased counselor staffing over the last five years. The community group and the State have kept counselor staffing the same.

⁴⁴ <http://www.ascanationalmodel.org/>

Exhibit 2-29
Trend in Counselor Staffing Over Time

Entity	2015-16	2016-17	2017-18	2018-19	2020-21	Percent Change
Lone Wolf	0.3	0.2	0.2	0.2	0.2	(33.3%) ▼
Buffalo Valley	0.6	0.2	0.3	0.3	0.3	(50.0%) ▼
Gracemont	0.1	0.3	0.3	0.4	0.4	300.0% ▲
Panola	1.0	1.0	0.0	0.0	0.1	(90.0%) ▼
Wanette	0.4	0.0	0.0	0.3	0.2	(50.0%) ▼
Wynona	0.4	0.2	0.2	0.1	0.1	(50.0%) ▼
Community Group	0.3	0.3	0.3	0.3	0.3	0.0% ●
State	3.1	2.9	2.9	3.0	3.1	0.0% ●

Source: Office of Educational Quality and Accountability, Profiles Database

FINDING 2-11

The teachers and tutorial volunteers serve as informal counselors with LWPS students. They are intentional in helping students feel comfortable in coming to them with problems. Most teachers implement Capturing Kids Hearts (CKH) in their classroom and recognize they serve as the significant, safe, adult that students find comfortable going to with problems.

CKH was evident in some classrooms. Teachers had attended the training and a representative from the program visits the district to follow-up, and teachers improve and strengthen the implementation of CKH.

The CKH program trains teachers to create classrooms having high student performance, attendance rates and minimal behavioral incidents. It is a relationship-building approach to discipline that creates self-managing groups. Teachers use the EXCEL model, as shown in **Exhibit 2-30**, to communicate with students. Students create their own rules via a social contract. Students hold each other accountable using “checks” and “fouls”. An environment is created that emphasizes positivity through “good things” and “affirmations”.

Exhibit 2-30
Capturing Kids Hearts EXCEL Model

Step	Description
Engage	Students are greeted at the door with a handshake, hug, or high-five with eye contact and a sincere welcome.
X-plore	Teachers listen and attend to the personal, emotional, and academic needs of our students.
Communicate	Teachers communicate care as well as content.
Empower	Teachers empower students to gain the ability to “use and do” the things they have been taught.
Launch	Deals with how we “end and send” our students into the world. The purpose is to start our students on a course of action by ending our classes on a powerful note

Source: https://www.reddingschools.net/parents/prospective_families/capturing_kids_hearts

Past research has shown positive teacher-student relationships promote student academic achievement, such as better grades and test scores. A new study at the University of Missouri found positive teacher-student relationships lead to better teaching as well.

The findings emphasize the importance of teachers demonstrating ‘soft’ skills, or prosocial behaviors, in the classroom – such as showing kindness, compassion and caring for others – compared to solely teaching students the traditional ‘hard’ skills of reading, writing and arithmetic.

“Students are more likely to learn when they feel cared for and valued by their teacher,” said Christi Bergin, Associate Dean and research professor in the Department of Educational, School, and Counseling Psychology and senior author on the study. “One reason for that is students tend to be more motivated to learn and be engaged in the classroom when their teacher likes and cares about them. Positive teacher-student relationships change student behavior, and in this study, we found building those positive relationships actually leads to better teaching, too. It changes teacher behavior.”⁴⁵

Xintong Li analyzed survey data from the Network for Educator Effectiveness, a system developed at the MU College of Education and Human Development. The survey asked students in grades four through 10 to evaluate their teachers on four teaching practices highly linked with student academic achievement: sparking cognitive engagement, critical thinking and problem solving, helping students follow along from one topic to the next, and making curriculum interesting and relevant. Other ‘relationship-building’ survey questions asked the students if they believed their teacher cared about them, was accessible to other students in class, and if they enjoyed learning from the teacher. Bergin found the students who reported having more positive relationships with their teachers also reported that their teachers used more high-impact teaching practices linked with student academic achievement. She explained that these high-impact teaching practices are often hard to implement, as they take a lot of effort and do not happen

⁴⁵ <https://education.missouri.edu/2022/03/positive-teacher-student-relationships-lead-to-better-teaching/>

frequently in classrooms. The study provides evidence that one way to activate high-impact teaching practices is to promote caring teacher-student relationships.

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COMMENDATION

The district's teachers are commended for their intentional efforts to support the social emotional learning needs of LWPS students.

FINDING 2-12

The LWPS counseling program is not serving the needs of students. The K-12 counselor works half day, with two hours assigned to counseling. The counselor helps with scheduling and administrative paperwork, teaches two classes, and is the district's testing coordinator. There is no in-class teaching and minimal one-to-one counseling.

Individual Career Academic Planning (ICAP) for students is provided by the Burns Flat Vo-Tech school and Wengage data is not input by the counselor. Currently, the counselor has random involvement with graduation requirements and career college support. No SEL counseling or coursework is implemented. There is minimal communication and interaction with teachers, students, parents, and the community at large. Most of the teachers assume the responsibility for addressing the social emotional well-being of students. Great Plains Youth & Family Services from Hobart comes to work with seventh and eighth graders every other week to address bullying.

In the student survey conducted for this review, (**Exhibit 2-31**) 25 percent reported the lack of college counseling services and 19 percent reported the lack of career counseling services. Only 34 percent and 43 percent, respectively, felt they were getting good counseling in these areas. Similarly, only 54 percent strongly agreed or agreed it was teachers who communicated with students regarding academic progress.

Exhibit 2-31
Student Survey Results Regarding Counseling Services

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I have access to good college counseling at this school.	12%	22%	41%	15%	10%
I have access to good career counseling at this school.	14%	29%	38%	12%	7%
My teachers communicate regularly with me about my academic progress.	14%	40%	21%	17%	7%

Source: Prismatic Survey Results, March 2023

Research indicates school counseling programs have considerable influence on discipline problems. Baker and Gerler reported that students who participated in a school counseling program had substantially fewer inappropriate behaviors and more positive attitudes toward school than those students who did not participate in the program. Another study reported that group counseling provided by school counselors considerably decreased participants' aggressive and hostile behaviors.⁴⁶

Two other studies found that elementary guidance activities have a positive influence on elementary students' academic achievement.⁴⁷ Comprehensive school counseling programs help provide equitable access to more educational opportunities. Through the counseling program, all students are guided to a rigorous curriculum, and can fully participate in the educational process.⁴⁸ As defined by ASCA, a comprehensive curriculum consists of K-12 "structured lessons designed to help students attain the desired competencies and to provide all students with the knowledge, attitudes, and skills appropriate for their developmental level."⁴⁹

Teachers make intentional effort to be available and meet the social emotional needs of students. Budgetary and staffing constraints prevent LWPS from having a K-12 comprehensive counseling program. However, LWPS students would benefit from in-class services, one-to-one social emotional support, and more college/career counseling. The district did not provide evidence that they review all aspects of the counseling program, identify key issues and how to better serve the counseling needs of students.

⁴⁶ Baker, S. B., & Gerler, E. R. (2001). *Counseling in schools*. In D. C. Locke, J. E. Myers, and E. L. Herr (Eds.), *The Handbook of Counseling*, Thousand Oaks, CA: Sage Publications. Omizo, M.M., Hershberger, J.M., & Omizo, S.A. (1988). Teaching children to cope with anger. *Elementary School Guidance & Counseling*, 22, 241-245. 37 Hadley, H.R. (1988).

⁴⁷ Hadley, H.R. (1988). Improving reading scores through a self-esteem prevention program. *Elementary School Guidance & Counseling*, 22, 248-252. Lee, R.S. (1993). Effects of classroom guidance on student achievement. *Elementary School Guidance & Counseling*, 27, 163-171.

⁴⁸ <http://www.schoolcounselor.org/>

⁴⁹ Bowers, J., & Hatch, T. (2005). *The ASCA national model: A framework for school counseling programs* (3rd ed.). Alexandria VA: American School Counselor Association.

RECOMMENDATION

Explore all options for improving counseling services for LWPS students.

The BOE, superintendent, and teachers should be keenly aware of the demographic profile of LWPS students. The student population needs a more comprehensive counseling program. Many K-12 students need help working through social/emotional challenges. Middle school and high school students need help planning their college/career paths and getting connected to the resources they need.

The BOE should give ample consideration to the possibility of increasing the counselor assignment by two hours, making counseling a full half day. The superintendent, principals, and teachers should provide coordinated leadership for identifying needs and seeking ways to improve the program. The counselor can continue the administrative, paperwork, and testing coordinator responsibilities currently in place. Should the district elect to add two more hours to the counselor's schedule, that time should be used to address character building and implement in class learning, provide college/career counseling, help students with ICAP, and provide more one to one counseling services.

In addition to CKH, another program to consider implementing for in-class character building is the Second Step Curriculum. Once a month the counselor presents lessons in the classrooms. The curriculum offers social-emotional learning. Age-appropriate lessons teach students about school and family communications, appropriate response and behaviors, and life skills needed to succeed in the real world.

LWPS should consider the following program components when improving the counseling program:

- establishment of a teacher advisement program;
- adoption of research-based, federally approved curriculums for bullying and drug use prevention;
- creation of a district-wide personal safety, social, and academic skill development program;
- establishment of strands for crisis intervention and group and individual counseling for at-risk students; and
- adoption of a schedule for the counselor, principal, and teachers to meet on a regular basis to evaluate and refine the comprehensive counseling program and services.

ASCA defines the school counselor's primary role as to design and implement a comprehensive district-wide program that promotes student achievement and personnel well-being. The program is preventive in design and developmental in nature. The ASCA National Model guides school counselors in the development of school counseling programs that:

- are based on data-informed decision-making;

- are delivered to all students systematically;
- include a developmentally appropriate curriculum focused on the mindsets and behaviors all students need for postsecondary readiness and success;
- close achievement and opportunity gaps; and
- result in improved student achievement, attendance, and discipline.⁵⁰

The ASCA framework identifies the four key components of an effective program. They include foundations, delivery, management, and accountability.

LWPS should clearly define program goals and develop a comprehensive district-wide plan for delivering counseling services to all students. The administrative staff and counselors should work with all stakeholders to implement comprehensive procedures and processes that drive the counseling program to enable the counselor to increase efficiency and effectiveness.

Effective district-wide counseling programs should have measurable data to analyze and determine how students are different because of counseling services. Student achievement in population subgroups and genders should have focus and attention. Student attendance patterns, discipline, and behavioral referrals also render data for program evaluation.

Board policy needs to articulate processes and procedures for the overall counseling plan. The plan's design should clearly outline the vision, scope, and job responsibilities of the district's counselors. The plan should be published, adopted by the board of education, and shared with all faculty, parents, and students. The basis and final product of the comprehensive plan should be driven by a focus to promote and enhance learning for students.⁵¹

FISCAL IMPACT

This recommendation can be implemented with existing resources.

⁵⁰ <https://schoolcounselor.org/About-School-Counseling/ASCA-National-Model-for-School-Counseling-Programs>

⁵¹ <https://www.schoolcounselor.org/getmedia/bd376246-0b4f-413f-b3e0-1b9938f36e68/ANM-executive-summary-4th-ed.pdf>

Bowers, J., & Hatch, T. (2005). *The ASCA national model: A framework for school counseling programs* (3rd ed.). Alexandria VA: American School Counselor Association.

Chapter 3:
Business Operations

Chapter 3

Business Operations

This chapter addresses the business operations of Lone Wolf Public Schools (LWPS) and is divided into the following sections:

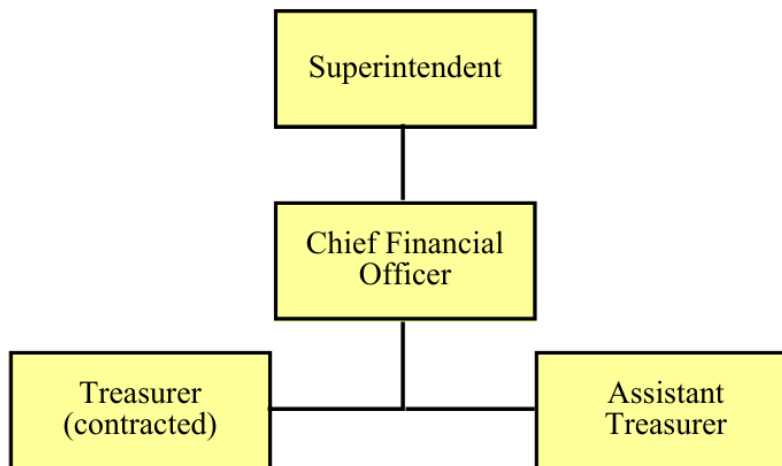
- A. Organization, Management, and Staffing
- B. Planning and Budgeting
- C. Accounting/Internal Control and Payroll
- D. Internal and External Auditing
- E. Fixed Asset Management
- F. Purchasing Policies, Procedures, Planning, and Operation

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

Background

Oklahoma law entrusts a school district’s board of education with specific responsibilities, including the oversight of investments and funds. The school board is allowed to contract with the county treasurer for the management of its accounts, or it may choose to appoint a treasurer. **Exhibit 3-1** shows the organization of LWPS business operations.

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



Source: Created by Prismatic, April 2023

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

Exhibit 3-2
Staff Survey Results Regarding Business Operations Functions

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Budgeting	42%	25%	8%	8%	0%	17%
Financial management	50%	17%	8%	8%	0%	17%

Source: Prismatic Survey Results, March 2023

Financial Statements

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

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

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

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

Source: LWPS Annual Financial Report, 2022

Oklahoma Cost Accounting System

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

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

Revenue Sources

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

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

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

A mill is the equivalent of \$1 per \$1,000 or (1/10 of a penny) of net asset valuation. Assessment ratios for real and personal property are determined locally by each individual county assessor within guidelines established by the State Board of Equalization and the Oklahoma Tax Commission. Property within the LWPS district boundary had a net valuation of \$7,624,703 in 2021 and \$7,771,221 in 2022. The millage rate levied was 74.45 in 2021 and 2022.

State funds and ad valorem taxes are accounted for in the general fund of the district, which is authorized pursuant to *Title 70, Section 1-117*, Oklahoma Statutes 2001, as amended pursuant to *Article X, Section 9*, of the Oklahoma Constitution. The purpose of the general fund is to pay for

operations. School districts are not authorized to use these revenues for capital expenditures as defined in the statutes.

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

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

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

Between 2015-16 and 2019-20, the average assessed property value per student in LWPS decreased by 52.7 percent as shown in **Exhibit 3-4**. This was the only decrease among all the comparison groups.

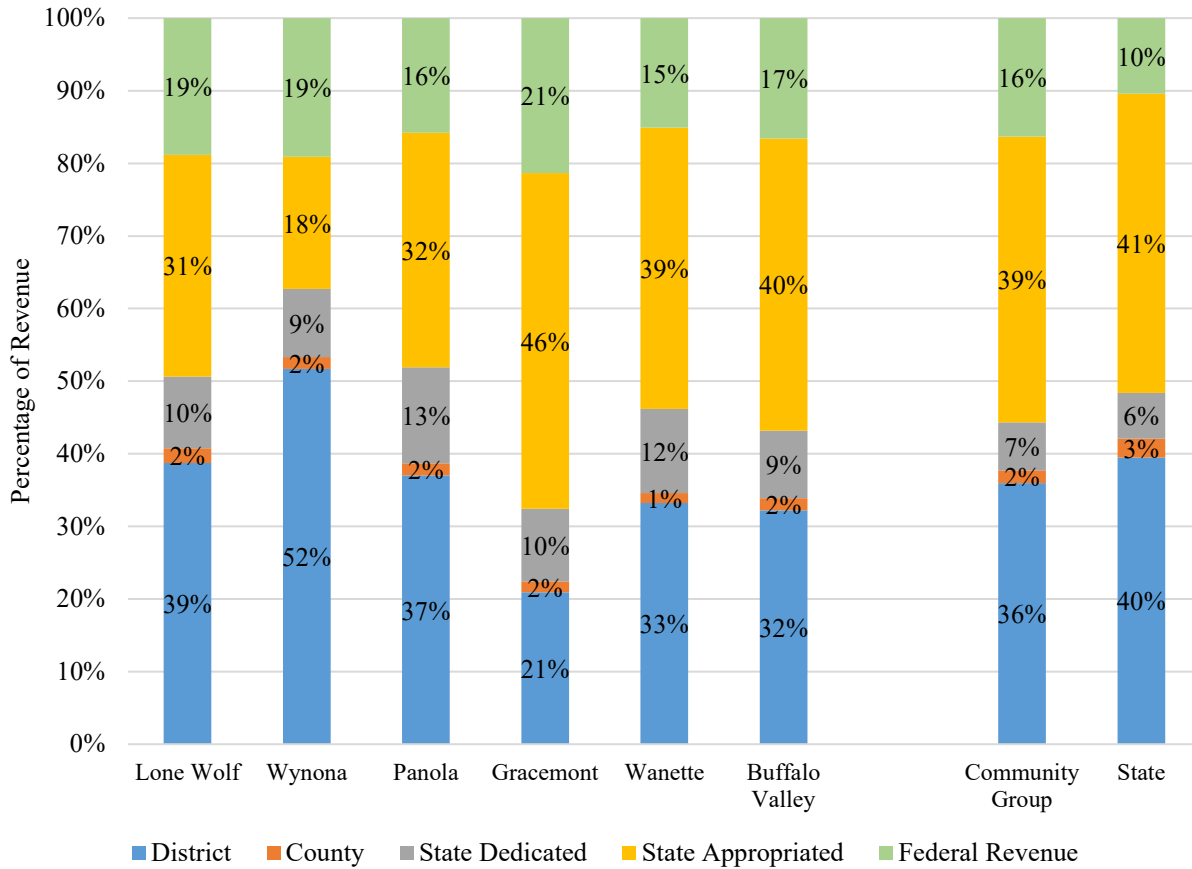
Exhibit 3-4
Trend in Assessed Property Value per Student

Entity	2015-16	2016-17	2017-18	2018-19	2019-20	Percent Change
Lone Wolf	\$137,653	\$58,710	\$67,794	\$85,874	\$72,648	(52.7%) ▼
Wynona	\$81,983	\$81,070	\$85,211	\$99,367	\$107,760	31.4% ▲
Panola	\$58,955	\$59,988	\$81,172	\$82,037	\$100,765	70.9% ▲
Gracemont	\$31,975	\$28,200	\$29,905	\$34,752	\$41,090	28.5% ▲
Wanette	\$49,980	\$56,906	\$62,111	\$69,384	\$74,615	49.3% ▲
Buffalo Valley	\$46,795	\$44,729	\$48,539	\$49,235	\$58,722	19.4 ▲
State	\$49,623	\$49,471	\$52,219	\$55,097	\$57,746	16.4% ▲

Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3-5 shows the percentages of district, county, state, and federal revenues for LWPS and its peers.

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



Source: Office of Educational Quality and Accountability, Profiles Database

Exhibit 3-6 shows the trend in revenue sources for LWPS, the community group, and the state. The LWPS district and county revenue percentage was more than the community group and state most years. The state dedicated and appropriated percentage of revenue was lower than the community group and the state all years. The percentage of federal funding was lower than the community group and the state nearly every year.

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

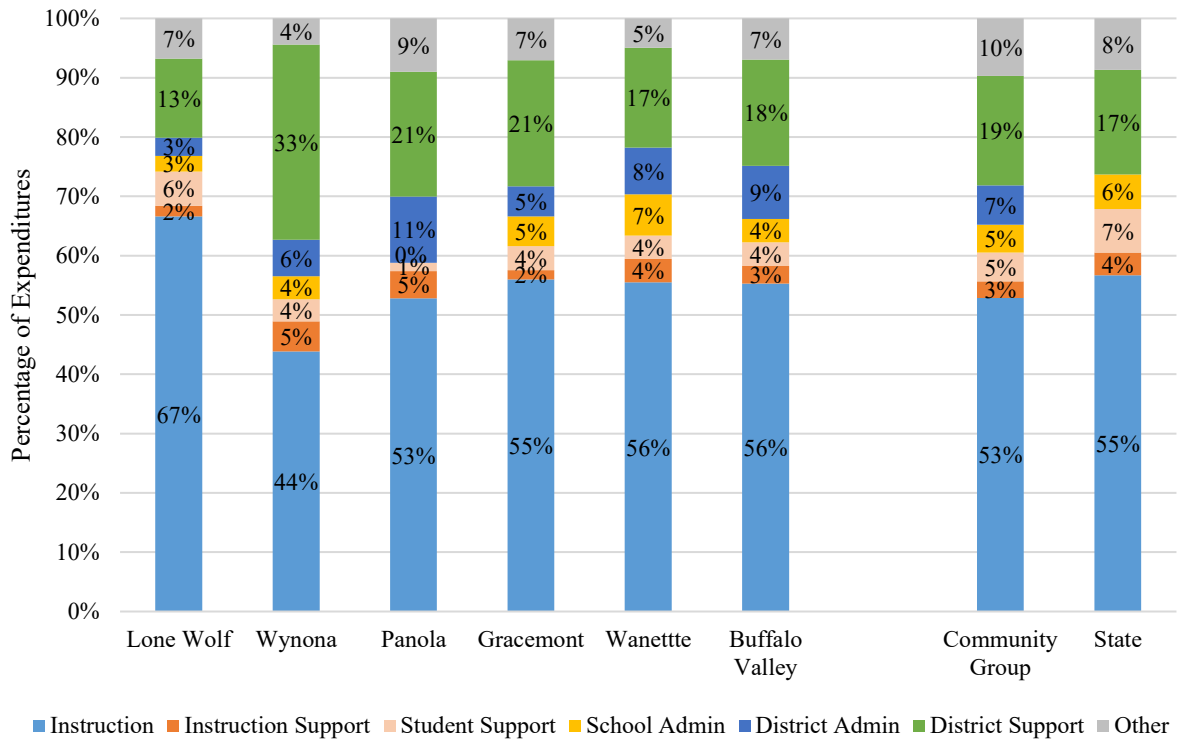
Source of Revenue	Entity	2015-16	2016-17	2017-18	2018-19	2019-20
District & County	Lone Wolf	45.1%	43.2%	45.9%	49.4%	40.7%
	Community Group	34.7%	37.4%	36.5%	36.9%	37.7%
	State	42.1%	43.2%	44.2%	41.9%	42.1%
State Dedicated & Appropriated	Lone Wolf	42.0%	44.6%	44.7%	43.6%	40.4%
	Community Group	47.7%	45.5%	46.6%	46.4%	45.9%
	State	46.3%	45.5%	45.1%	47.5%	47.5%
Federal	Lone Wolf	12.9%	12.1%	10.5%	6.9 %	19.8%
	Community Group	17.5%	16.9%	17.0%	16.6%	16.3%
	State	11.6%	11.3%	10.7%	10.6%	10.4%

Source: Office of Educational Quality and Accountability, Profiles Database

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

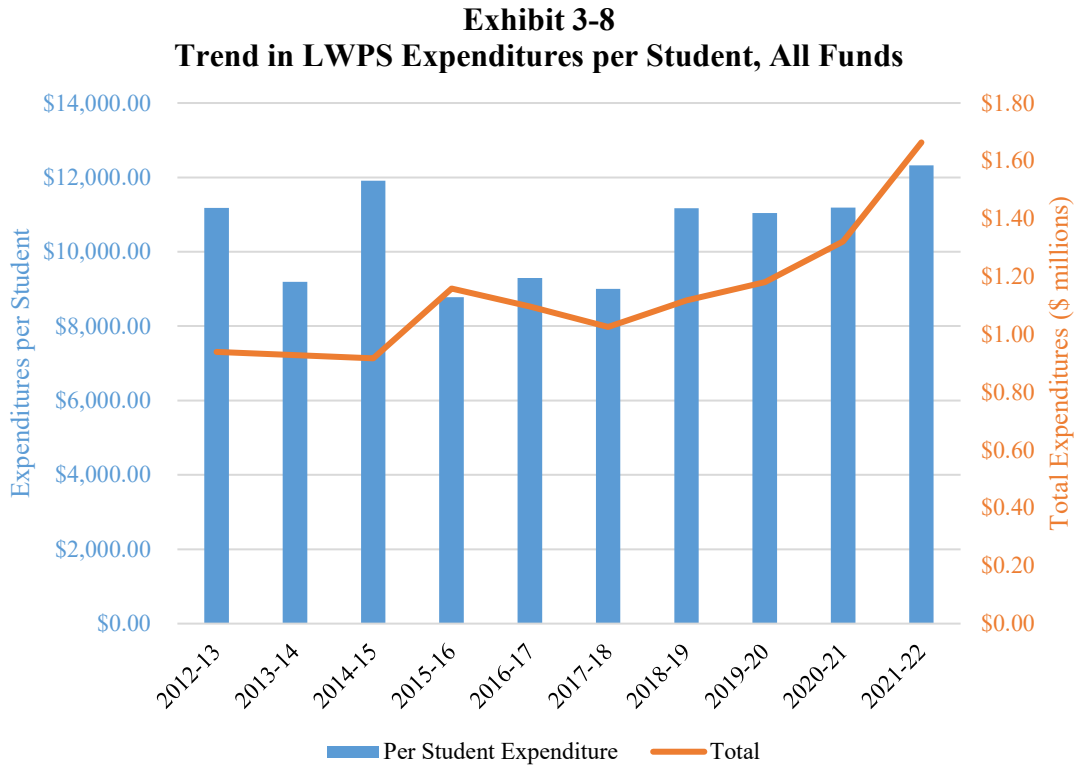
- LWPS spent the highest percentage among community groups on instruction.
- LWPS spent the least among the community group and state on instructional support.
- LWPS spent the lowest percentage of all comparison groups for school administration and district support, but higher in student support than the community groups.

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



Source: OEQA, Profiles Database

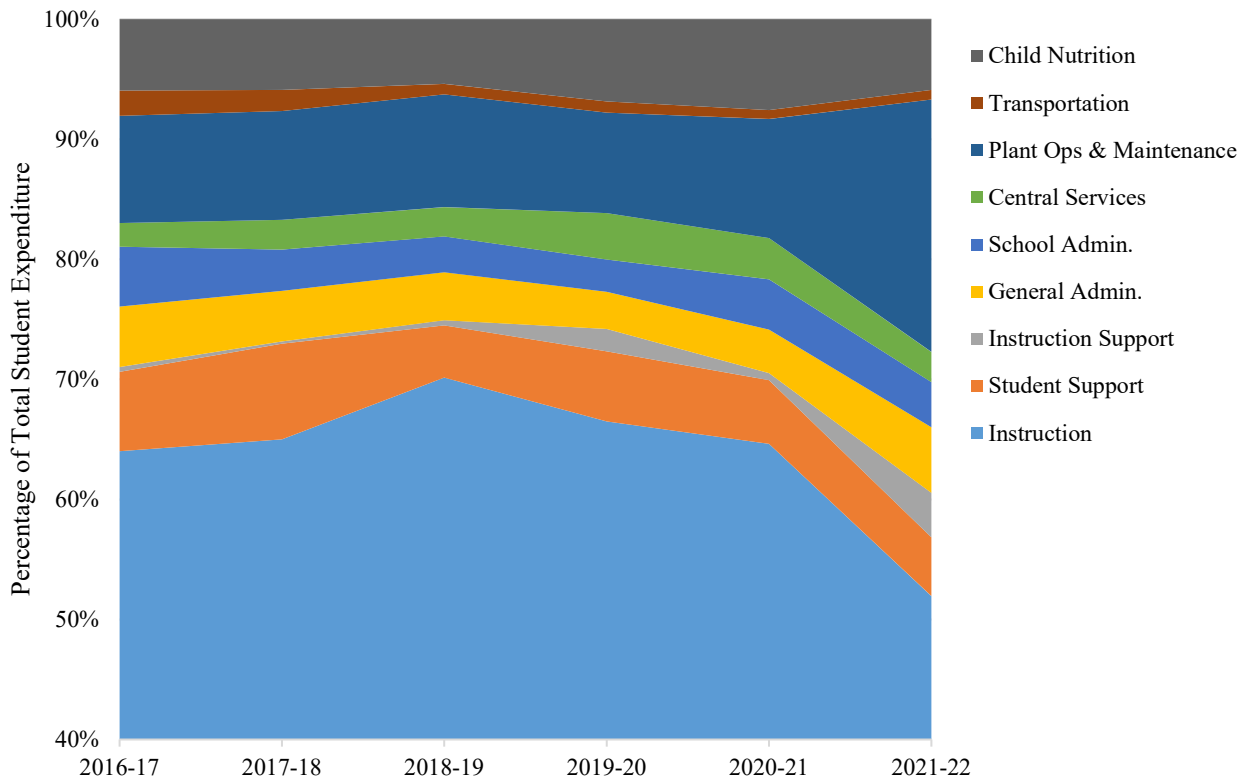
Exhibit 3-8 shows the trend in LWPS expenditures per student and overall, for the past 10 years. While the total expenditures have fluctuated between \$1 million and \$1.6 million, the per-student expenditures reached a maximum of \$12,323 in 2021-22.



Source: Oklahoma Cost Accounting System and Prismatic calculations

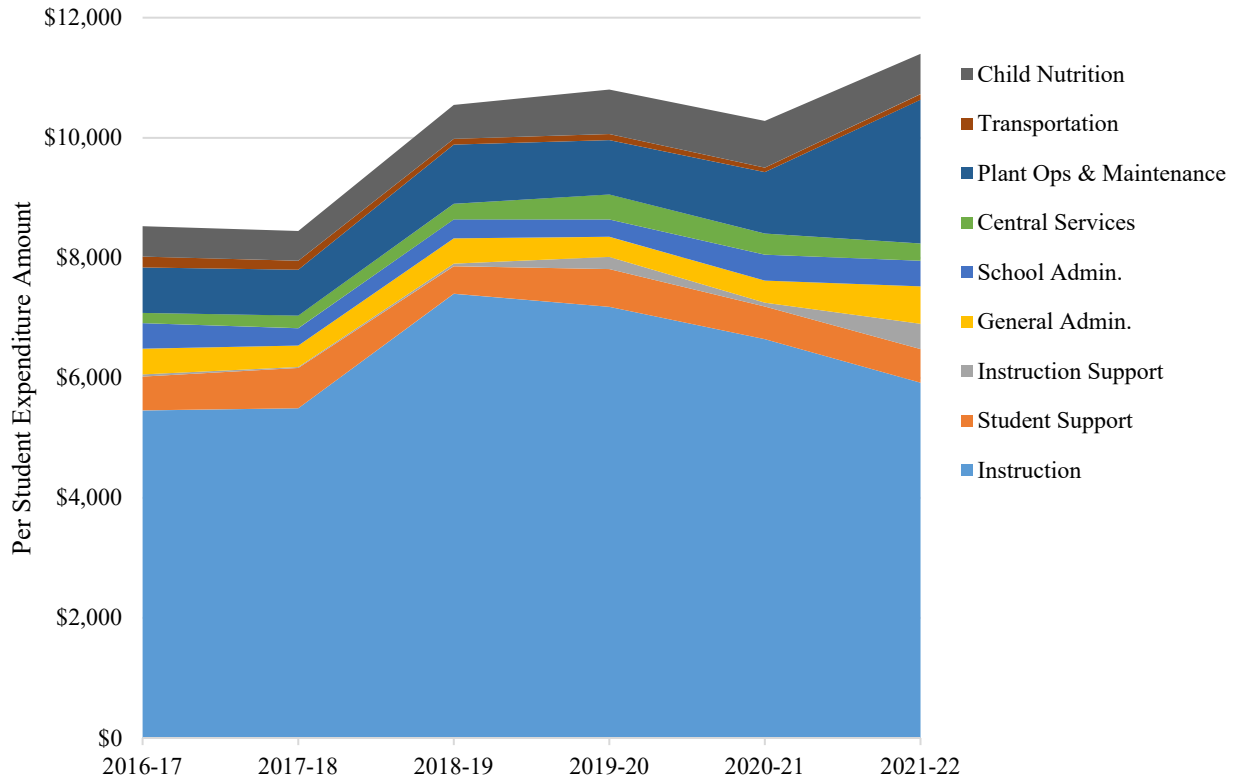
Exhibit 3-9 shows LWPS expenditures per student for the past six years, disaggregated by function code as a proportion of the total expenditures per student. **Exhibit 3-10** shows the same expenditures in dollars, also per student by function code. The function code is a dimension used to describe the service or commodity obtained as a result of the expenditure. As shown, as a proportion of total per-student expenditure, spending for instruction and plant operations and maintenance increased, while all other categories decreased or stayed the same. Across the period shown, the total dollars spent per student increased in every category.

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



Source: Oklahoma Cost Accounting System and Prismatic calculations, March 2023

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



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

Fund Balance

The fund balance, often referred to as “carryover,” is defined as the excess of assets over liabilities and is used in future years to offset any revenue shortfalls or negative midyear adjustments that may occur. Fund balance is the amount of cash that is not obligated by purchase orders, contracts, outstanding warrants, or other commitments. A healthy fund balance can be beneficial to a school district by permitting longer investment terms and bridging periods of low cash flow during the year. Perhaps more importantly, it helps the district maintain cash flow to get through the first part of the new school year until state aid distribution can catch up with the district’s obligations.

A school district’s fund balance policy can provide guidance for the development and implementation of an annual budget. Oklahoma public school laws provide guidance regarding the allowable year-end balances. *Title 70, Section 18* of Oklahoma Statutes provides the maximum amount, as a percentage of total general fund collections, that a school district can maintain as a fund balance. **Exhibit 3-11** shows the table of maximum allowable balances expressed as a percentage of their general fund collections.

**Exhibit 3-11
Maximum Allowable Balances at Year End**

General Fund Collections	Maximum Allowable Balances
less than \$1,000,000	40%
\$1,000,000 - \$2,999,999	35%
\$3,000,000 - \$3,999,999	30%
\$4,000,000 - \$4,999,999	25%
\$5,000,000 - \$5,999,999	20%
\$6,000,000 - \$7,999,999	18%
\$8,000,000 - \$9,999,999	16%
\$10,000,000 or more	14%

Source: SDE Technical Assistant Document, July 2009

Bond Issuance and indebtedness

Article X, Section 26 of the Oklahoma Constitution prohibits school districts from issuing debt without the 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 3-12** compares the district’s average daily membership (ADM), assessed property value, and bonding capacity for the last eight years. As shown, ADM has decreased since 2015-16 by 16.4 percent while property value and bonding capacity have increased by 10.9 percent.

**Exhibit 3-12
LWPS Trends in ADM, Assessed Values, and Bonding Capacity**

School Year	ADM	Assessed Property Valuation	Bonding Capacity
2015-16	128	\$7,136,641	\$713,664
2016-17	123	\$7,218,395	\$431,840
2017-18	109	\$7,386,829	\$448,683
2018-19	90	\$7,734,658	\$548,466
2019-20	104	\$7,559,790	\$605,179
2020-21	113	\$7,624,703	\$687,470
2021-22	122	\$7,771,221	\$777,122
2022-23	107	\$7,911,288	\$791,128
Percent Change	(16.4%) ▼	10.9% ▲	

Source: Office of Educational Quality and Accountability, Oklahoma State Auditor and Inspector

The debt service expenditure per student is based on the amount of outstanding debt and the number of students a district has during a given school year. Districts must balance facility and equipment needs with the amount of tax money requested of district taxpayers. In 2019-20,

LWPS had the highest debt service expenditure per student of its peer districts and was higher than the community group but less than the state. (**Exhibit 3-13**).

Exhibit 3-13
Debt Service Expenditures per Student, 2019-20

Entity	Debt Service per Student
Lone Wolf	\$762
Wynona	\$636
Panola	\$372
Gracemont	\$730
Wanette	\$0
Buffalo Valley	\$527
Community Group	\$477
State	\$1,152

Source: Office of Educational Quality and Accountability, Profiles Database

A. ORGANIZATION, MANAGEMENT, AND STAFFING

School districts must practice sound financial management to maximize the effectiveness of limited resources and to plan for future needs. Effective financial management ensures that internal controls are in place and operating as intended, technology is maximized to increase productivity, and that reports are generated that help management reach its goals.

Financial management includes the broad areas of organization, management, and staffing of the financial management function, planning and budgeting, accounting/internal control and payroll, internal and external auditing, and cash management. The district is required to manage its financial operations in conformity with the regulations and requirements of the Oklahoma State Department of Education’s (SDE) Oklahoma Cost Accounting System (OCAS) and to report its data to the SDE.

Financial management is most effective when a district properly aligns its business services functions, establishes strong systems of internal control, and properly allocates staff resources to achieve the best results. A department that is well-defined in those areas is well-positioned to succeed at its core functions.

Day-to-day financial processes should be efficient and effective. They should also be documented, transparent, and rational. Accounting and payroll are among the most important business functions performed by a school district. Although regulations such as the OCAS and other accounting standards exist, actual practices can vary widely among Oklahoma school districts. **Exhibit 3-14** indicates that staff has a largely favorable opinion of district administrative processes.

**Exhibit 3-14
Staff Survey Results Regarding LWPS Administrative Processes**

Survey Question	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Most district administrative processes (i.e. purchasing, travel requests, leave applications, personnel, etc.) are highly efficient.	25%	67%	0%	8%	0%

Source: Prismatic Survey Results, March 2023

FINDING 3-1

In the past, employee leave was recorded manually in a black notebook and tracked by the secretary. This year, the CFO has entered the leave balances into Wengage, the district’s payroll software, but there is no formal leave policy in place. Also, there is no vacation leave policy for 12-month employees.

The school district lacks an employee leave policy. Prior to this year, sick and personal leave was tracked by hand in a small spiral notebook with specific pages dedicated to each employee. Since the CFO was hired in September 2022, she has transferred the leave balances for employees into the district’s financial software, Wengage. Now, employees complete a form to submit leave and the CFO enters it into the software so that it can be tracked electronically.

During interviews, it became apparent that there is no policy in place regarding leave since no one could locate the board policy manual. Twelve-month employees do not take vacation leave when they need to take time off due to the district not having a formal policy listing the types of leave available for employees to use. Before the district began using the software to track leave, the manual system had the potential to lead to errors and a lack of accuracy in recording leave balances. This could lead to unnecessary costs to the district if an employee is able to use more leave than would be allowed by policy.

Most districts have existing leave policies in place as part of their Board of Education policy manual. These policies lay out how different types of leave are available based on employee type, how the leave is earned, restrictions on the use of specific leave, the amounts that are earned annually, and the allowed accrual balances. Using the district’s payroll software to track the leave not only leads to greater accuracy but also more awareness for employees as the leave balances can be printed on an employee’s pay stub or direct deposit advice slip. Having a leave policy in place provides clarity for employees and sets an expectation on how leave is used when an employee asks for time off work. A clear policy also ensures fairness that leave is administered consistently to all employees.

RECOMMENDATION

Create a leave policy for employees in the newly created board policy manual that includes sick leave, personal leave, and vacation leave that includes the amounts earned, the allowed accrual, and guidelines for how it can be used.

The Superintendent and CFO should work with the Oklahoma State School Boards Association or their legal representation to establish an employee leave policy that is consistent with state education laws and that uses the most common leave practices in Oklahoma school districts. The policy should be competitive with surrounding districts to attract or retain employees. The policy needs to provide clear guidance on the types of leave available, the amounts earned, how leave is to be used, the process for approval, and the allowed accrual balances for unused leave. The types of leave that should be considered in the policy are sick leave, personal leave, vacation leave, and other types such as bereavement leave.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-2

The key responsibilities for the job functions of the chief financial officer are in written format.

The Chief Financial Officer performs several job functions for the school district. The position performs the role of encumbrance clerk, payroll clerk, personnel clerk, and board minutes clerk. There are written lists of responsibilities for each of these key functions. The CFO created these written job responsibilities after she was hired in the fall of 2022. While the written lists do not detail the steps to perform each function, the lists are easily understandable, and this should help others if the CFO must take leave or chooses to end their employment at LWPS.

For internal controls to operate effectively, all employees need a documented reference detailing how they perform their assigned daily duties. An employee's desk procedures are in much more detail than an employee handbook and are basically a step-by-step written document approved by administration that describes how an employee is expected to complete their individual daily assignments. Desk procedures facilitate the cross-training of employees and training of new employees since they provide the step-by-step instructions needed to perform specific tasks. This increases internal control by helping to ensure procedures are performed correctly.

A thorough desk procedure covers a task's steps to a sufficient degree of detail that an individual attempting a task for the first time can perform it with little additional instruction. The procedure also lists forms to be used, computer screens that are accessed, fields on the screens in which information is to be entered, as well as identifying other positions that supply information, or other positions which receive information once a procedure has been completed.

Without approved desk procedures, employees complete their duties based on verbal directions that may have been received quite some time ago and may have since become stale.

Additionally, without a written guide, employees are left to improvise and develop their own ways to complete tasks, often leading to errors.

COMMENDATION

The district is commended for having written key responsibilities for each of the key functions of the Chief Financial Officer.

B. PLANNING AND BUDGETING

An organization’s budget development and management establish the foundation for all other financial operations. The budget process should be strategic in nature and consist of activities that encompass the development, implementation, and evaluation of a comprehensive plan for student success.

The National Advisory Council on State and Local Budgeting (NACSLB) has identified four essential principles of effective budgeting. The specific principles include the following tasks:

1. Set broad goals to guide decisions.
2. Develop strategies and financial policies.
3. Design a budget supportive of strategies and goals.
4. Focus on the necessity of continually evaluating goal achievement.

**Exhibit 3-15
Survey Results Regarding District Budgeting**

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	Funds are managed wisely to support education in this district.	8%	50%	25%	17%	0%
	The budgeting process effectively involves administrators and staff.	8%	25%	33%	25%	8%
	My school/department allocates financial resources equitably and fairly.	9%	55%	27%	9%	0%

Source: Prismatic Survey Results, March 2023

FINDING 3-3

The school district's enrollment is declining, and the district is facing future financial challenges. The district is currently funded based on 2022-23 enrollment figures for their state aid allocation, but enrollment has dropped by approximately 30 students in the past two school years. Currently, 60 percent of the district's enrollment is transfer students.

The Oklahoma state aid formula funds school districts based on student enrollment. Students are weighted based on their grade year, if they qualify for free or reduced lunch, if they are identified for gifted services, if English is not their primary language, and if they are identified for Special Education services. A school district can use the highest of either the current year or the prior year's Weighted Average Daily Membership (WADM) based on enrollment on October 1st of each year. Currently, Lone Wolf is using their 2021-2022 WADM for State Aid purposes. The Average Daily Membership (ADM) for 2021-2022 was 121.33 and the WADM was 212.12. The district's current year ADM is 106.79 and the WADM is 179.99. If the district is required to use the current year enrollment for state aid next year, the district would lose an estimated \$123,684 in revenue for the 2023-24 school year. This estimate is based on the current state aid factor of \$3,849.48. At the time of this review, the district had an enrollment of 92 students which would lead to even further reductions in the future.

A majority of the current enrollment is transfer students from other districts. Having a large proportion of your student body on a transfer basis leads to even greater uncertainty if those students return to their home district in the future. If that were to occur, the district would face more financial challenges. Financial concerns were often mentioned in the onsite interviews with staff and the advanced interviews with various stakeholders. The current level of district expenditures will not be able to be maintained as future revenue declines. The district, at some point in the future, will cease to operate financially without changes in its spending.

GFOA recommends that governments adopt rigorous policies for all operating funds, aimed at achieving and maintaining a structurally balanced budget. The policy should include parameters for achieving and maintaining structural balance where recurring revenues are equal to recurring expenditures in the adopted budget.

Jenks Public Schools several years ago created a list of strategies to consider during revenue fluctuations. The list is a working document and items are added for future consideration or removed if the strategies have been implemented or are no longer relevant. This document was created in a year when the budgets were not strained so that the list was thoughtful and various stakeholder input was involved. This list has been used during multiple economic downturns to help guide the district through challenging situations. Since the document was created when times were better financially, strategies have been easier to implement due to less emotion involved in the decision-making process.

RECOMMENDATION

Create a list of expenditure reductions to implement over the next year to help align the district's expenditures with the reduced available revenue.

With consistent declining enrollment and less future revenue likely available, the district must begin to prepare for future budget years. The district should form a committee of various stakeholders to review all current expenditures, including all services and programs. Expenditures should be categorized as either one-time costs or recurring costs and identified as instructional or non-instructional expenses. If a service or program is eliminated, all implications should be considered including any unintended costs from cutting the item. Some items may save the district money in other areas. The list should include the dollar amount that would be saved, or if it is a strategy that brings in potential new funding, list the amount of estimated additional revenue. Behavior changes should be considered as well. An example of a behavior change could be a strategy such as adjusting all thermostats to a specific setting during the summer and winter to save on energy costs. The list should include both short-term and long-term strategies. Once the list is finalized by the review committee, it should be taken to the Board of Education for approval before the items are implemented.

FISCAL IMPACT

This recommendation can be implemented with existing resources. The recommendation will save the district an undeterminable amount for future budget years based on the level of adjustments made in the district's spending.

FINDING 3-4

The school district offers a tuition-free early childhood program for three-year-olds, yet only one of the ten students lives within district boundaries. The district receives no revenue for these students.

The state aid formula only funds students who are enrolled in grades Pre-Kindergarten through 12th grade. The Pre-Kindergarten offered in districts is a program for students who are four years old. Any district that offers an early childhood program for kids under the age of four does so without any state funding. Most who offer these to their patrons do so on a tuition basis as a service to the community. Some early childhood programs may partner with local non-profits or tribes so that tuition is reduced for parents, but revenue is still received by the district from a partner institution to subsidize the program to ensure all expenses are covered.

Lone Wolf offers a tuition-free 3-year-old program as a service to the community but there is no revenue received to offset the expenses of the program. Of the children enrolled in the program at the time of the review, 90 percent lived outside the community. The district is spending over \$20,000 annually on the program. While quality early childhood programs are likely to increase future academic outcomes for students, it is difficult to continue to provide such a program at no cost while facing financial challenges. In interviews with staff, it was mentioned that the district decision-makers were committed to the current tuition-free program even when presented with the financial information. With the district facing future budget challenges due to lower

enrollment totals, older students already have limited activities to participate in outside of classroom instruction. Many older students transfer to other local districts to participate in athletics or other programs not offered at Lone Wolf. Continuing to operate the early childhood center further limits the district's ability to offer additional opportunities for those older students. Another cost consideration is the roof needs to be replaced for the building that houses the program (**Exhibit 3-16**).

Exhibit 3-16
Three-Year-Old Program Building



Source: Prismatic Services Photo, March 30, 2023

In order to sustain a program financially, there must be a dedicated stream of recurring revenue to pay for the annual operating costs. If expenditures are not aligned with available revenue, eventually the program will cease to exist. This is the reason why most early childhood programs charge tuition.

RECOMMENDATION

Eliminate the three-year-old program as an expenditure reduction measure to assist in aligning the district's budget with its declining enrollment and revenue.

District leadership should perform a cost analysis of all expenses related to operating the current program. This will lead to a more thoughtful process and bring awareness to the issue. The information obtained through this process should be shared with community stakeholders for all involved to have a true understanding of the situation. Families with students involved in the program should be given adequate time to find other arrangements before the program is discontinued.

FISCAL IMPACT

This recommendation has the potential to save the district an estimated \$20,000 in operating expenses annually. This was calculated using the payroll costs of the current employee, building maintenance and utilities, classroom materials, and other program-related costs.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Discontinue 3-year-old program.	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000

FINDING 3-5

The district has applied for a few competitive state or federal grants to assist with district needs, yet the district has limited money to address student needs from existing funds. The district could potentially be missing out on additional revenue.

The district receives Federal Title funds and IDEA funds to assist in providing services to special education students. Federal Covid-related funds have assisted the district for the last three years in helping the district pay for a bus, an HVAC project, and supplemented a roofing project. The district has not sought out many opportunities to apply for competitive grants at the state and federal levels. In the past two years, there have been funding opportunities with the Department of Justice along with Twenty-First Century grants to provide districts with much needed resources, yet the district did not apply for these grants.

As stated in earlier findings, the district faces financial challenges. Applying for additional funding opportunities could allow the district to provide needed services or resources to benefit the students in Lone Wolf. Many grants can provide multiyear commitments such as a three-year or five-year grant. Seeking out these opportunities can provide the district with additional revenue streams and could also help bring programs to help retain staff and students.

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

RECOMMENDATION

Research and apply for available grant opportunities to assist in providing additional funding sources to LWPS.

The district should research programs and services that other districts are funding through competitive grant opportunities and identify those that would enhance the educational experience for the students of Lone Wolf. Once those opportunities are identified, the district should submit applications seeking those opportunities. The district may need to pay for the services of an organization or consultant to ensure that the applications are completed correctly so that the

district has a greater chance of being awarded the grant. With some of the aging facilities, there may be some funding opportunities to assist in the restoration of a building.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-6

The district ended last year with an adequate fund balance, but there is not a targeted fund balance range to protect the district from future revenue fluctuations. This year’s balance is mostly inflated due to the amount of pandemic-related funding flowing through the budget.

School districts with annual general fund collections between \$1,000,000 to \$2,999,999 are allowed to have an ending cash balance of up to 35 percent to carry over into the next fiscal year (**Exhibit 3-11**). Any funds exceeding that carryover percentage are subject to state aid penalties. Lone Wolf does not have a targeted fund balance range policy. The district’s fund balance has decreased from 25.6 percent to 16.1 percent in the past three years (**Exhibit 3-17**), even with the receipt of federal Covid relief funds.

**Exhibit 3-17
Trend in LWPS General Fund Balances**

	2019-20 Actual	2020-21 Actual	2021-22 Actual
General Fund Collections	\$1,115,009	\$1,098,976	\$1,563,294
Fund Balance	\$285,508	\$170,805	\$252,634
Percentage of General Fund Collections	25.6%	15.5%	16.1%
Fund Balance Year-Over-Year Change		(39.4%)	3.8%
Fund Balance Three-Year Change			(37.1%)

Source: LWPS Annual Audit Reports, 2019-20 through 2021-22, and Prismatic calculations

The district has not adjusted recurring expenditures with the amount of revenue available and has been operating at a deficit which has had a negative impact on the fund balance. Without a targeted fund balance, it creates difficulty in making expenditure decisions and creating an annual budget.

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

The Government Finance Officers Association (GFOA) has developed standards for fund balance and recommends that:

- Governmental agencies establish a fund balance policy setting forth unreserved balances.
- The level of these recommended unreserved balances is based on unique characteristics and needs.
- Unreserved balances are no less than five percent of general operating revenues or no less than one or two months of regular general fund operating expenditures.
- Accountability measures consider long-term forecasting.

For example, Guthrie Public Schools in Oklahoma has a general fund balance policy that states:

An adequate level of general fund balance is required in order to maintain efficient cash flow, cover emergency expenditures, adjust for revenue shortfalls, and avoid paying interest on non-payable warrants. To maximize the efficient use of this fund, the board of education establishes the fiscal management priority objective of achieving and maintaining a general fund balance of twelve percent (12 percent). Should the general fund balance drop below a minimum level of eight percent (8 percent), the administration shall give 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 3-18** shows a sample of the data included in that report. This report is shared with the superintendent and school board.

Exhibit 3-18
Example Fund Balance Projection Report

Expenditure Classification	2014-15 Activity	2015-16 Activity YTD Activity	2015-16 Projected Activity	2015-16 Total Activity	Increase/ (Decrease)
BEGINNING FUND BALANCE					
Current Year	\$2,745,439	\$2,776,000	\$0	\$2,776,000	\$30,561
Lapsed From Prior Year	\$0	\$23,560	\$0	\$23,560	\$23,560
REVENUES					
Local Sources	\$4,758,920	\$3,894,754	\$938,950	\$4,833,704	\$74,784
Intermediate Sources	\$849,719	\$617,776	\$227,224	\$845,000	(\$4,719)
State Sources	\$15,047,772	\$7,707,310	\$5,737,251	\$13,444,562	(\$1,603,210)
Federal Sources	\$1,541,225	\$1,023,399	\$516,958	\$1,540,357	(\$868)
Non-Revenue Receipts	\$223,533	\$48,579	\$161,421	\$210,000	(\$13,533)
Total Revenues	\$22,421,169	\$13,291,818	\$7,581,805	\$20,873,623	(\$1,547,546)
EXPENDITURES					
Total Expenditures	\$22,390,608	\$21,329,397	\$540,382	\$21,869,778	(\$520,830)
ENDING FUND BALANCE	\$2,776,000	(\$5,238,018)	\$7,041,424	\$1,803,405	(\$972,595)

Source: Guthrie Public Schools, February 2016

RECOMMENDATION

Establish a general fund balance policy to provide guidance on how to achieve the minimum required balance, provide a desired fund balance range, and require fund balance status reports to the board of education.

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

It is recommended that the superintendent and the board of education should create a fund balance target maintaining at least two months of regular general fund operating expenditures as recommended by GFOA. In 2021-22, the district general fund expenditures totaled \$1,481,465. Two months of expenditures would have totaled \$246,911. The district ended the year with a fund balance of \$252,634. This district would have met this goal last year if a policy had been in place.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

C. ACCOUNTING/INTERNAL CONTROL AND PAYROLL

Day-to-day financial processes should be efficient and effective. They should also be documented, transparent, and rational. Accounting and payroll are among the most important business functions performed by a school district. Although regulations such as the OCAS and other accounting standards exist, actual practices can vary widely among Oklahoma school districts. A sound accounting and payroll system can provide numerous benefits including:

- providing internal controls and safeguards;
- providing timely reporting on the status of funds; and
- allowing systematic disbursements to maximize available funds.

FINDING 3-7

In reviewing district financial statements, there were several OCAS coding errors that misrepresented how district funding was spent in specific areas in the prior year. The district's OCAS data wasn't approved by the State Department of Education until after the official deadlines due to errors.

Accuracy in financial reporting is vital for public trust for institutions funded by taxpayer dollars. Public trust is extremely important when districts are struggling financially. When reviewing data for Lone Wolf, there were instances where errors in OCAS coding misrepresented how money was expended by the district in 2021. One example was \$5,367.79 coded as Books (E-books) but was used for milk purchases. Another example was \$400 was coded to the child nutrition function code for food and milk purchases but was used for Natural Gas purchases. Both can be seen in **Exhibit 3-19**.

Exhibit 3-19
Child Nutrition OCAS Coding Errors

			Noncertified Personnel	
3120	Food Preparation and Dispensing Services	241	FICA - Employer's Contribution - Noncertified Personnel	\$1,744.47
3120	Food Preparation and Dispensing Services	242	Medicare - Employer's Contribution - Noncertified Personnel	\$407.94
3120	Food Preparation and Dispensing Services	437	Plumbing Services	\$12.99
3120	Food Preparation and Dispensing Services	618	Cleaning, Maintenance and Groundskeeping Supplies	\$614.00
3120	Food Preparation and Dispensing Services	810	Dues and Fees	\$125.00
3130	Food and Supplies Delivery Services	599	Other Purchased Services	\$156.69
3140	Other Direct and/or Related Child Nutrition Programs Services	410	Utility Services	\$1,636.50
3140	Other Direct and/or Related Child Nutrition Programs Services	437	Plumbing Services	\$100.00
3140	Other Direct and/or Related Child Nutrition Programs Services	570	Food Service Management	\$1,066.15
3140	Other Direct and/or Related Child Nutrition Programs Services	617	Kitchen Products and Supplies	\$1,523.70
3140	Other Direct and/or Related Child Nutrition Programs Services	624	Electricity	\$2,898.62
3140	Other Direct and/or Related Child Nutrition Programs Services	627	Natural Gas	\$4,033.07
3140	Other Direct and/or Related Child Nutrition Programs Services	651	Appliances / Furniture / Fixtures	\$2,693.97
3140	Other Direct and/or Related Child Nutrition Programs Services	731	Appliances / Furniture / Fixtures	\$5,017.45
3150	Food and Milk Purchases for Reimbursable Student Meals	630	Food and Milk	\$30,678.79
3150	Food and Milk Purchases for Reimbursable Student Meals	641	Books / EBOOKS	\$5,367.79
3155	Food and Milk Purchases for Adult/Contract Meals	627	Natural Gas	\$400.00

Source: Oklahoma State Department of Education Website

A total of \$92,979.37 was coded to the object code for Buildings, which would be used for the purchase of a building. Instead, it was used for a capital improvement project from ESSER Funds that should have used contracted services 400 series object code. In the interviews with staff, the CFO had to correct many OCAS issues from prior staff. The district had missed the submission deadline by 45 minutes. Since the district did not have district email in place prior to this year, emails from the OSDE to correct errors were going to personal email addresses belonging to employees who were no longer in LWPS. The district had to ask the State Board of Education for an OCAS waiver for 2021-22 since the deadline was missed for the data submission.

According to GFOA, trust is an asset as important as any that can be found on a balance sheet. Public service is a special trust. The finance office plays an important role in the public service. The finance office has stewardship over citizens' shared financial resources. These resources make possible the services that are essential to the safety, livability, and vitality of our communities.

RECOMMENDATION

Invest in professional development for the business office staff that is available from the Oklahoma State Department of Education or state education associations such as OKASBO and prioritize the need for accurate financial reporting.

The district should prioritize the importance of accurate financial reporting. The superintendent needs to identify the staff members who need to attend the OSDE OCAS workshops. Staff needs to download the available OCAS manuals and review them monthly to become familiar with all elements of the OCAS code. While only the Treasurer and Encumbrance Clerk are required by law to have a required number of current training hours for accreditation purposes, the district should develop professional development requirements for business office staff which should include OCAS training. The CFO and Superintendent should review financial reports monthly to find exceptions so that errors can be corrected in a timely manner.

FISCAL IMPACT

The recommendation can be implemented with existing resources.

FINDING 3-8

There are no written activity fund procedures in place. No one can find any written guidance from past years.

While there are not many fundraising efforts for the Activity Fund, the absence of written procedures for activity funds creates risks that are unnecessary. The main two fundraising activities for the district activity fund are Blue and Gold Sausage sales and Bingo nights. In the staff interview with the CFO, it was stressed how much the community enjoys the two-night bingo event. When asked if the district secures a license from the Oklahoma ABLE Commission for the night, there was a pause and the CFO said, “probably not.” While raffles or bingo nights are allowed in public schools, specific rules must be followed to ensure that the event operates within what is allowed in state statutes. This is the type of guidance that should be included in a written manual.

The district lacks a written document detailing the processes to be performed by staff involved with activity funds. Without a manual that provides detailed instructions, it is difficult for the processes to be standardized and the district is at risk of not fulfilling its responsibility to properly administer activity funds. A manual normally includes written guidance on how funds may be expended, how receipt and disbursement transactions are to be documented, how to reconcile gate receipts, who is required to approve various transactions, and when cash must be submitted to the activity account custodian.

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

Written procedures are essential to maintaining proper internal controls for an organization. Ideally, written procedures are provided to all activity fund sponsors in the form of a handbook. A typical handbook would include these sections:

- general information;
- responsibilities of the principal;
- responsibilities of sponsors;
- responsibilities of the activity fund custodian;
- procedures for fundraisers;
- procedures for purchasing;
- sponsor procedures for receipting;
- activity fund custodian procedures for receipting money;
- important points to remember, sponsor;
- important points to remember, activity fund custodian; and
- activity fund project codes.

For example, Guthrie Public Schools publishes a comprehensive manual that provides guidance for managing school activity funds. The manual provides instructions and guidelines that cover over 30 topics along with forms, board policies, and examples. Topics in the manual include:

- procedures for purchasing;
- receiving and depositing cash;
- accounts payable;
- administrator responsibilities;
- receipts and deposits; and
- expenditures.

The Guthrie handbook also includes Oklahoma state laws and SDE regulations pertaining to activity funds. The manual is reviewed annually and updated as needed. It provides a valuable resource to principals and sponsors, as they manage activity funds and prepare various documents related to activity funds.

RECOMMENDATION

Develop a written activity fund procedures manual to ensure funds are properly administered.

The procedures should clearly state how all activity funds are to be administered and thus will assist the superintendent, staff members, and sponsors in fulfilling their responsibilities. The handbook also will provide a good reference for those same individuals. An electronic copy of the handbook should be published on the district website.

The CFO should require every sponsor to read the handbook and sign an “activity account sponsor’s affidavit of responsibility” stating that they have read the handbook and understand it. This form should also be signed by the individual and the activity account name or number for which they are responsible. The individual could be issued a receipt book only upon approval of this affidavit.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

D. INTERNAL AND EXTERNAL AUDITING

Internal and external audits provide a review of the district’s compliance with established standards and practices. External audits are required of all Oklahoma school districts and are performed by state-approved public accounting firms. The external audit provides:

- an annual financial and compliance report;
- an examination of the expenditure of federal funds (as applicable); and
- a report to management on internal accounting controls (as applicable).

The internal audit function supplements the work of the external auditor. The internal audit function examines specific areas to determine:

- the adequacy of internal controls;
- compliance with adopted policies and procedures;

- adherence to applicable law and regulation; and
- efficiency and effectiveness of operations.

E. FIXED ASSET MANAGEMENT

Fixed asset management involves managing the district’s physical assets in a cost-effective and efficient manner. Effective fixed asset management involves the safeguarding of property from loss, damage, theft, and obsolescence. The proper safeguarding of district assets requires an effective system of accountability and a culture of adherence to established policies and procedures.

FINDING 3-9

The district owns several properties such as the football, softball, and baseball fields, along with the Ag farm which are all no longer in use. The district is paying utilities on these properties as well as continuing to maintain the grounds for these facilities.

The district has not fielded a football team since the turn of the century. When asked about the last event at the stadium, it was believed to be the graduation ceremony in 1999. The district still mows the grounds, but the facility is decaying (**Exhibit 3-20**) and has not been utilized in years.

**Exhibit 3-20
Football Stadium**



Source: Prismatic Services Photo, March 2023

The baseball field and Ag farm are located on the same property (**Exhibits 3-21** and **3-22**). The district no longer has a baseball team or a Vocational-Ag program. The district is still maintaining the property even though no students participate in baseball or own animals to house

at the Ag farm. While the baseball facility is in better condition than the football stadium, the district is still spending resources maintaining the grounds of facilities no longer in use.

**Exhibit 3-21
Baseball Field**



Source: Prismatic Services, March 2023

**Exhibit 3-22
Ag Farm**



Source: Prismatic Services, March 2023

With the district struggling to maintain the buildings that are utilized, any time or resources spent on facilities no longer in use is not a good use of the district's precious resources. The district has

failed to use those resources to make repairs to items such as the sidewalks (**Exhibit 3-23**) on the school's main campus.

**Exhibit 3-23
School Sidewalks**



Source: Prismatic Services, March 2023

When a school district is confident a school building or facility will never be needed again, selling the property is absolutely the right choice. Facilities and operations costs are a tremendous burden on school district budgets, especially when that money could be used in other areas such as academic achievement and performance. If the district feels it might use a facility again, it might consider leasing the property to bring in some needed recurring revenue.

RECOMMENDATION

Declare specific facilities as surplus property and list them to the public for sale to help the district pay for needed one-time improvements to existing utilized buildings.

The superintendent and board of education should identify a list of properties no longer used and will not be needed in the future to be declared surplus. They should contact their legal counsel to ensure that all Oklahoma laws are followed for the sale of school property. An appraiser should be hired to determine current market values of identified properties. The appraisal amounts will determine if any bids received by the district are worthy of consideration. The district should also identify when the funds from the sale of the property should be allocated. Since these would be one-time sources of revenue, the money should be allocated to one-time type of expenditures. If any property might be identified for future use, but not at the current time, the district should consider leasing that property at a current market rate with a written lease agreement so that the district can use the property as a source of revenue. As with revenue received from the sale of the property, the district should identify uses for the recurring revenue.

FISCAL IMPACT

This recommendation can be implemented with existing resources. While there will be legal and appraisal costs, those will be offset by the money received from the proceeds of the sale of property. With the sale of property, there will be an undetermined amount of revenue collected by the district.

FINDING 3-10

The district's facilities have not been maintained and need repair. There is also a lack of funding for needed child nutrition upgrades and technology.

As previously mentioned, the district is struggling financially and the lack of investment in maintenance of facilities, child nutrition improvements, technology upgrades, and other needed improvements are visibly apparent and could be contributing to the loss of students to other districts. The district's last bond issue was approved by local voters and issued in 2015 for \$290,000. That bond was paid off in August 2020. The district currently has \$791,288 in bonding capacity available (**Exhibit 3-12**).

While Covid relief funding helped the district add a new phone system, HVAC improvements, and supplement a roof repair that was partially paid also from insurance proceeds, there are still many improvements to be done. School districts are a source of pride for the community and should mirror that in their appearance.

The district does not have a long-term capital improvement plan. Without soliciting the local community to support a bond initiative for maintenance improvement projects along with security and technology needs, this puts additional financial pressure on the district's general and building funds.

Currently, there are no debt service requirements since the district has not issued bonds. The district hasn't considered a bond initiative. Although LWPS has a higher net assessed valuation when compared to peer districts, the district is not using any of its bonding capacity.

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

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

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

RECOMMENDATION

Develop a district facilities improvement plan and work with all community stakeholders to identify improvement projects along with equipment and technology needs to be placed on a potential bond issue.

The board of education and superintendent should develop a long-range facilities improvement plan involving community stakeholders and business partners. The plan should list identified renovation and maintenance projects, child nutrition needs, technology hardware and software, and security improvements. The plan should include estimated project and item costs, estimated timelines for projects, and sources of funding to complete each project. If a bond issue or multiple bond issues are considered as a source of funding, the district should work with the community to build support for the plan and illustrate how the bond funds will improve the community.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

F. PURCHASING POLICIES, PROCEDURES, PLANNING, AND OPERATION

An effective purchasing system allows a school district to receive quality materials, supplies, and equipment in the right quantity in a timely, cost-effective manner. Purchasing includes those activities involved in the identification and purchase of supplies, equipment, and services needed by the district, as well as the storage and distribution of goods. Goods and services must be obtained according to the specifications, at the lowest responsible cost, and within state laws and regulations, including the state’s purchasing and bid requirements and the School Laws of Oklahoma.

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various LWPS functional areas. **Exhibit 3-24** provides the results for purchasing. More than half of the staff (59 percent) gave purchasing an A or B, but one-fourth (25 percent) had no opinion.

**Exhibit 3-24
Staff Survey Results Regarding Purchasing Functions**

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Purchasing	42%	17%	17%	0%	0%	25%

Source: Prismatic Survey Results, March 2023.

There are no written purchasing procedures in place as no one can locate a board policy manual. Without written procedures, it is difficult to monitor the purchasing process.

After many years of having the same superintendent and encumbrance clerk, the district has experienced a lot of employee turnover in the past year in key roles in business operations. The CFO was hired in the Fall of 2022 and the Assistant Treasurer in January. More turnover is likely soon, and this creates a greater need for clear written procedures. While the CFO has several years of experience in school business and a good understanding of school finance law, the lack of written policies and procedures can create situations where employees create their own processes or rules that might not align with board policies or state statutes. There are no written instructions for the steps to complete a purchase requisition and submit for approval to order an item, much less purchasing limits, bid requirements, and other best practices usually included in a purchasing policy.

Most staff come to the CFO to complete a paper requisition to submit to the superintendent for approval. All instructions have been verbal and nothing is in writing. If the CFO were to leave the district, there are no written procedures for the successor to use to ensure the legal process is being followed.

Many districts establish purchasing guidelines for the acquisition of goods and services based on the amount and type of purchase. Also, many districts delegate authority to schools and departments to make purchases that do not exceed a certain amount, such as \$250, without having to obtain prior approval from the central office.

Not having written purchasing guidelines places an unnecessary burden on staff. It also places staff in a position to unknowingly violate the unwritten purchasing procedures of the district. Unwritten policies and verbal approvals place both employees and the district in a position where purchases and contracts can be made in a manner that is not acceptable to the district.

Districts with successful purchasing programs in place normally have written purchasing guidelines that address the following practices:

- Establish a set of purchasing policies that clearly state purchasing processes for various types and amounts of purchases that follow applicable laws and guidelines.
- Set administrative procedures for implementing policies that reflect step-by-step purchasing guidelines for central office staff and school administrators that outline the procedures and forms to be used for competitive bidding, requests for proposals and competitive sealed proposals, and purchase orders.
- Clearly communicate purchasing policies to district staff, potential vendors, and the general public, and are followed without deviation.

RECOMMENDATION

Create a purchasing policy and written procedures for the purchasing process.

The district should set standards for its purchasing activity. Developing procedures will provide consistent purchasing practices, provide a reference tool for user training, reduce frustrations and

inefficiencies in the purchasing process, and ensure the appropriate purchasing processes are followed.

The superintendent and CFO should develop a set of written purchasing guidelines and procedures for the superintendent and School Board review and approval. The procedures should include a requirement for attaching completed forms to purchase requisitions that document compliance with purchasing guidelines. Consideration should be given to establishing guidelines like those presented as an example in **Exhibit 3-25**.

**Exhibit 3-25
Recommended Purchasing Guidelines**

Type of Purchase	Proposed Requirements	Performed by/Approved by
Purchases or contracts exceeding \$50,000	Open competitive bids	Purchasing Agent/Superintendent and School Board
Purchases or contracts between \$5,000 and \$50,000	Three written bids	Purchasing Agent/Superintendent and School Board
Purchases or contracts between \$1,000 and \$5,000	Three verbal quotes	Purchasing Agent/Superintendent
Purchases or contracts between \$250 and \$1,000	One quote	Principal/Purchasing Agent and Superintendent
Purchases or contracts under \$250	One quote	Teacher/Principal

Source: Prismatic, March 2023.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 3-12

Paper requisitions are still used for the encumbrance process along with manual signatures for approval. The district’s financial software has an electronic purchasing requisition module.

The use of paper requisition forms is an outdated and inefficient process. Paper forms are completed and turned in to the CFO. These are given to the superintendent to manually sign for approval. Using a paper form leads to a lengthy purchasing process.

If someone is absent from work in the current process or the paperwork is misplaced, an important purchase may not happen, or funds might not be encumbered before an item is ordered. Having an electronic workflow module leads to a cleaner process and better recordkeeping in the long term in the financial system.

Most financial software packages, including Wengage, have purchasing requisition workflow modules. During the interview with the CFO, the reason for not using the online Wengage requisition module yet is there have been so many other issues to tackle in the first year. This is a long-term goal to use the module. While there may be some new training required to learn the

module, the long-term benefits would far outweigh the current process. This would lead to a quicker and more efficient method of encumbering the district's funds.

RECOMMENDATION

Implement the electronic purchasing requisition module in Wengage.

The superintendent and CFO need to modify the purchasing process by working with Wengage to implement the electronic requisition module. The project plan should be created to entail the implementation of this module. The plan should list the scope of the project, project timelines, responsibilities for individuals, technology needs, target dates on deliverables for each step of the implementation, and staff training requirements.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

H. CONTRACTING PROCESS

FINDING 3-13

The district is renting out one of the Ag buildings to an individual, but there is no written lease agreement in place with the length of term or payment terms. The individual irregularly provides payment to the school district.

The district's Ag building (**Exhibit 3-26**), which is to be used for the shop class that is located directly east of the transportation building, is being leased to an individual from the community. This would be an acceptable practice if there was a written lease agreement in place with terms that would benefit the district and provide an additional revenue source of funding for an unused facility, and payments were made as required by the terms of the agreement.

**Exhibit 3-26
Ag Barn**



Source: Prismatic Services, March 30, 2023

Currently, the individual is not making consistent payments to the district and the amount of the payments is not even covering the cost of utilities the district is paying on the building. The district has received a total of \$8,310 over the past four years in rent for the building (**Exhibit 3-27**). In March 2023, the utility costs for natural gas, electricity, and city services totaled \$2,707. The natural gas bill for the prior month was \$5,028. The district is losing money on this rental agreement.

**Exhibit 3-27
Lease Payments for Ag Barn**

Year	Number of Lease Payments	Total Rent Paid
2019-20	2	\$500
2020-21	3	\$2,750
2021-22	5	\$4,309
2022-23	1	\$750
Total	11	\$8,310

Source: Lone Wolf Public Schools, 2023

According to the law firm Harrison Drury, the five most important reasons you should always have a written lease are:

- It is the Law - A tenancy of three years or over must be made by deed. With only a verbally agreed to a five-year term, the tenant could potentially walk liability-free at any time.

-
- **Protection** – In order to ensure the return of the property from the tenant, it is essential to have a written lease. If the lease is a periodic lease, that is, it runs from month to month or year to year or is for a fixed term of over 12 months, it will be protected by the provisions of the Landlord and Tenant Act 1954. This protection restricts the rights of the landlord to get the property back at the end of the lease term and allows the tenant to apply for a new lease which the landlord can only object to on specific grounds. The landlord and tenant can agree that this protection does not apply, but they must follow a procedure that requires there to be a lease in writing.
 - **Insurance, Repairs, and Decoration** – In most commercial leases the obligation to insure, repair, and redecorate is placed upon the tenant. The extent of the obligation is up for negotiation, but at the very least a tenant should be made liable to pay for the building's insurance on the property, keep the property in at least as good a state as it was at the start of the lease, making good any damage including that through wear and tear, and to decorate the property before handing it back. If there is no written lease, the tenant has no obligation to contribute towards insurance or do anything to the premises, other than avoid deliberate damage.
 - **Use** – The only way to restrict what the tenant does on the property is to have limitations in the written lease. This can prevent the tenant from doing something on the property which may bring a nuisance and could depress rental values on other properties or stigmatize the property they are occupying.
 - **Termination** – A properly drafted commercial lease will have a provision that the landlord can get the property back if the rent is a specified number of days late, usually somewhere between 7-28 days. It also should state that where there has been any other breach of the lease terms, or the tenant has become insolvent, the landlord has a right to terminate the lease. This powerful remedy is known as the forfeiture clause, and only exists if it has been properly agreed, and it will be difficult to argue it has been agreed unless it is contained within a written lease.

RECOMMENDATION

Create a written lease agreement with terms that are mutually beneficial for both the renter and the school district.

The district should terminate the current verbal agreement immediately. This district is losing money. No one knows what was agreed to when someone let the individual lease the building. If the district decides to enter into a new agreement with the individual, the board of education and superintendent need to work with legal counsel to draw up terms for a written lease agreement. The rental payment amount should be enough to cover all costs of the building, including utilities and insurance, and provide the district with additional revenue to use toward district needs.

FISCAL IMPACT

This recommendation can be implemented with existing resources. It should result in either reduced costs (if the building is no longer rented and utilities decrease) or increased revenue (if a lease agreement is developed that covers all costs plus provides a profit).

Chapter 4:
Facilities Use and Management

Chapter 4

Facilities Use and Management

This chapter addresses the facilities use and management of Lone Wolf Public Schools (LWPS) in the following sections:

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

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

- planning and designing facilities to meet educational standards and to provide a physical framework that enhances learning conditions;
- properly maintaining and cleaning facilities so that teaching and learning can take place in a healthy and clean environment;
- providing regulated access to individuals and groups, and school and community organizations for use of the facilities after hours and on weekends;
- operating the facilities in a manner that uses all forms of energy in the most frugal manner possible;
- ensuring that the facilities are safe when students and teachers are present;
- creating proper safeguards to ensure the security of the facilities during and after school hours; and
- having safety plans in the event of a crisis or natural disaster so that students and staff members are protected.

Background

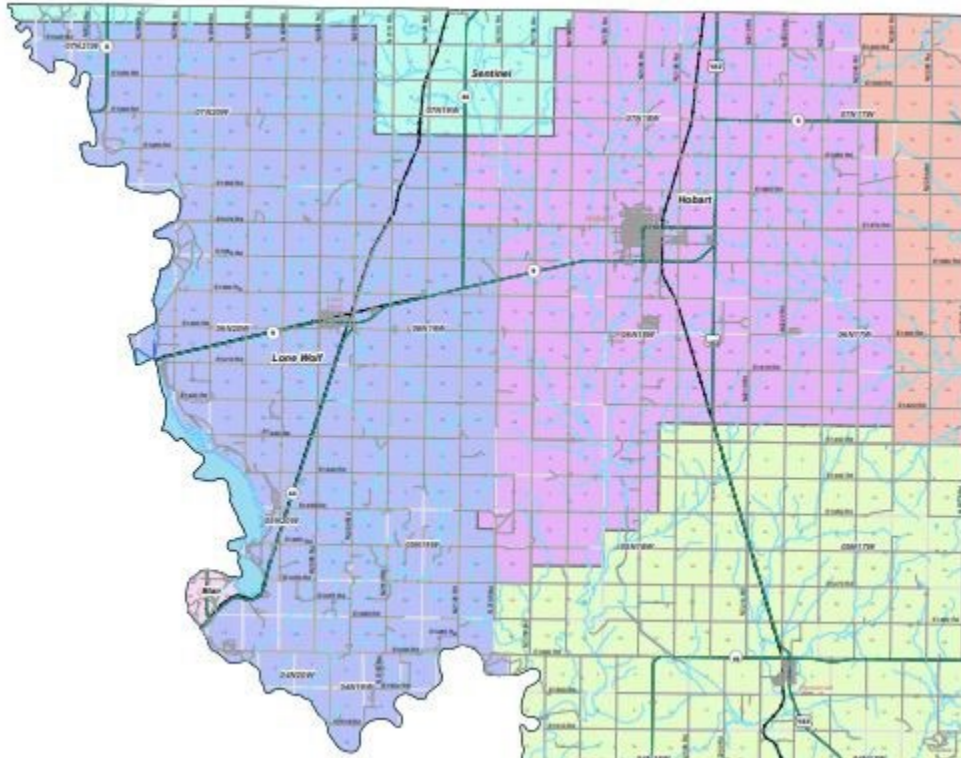
The Oklahoma History Society describes “The Community of Lone Wolf” in this manner:

The Kiowa County community...was founded upon the opening to White settlement of the Kiowa, Comanche, and Apache Reservation in August 1901. Established along the Chicago, Rock Island and Pacific Railway, the settlement was quickly populated and named for Kiowa Chief Lone Wolf. The community’s first business was a restaurant operated by Mark Sauerberg and his partner, Hance Van Rankin. Chief Lone Wolf and his wife and son were their first customers. Other early businesses included Sauerberg’s dray business, three lumberyards, a feed store, one hardware store, a drug store, two

doctors, one dentist, two banks, five cotton gins, five grain elevators, three general stores, one livery stable, and saloons. Two wells located south and west of town supplied fresh water. Schools and churches were built, and farming was the major industry.¹

Lone Wolf Public Schools is one of four school districts located inside Kiowa County and is located west of the town of Hobart (**Exhibit 4-1**). The district covers 161 square miles and has one campus area (**Exhibit 4-2**).

Exhibit 4-1
School Districts in Kiowa County



Source: Center for Spatial Analysis, University of Oklahoma

¹ [Lone Wolf | The Encyclopedia of Oklahoma History and Culture](#)

Exhibit 4-2 Aerial View of Lone Wolf Public Schools Campus and Facilities



Source: Google Earth with enhancements by Prismatic Services, April 2023

The population of Lone Wolf has steadily decreased from 576 in 1990 to 367 in 2021. Consequently, the enrollment at LWPS has also decreased to just above 100 currently, with some projections below 100 students in the coming school years across Grades Pre-K through Grade 12, including children beginning attendance at age three.² The past 33 years have therefore been filled with a struggle by school administrators to maintain LWPS both as a functioning place of learning and physically as a place to gather and be. Graduating classes often had numbers in the single digits, and at one time a single graduate received a high school diploma from LWPS. The School Board and previous superintendent fought tenaciously to keep the school in operation, resisting every suggestion that the district might be dissolved or consolidated with those of nearby communities.

The struggle also played out on the physical facilities' maintenance side. The recently retired superintendent retired in 2021-22, after serving as superintendent for 33 years. In addition to being the chief education officer and operational administrator of Lone Wolf Public Schools, he also worked as a self-appointed amateur unlicensed electrician, plumber, and jack-of-all-trades. He did his best to keep the buildings maintained while keeping calls to licensed professionals to a minimum. These efforts have resulted in the present condition of the LWPS buildings and grounds - electrical, plumbing, and other repairs do not necessarily all comply with standard

² Lone Wolf, Oklahoma Population History | 1990 - 2022 (biggestuscities.com)

trade practices, nor do they necessarily meet all building code requirements. In addition, it is likely that preventive maintenance practices have not been widely applied during the past several decades. Reactive maintenance practices have instead been prevalent.

Exhibit 4-3 lists the major buildings and other facilities of Lone Wolf Public Schools, together with current replacement values for the buildings and contents, and floor areas.

**Exhibit 4-3
LWPS Facilities Inventory**

Facility Name	Current Replacement Value (CRV)	Contents Value	Floor Area (Sq. Ft)
Grade School, High School, Auditorium	\$4,114,475	\$411,447	23,653
Gym, Cafeteria, Kitchen, Pool ³	\$2,429,204	\$242,921	16,120
Bus Barn ⁴	\$451,058	\$45,106	5,800
3 Yr. Old Building	\$233,062	\$25,429	2,012
Pre-K/KG Annex (School Annex) ⁵	\$737,027	\$100,883	4,440
Former Music/Spec. Ed.+ Shelter ⁶	\$105,826	\$21,207	800
Ag Barn (Vo-Ag Shop)	\$132,280	\$26,509	1,411
Playground Equipment	\$24,383		
TOTAL	\$8,227,315	\$873,502	54,236

Source: Oklahoma Schools Insurance Group (OSIG) and Wichita Insurance, and calculations by Prismatic Services, April 2023

The exteriors of the main LWPS facilities are shown in **Exhibit 4-4**.

³ The Swimming Pool has been inoperative for almost two decades. A recommendation is to fill it in and convert the resulting interior space into a greenhouse.

⁴ The Bus Barn is disorganized, disheveled, and a hazardous workspace. A recommendation is to demolish it except for the undamaged foundation slab for bus and utility vehicle parking.

⁵ A recommendation is to remove the computer lab from Pre-K/KG Annex and move 3-year-olds into that space and create a common fenced play area adjacent to the Annex. Convert the former 3-year-old building to staff housing. A move of the computer lab into the main building grade school or high school building completes this rearrangement.

⁶ The former Music Building is now filled with surplus goods. A recommendation is to identify an alternative function other than storage (e.g., staff housing, resource officer, monitoring station, revived music education, etc.).

**Exhibit 4-4
LWPS Building Stock**



Source: Prismatic, March 2023

Between 2015-16 and 2019-20, the average assessed property value per student in LWPS Decreased by 52.7 percent as shown in **Exhibit 4-5**. This was the only decrease among all the comparison groups.

**Exhibit 4-5
Trend in Assessed Property Value per Student**

Entity	2015-16	2016-17	2017-18	2018-19	2019-20	Percent Change
Lone Wolf	\$137,653	\$58,710	\$67,794	\$85,874	\$72,648	52.7% ▼
Wynona	\$81,983	\$81,070	\$85,211	\$99,367	\$107,760	31.4% ▲
Panola	\$58,955	\$59,988	\$81,172	\$82,037	\$100,765	70.9% ▲
Gracemont	\$31,975	\$28,200	\$29,905	\$34,752	\$41,090	28.5% ▲
Wannette	\$49,980	\$56,906	\$62,111	\$69,384	\$74,615	49.3% ▲
Buffalo Valley	\$46,795	\$44,729	\$48,539	\$49,235	\$58,722	19.4% ▲
State	\$49,623	\$49,471	\$52,219	\$55,097	\$57,746	16.4% ▲

Source: Office of Educational Quality and Accountability, Profiles Database

Debt service expenditures per student are based upon the amount of outstanding debt and number of students a district has during a given school year. Districts must balance facility and equipment needs with the amount of tax money requested of district taxpayers. In 2019-20, LWPS had \$762 in debt service expenditure per student. However, 2019-20 was the final year of the 5-year bond of \$290,000. That bond provided funding for a school bus, water line replacement, computers, and roof repairs. As of the onsite visit, LWPS had no outstanding debt service and \$791,288 in bonding capacity available.

A. FACILITIES PLANNING AND CONSTRUCTION

Well-planned facilities are based on 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 provides a studied, developed, and logical process for prioritizing, beginning, and completing building projects. As district leaders change, having a long-range facilities master plan will add stability and cohesiveness to the district’s construction, use, and management of facilities.

A school district’s long-range facilities master plan is a compilation of district policies and statistical data that provide a basis for providing educational facilities to meet the changing needs of a community. A valuable resource in developing a quality long-range facilities master plan

can be obtained from the Association for Learning Environments (A4LE).⁷ Effective long-range school facilities master planning incorporates the following elements:

- **Facility Capacity:** Districts establish the capacity of each school facility by setting standards that govern student/teacher ratios and the number of square feet required per student in a classroom. These standards deal with the minimum size of core facilities, such as classrooms, gyms, cafeterias, and libraries, so that schools do not overload these facilities or overuse portable classrooms.
- In 2008, the Oklahoma State Department of Education (SDE) published the second edition of *Planning for Education: Space Guidelines for Planning Educational Facilities*.⁸ The guidelines were developed to assist the local board of education, school administrators, architects, engineers, and planners in planning and designing educational facilities. The guidelines arrange space information by the major activities of instructional spaces, auxiliary spaces, and service and structure spaces for the various grade ranges. They also provide suggested methods of calculating preliminary net and gross square footage for school buildings by grade and major activity. Another excellent resource for facility construction is *An Administrator's Guide to School Construction Projects*, also published by SDE.⁹
- **Facility Inventory:** An accurate facility inventory is an essential tool in managing the use of school facilities. The inventory identifies the use and size of each room, which enables planners to accurately set the capacity of each school. Modifications to schools are noted in the inventory so it can be kept up to date.¹⁰
- **Enrollment Projections:** Effective planning requires accurate enrollment projections at least five years into the future.¹¹ Accurate projections require planners to examine district demographics and track any new construction activity in the district. Many school planners work in coordination with county and city planners to track growth patterns.
- **Capital improvement program:** Effective planning requires the district to anticipate its future needs and balance these against expected resources. A capital improvement program charts future improvements to school facilities and identifies funding sources for them. An effective planning process involves the community at large, identifies district goals and objectives, and prioritizes projects based on those goals and objectives.
- **Facilities Maintenance Plan:** School facility planning necessitates identifying links between facilities maintenance and facilities construction and renovation. Capital outlay for school construction is generally a more palatable proposition for taxpayers and public officials when a school system demonstrates that existing facilities receive appropriate care and

⁷ Council of Educational Facility Planners International. (2004). *Creating connections: The CEFPI guide for educational facility planning*. <http://creatingconnections.a4le.org/>

⁸ <http://digitalprairie.ok.gov/cdm/singleitem/collection/stgovpub/id/9456/rec/4>

⁹ <http://sde.ok.gov/sde/sites/ok.gov.sde/files/CI-AdministratorsGuide.pdf>

¹⁰ A detailed, space-by-space inventory is not available from LWPS.

¹¹ No official enrollment projections are available from any sources for LWPS.

maintenance. Good plans include short- and long-term objectives, budgets, and timelines – all of which demonstrate organizational commitment to facilities maintenance.¹²

Exhibit 4-6 provides student and parent responses regarding LWPS facilities generally. Most student survey respondents do not feel the facilities are attractive and welcoming. In contrast, most parents do.

**Exhibit 4-6
LWPS Survey Results Regarding Maintenance**

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Student	My school is attractive and welcoming.	2%	17%	27%	29%	24%
Parent	My child’s school is attractive and welcoming.	24%	53%	0%	6%	18%

Source: Prismatic Survey Results, March 2023

FINDING 4-1

The condition and current use of the district’s facilities demonstrate an inconsistent pursuit of facilities planning, design, construction, renovation, or maintenance. Despite the generally poor condition of all LWPS facilities, the only major actions taken in recent years appear to have been:

- A Board member asked for an estimate to restore the pool.
- An insulating foam layer was applied to the roofs of the main building and the gymnasium.
- New air conditioner units were installed at the main building, but not in the auditorium portion. Non-functioning evaporative cooling units remain there.

The district does not have a facilities master plan to guide the financial or facility management decisions of the district. Facilities master planning is an essential activity for any school district of any size. Without a master plan, the district runs the risk of overbuilding, underbuilding, or otherwise spending on facilities that do not meet district needs sufficiently. Based on projections compiled by the consulting team, student enrollment is unlikely to increase in the next 10 years, which should also be considered in facilities planning. **Appendix E** provides grade-level enrollment projections.

LWPS lacks processes and data for developing and maintaining a long-range, continuous facility plan that addresses issues from building maintenance to students’ educational needs. Neither the school board nor the leadership team of LWPS is engaged in active facilities master planning.

Facilities planning is not just about new construction or big projects. Rather it includes a broad spectrum of actions, including, but not limited to, the following:

- properly and realistically funded facility maintenance and operations activities, including preventive and reactive maintenance tasks, operational energy efficiency improvements, custodial services, and many other tasks aimed at keeping buildings safe, clean, healthy, and conducive to teaching and learning;
- major and minor capital improvement projects, such as additions, renovations, replacements, facility adaptive reuse projects, or upgrading of building systems or elements;
- proper staffing of maintenance and custodial functions, supplemented by outsourcing as needs may arise;
- land and facilities sales or acquisitions; and
- new construction.

Districts that engage in facilities master planning systematically identify and collect the data needed to inform decision-making in the facilities master planning process. Major data collection activities include:

- periodic building condition assessments;
- demographic, economic, and geographic development trends;
- building capacity and space use; and
- any other research or data collection efforts needed for decision-making, such as redistricting, building additions, building closures, and mobile classroom management.

There are additional best practices to consider for the components of the plan. The long-range facilities master plan for a school district is a compilation of district policies and statistical data that provide a basis for educational facilities to meet the changing needs of a community.

RECOMMENDATION

Develop and maintain a comprehensive facilities plan.

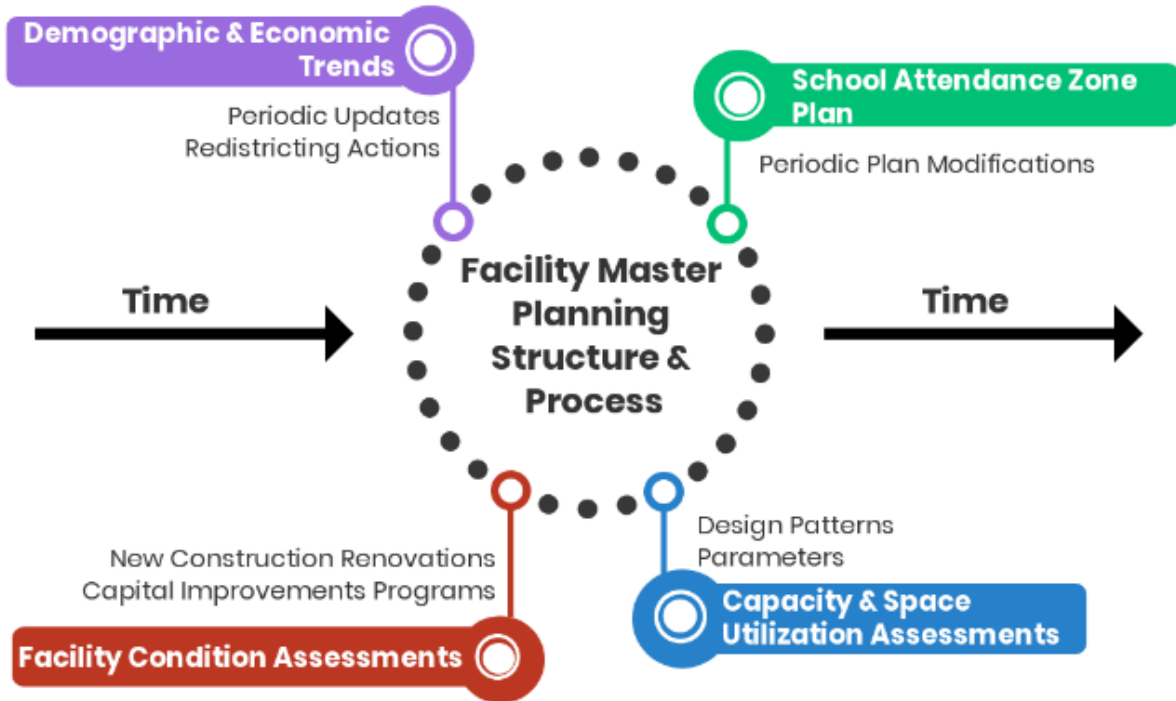
LWPS should design and implement a protocol for a continuous, ongoing facilities master planning activity. As noted in one best practice resource for facilities master planning:

[Facilities 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 Board of Education (BOE) demonstrates the significance of the Facilities Management Plan and that the plan has a high level of support.¹³

¹³ Ibid.

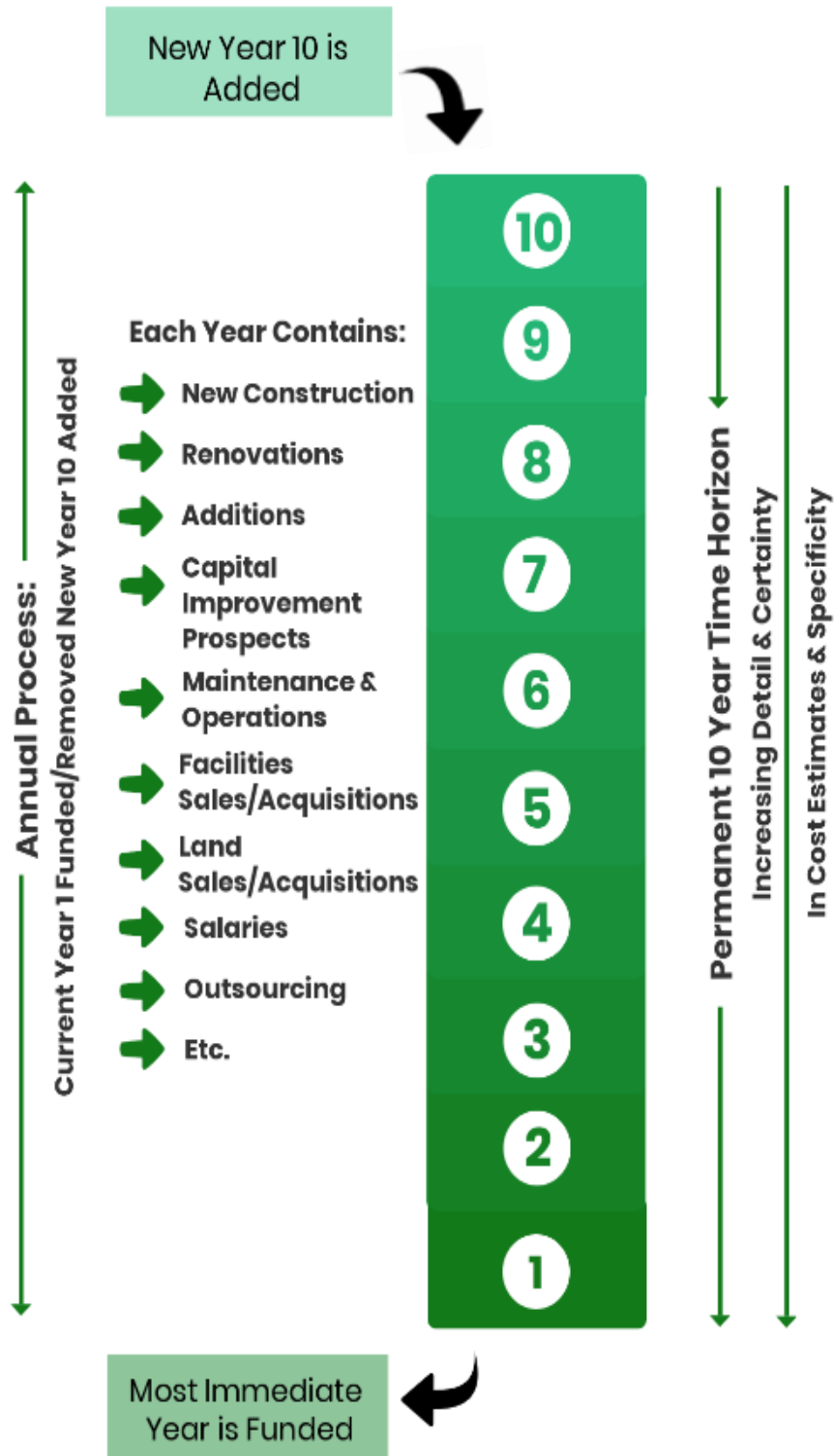
Exhibits 4-7 and 4-8 show in diagrammatic form how a continuous facilities master planning process should function.

Exhibit 4-7
Facilities Master Planning Structure and Process



Source: Created by Prismatic, April 2023

Exhibit 4-8
Procedure for Maintaining a Continuous 10-Year Time Horizon



Source: Created by Prismatic, April 2023

Recognizing that enrollment is unlikely to increase substantially in the next ten years and that LWPS must compete with neighboring districts to even retain its current student population, the consulting team recommends that the district develop a comprehensive facilities plan that calls for:

- the sale of the unused football and baseball fields;
- the sale of the transportation building and the relocation of the weight room;
- the repurposing of the building currently used by the 3-year-old program into a duplex whose units can be rented to teachers in the district;
- the repurposing of the old music building into a community library;
- either the sale of the annex or the repurposing of the annex into multi-unit housing whose units can be rented to teachers in the district; and
- regular bond votes to provide the funds to keep the main, historic building and gymnasium in acceptable condition.

FISCAL IMPACT

With one possible exception, this recommendation can be implemented with existing resources. The possible exception is the potential need for outside assistance in the initial set-up of the facilities planning process. An independent consultant to assist the district with the original set-up could be an architect or planner who has helped other schools develop a facility planning process. In the case of LWPS, this might require process design with input from the school board and superintendent, and eventually oversight at successive board meetings for the first year. The consulting team estimates that a facilities planning consultant will cost approximately \$9,000. This cost will be more than offset by the sale of unused lands and buildings. It should also result in a schedule of regular bond votes that will continue to provide the district with funds for facilities improvements.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Hire a consultant to develop a facilities plan.	\$0	(\$9,000)	\$0	\$0	\$0

FINDING 4-2

The district has a number of unused and unsightly facilities and spaces. This creates an unattractive learning and working environment.

The district’s swimming pool has sat, unused, for nearly two decades. It has been, and is now, hazardous and unsanitary. This is especially problematic because it is located adjacent to the kitchen and cafeteria spaces, possibly sharing some of the indoor air.

In interviews and focus groups, various district stakeholders raised the possibility of restoring the pool to functionality as an attractor for students and community residents. However, recent quotes obtained by school board members indicate that at least \$100,000 would be necessary to complete just pool repairs. This does not include repairs to the facility housing the pool or ongoing monthly maintenance costs.

Other unsightly LWPS facilities and spaces include:

- The Bus Barn is irretrievably disorganized, disheveled, and a hazardous, unsanitary workspace.
- The former Music Building is now filled with surplus goods.
- The baseball stadium and remnants of the Ag program have been deteriorating and vandalized throughout several decades.

The Pre-K/Kindergarten Annex has largely unused space in its computer lab.

RECOMMENDATION

Address the pool, bus barn, music building, and unused acreage in the facilities master plan.

The consulting team recommends that LWPS:

- Fill in the pool and convert the space to a greenhouse. A greenhouse is a use compatible with the adjacent kitchen/cafeteria. Vegetables grown there can be included in the lunch menu. Gardening activities could be incorporated into the elementary curriculum. A gardening elective could become a curricular option for older LWPS students. The district should contact the USDA Cooperative Extension for advice and collaboration in a Master Gardener certification program available through them and LWPS. This program can be open to persons beyond high school age.

To implement this recommendation the district should hire an architect and contractor, then perform the renovation with a building permit and a local building inspector who has reviewed the construction documents and will review the work against these documents during construction. This should be included in the new facilities plan as a high-priority initiative. Other facilities planning issues should also be included with lower priority and urgency:

- Demolish the bus barn down to the slab. The slab should serve as bus and utility vehicle parking. It should not be used to store any items that should be recycled or placed in a landfill. The currently filthy and unused weight room should have all reusable equipment sanitized and sterilized and moved to the gym or the main school building.
- Develop the former music building into a community feature, such as a public library. In consultation with stakeholders (staff, parents, students, community leaders) district

leadership should identify an alternative function other than storage (e.g., library, staff housing, resource officer, monitoring station, revived music education, etc.) and plans made for the selected re-use.

- Repurpose the Pre-K/Kindergarten annex into the early childhood annex. If it continues to operate one, LWPS should move the three-year-old program into the space now used as the unrelated computer lab. Then it can create a common fenced play area adjacent to the annex. After that, LWPS should convert the building now housing the three-year-old program to staff housing. Finally, LWPS should move the computer lab into the main building grade school or high school building.
- Sell the baseball stadium and remnants of the Ag program.

The consulting team recommends this schedule of events:

Timeframe	Initiative
2023-24	Pool – convert to greenhouse
2024-25	Bus Barn – demolish
2025-26	Former Music Building – remove surplus storage and reuse building
2026-27	Create Early Childhood Annex
When appropriate	Old Pre-K/Kindergarten Building – convert to staff housing
As soon as possible	Sale of land with baseball and Ag Program vestiges

FISCAL IMPACT

This recommendation will require district expenditures, but the consulting team is unable to adequately estimate them at this time. The creation of a shared community space in the music building could be done in conjunction with the town in order to share costs. The conversion of the Pre-K/Kindergarten building into staff housing should help with staff recruitment and should also generate some revenue for the district.

FINDING 4-3

The current superintendent has sought historical recognition for the main district facility.

The current superintendent chose to participate in an effort by the State of Oklahoma to place all Works Progress Administration (WPA) building projects in Oklahoma on the National Register of Historic Places. The LWPS Grade School was a WPA project. This initiative is ongoing with the assistance of a firm hired by the State with expertise in historic preservation. A consultant was onsite at LWPS to perform the necessary documentation for application to the National Parks Service of the U.S. Department of the Interior.¹⁴

¹⁴ <https://www.nps.gov/subjects/nationalregister/index.htm>

COMMENDATION

LWPS is commended for joining the Oklahoma initiative to place WPA buildings in Oklahoma on the National Register of Historic Places of the National Parks Service of the U.S. Department of the Interior.

B. MAINTENANCE AND CUSTODIAL OPERATIONS

The objective of maintaining and cleaning school facilities is to provide safe and cost-effective buildings, a sound educational environment, increased longevity of buildings and equipment, and the protection of school property. The maintenance and cleaning of the facilities must be accomplished in an efficient and effective manner to provide a safe and secure environment that supports the educational program and reflects proper stewardship of district resources.

Efficiencies and economies of maintenance and cleaning are critical to ensure that resources for direct instruction are maximized. However, extreme actions to reduce the cost of maintenance and cleaning can result in higher than acceptable costs of repair and replacement in the years to come. Consequently, a balance must be achieved between reasonable economies and unreasonable cost-cutting.

Maintenance

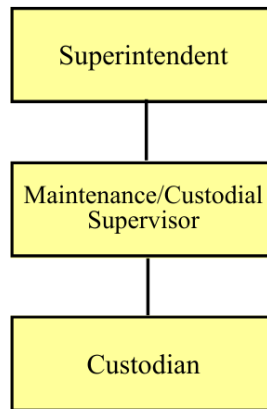
The proper maintenance of facilities is critical to ensuring support for an effective instructional program. Research has shown that appropriate heating and cooling levels, building and room appearances, the condition of restrooms and other facilities, as well as occupant safety, all impact how students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

At the time of the onsite visit, the district's maintenance supervisor/custodian was scheduled to retire in June 2023. At that point, the district had not engaged in any succession planning for this critical position.

The current organization of maintenance and transportation is shown below in **Exhibit 4-9**.

Exhibit 4-9
Organization Chart of LWPS Maintenance



Source: Created by Prismatic, April 2023

The retiring incumbent roughly splits his time between maintenance/repairs and custodial work. He has an assistant who works half-time as a custodian and also serves as a driver to and from the local vocational-technical center.

The current LWPS maintenance staff consists of a two-person team responsible for maintenance and repair as necessary, as well as custodial tasks:

- A full-time maintenance supervisor who splits his time roughly half between maintenance/repair tasks and custodial work. He will retire at the end of the current School Year 2022-23.
- A half-time custodian who also drives students to and from the vocational-technical center. He also performs occasional maintenance and repair tasks as needed.

Exhibit 4-10 shows the trend in LWPS maintenance expenses over the past five years compared to the peer districts. The district's maintenance spending has been rather erratic. In three of the five years shown, it was the lowest of the peers.

Exhibit 4-10
Trend in Maintenance and Operations Expenditures

Entity	2017-18	2018-19	2019-20	2020-21	2021-22	Percent Change
Lone Wolf	\$87,113	\$201,093	\$ 101,483	\$179,591	\$423,653	386.3% ▲
Wynona	\$196,923	\$226,827	\$458,325	\$1,005,202	\$932,002	373.2% ▲
Panola	\$138,184	\$157,573	\$163,544	\$196,710	\$189,136	36.8% ▲
Gracemont	\$181,033	\$431,867	\$286,145	\$196,051	\$282,569	56.0% ▲
Wanette	\$384,137	\$311,951	\$167,127	\$200,640	\$187,587	(51.1%) ▼
Buffalo Valley	\$182,194	\$128,659	\$207,738	\$171,712	\$274,853	50.8% ▲
Peer Average	\$216,494	\$251,375	\$256,575	\$354,063	\$373,229	72.4% ▲

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

FINDING 4-4

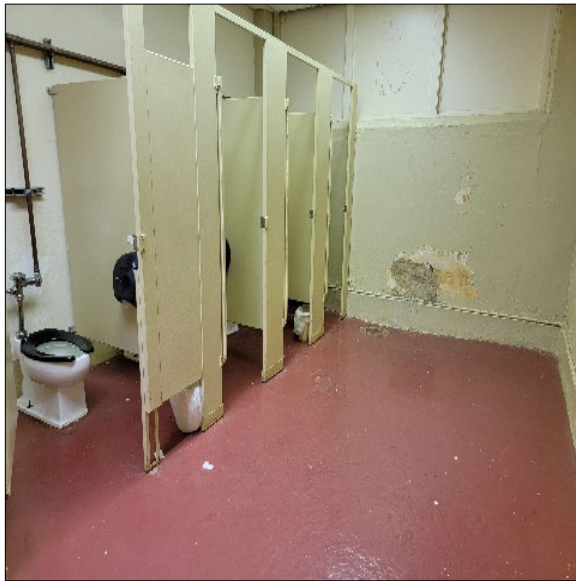
The district has a high level of deferred maintenance. LWPS does not have an effective maintenance program. There is no work order system to document and/or schedule either preventive or corrective maintenance. There is no preventive maintenance program.

The former LWPS superintendent was not only the traditional academic leader/administrator, but also a self-declared volunteer unlicensed maintenance technician in plumbing, electrical, and HVAC repairs. He also trimmed trees and participated in, or led, many other maintenance and repair-related tasks. With his retirement and advancing age, his volunteer repair and maintenance services are no longer available to LWPS.

The consulting team found evidence of maintenance deferral across the district's building stock (**Exhibit 4-11**). The gymnasium building appears to be most affected, followed closely by the main school building. The bus barn is so badly deteriorated that a justification to save it from the wrecking ball can no longer be supported.

The recently applied roof coating with a protective foam on the main building and the gymnasium would have been a move in the right direction, if it had been accompanied by major roof repairs beforehand, instead of relying on the foam to serve as the only defense against major leaks. Once the leaks have been durably repaired, interior damage from the persistent leaks must also be repaired. The replacement of HVAC units at the main building was likewise a positive action; however, the district failed to dispose of the old machinery properly. In addition, the evaporative cooling units (swamp coolers) on the exterior behind the auditorium have not been scrapped, even though they are no longer fully operational and remain a potential source of legionella bacteria. Finally, it appears that the size calculation for the new HVAC units appears, on the surface, too generous in a few cases, leading potentially to excessive energy consumption over the life of the units in question.

Exhibit 4-11
Select Examples of Widespread Deferred Maintenance



Source: Prismatic, April 2023

Maintenance deferral usually goes hand in hand with a nearly total reliance on reactive repairs and preventive maintenance being largely absent because it is incorrectly viewed as an unaffordable luxury. This type of maintenance leads to a spiraling degradation of building condition, plus an increase in the cost of maintenance because reactive repairs almost always engender more overall damage than those under a strong preventive maintenance regime.

To monitor the extent of maintenance deferral in a building, best practices prescribe that a full-scope (all systems and components) building condition assessment (BCA) be conducted roughly every five years on every building. A BCA is typically performed by a team of architects and

engineers. Annual updates of a BCA are recommended to document the removal of maintenance neglect. District staff was unable to provide evidence that a BCA had been conducted in the past five years.

Exhibit 4-12 shows responses by staff, parents, and students to questions about facilities maintenance and operations. Many parents seem to be unaware of the high levels of deferred maintenance in the main school building and the gymnasium. Staff has a greater awareness of maintenance neglect. Only students seem to be aware of the full extent of the neglected and deferred maintenance.

Exhibit 4-12
Staff, Parent, and Student Survey Responses Regarding Facilities Maintenance

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	Our facilities are well maintained.	8%	17%	8%	33%	33%
Parent	My child’s school is well maintained.	24%	41%	18%	12%	6%
Student	My school building is well maintained.	2%	12%	31%	33%	21%
Student	My school building needs a lot of repairs.	45%	33%	12%	7%	2%

Source: Prismatic Survey Results, March 2023

In smaller school districts, it is a frequent practice to hire custodians who also have some ability to diagnose and repair minor plumbing, electrical, and HVAC faults. However, outsourcing retainer contracts are also established with reputable, licensed private local companies to fix more complex issues, and to establish a schedule of preventive maintenance tasks to guard against the need to react to failures from maintenance neglect.

Breaking down the past five years of LWPS maintenance spending by category, one sees that the emphasis of the LWPS budget has been increasingly on purchased services each year (**Exhibit 4-13**).

**Exhibit 4-13
Trend in LWPS Maintenance and Operations Expenditures, All Funds**

Expenditure by Category	2017-18	2018-19	2019-20	2020-21	2021-22	Percent Change
Salaries	\$19,618	\$21,633	\$23,383	\$25,000	\$30,423	35.5% ▲
Benefits	\$1,500	\$1,654	\$5,734	\$12,780	\$9,706	547.0% ▲
Purchased Services	\$6,995	\$34,698	\$31,900	\$40,238	\$233,062	3,231.8% ▲
Supplies	\$35,146	\$40,880	\$35,631	\$42,058	\$50,131	42.6% ▲
Property	\$0	\$101,999	\$4,832	\$59,313	\$100,329	N/A
Other	\$110	\$226	\$0	\$200	\$0	(100.0%) ▼
Total	\$87,113	\$201,093	\$101,483	\$179,591	\$423,653	386.3%

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

Overall, spending has shown itself to be erratic and seemingly unpredictable. This unsteady pattern of expenditures is characteristic of a reactive maintenance stance, with little or no preventive maintenance being practiced. Reactive maintenance is unplanned maintenance, sometimes sarcastically called “maintenance by surprise.” It reacts to a sudden and unexpected failure or breakdown. Such events must often be repaired urgently, and occasionally with a need to resort to overtime. Also, collateral damage is often greater than during a scheduled or preventive maintenance task. All these conditions have an influence on raising repair costs.

One additional negative condition is often a consequence of reactive maintenance: a high amount of maintenance deferral. Deferring maintenance is often the consequence of not performing preventive maintenance, which then leads to surprise failures. When the value of the deferred maintenance exceeds 30 percent of a building’s replacement value, it is often viewed as a point of no return: unless such a facility has overriding nostalgic or historic value, demolition and replacement should be given serious consideration. Thus, a best practice rule emerges, maintenance is best when it is planned and deliberate. It is at its worst when it is performed only in reaction to things “suddenly tearing asunder.”

A complete maintenance program involves:

- timely attention to emergency and corrective maintenance conditions. Emergency and corrective maintenance occur when equipment fails, typically requiring more time and resources to correct than preventive maintenance;
- a preventive maintenance program is designed to keep equipment running at peak efficiencies to avoid equipment breakdowns and prevent minor problems from escalating into major ones; and
- a long-range plan to address HVAC, mechanical, electrical, plumbing, and low voltage systems and/or component replacements required at the end of their expected useful life. The plan will typically indicate the current age of the components, what year to expect replacements to occur, and anticipated costs using a Consumer Price Index multiplier or estimated inflation rate.

As an example, Spring Independent School District (SISD) in Texas developed a comprehensive preventive maintenance program that includes the maintenance schedules shown in **Exhibit 4-14**. This schedule could be modified to meet the needs of LWPS.

Exhibit 4-14
Sample Preventive Maintenance Program Schedule

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

Source: SISD Facilities Department, November 2010

It is a best practice that maintenance expenses on an annual basis should be within two to four percent of the current replacement value (CRV) of the facilities inventory owned and operated by the organization responsible for the facilities management.¹⁵ The aggregate replacement value of the current LWPS facilities inventory is \$9.1 million. The recommended two to four percent range would require a maintenance and repair budget between \$182,000 and \$364,000 annually. (**Exhibit 4-15**). Unfortunately, the “2-4% Rule” only applies when there is an active preventive

¹⁵ National Research Council 1990. *Committing to the cost of ownership: Maintenance and repair of public buildings*. Washington, DC: The National Academies Press. <https://doi.org/10.17226/9807>.

maintenance protocol in place, and only a small amount of deferred maintenance in evidence – usually five percent or less of replacement value. Districts with large amounts of deferred maintenance typically have to spend more than 2-4 percent, until preventive maintenance is stepped up, and maintenance deferral is reduced.

Exhibit 4-15
LWPS Current Replacement Value (CRV) for Maintenance and Repair Expenditures

Entity	2016-17	2017-18	2018-19	2019-20	2020-21
Maintenance Exp.	\$87,113	\$201,093	\$101,483	\$179,591	\$423,653
CRV	\$7,161,462	\$7,160,930	\$7,121,610	\$7,348,179	\$9,072,748
CRV Percentage	1.22%	2.80%	1.42%	2.44%	4.67%

Source: SDE, Insurance Papers, School District Expenditure Reports 2016-2021, and Prismatic calculations

A good guide for planning and designing a maintenance program is the *Planning Guide for Maintaining School Facilities* by the School Facilities Task Force, National Forum on Education Statistics and the Association of School Business Officials International.¹⁶ Included in the guide are topics such as maintenance check lists, preventative maintenance, job descriptions, employee training, managing supplies, and employee evaluations.

RECOMMENDATION

Develop a comprehensive maintenance program.

To begin, the consulting team recommends these steps:

- Develop a bond proposal to address the largest facilities needs. The district currently has bonding capacity available. It should be used to return LWPS facilities to a source of community pride.
- Budget annually for at least five percent of CRV to be used on maintenance. This figure could be lowered after a few years of concentrated maintenance efforts, but should not be below two percent in any budget cycle.
- Establish a formal outsourcing relationship with a minimum of four contractors: plumbing, electrical, HVAC, and roofing. The district should invite local/regional plumbing, electrical, roofing, and HVAC contractors to bid on a retainer contract for a period of three years, subject to satisfactory annual performance. The district should hire local contractors in other categories on an as-needed basis for such services as broken window replacement, carpentry, locksmithing, painting, waterproofing, etc. The four main contractors hired on retainer should be required to perform preventive maintenance tasks on an agreed schedule and for a fixed, agreed-upon price. In addition, the contract should specify labor rates, overhead, and other charges to be applied to specific major and minor maintenance and repair jobs that go beyond the preventive maintenance schedules. For each trade, the contract should also include major scheduled jobs, such as roof replacements, major

¹⁶ Available for free at <http://nces.ed.gov/pubs2003/2003347.pdf>

equipment overhauls, and the like. Each contract should have a maximum spending limit requiring school board approval to override.

- Require the retainer outside contractors to identify and report on deferred maintenance conditions at least annually. LWPS should include in its retainer contracts a provision requiring each contractor to report on deferred maintenance conditions they encounter during their preventive maintenance work. Make available to each contractor an e-book gratis from a website describing different options for collecting building condition assessment data.¹⁷ The contractors have an incentive to find deferred maintenance examples because it may become a job for them to remove or correct

FISCAL IMPACT

The consulting team recommends that the district seek a bond at the limit of its bonding capacity, which would currently be approximately \$790,000. This would fund the recommended demolition and repurposing of facilities, as well as address at least a large portion of the maintenance backlog. Assuming a 4 percent interest rate on a five-year bond, the interest would be \$158,200. LWPS would

At the same time, the consulting team recommends that the district allocate five percent annually for contractors to performance routine, deferred, and preventive maintenance. This should be allocated from general funds. This is just under the amount budgeted in 2020-21. Based on a CRV of \$9,072,748, this would mean an expenditure of \$453,637 annually. The difference between what LWPS budgeted in 2020-21 and this figure is \$29,984 (\$453,637 - \$423,653).

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Obtain a bond and being repayments.	\$790,000	(\$189,640)	(\$189,640)	(\$189,640)	(\$189,640)
Spend five percent annually on maintenance.	(\$29,984)	(\$29,984)	(\$29,984)	(\$29,984)	(\$29,984)
Total	\$760,016	(\$219,624)	(\$219,624)	(\$219,624)	(\$219,624)

FINDING 4-5

The district currently processes work orders and purchase orders in a manual fashion. The availability of software for purchase orders and work order processing would allow for more accurate recordkeeping, data storage and retrieval, data analysis, and performance assessments. A lack of sufficient training and poor access to user support may be the reasons why many LWPS staff members have retreated to their respective comfort zones.

A well-functioning work order system is effective in assigning work orders, assessing time to complete the work, developing workload data, providing feedback to the source of the request, and analyzing maintenance trends. These are all activities that are vital to a robust corrective maintenance program. Additionally, without a detailed preventive maintenance program, it is

¹⁷ The Building Condition Assessment: 4 Options for Successful Data Collection | Gordian

impossible to schedule maintenance activities so as to prevent equipment breakdowns. A strong preventive maintenance program is essential to the smooth operation of any facility.

RECOMMENDATION

Select a digital work order and purchase order software that can be employed district-wide, including with contractors on retainer.

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

SchoolDude (later Dude Solutions) products and procedures should be seriously considered because they offer a fully integrated system for school districts, with modules for other departments besides Facilities Use and Management. Other software is also available and due diligence should be employed during selection. Easily accessible user support and customer service should be a prerequisite to serious consideration.¹⁸

FISCAL IMPACT

This recommendation can be implemented with existing resources.¹⁹

FINDING 4-6

Many of the electrical and plumbing installations in the main building and the gymnasium were done without proper licensure. The district has not had these items checked by a licensed electrician or plumber to assess building code compliance or the need for repairs. HVAC units may also have been installed in some instances under similar circumstances. The evaporative cooling units at the back of the auditorium may have been operated improperly after the interior spray units failed.

RECOMMENDATION

Prepare a code compliance task order for the electrical, plumbing, and HVAC contractors under their respective retainer contracts.

The electrical scope of work should be for all electrical installations in the main building and the gymnasium, as well as for any other electrical fixtures that arouse suspicion elsewhere. The plumbing scope of work should include water and gas lines anywhere and everywhere. The HVAC scope does not need to include the newly installed units in the main building, but all other units, including the evaporative coolers, must be included.

¹⁸ <https://login.schooldude.com/>

¹⁹ <https://www.brightlysoftware.com/blog/schooldude>

FISCAL IMPACT

This recommendation can be implemented with existing resources, assuming the allocation of five percent annually for maintenance expenditures.

FINDING 4-7

The main building and the gymnasium have suffered from prolonged roof leaks and the resulting interior damage has not been repaired.

Using the previous bond, the district applied a sun-reflective, white-insulating foam layers over their roofs. It is hoped that the roof leaks were fully repaired before the foam was applied, but no district staff could confirm that work had been done. Therefore, it is not yet known whether the current roofs are watertight. They should be made watertight before repairs are made to correct the extensive interior water damage. In addition:

- In the main building, mortar efflorescence has penetrated through the interior wall surface in several locations.
- In the gymnasium, pigeons have gained a foothold inside corner walls in at least one location. They have remained there despite the roof foam application. It is unclear where the birds continue to gain access.

RECOMMENDATION

Ensure that the roof has been made durably watertight, then repair the damage to ceilings, walls, floors, and other parts of the main building and the gymnasium.

The district should not begin the interior repair work until it confirms that all leaks have been durably stopped. Once confirmed, LWPS should perform this interior repair work.

FISCAL IMPACT

This recommendation can be implemented with existing resources, assuming the allocation of five percent annually for maintenance expenditures. In some cases, the damage may be sufficiently deep to require full or partial exterior and interior wall replacement or restoration. In other cases, cosmetic repairs may suffice. Restorative repairs to the WPA building may be eligible for financial assistance.

FINDING 4-8

The metal building housing the 3-year-old program has a leaky roof that has not been made leakproof, despite numerous past attempts. If the program for 3-year-olds is moved to the annex building's current computer lab space, the roof repair should be scheduled jointly with the structure's conversion to staff housing. If this decision is not implemented or delayed, the roof repair should be scheduled for the Summer of 2023.

RECOMMENDATION

Make the roof of the 3-year-old building durably watertight.

Architects, engineers, or roofing contractors with proven expertise in making metal roofs durably watertight should be consulted. In essence, they should all be metal roofing experts. If the building is remodeled as staff housing, then an expert architect in both metal structures and housing design should be selected. He or she should be given the option of forming a design-build relationship with a metal building contractor. If only the roof is to be made watertight, it is safe to ask metal building contractors for competitive bids.

Regardless of the repair path selected, the scope of work must include the full removal of any residual mold from the years of roof leaks providing the moisture mold spores need to remain active.

FISCAL IMPACT

This recommendation can be implemented with existing resources, assuming the allocation of five percent annually for maintenance expenditures. The consulting team estimates that the roof repair will cost approximately \$20,000.

FINDING 4-9

The district has an excess of surplus and discarded materials around campus. This creates an uninviting and uninspiring learning environment.

Across the district, empty or full boxes, discarded machinery and equipment, outdated textbooks, surplus furniture, and ancient teaching technology dominate the random storage in opportune and often hazardous and inappropriate locations. In addition, scattered non-working machinery and tools lie disorganized in the bus barn and elsewhere, among possum and other animal carcasses and shards of ceiling gypsum board. Old non-working water heaters, air conditioners, other machinery, and appliances are lying outdoors, improperly disposed. One entire building once used for music is now filled with surplus debris. Beyond the unsightly nature of the debris, these widespread conditions create potential health hazards. Moreover, thousands of square feet of usable space have been commandeered for a useless, hazardous, and pointless purpose.

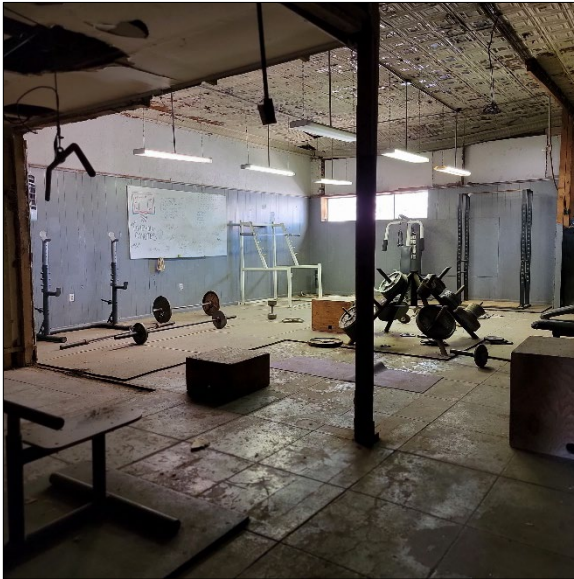
The condition of the district developed over a number of years. The current superintendent recognized the problem and, shortly after her arrival, initiated an ambitious over-the-summer clean-up effort. Although numerous filled dumpsters were removed, the school buildings and grounds appeared as though not a visible dent was made. **Exhibit 4-16** provides a sample of some of the conditions the consulting team observed:

- The weight training area is covered with filth. This leaves a hazardous, unhealthy, and dangerous environment.
- The former music building is filled with surplus items no longer wanted or needed by LWPS, rendering the building completely useless.

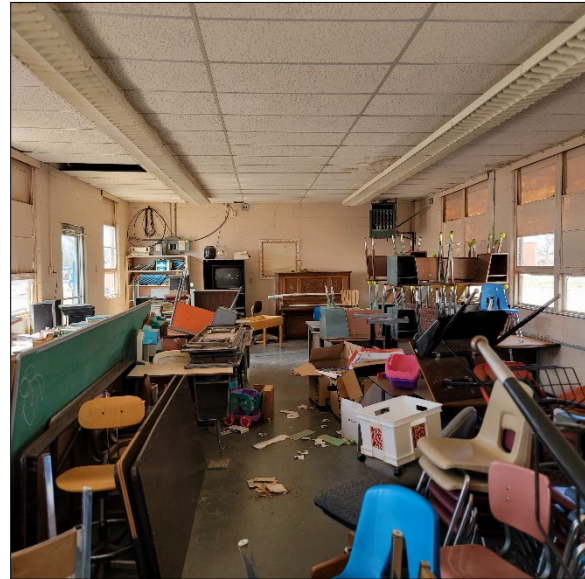
- Empty and partially filled boxes are in every conceivable empty area in all parts of the grade school and high school, at the gym, in the basement below the auditorium, and in the computer lab in the annex.
- Students on lunch break throw their empty lunch wrappers on the ground or on the floor because the school is already littered.

**Exhibit 4-16
LWPS Surplus and Clutter**

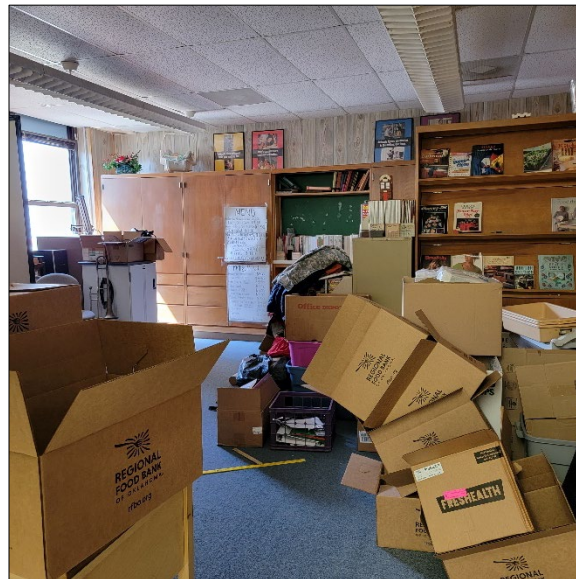
Weight Room



Music Building



Unused Classroom



Source: Prismatic, March 2023

Exhibit 4-17 provides photos of the storage mismanagement in and around the bus barn. The bus barn contains generations of lawnmower tractors that no longer work. A cabinet was once loaded and organized with tools that are now strewn everywhere and filthy. An opossum carcass lies among fallen ceiling drywall. On the south side of the bus barn, there is a dumping ground for discarded but not recycled water heaters, air conditioners, and other recyclable metal objects. These could be hazardous if students choose to play on/around them. They are also an inviting structure for snakes.

Exhibit 4-17
Examples of Storage Mismanagement in and Around the Bus Barn



Source: Prismatic, March 2023

RECOMMENDATION

Continue the facilities clean-up during summer and holiday breaks until no unjustifiable, unwarranted storage and no likely health hazards remain.

The next superintendent should make the de-cluttering and de-littering of LWPS a high priority, with completion by Summer 2024. The next superintendent should also present an “anti-squalor” policy to the School Board for their approval and his/her implementation and enforcement.

The school buildings and grounds should be healthy environments for adults and children alike. The final goal should be a building and grounds inventory free of harmful or dangerous conditions and unsightly piles of solid and potentially hazardous waste. Only then does it become clear where space has been freed and made useful again for the business of education. Indoor air quality measurements should be taken before and after the final cleanup. Parents and other community volunteers should help take truckloads to the dump and metal recyclers should pick up the recyclables free of charge.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Custodial Operations

Safe, clean, and sanitary facilities are essential elements of the education environment. School systems across the United States use different means to address these elements. Typically, school boards either contract out or outsource custodial services or organize a comprehensive in-house program with staff to provide custodial services. Personnel will be employed by either the outsourced company or the board of education.

Management responsibility, if the program is in-house, may reside partially or wholly with the central office, the individual school, or the 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 4-18**.

Exhibit 4-18 Appearance Factors and the Five Levels of Clean

Level 1— Orderly Spotlessness

- Floors and base moldings shine and/or are bright and clean; colors are fresh. There is no buildup in corners or along walls.
- All vertical and horizontal surfaces have a freshly cleaned or polished appearance and have no accumulation of dust, dirt, marks, streaks, smudges, or fingerprints.
- Lights all work and fixtures are clean.
- Washroom and shower fixtures and tile gleam and are odor-free. Supplies are adequate.
- Trash containers and pencil sharpeners hold only daily waste, are clean, and odor-free.

Level 2 — Ordinary Tidiness

- Floors and base moldings shine and/or are bright and clean. There is no buildup in corners or along walls, but there can be up to two days' worth of dust, dirt, stains, or streaks.
- All vertical and horizontal surfaces are clean, but marks, dust, smudges, and fingerprints are noticeable upon close observation. Lights all work and fixtures are clean.
- Washroom and shower fixtures and tile gleam and are odor-free. Supplies are adequate.
- Trash containers and pencil sharpeners hold only daily waste, are clean, and odor-free.

Level 3 — Casual Inattention

- Floors are swept or vacuumed clean, but upon close observation there can be stains. A buildup of dirt and/or floor finish in corners and along walls can be seen.
- There are dull spots and/or matted carpet in walking lanes. There are streaks or splashes on base molding.
- All vertical and horizontal surfaces have obvious dust, dirt, marks, smudges, and fingerprints. Lamps all work and fixtures are clean.
- Trash containers and pencil sharpeners hold only daily waste, are clean, and odor-free.

Level 4 — Moderate Dinginess

- Floors are swept or vacuumed clean, but are dull, dingy, and stained. There is an obvious buildup of dirt and/or floor finish in corners and along walls.
- There is a dull path and/or obviously matted carpet in the walking lanes. Base molding is dull and dingy with streaks or splashes.
- All vertical and horizontal surfaces have conspicuous dust, dirt, smudges, fingerprints, and marks.
- Lamp fixtures are dirty and some (up to 5 percent) lamps are burned out.
- Trash containers and pencil sharpeners have old trash and shavings. They are stained and marked.
- Trash containers smell sour.

Level 5 — Unkempt Neglect

- Floors and carpets are dull, dirty, dingy, scuffed, and/or matted. There is a conspicuous buildup of old dirt and/or floor finish in corners and along walls. Base molding is dirty, stained, and streaked. Gum, stains, dirt, dust balls, and trash are broadcast.
- All vertical and horizontal surfaces have major accumulations of dust, dirt, smudges, and fingerprints, all of which will be difficult to remove. Lack of attention is obvious.
- Light fixtures are dirty with dust balls and flies. Many lamps (more than 5 percent) are burned out.
- Trash containers and pencil sharpeners overflow. They are stained and marked. Trash containers smell sour.

Source: Fichter, G., (2011). *Maintenance of buildings, operational guidelines for educational facilities: Custodial. APPA, third edition, pp. 72-73.*

FINDING 4-10

The district’s facilities were unacceptably dirty at the time of the onsite visit. It was apparent that custodial work was only irregularly completed, perhaps due to the overwhelming maintenance and repair needs, the obstructions presented by haphazard excess storage, or both.

Exhibit 4-19 shows the responses of staff, parents, and students to cleanliness conditions at LWPS. The awareness of a paucity of cleanliness is once again strongest among students and staff, whereas parents are generally unaware of a problem with the quality of custodial work, aided and abetted in part by the tolerance of random storage clutter.

**Exhibit 4-19
Staff, Parent, and Student Survey Responses Regarding Facilities Cleanliness**

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	Our facilities are clean.	8%	33%	8%	25%	25%
Parent	My child’s school is clean.	41%	29%	18%	6%	6%
Student	My school building is clean.	0%	24%	21%	19%	36%

Source: Prismatic Survey Results, March 2023

When compared to the industry-standard levels of cleanliness, the consulting team found that the accessible areas were no higher than Level 3, and others at Level 4+, because of excess storage being present along with filth that would need to be removed first. Acceptable conditions are Level 2 in lavatories and Level 3 in all other areas. Many areas at LWPS are either not accessible because they are cluttered with boxes or surplus goods, or they are simply too filthy for ordinary custodial attention, as in the bus barn.

In 2013-14, the consulting team found that in Blair Public Schools (OK), the only custodians were six part-time high school students. They began cleaning at the end of classes for the day. Their duties included sweeping floors, carrying out trash, and cleaning restrooms. The consulting team observed that the student custodians were capable of keeping the facilities at an acceptable level of cleanliness.

RECOMMENDATION

Hire a pool of responsible high school students as junior custodians to complete daily custodial activities.

The students selected should be recommended by teachers because they know they are committed to the school, responsible and trustworthy. Only students in grades 10-12 should be permitted to serve as junior custodians. They should be assigned specific custodial jobs/modules that can be easily defined and taught. Such tasks should be easily completed in one hour after classes have been dismissed. Preferably, such assignments should focus on a classroom to which

they are assigned during the school day. Pay should be commensurate with the prevailing minimum wage. Training should be easy to impart by the maintenance supervisor/custodian. during summers, spring, and end-of-year breaks, especially well-performing junior custodians shall be eligible for full-time service to help remove the excess storage.

FISCAL IMPACT

The cost of this program assumes five junior custodians working one hour per weekday after school, Monday through Thursday at the minimum wage of \$7.25 per hour, during a school year of 170 days. ($7.25 \times 170 \times 5 = 6,162.50$).

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Hire students as custodians.	(\$6,163)	(\$6,163)	(\$6,163)	(\$6,163)	(\$6,163)

C. ENERGY MANAGEMENT

General energy consumption can be one of the most expensive operational areas for a school district. Due to the large infrastructure required for education, schools use large quantities of electricity, water, oil, and natural gas. Implementing an energy management program can assist in reducing a school district’s operational costs associated with otherwise excessive utility use.

Energy management programs can be implemented in a wide variety of ways, from hiring full-time energy managers to sending out simple shut-down reminders before school dismissal or before a break. One of the most beneficial practices of energy management is the recording of monthly utility bills and the communication of use and costs to the general staff. Tracking utility use can give a bird’s eye view of how much each separately metered facility is spending on its utilities compared to other buildings. The energy manager can then target the most expensive utilities and work to reduce consumption. This communication helps foster awareness of the expenses of running a school and brings attention to energy conservation measures by both students and staff.

The American Society for Hospital Engineers (ASHE) has developed a list of ten components necessary for a successful energy management program. Although this list was originally intended for hospital organizations, they are applicable to all energy management programs. As recommended by ASHE, the items to consider are:

1. Measure/benchmark current energy consumption.
2. Develop an energy use profile.
3. Complete a greenhouse gas emissions inventory.
4. Build teams, get leadership support, and assign dedicated resources.
5. Set targets/goals.

6. Develop strategic action plans for improvement.
7. Consider adopting a strategic energy management plan.
8. Implement projects.
9. Track, measure, and report.
10. Train, educate, and celebrate.

The Association of School Business Officials, in their publication *Planning Guide for Maintaining School Facilities*, suggests that the following guidelines will help a school system accomplish more efficient energy management:

1. Establish an energy policy with specific goals and objectives.
2. Assign someone to be responsible for the district's energy management program and give this energy manager access to top-level administrators.
3. Monitor each building's energy use.
4. Conduct energy audits in all buildings to identify energy-inefficient units.
5. Institute performance contracting (i.e., contracts requiring desired results rather than simply a list of needed products) when replacing older, energy-inefficient equipment.
6. Reward employees of schools or buildings that decrease their energy use.
7. Install energy-efficient equipment including power factor correction units, electronic ballasts, high-efficiency lamps, set-back thermostats, and variable-speed drives for large motors and pulleys.
8. Install motion detectors that turn lights on when a room is occupied and off when the room is unoccupied.²⁰

Additional information about energy management can be found on the National Clearinghouse for Educational Facilities' Energy page²¹ 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 4-11

Energy consumption at LWPS is remarkably low compared to industry metrics. **Exhibit 4-20** shows the district's consumption of water, sewer, garbage, electricity, and natural gas for 2020-21.

²⁰ <http://nces.ed.gov/pubs2003/2003347.pdf>

²¹ <http://www.ncef.org/search/node/energy%20management>

Exhibit 4-20
Energy/Utility Expenses by LWPS in 2020-21

Category	Cost
Sewer, Water, Garbage, Hazardous Waste	\$5,725
Electricity	\$8,416
Natural Gas	\$6,406
TOTAL	\$20,547

Source: OCAS Reports for 2021-22 and Prismatic Calculations, April 2023

LWPS had energy costs of 44 cents per square foot in 2020-21 (**Exhibit 4-21**). School districts that are members of the Council of Great City Schools reported an average of 88 cents per square foot in energy costs. Oklahoma schools have a traditionally lower energy cost than most of the other states.

Exhibit 4-20
LWPS Energy Cost per Square Foot

Unit	Cost
MPS Energy/Utility Costs for 2021-22	\$20,547
Floor area of all facilities ²²	46,225 sq. ft.
\$/sq. ft. over all facilities	\$0.44/sq. ft.
CGCS Schools, lowest quartile, average costs, 2020-21	\$0.88/sq. ft.
CGCS Schools, median costs, 2020-21	\$1.12/sq. ft.
CGCS Schools, upper quartile, average costs, 2020-21	\$1.36/sq. ft.

Source: LWPS, CGCS, and Prismatic Calculations, April 2023

COMMENDATION

LWPS has low energy consumption and utility utilization, which helps keep costs lower.

FINDING 4-12

LWPS buildings have a mixture of fluorescent and incandescent electric lamps deployed. A replacement effort with light-emitting diode (LED) tubes and bulbs will save significant amounts of electricity.

The cost-effectiveness favors LED under all circumstances. The U.S. Department of Energy notes:

LED is a highly energy-efficient lighting technology and has the potential to fundamentally change the future of lighting in the United States. Residential LEDs -- especially ENERGY STAR-rated products -- use at least 75% less energy and last up to 25 times longer than incandescent lighting.

²² Floor area does not include bus barn, ag barn, and former music building since they are not in use.

Widespread use of LED lighting has a large potential impact on energy savings in the United States. By 2035, the majority of lighting installations are anticipated to use LED technology, and energy savings from LED lighting could top 569 KWh annually, equal to the annual energy output of more than 92 1,000 MW power plants.²³

Moreover, LEDs emit little heat in comparison to incandescent and CFLs. They also typically last much longer than other lighting types. A good-quality LED bulb can last 3-5 times longer than a CFL and 30 times longer than an incandescent bulb.

RECOMMENDATION

Replace lights with LEDs.

This task can be scheduled as part of an overall performance contracting arrangement or as a stand-alone effort. The re-lamping work can proceed as a stand-alone effort at the pace when incandescent, fluorescent, and compact fluorescent lamps and tubes have their life expectancy expire. While such a replace-as-you-go approach will not allow the savings of bulk purchasing, it can be accomplished with existing resources. The electricity savings can be used eventually to buy more LED lamps and keep stock for much, much slower replacement of the LED lamps eventually in place.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 4-13

The district has not historically intentionally engaged in energy-saving measures. A more focused approach could yield savings.

Energy conservation behavior is an important contributor to low energy utility bills. It is easy for building users to fall back on lax behavior, such as forgetting to turn off power users overnight and on weekends. A periodic campaign to re-energize energy conservative attitudes and actions will have the desired effect.

The U.S. Department of Energy determined that at least 25 percent of all energy consumed in a school facility is due to energy inefficiency. This inefficiency can be caused by:

- dry transformers;
- poor location of light switches;
- continuously burning hallway lights;
- excessive plug loads and use of personal appliances; and

²³ LED Lighting | Department of Energy

- phantom loads.²⁴

The search for more energy saving opportunities – and for more sources of energy – is never abandoned in high performing districts. One of the best sources of this attitude is Dr. Daniel Yergin’s book *The Quest – Energy, Security, and the Remaking of the Modern World*.

RECOMMENDATION

Pursue energy conservation opportunities.

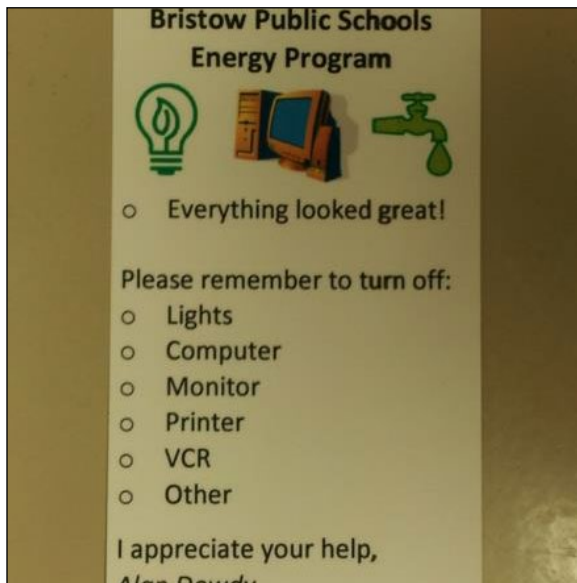
In addition to the LED re-lamping, the district should pursue enhanced energy-saving behavior among building users, investigate renewable energy sources, and seek other viable energy cost-savings as they arise. Wind, solar, and groundwater heat pumps are perhaps the most prominent avenues LWPS has not yet pursued. Some school districts have operated wind generator towers, one with thermal heat pump installations, and another with a solar panel installation in their parking lot. For many school districts, it is now the time to look at alternatives to renting electricity. Solar and wind installations turn renters into generator owners who can engage in net metering with their electric utility companies. Groundwater heat pumps offer the most efficient heating and cooling because groundwater remains at the same caloric content throughout the year, whereas outdoor air temperature fluctuates drastically in most parts of the globe.

An active energy awareness program is a best practice for school districts and should be considered by LWPS. The following are some examples of these conservation efforts:

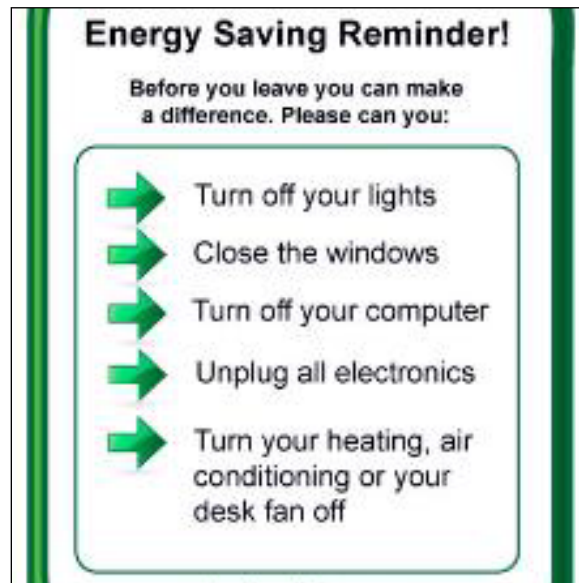
- creating low utilities usage competitions among the schools, with a portion of saved dollars being given to student organizations, or to staff and faculty for their proven contribution to energy savings;
- performing building checks to see if lights are turned off, doors are closed, water faucets are not dripping, etc.;
- leaving notes reminding teachers or staff of the proper procedure, such as those shown in **Exhibit 4-22**, if problems are found during building checks;

²⁴ See http://www.stratenergy.ca/phantom_loads.htm for a detailed explanation.

Exhibit 4-22
Examples of Energy Saving Reminder Stickers



Source: Prismatic Archives, April 2012



Source: BusinessHelpZone.com, December 2015

- enforcing set points for thermostats at 76 degrees in the summer and 69 degrees in the winter; and
- setting water heaters or boilers at a maximum temperature of 140 degrees, except in areas requiring higher temperatures for sanitation purposes, such as kitchens.

FISCAL IMPACT

This recommendation can be implemented with existing resources. Tax credits and other incentives may reduce the installation costs significantly, and possibly eliminate them.²⁵ One financing alternative to bonds is energy performance contracting. Energy Savings Performance Contracting is often viewed not only as an alternative to bond financing, but also as a vehicle for increasing the availability of capital for making energy savings improvements not by simply borrowing money, but by using the projected energy savings as acceptable collateral for the loan. Moreover, the Energy Service Company (ESCO) that arranges the financing will guarantee that it will make up any shortfall in energy savings to pay off the loan.²⁶

FINDING 4-14

It is a fundamental tenet of Total Quality Management (TQM) that processes and products must be subjected to continuous improvement efforts. One is never allowed to “rest on one’s laurels.” School districts are constantly seeking ways to control their energy costs, even to the point of

²⁵ https://www.solar-electric.com/learning-center/solar-energy-tax-incentives.html?msclkid=f60b716dec3a14ce50cf15716e7e9eef&utm_source=bing&utm_medium=cpc&utm_campaign=Search%20-%20Dynamic%20Search&utm_term=solar-electric&utm_content=All%20Webpages

²⁶ <https://www.energy.gov/eere/slsc/energy-savings-performance-contracting>

ending the practice of “renting electricity” and instead generating power via solar and wind sources. LWPS is in the same position of needing to remain competitive. It is a best practice to seek more energy conservation opportunities constantly.

RECOMMENDATION

Seek new energy conservation opportunities constantly during the facility planning process.

Such opportunities are literally limitless in terms of topics, scope, and size.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

D. SAFETY AND SECURITY

School districts are expected to provide a safe and secure environment for their students and staff. While districts are largely insulated from violent crime, incidents of violence at schools draw national attention. School districts must take proactive measures for safety and security even in incident-free schools. Students, teachers, and other district employees deserve a safe school environment in which to work and learn.

In 2003, Homeland Security Presidential Directive-5 (HSPD-5) initiated the development of a National Incident Management System (NIMS) and requires its use by public sector agencies, including school districts. The intent of this system is to provide a common template and language for responding organizations to work together in preventing, preparing for, responding to, and recovering from incidents. As noted by the Federal Emergency Management Agency, NIMS represents “a core set of doctrine, concepts, principles, terminology, and organizational processes that enables effective, efficient, and collaborative incident management.”

NIMS emphasizes that true preparedness requires a commitment to continuous review and improvement. Most districts understand the continuous nature of emergency management and the need for an all-hazard approach. As such, the mission of school districts in an emergency/disaster is to:

- **Prevent** a threatened or actual incident from occurring.
- **Protect** students, teachers, staff, visitors, networks, and property from a threat or hazard.
- **Mitigate** to eliminate or reduce the loss of life and property damage by lessening the impact of an event or emergency.
- **Respond** to stabilize an emergency once it has already happened or is certain to happen in an unpreventable way; establish a safe and secure environment; save lives and property; and facilitate the transition to recovery.

- **Recover** to assist schools affected by an event or emergency in restoring the learning environment (**Exhibit 4-23**).

Exhibit 4-23
Continuous Process of Emergency Management



Source: <https://blog.ed.gov/2014/04/join-americas-prepareathon/>

The Oklahoma Commission on School Safety, which was created in response to the Newtown tragedy, submitted several recommendations to the Oklahoma Legislature. Based upon the commission’s recommendations, the Legislature passed four new laws. Among other things, the laws require schools to update their safety plans every year and have frequent “intruder drills,” with students taking cover while the doors are locked and the windows are covered. The state also created a new Oklahoma School Security Institute (OSSI) to help schools keep their policies up to date.

The Oklahoma Department of Emergency Management (ODEM) reports that the state has had an increased number of earthquakes in recent years. 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.²⁷

According to **Exhibit 4-24**, nearly all staff feel prepared to appropriately respond in a crisis or emergency. Most parents report that their child feels safe and secure at school. Students were nearly equally split on whether then feel safe and secure in school.

²⁷ https://www.ok.gov/OEM/Programs_&_Services/Preparedness/Preparedness_-_Earthquakes.html

**Exhibit 4-24
LWPS Survey Results Regarding School Safety**

Survey Group	Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Staff	I know what to do during a crisis or emergency on campus.	33%	58%	8%	0%	0%
Parent	My child feels safe and secure at school.	29%	47%	6%	12%	6%
Student	I feel safe and secure at school.	5%	29%	29%	17%	21%

Source: Prismatic Survey Results, March 2023

FINDING 4-15

The school district has not yet made the effort necessary to be fully prepared to respond to the spectrum of safety and security threats and challenges faced by all schools in the United States. No evidence was presented to the consulting team of any efforts by LWPS except the absolute minimum required complement of drills and reports required to be furnished to OSSI.

All Oklahoma public schools can access the Rave Panic Button app free of charge. Provided by Rave Mobile Safety, the app allows users to simultaneously connect with 9-1-1 and first responders and sends a text alert to school staff in the event of an emergency.²⁸

RECOMMENDATION

Implement the mobile emergency management plan furnished to all Oklahoma School districts.

In addition to holding the minimum required school drills mandatorily reported to OSSI, the district should be able to respond to emergencies with an emergency management plan that administrators, faculty, students, and parents can access and understand. The district should implement the Rave Panic Button app during the 2023-24 school year.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 4-16

The district has historically not engaged pro-actively in pursuit of a comprehensive security program.

The district has not yet requested a safety evaluation from the Oklahoma School Security Institute (OSSI). These Risk and Vulnerability Assessments are conducted onsite by OSSI professional security and safety consultants. The focus is chiefly on the physical hardening of the

²⁸ https://www.ravemobilesafety.com/products/rave-panic-button/?utm_term=rave%20mobile%20safety&utm_campaign=Rave-Brand&utm_source=bing&utm_medium=cpc

school district, plus organizational and attitudinal aspects of security and safety awareness. A written report containing recommendations is furnished. The entire service is provided upon request and is performed free of charge.

RECOMMENDATION

Invite the OSSI to perform a Risk and Vulnerability Assessment and make written recommendations.

Once the report has been received from OSSI, prepare an action plan of security and safety initiatives and projects to enhance, improve, or remedy current conditions. The results of this assessment will provide useful input to facilities planning as the physical facilities are improved in the coming years.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 5:
Support Services

Chapter 5

Support Services

This chapter reviews several areas of support services in Lone Wolf Public Schools (LWPS). It is divided into these sections:

- A. Child Nutrition
- B. Technology
- C. Transportation

A. CHILD NUTRITION

Successful administration of the child nutrition program depends upon consistent program organization, strong financial reporting, and precise personnel management. All of these administrative areas must align and support the district's goals for student achievement.

School meal programs began in 1946, when the *National School Lunch Act* was signed, authorizing the National School Lunch Program (NSLP) to “safeguard the health and well-being of the nation’s children.” The program, administered by the U.S. Department of Agriculture (USDA), is open to all public and nonprofit private schools, as well as all residential childcare institutions. The NSLP also offers afterschool snacks and dinners for sites that meet the eligibility requirements.

The *Child Nutrition Act of 1966* established the School Breakfast Program (SBP). This is a federally assisted meal program that provides nutritionally balanced, low-cost, or free breakfasts to children in public schools, nonprofit private schools, and residential childcare institutions.

LWPS participates in the NSLP, the SBP, and the USDA Foods in Schools Program. Districts that participate in these federal programs receive cash subsidies and donated commodities from the USDA for each eligible meal they serve. In return, the district must serve student meals that meet federal guidelines for nutritional value, offer free or reduced-price meals to eligible students, and accurately keep required records.

Students in the lowest socioeconomic bracket qualify for free lunches, while others qualify for reduced price lunches. Meals served according to federal guidelines receive some level of reimbursement, including those served to students who pay full price. School districts do not receive federal reimbursement support for teacher or guest meals. **Exhibit 5-1** shows the applicable 2021-22 and 2022-23 federal reimbursement rates for breakfast and lunch. A USDA waiver allowed for free meals for all students during 2021-22. Effective for the 2022 calendar year, USDA increased reimbursement rates for breakfast and lunch; these increases are shown as the second figures for the free rates. LWPS also receives an additional \$0.08 per meal for meeting the meal pattern requirements.

Exhibit 5-1
School Meals: Federal per Meal Reimbursement Rates 2021-22 and 2022-23

Meal Type	School Breakfast Program - Severe Need ¹		National School Lunch Program	
	2021-22	2022-23	2021-22	2022-23
Free	\$2.46/\$2.60	\$2.67	\$4.31/\$4.56	\$4.43
Reduced Price	NA	\$2.37	NA	\$3.95
Paid	NA	\$0.50	NA	\$0.87

Source: <http://www.fns.usda.gov/schools-meals/rates-reimbursement>

The *Healthy, Hunger-Free Kids Act of 2010 (HHFKA)* provided sweeping modifications to the school nutrition programs and made substantial changes in the required meal components. The new regulations require districts to charge equitable prices for full-pay meals and non-reimbursable à la carte items, establish nutritional requirements for all foods sold on campus at any time during the school day, provide free water where meals are served, provide nutrition education to students in the district, and require school nutrition directors/managers to meet education, training, and certification requirements.

Exhibit 5-2 provides the nutritional requirements as specified in the *HHFKA*. Both the breakfast and lunch menus now must offer more fruits and vegetables than before. Milk must be low-fat or fat-free. Sodium levels must be reduced. Whole grains must be increased, and trans fats must be eliminated. In the last year, while many districts have successfully implemented the requirements of *HHFKA*, there have been discussions at the federal level about rolling back some provisions and delaying the implementation of others.

Effective in February 2022, USDA issued temporary standards for three items which will supersede the requirements for 2022-23 and 2023-24. They are:

- Milk – can offer flavored low-fat one percent milk in addition to non-fat flavored and non-fat or low-fat unflavored;
- Grains – items must be at least 80 percent whole grain rich; and,
- Sodium – will remain at Target 1 for 2022-23 and will be reduced by 10 percent for lunch in 2023-24.

Meeting nutritional requirements continues to be challenging for school meal program operators while USDA responds to changing viewpoints on optimal nutritional targets for meals in schools.

¹Lone Wolf is eligible to receive severe-need reimbursements for breakfasts served to eligible students in 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 or initiating a school breakfast program.

**Exhibit 5-2
Summary of Nutritional Requirements for Breakfast and Lunch**

	Breakfast		Lunch	
Fruits and Vegetables	1 cup per day (vegetable substitution allowed). Students are allowed to select ½ cup under Offer Versus Serve.		¾-1 cup vegetables plus ½-1 cup fruit per day.	
Grains	Daily minimum of 1-ounce equivalent minimum per day; weekly minimum ranges, varying by grade: K-5: 7-10 ounces 6-8: 8-10 ounces 9-12: 9-10 ounces		Daily minimums varying by grade: K-5: 1 oz. eq. min. daily (8-9 oz. weekly) 6-8: 1 oz. eq. min. daily (8-10 oz. weekly) 9-12: 2 oz. eq. min. daily (10-12 oz. weekly)	
Meat/Meat Alternate	May substitute meat/meat alternates after minimum daily requirement for grains is met.		K-5: 1 oz. eq. min. daily (8-10 oz. weekly) 6-8: 1 oz. eq. min. daily (9-10 oz. weekly) 9-12: 2 oz. eq. min. daily (10-12 oz. weekly)	
Whole Grains	All must be whole grain-rich unless exemption is granted.		All must be whole grain-rich unless exemption is granted.	
Milk	1 cup, 1% (unflavored) or fat-free (unflavored/flavored)		1 cup, 1% (unflavored) or fat-free (unflavored/flavored)	
Sodium*	Target 2 (2017-18): K-5: ≤ 485 mg 6-8: ≤ 535 mg 9-12: ≤ 570 mg	Target 3 (2022-23): K-5: ≤ 430 mg 6-8: ≤ 470 mg 9-12: ≤ 500 mg	Target 2 (2017-18): K-5: ≤ 935 mg 6-8: ≤ 1035 mg 9-12: ≤ 1080 mg	Target 3 (2022-23): K-5: ≤ 640 mg 6-8: ≤ 710 mg 9-12: ≤ 740 mg
Trans Fat	Zero grams per serving (nutrition label)		Zero grams per serving (nutrition label)	

Source: USDA, January 2012

**Target 1 was set to be implemented by 2014-15*

Exhibit 5-3 provides photos of a sampling of LWPS trays selected by students during the onsite period. Trays for breakfast and lunch are shown.

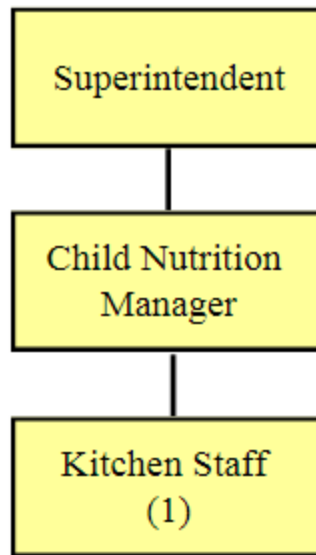
Exhibit 5-3
Breakfast and Lunch Sample Trays and LWPS Salad Bar



Source: Prismatic, March 2023

Exhibit 5-4 shows the organization of staff within the LWPS child nutrition department. The kitchen staff person reports to the manager who reports to the superintendent.

**Exhibit 5-4
LWPS Child Nutrition Organization**



Source: Created by Prismatic, March 2023

On the stakeholder survey conducted for this review, the staff was asked to assign a letter grade to various LWPS functional areas. **Exhibit 5-5** provides the results for child nutrition. The majority, 92 percent, gave child nutrition an A or B, which indicates staff is positive about the program and its staff.

**Exhibit 5-5
Staff Survey Results Regarding Child Nutrition**

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Child Nutrition	50%	42%	8%	0%	0%	0%

Source: Prismatic Survey Results, March 2023

FINDING 5-1

Lone Wolf child nutrition is not in compliance with requirements of USDA Professional Standards. A component of the *Healthy Hunger Free Kids Act (HHFKA)*, the professional standards became effective in 2015-16. They require a minimum amount of annual training hours for all child nutrition managers and staff. They also require that the district maintain a log of training for at least three years plus the current year, which the district is not currently doing.

The purpose of the professional standards provision is to establish minimum continuing education standards for all school nutrition professionals. These training standards help ensure that child nutrition personnel have the knowledge, training, and tools they need to plan, prepare, and serve nutritious meals to school students. **Exhibit 5-6** outlines the minimum training hours required for each employee group. The training must be job-specific, apply to the employee’s work duties, and assist them in optimal performance of their assigned job duties.

Exhibit 5-6
Professional Standards Annual Training Hours for Child Nutrition Staff

Employee Type	Requirements
Director	12 hours
Manager	10 hours
Staff, 20+ hours per week	6 hours
Staff, <20 hours per week	4 hours

Source: USDA, May 2019

During their interviews, neither kitchen employee indicated an awareness of the professional standards requirement. They stated they have attended classes but noted topics that are required of all district employees, such as Civil Rights. The manager stated she attends annual required training provided by the SDE Child Nutrition Unit. The manager was not able to provide a log of training classes either staff member had attended. Based on the available data, The consulting team concluded the two employees are not completing training classes to meet the requirements of the professional standards provision.

In addition to USDA requirements for training, the School Nutrition Association (SNA) in their *Keys to Excellence: Standards of Practice for Nutrition Integrity*² recommend as a best practice: “Orientation and training that enhances learning and improves job skills is available to all school nutrition personnel.”

RECOMMENDATION

Develop an annual training calendar and log to ensure compliance with child nutrition professional standards requirements.

Training trackers are available on the SDE Child Nutrition website. Records must be available to SDE and are now part of the administrative review. USDA provides a training tracking tool on their website to assist districts with the recordkeeping requirement. Training records must be kept for three years plus the current school year.

The child nutrition manager should research available classes offered by the SDE Child Nutrition Unit as well as the Institute for Child Nutrition (ICN). Both institutions have classes available as an on-line format. Kitchen staff should consider attending the annual OK child nutrition conference. The manager should ensure she and her assistant complete the required hours of training on an annual basis. An electronic system for tracking the training should be established and maintained.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

² <http://www.schoolnutrition.org/Content.aspx?id=20206>

FINDING 5-2

The child nutrition manager lacks knowledge about several areas of USDA regulations resulting in program noncompliance. Specific areas include offer versus serve, menu components, menus, recipes, and nutritional analysis.

During lunch service, the consulting team observed all items were put on the tray. Offer versus serve was not in practice. When questioned why, the manager stated unless students specifically asked not to have an item, all items were put on the tray. When asked about offer versus serve, the manager said students had to take the entrée. The consulting team found a USDA Offer versus serve Manual on the shelf in the office and showed staff printed guidance on meal components and offer versus serve and pointed out the statement that students do not have to take an entrée or milk.

When asked about how she creates menus, the manager stated she uses menus developed by Hobart Public Schools with that district's manager's permission. On some days, she inserts menu items she thinks her students might like and mentioned fajitas for one example. The manager indicated that recipes are not often used. Kitchen staff did have on hand the USDA standardized recipes manual, but the district creates a number of items that are not in that manual. When asked to see the recipes for items not in this manual, staff said there were not any. The kitchen staff did not have the required nutritional analysis for recipes that were not in the manual or for menu items purchased. The LWPS manager does not know how to do nutritional analysis on a recipe, food item, or menu. When asked how she knew the menus from Hobart contained the correct meal components and met nutritional requirements, the manager stated she was given assurance they did but had no data to support this claim.

Offer versus serve allows students to decline a certain number of food components in the meal and select the foods they prefer to eat. This provision is designed to reduce food cost and waste. It allows menu planners the flexibility to address student participation and selection trends to determine what and how much food to prepare. A food component is one of five required food groups in reimbursable lunches. These are meats/meat alternates, grains, fruits, vegetables, and fluid milk. A food item is a specific food offered within the five food components. The required five food components must be offered for school lunch. Students must select at least three of the five required food components, including at least ½ cup of fruit and/or vegetable, to have a reimbursable lunch.

The *Oklahoma State Department Of Education Child Nutrition Programs(Cnp) Permanent Agreement National School Lunch Program, School Breakfast Program, Special Milk Program, And/Or After-School Snack Program* states that school districts must “Serve meals which meet the requirements prescribed in current regulations during a period designated as the meal period(s).” The Final Rule for USDA’s *Nutrition Standards in the National School Lunch and School Breakfast Programs*, (published January 26, 2012) intends to ensure the provision of nutrient-dense meals (high in nutrients and low in calories) that meet the health needs of school children and reflect the most current dietary science. This final rule requires school districts to perform a nutrient analysis on the meals served to students in the school meals programs.

The purpose of nutrient analysis is to determine compliance with regulatory requirements for calories, saturated fat, and sodium, and to monitor levels of these dietary components in school meals. Performing an accurate nutrient analysis is critical to the evaluation of menus and menu documentation.

RECOMMENDATION

Obtain training for the child nutrition manager on USDA regulations regarding menu components, meal service, menu planning, recipes, and nutritional analysis.

The manager should contact their SDE area consultant to schedule training and assistance. Specific areas needed are menu planning and development and nutritional analysis. The consulting team is familiar with other Oklahoma school district child nutrition programs who receive assistance from SDE with the nutritional analysis of their menus. New menus should be developed that meet the needs of Lone Wolf students and meet the nutritional requirements. These should be completed for use in the 2023-24 school year.

On the website for SDE CN Unit, it states “The Area Consultants from the State Department of Education can assist nutrition personnel in running a more efficient and effective child nutrition program by providing free technical assistance and training.” Two areas noted in the list of areas of assistance that would be beneficial to the LWPS Wolf child nutrition program manager are:

- Interpret program regulations to board members, administrators, and food service personnel.
- Evaluate the nutritional quality of meals provided and instruct program participants on creative ways to provide fun, healthy, and nutritious meals.

Other potential sources of training for the program staff are the Institute for Child Nutrition (ICN) which has online training and resources in the areas of menu planning, recipe development, offer versus serve, and nutritional analysis and the Oklahoma School Nutrition Association (SNA) which has an annual conference with numerous training sessions and a vendor exhibit to introduce attendees to new menu items. These training opportunities will also serve to meet the Professional Standards requirements.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-3

The CN manager is not performing several tasks typically assigned to staff in the school nutrition program, resulting in less optimal program management. These include receipt and monitoring of pre-payments and charges, ordering commodities and items for the Fresh Fruit and Vegetable program, maintaining daily participation records, preparing claims, and processing meal applications.

When asked to describe the duties of her position the manager indicated she did not perform any of these tasks. When asked what tasks the CFO performs for the child nutrition program, she

stated she receives the rosters, inputs the data into the system, does the edit check and prepares the monthly claim. Processing the meal applications is also a duty of the CFO as well as the verification process.

The assistant treasurer receives payments for student meals, writes a receipt, and takes the money (deposit) to the bank. She receives the meal counts each morning from the teachers, tabulates, and sends the total, as a text message, to the manager. She receives the weekly roster on Thursdays from the manager and computes the totals. This information is then given to the CFO. She sends out bills to parents for meal charges.

The superintendent orders the commodities and produce for the Fresh Fruit and Vegetable Program. She was told by the child nutrition manager that all these duties were done previously by the prior superintendent's secretary and the manager was not proficient with automation. The child nutrition manager also stated she would be retiring at the end of the year, so the decision was made to split the duties amongst the superintendent, CFO, and assistant treasurer for 2022-23.

The child nutrition program is a federal USDA program administered through offices at the state level. It is complex and contains numerous regulations, policies, and processes. When the district signs the agreement with the SDE they agree to operate the program and are then responsible to ensure all regulations are complied with. Oversight is an important part of this process as well as ensuring the nutritional needs of students are being met. Staff in the kitchens are the most appropriate to perform the various bookkeeping tasks as they are the ones preparing and serving the meals and are connected to the entities at the state and national level who provide training, program updates and professional development.

RECOMMENDATION

Ensure the child nutrition manager is proficient in automation as well as the typical variety of program-required tasks.

The new child nutrition manager should be trained specifically in child nutrition bookwork and the technology to support efficient completion of that bookwork. Once trained, the manager should assume the child nutrition management tasks that were previously accomplished by the superintendent, CFO, and assistant treasurer. Those currently performing these duties should train the manager. If needed, the district should enlist assistance from the SDE Child Nutrition Area Consultant.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-4

The child nutrition program is not adequately managing its staff. The current Meals Per Labor Hour (MPLH) is below industry standards and OK SDE guidelines. The cafeteria manager does

not calculate MPLH and therefore does not know the MPLH for the LWPS child nutrition operation.

The district is not using the Oklahoma State Department of Education (SDE) recommended staffing guidelines to set goals for productivity relative to meals served. SDE guidelines provide productivity goals based upon the number of meal equivalents served and the number of labor hours needed to prepare those meal equivalents. The student reimbursable lunch meal is the standard unit of conversion for determining meal equivalents. Therefore, all meal types are converted to meal equivalents for the purposes of measurement. A meal equivalent is not a unit of production, but a calculation that allows a cafeteria manager to equate all meals to a standard. By converting all food sales to meal equivalents, a manager can determine production rates. The SDE uses the following conversions to meal equivalents:

- one lunch and supper equate to one meal equivalent;
- two breakfasts equate to one meal equivalent;
- three snacks equate to one meal equivalent; and
- à la carte sales of \$4.75 (2022-23 rates) equate to one meal equivalent.

The most common means of measuring employee productivity in child nutrition is the meals per labor hour (MPLH) measure. This is calculated by dividing the number of meal equivalents produced and served in a day by the number of labor hours required to produce those meal equivalents. The SDE guidelines for MPLH staffing are shown in **Exhibit 5-7**. The SDE provides MPLH guidelines for both conventional and convenience systems of food preparation. The consulting team found LWPS to be using largely a conventional system of food preparation.

**Exhibit 5-7
Oklahoma Staffing Guidelines for Onsite Production**

Number of Daily Meal Equivalents	Recommended for Conventional Systems ³		Recommended for Convenience Systems ⁴	
	Meals per Labor Hour (MPLH)	Total Hours	Meals per Labor Hour (MPLH)	Total Hours
10 – 100	12	< 8	16	< 6
101 – 150	12	8 – 12	16	6 - 9
151 – 200	12	12 – 16	16	9 – 12
201 – 250	14	14 – 17	17	12 – 14
251 – 300	14	17 – 21	18	14 – 16
301 – 400	15	20 – 26	18	17 – 21
401 – 500	16	25 – 31	19	21 – 25
501 – 600	17	29 – 35	20	25 – 30
601 – 700	18	33 – 37	22	27 – 31

Source: OK SDE Child Nutrition Manual Compliance Section, July 2015

Exhibit 5-8 shows the monthly MPLH for the Lone Wolf cafeteria for the first half of 2022-23. Productivity (MPLH) at 7.49 was lower than the recommended standard of 12, and labor hours were in excess by 6 of SDE recommendations.

**Exhibit 5-8
Lone Wolf Cafeteria Meals per Labor Hour
2022-23 YTD**

Month	Lunches Served	Breakfasts Served	Meal Equivalents per Month	School Days Per Month	Daily Meal Equiv.	Daily Labor Hours	MPLH
August	1,383	495	1,631	15	109	14	7.76
September	1,187	861	1,618	16	101	14	7.22
October	1,377	683	1,719	16	107	14	7.67
November	1,263	627	1,577	15	105	14	7.50
December	814	426	1,027	9	114	14	8.15
January	1,191	601	1,491	16	93	14	6.65
TOTAL	7,215	3,693	9,063	87	629	84	44.95
AVERAGE	1,202	615	1,510	15	105	14	7.49

Source: LWPS and Prismatic calculations, March 2023

Costs for labor and benefits are a major expenditure for child nutrition programs. To maintain a sound financial position, goals for staffing must be established based upon industry standards. SDE has established guidelines for districts to calculate meal equivalents and assign labor hours.

³ A system where meals are generally prepared from scratch onsite.

⁴ A system where meals are generally only re-heated from frozen prepared items onsite.

MPLH must be calculated and evaluated on a regular basis to ensure that the kitchen has adequate labor hours but is not overstaffed.

RECOMMENDATION

Implement a combination of a reduction in labor hours and efforts to increase meal equivalents to yield higher productivity rates.

There are two ways to increase the productivity rate and produce more meals per hour of paid labor:

1. Decrease the number of labor hours – the number of staff hours worked daily can be reduced by adjusting work schedules; or
2. Increase the number of meal equivalents – implement measures to increase participation and à la carte sales. Lunch participation is an average of 67 percent so there is some opportunity to increase participation in this meal segment. At 36 percent participation, there is a large opportunity to increase breakfast participation. Since Lone Wolf does not have an à la carte program available to students or staff, offering à la carte choices is another approach that can help increase meal equivalents.

There is an excess of approximately six labor hours per day at LWPS. The consulting team recommends that the kitchen staff be reduced by one person and the remaining person be assigned eight hours. This change will require an additional person to staff the POS at lunchtime. The district should assess the feasibility of advertising this position to the school community in hopes of attracting a parent or retiree.

FISCAL IMPACT

The elimination of the six-hour employee will result in a savings of approximately \$11,505 (\$12.06 x 6 hours x 159 days).

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Eliminate one staff person.	\$11,505	\$11,505	\$11,505	\$11,505	\$11,505

FINDING 5-5

The financial status of the child nutrition program is currently positive. This means that the program is not currently requiring supplements from the general fund to operate.

Historical data show several recent years when the program operated at a loss. **Exhibit 5-9** shows the LWPS child nutrition program revenues and expenditures for the past five years as well as the current year to date. A breakdown by reimbursement sources and expenditure categories was not available for the current school year. The substantial increase in federal reimbursement in 2021-22 was most likely due to a USDA waiver during COVID allowing all students to be claimed as free and reimbursed at the higher summer feeding rate. Current

reimbursement has returned to the normal rate which will likely affect the financial status in the current year and going forward.

The district started charging the meal program utilities in 19-20 as noted in the sizeable increase in the “other” expenses category. In 20-21 and 21-22 there were charges for appliances, furniture, and fixtures.

**Exhibit 5-9
LWPS Child Nutrition Revenues and Expenditures Over Time**

	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23 YTD ⁵
Revenues						
District Sources	\$10,574	\$14,994	\$12,585	\$5,741	\$189	NA
State Sources	\$618	\$498	\$528	\$600	\$895	NA
Federal Sources	\$44,101	\$33,645	\$53,676	\$65,977	\$97,719	NA
Total Revenues	\$55,293	\$49,137	\$66,789	\$72,317	\$98,802	\$78,891
Expenses						
Salaries and Benefits	\$29,279	\$33,011	\$36,377	\$34,814	\$37,852	NA
Food and Supplies	\$24,624	\$20,395	\$32,376	\$41,419	\$38,093	NA
Other Expenses	\$2,734	\$3,476	\$10,486	\$17,068	\$19,878	NA
Total Expenses	\$56,637	\$56,882	\$79,239	\$99,952	\$95,823	\$72,587
Revenues - Expenses	(\$1,324)	(\$7,745)	(\$12,449)	(\$27,634)	\$2,979	\$6,304

Source: SDE, School District Revenue and Expenditure Reports 2018-23

Note: Totals may not reconcile completely due to rounding

When a child nutrition program loses money every year, in addition to requiring support from the general fund, it does not build up a fund balance. Ending the year with an overage makes it possible to pay for beginning of year expenses before federal reimbursement is received and ensures it can pay cost increases in categories such as food and labor/benefits. Industry experts advise maintaining a two-to three-month operating balance. USDA regulations limit net cash resources to an amount that does not exceed three months’ average expenditures.

COMMENDATION

The LWPS child nutrition program has been operating without financial loss for the past two years.

Moving forward, the district should continue to closely monitor the financial status to ensure the program maintains a positive position.

⁵ 7/1/2022-3/29/2023

FINDING 5-6

The child nutrition manager does not receive any financial data about the program and lacks knowledge about the financial status. There is no one in the district that monitors the financial position of the program. The child nutrition program funds are combined with the General Fund.

The CFO was able to print out year-to-date child nutrition expenditures and revenues, but no report is prepared and given to the manager. During the review, the consulting team inquired about charges on previous OCAS annual expenditure documents labeled “books/EBOOKS”. The CFO stated this was a coding error and should have been Food and Milk as the object description. The error was corrected immediately during the review. The CFO also stated she would be examining other questionable codes and correcting as needed.

There are no reports prepared showing participation, MPLH, or menu costing. Lacking these, the manager does not have adequate tools to assist in monitoring and analysis to help guide decision-making and achieve optimal financial performance.

Standard business practice dictates the development of a well-defined set of reports that can be used for data analysis and program improvement. *Managing Child Nutrition Programs Leadership for Excellence*⁶, second edition, states, “One of the most important aspects of financial management involves the preparation of financial statements that can be used to analyze program operations.” School meal programs are unique in a school district because they have both revenue and expenditure accounts. If the programs do not operate with fiscal soundness, they are dependent upon the general fund for subsidization. The only way to ensure a fiscally solvent program is to prepare reports and then use this information for making decisions.

Exhibit 5-10 shows a listing of reports typically used in school districts to monitor the child nutrition operation. Data contained in each report are noted, as is how the report is used. Samples of these reports can be found in *Financial Management: A Course for School Nutrition Directors*⁷ and *Financial Management Information System*⁸ both from the ICN.

⁶ Martin, J. (2008). *Managing child nutrition programs: Leadership for excellence* (2nd ed.). Sudbury, Mass.: Jones and Bartlett.

⁷ Institute of Child Nutrition. (2017). *Financial management: A course for school nutrition directors* (2nd Ed). University, MS: Author

⁸ Institute of Child Nutrition (20145). *ICN financial management information system* (2nd ed). University, MS: Author.

Exhibit 5-10
Sample Financial Management Reports Used to Monitor Child Nutrition Operations

Data	Uses	Frequency
<ul style="list-style-type: none"> Forecasted revenue by source based upon estimates of participation, reimbursement, meal prices, and new revenue sources Forecasted expenditures based upon a determination of increases or decreases in each category 	<ul style="list-style-type: none"> Allow for a projection of financial performance for the next school year Allow for comparisons between actual and forecasted performance 	<p>Once a year with monthly monitoring and adjustments as necessary</p>
<ul style="list-style-type: none"> All revenues by source and expenditures by category Net gain/loss for the time period Comparison of current month to previous month and year to date Reflects activity over one month 	<ul style="list-style-type: none"> Determine if revenues are sufficient to cover expenditures Identify sites needing adjustments to reduce loss 	<p>End of each month</p>
<ul style="list-style-type: none"> Assets, liabilities, fund balance Reflects financial position at a point in time 	<ul style="list-style-type: none"> Determine amount of fund balance available for expenditures Verify if program has no more than three months average operating costs in reserve Determine financial status of program 	<p>End of each month</p>
<ul style="list-style-type: none"> An analysis of expenditures to revenue Calculated by dividing each expenditure category by total revenue generated during the same time period 	<ul style="list-style-type: none"> Determine the percentage of revenue that is used for food, labor, benefits, supplies, overhead, capital expenditures, and indirect costs Compare actual ratios to goals set and industry standards Determine if the program is operating at break-even or experiencing a profit or loss 	<p>Monthly or quarterly</p>
<ul style="list-style-type: none"> Calculated by dividing total number of meals/meal equivalents by total number of labor hours for each site Meal equivalents are determined by converting all meals and à la carte revenue to a standard unit (lunches) 	<ul style="list-style-type: none"> Analyze staffing patterns by site and compare to goals set Identify sites needing adjustments to labor hours Allow comparison to industry standards 	<p>Monthly</p>
<ul style="list-style-type: none"> Average daily attendance (ADA), number and percentage of students eligible by category (free, reduced, paid), average number of breakfast and lunch meals served by category, daily participation percentage by eligibility category District level and site level data 	<ul style="list-style-type: none"> Determine what percentage of eligible students are participating in each program Identify eligibility categories to target for participation improvement Identify sites not meeting participation goals Allow comparison to industry standards 	<p>Monthly and at end of year</p>
<ul style="list-style-type: none"> Menu items Forecasted and actual amounts used Food cost per menu item Total cost per menu Cost per serving Average food cost per meal District and site level data 	<ul style="list-style-type: none"> Allow for comparison of actual cost per meal to revenue per meal (reimbursement, commodity value, payment) Determine menus needing adjustments for cost effectiveness Assist in purchasing and evaluation of new products 	<p>Monthly</p>

Source: Created by Prismatic, February 2015

ICN recommends preparing and distributing site-level performance reports in their class *Financial Management: A Course for School Nutrition Directors*.⁹ SNA's self-assessment tool, *Keys to Excellence*, includes the following best practices and indicators:

- A Statement of Revenue and Expenditures (Profit and Loss Statement) is prepared on a monthly basis for the department level and for each serving site.
- School nutrition site-level Statements of Revenue and Expenditures are distributed.
- School nutrition personnel at the school site level receive training on controlling costs and revenue generation.
- School nutrition personnel at the school site level are encouraged to develop and implement practices to increase revenue and control costs.¹⁰

One cafeteria-level report distributed by another school district is shown in **Exhibit 5-11**. This sample provides a variety of data, including financial and performance data, in a format that is easy to read and understand. Additional sample reports can be found in the ICN financial management class materials.

⁹ Institute of Child Nutrition. (2017). *Financial management: A course for school nutrition directors* (2nd Ed). University, MS: Author.

¹⁰http://schoolnutrition.org/uploadedFiles/4_Certification_Education_and_Professional_development/3_Keys_to_Excellence/Keys%20to%20Excellence%20Standards%202015-2016.pdf

**Exhibit 5-11
Sample Monthly Cafeteria Report**

Revenue:		Current Month	Year to Date
Meal Revenue		\$2,411.40	
Supplemental Sales		\$1,648.90	
Other Revenue		\$75.34	
Total Reimbursement		\$15,061.75	
TOTAL REVENUE:		\$19,197.39	\$139,903.44

Expenses:		Current Month	Year to Date
<i>Inventory/Food Cost</i>			
Beginning Inventory		\$5,973.00	
Purchases		\$7,167.00	
Transfers		(\$70.00)	
Ending Inventory		\$5,932.00	
<i>Total Food Usage:</i>		\$7,138.00	\$51,686.00
<i>Inventory/Supply Cost</i>			
Beginning Inventory		\$1,413.00	
Purchases		\$753.00	
Transfers		\$311.00	
Ending Inventory		\$1,564.00	
<i>Total Supply Usage:</i>		\$913.00	\$6,618.00
Labor Costs			
School Staff		\$8,186.19	
Temporary Labor		\$0.00	
<i>Total Labor:</i>		\$8,186.19	\$67,638.24
Overhead		(\$108.37)	\$6,207.11
TOTAL EXPENSES:		\$16,128.82	\$132,149.35
GAIN or (LOSS):		\$3,068.57	\$7,754.09
% GAIN or (LOSS):		15.98%	5.54%

Supervisor Comments/Suggestions:

Percent of Revenue			
	Total Cost	% of Total Revenue	Goal Less Than
Food	\$7,138.00	37.18%	40%
Supplies	\$913.00	4.76%	5%
Labor	\$8,186.19	42.64%	40%
Overhead	(\$108.37)	-0.56%	7%
Total Cost	\$16,128.82	84.02%	92%

Total Meal Equivalents Per Day	
Total Breakfasts:	56
Total Lunches:	264
Supplemental Sales:	36
Total Meal Equivalents:	357

% of Eligible Meals Served			
Average Daily Attendance:		426	
	# Eligible	% Served	Goal
Free	223	85.67%	
Reduced	14	88.72%	
Paid	219	26.56%	

Current Month Plate Cost			
	Total School Cost	Cost Per ME	Goal
Food	\$7,138.00	\$1.05	\$1.08
Supplies	\$913.00	\$0.13	\$.13
Labor	\$8,186.19	\$1.38	\$1.08
Overhead	(\$108.37)	(\$0.02)	\$.19
Total Cost	\$16,128.82	\$2.55	\$2.48

YTD Plate Cost			
	Total School Cost	Cost Per ME	Goal
Food	\$51,686.00	\$1.05	\$1.08
Supplies	\$6,618.00	\$0.13	\$.13
Labor	\$67,638.24	\$1.37	\$1.08
Overhead	\$6,207.11	\$0.12	\$.19
Total Cost	\$132,149.35	\$2.67	\$2.48

Source: Prismatic files, December 2013

RECOMMENDATION**Improve management of the child nutrition program by preparing child nutrition financial reports that will provide meaningful data in a format that can be used for analysis and decision-making.**

The CFO should develop child nutrition reports that provide meaningful data, provide them to the child nutrition manager, and train her on how to interpret and analyze. The child nutrition manager should work with the CFO to determine what data are needed to assess how well the program is doing. Sources of this data should then be identified, and staff should be assigned to collect and assemble the information in a format usable for evaluation and analysis. Reports should be prepared in a timely manner and distributed. The manager and CFO should meet on a monthly basis to evaluate the data and determine if changes are needed for program improvement.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-7

Lone Wolf does not participate in available programs such as the Community Eligibility Provision (CEP) even though the district meets the eligibility requirements. This USDA initiative eliminates the need to collect meal applications from households and meals are offered to all students at no charge. It eliminates the burden for families to submit meal applications and decreases administrative paperwork.

CEP eligible schools are reimbursed for meals served, based on an identified student percentage (ISP) formula of students eligible for free meals based on their participation in other specific means-tested programs, such as the Supplemental Nutrition Assistance Program (SNAP) and Temporary Assistance for Needy Families (TANF). Reimbursements to the school are calculated by multiplying the percentage of identified students by 1.6 to determine the percentage of meals that will be reimbursed at the federal free rate. For example, a school with 50 percent identified students would be reimbursed at the free rate for 80 percent of the meals eaten (50 multiplied by 1.6 is 80), and at the paid rate for 20 percent.

To be eligible to operate CEP, a school or group of schools within a district must have an Identified Student Percentage (ISP) of 40 percent or higher. The OK SDE *Community Eligibility Proxy Report* is produced every year and shows the following ISP data for Lone Wolf:

- 2022: 51.11%
- 2021: 45.76%
- 2020: 32.7%
- 2019: 41.0%

As indicated, LWPS could have applied for CEP several years ago. USDA’s Food and Nutrition Service announced on March 23, 2023, that they would be issuing a proposed rule with the intent to expand access to CEP by lowering the minimum ISP participation threshold from 40 to 25 percent.

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.

RECOMMENDATION

Notify OK SDE of the district’s intent to apply and implement CEP beginning in 2023-24.

The CFO and child nutrition manager should work with the SDE consultant to complete the necessary paperwork and become approved as a CEP district. The district should determine the best notification method and communicate the parameters to parents and the school community. This new program should be fully implemented as quickly as possible in 2023-24.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-8

The LWPS menus are not optimal. There are no choices other than the fruit/vegetable bar. Menus and portion sizes are not customized by age group. There is no self-serve except for the fruit/vegetable bar. There is no student involvement to develop menus. The fruit/vegetable bar lacks variety from day to day.

Student perceptions about the food served in the cafeteria are shown in **Exhibit-12**. As noted, only 39 percent agree that they like the food. Approximately one third have no opinion and the remaining 25 percent do not like the food served. Half of the students think there is a good variety of food served at lunch and the other half either have no opinion or disagree. These responses indicate there is room to improve the program and strive to better meet student tastes and expectations.

**Exhibit 5-12
Student Survey Results Regarding Child Nutrition**

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I like the food served in the cafeteria.	2%	37%	37%	15%	10%
The cafeteria serves a good variety of food for lunch.	5%	48%	30%	10%	8%

Source: Prismatic Survey Results, March 2023

The consulting team found several practices that are contributing to the lukewarm responses of students about the lunch meals:

- The same menu is used for all grade levels. Different age groups have different food preferences and menus need to accommodate the more developed palates of the older students. After eating the same menu in elementary school, older students are more prone to menu burnout.
- There is only one entrée offered.
- Pizza, which is a student favorite, was not on the menu in March and only once in April.
- There is no ability for students to select what items they want on the line through a self-serve process. Servers ask every student, for each item offered, whether they would like it to be put on their trays. When a student selects from several options, they feel a sense of control and are more inclined to consume what they have selected. **Exhibit 5-13** shows an example of how proportioned items can be presented.

Exhibit 5-13
Example of Pre-Portioned Vegetable Servings at Another School



Source: Prismatic, January 2022

- There are no à la carte items available for sale. An à la carte program has the potential of increased revenue and higher student satisfaction and participation especially among the older students.
- There are no pre-wrapped grab and go items such as hot and cold sandwiches, wraps, burritos, prepackaged meal salads, and pizza in boxes which are popular with secondary students

-
- The bars contained many identical items on the two days of observation. On day two the bar had the same fruit as was served at breakfast.
 - Students are not being fully utilized to provide input on menus and the overall meals program.

The School Nutrition Association (SNA)¹¹ recommends several best practices regarding student feedback in its self-assessment tool, *Keys to Excellence*:

- Student preferences are considered when planning menus.
- School nutrition personnel solicit feedback from students about meal choices and report feedback to the manager.
- Students are included in panels and/or committees used to select products and/or plan menus.
- Students, parents, and other stakeholders are encouraged to provide feedback on the menu (i.e., via email, suggestion boxes, comment cards, surveys, Website, social media).

SNA's 2015 *School Nutrition Trends Report* discussed several programs or initiatives to promote healthier school food choices. They stated the most prevalent program implemented is student taste tests and sampling as cited by nearly 75 percent of districts overall.

In *School Food & Nutrition Service Management*,¹² Pannell-Martin recommends getting feedback from students, as it is more definite than using production records to determine student preferences. She goes on to indicate the following as good techniques for gathering feedback from students:

- formal questionnaires and surveys;
- informal interviews;
- small-group discussions;
- suggestion boxes;
- asking for immediate feedback using texts from mobile devices; and
- tasting parties and sampling.

¹¹ <http://www.schoolnutrition.org/Content.aspx?id=20206>

¹² Pannell-Martin, D., & Boettger, J. (2014). *School food and nutrition management for the 21st century* (6th ed.). School Nutrition Association

RECOMMENDATION

Improve lunch menus by:

- **developing lunch menus by age groups utilizing student advisory groups;**
- **offering a variety of choices and incorporate self-serve for these options; and**
- **adjusting portions to follow USDA meal pattern guidelines.**

The manager should organize an elementary and a secondary student advisory group to provide input on the menus currently being used and to taste new food items and recipes. Feedback from these meetings should be used to revamp menus. The manager should then develop two menus, an elementary and a secondary. Menu planning should include multiple entrée and side choices at all grade levels as well as pre-wrapped grab and to go items at the secondary level.

In addition, the manager should:

- provide a variety of different items on the salad bar from day to day;
- pre-portion menu items on the serving line so students can self-select items for their meal. Staff should be used to supply the lines instead of asking students what items they want. Meal service lines will need to be reorganized to accommodate proportioned items and à la carte items;
- make à la carte items available for purchase for secondary students; and
- develop marketing and communication materials outlining the changes will need to be developed for students, teachers, and parents. The manager should assess results of changes on a regular basis and make improvements as needed.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-9

The fruit/vegetable bar at lunch is not being properly used. Fruit and vegetable components are put on the plate at the serving line. Students then self-serve items, as extras, from the bar. The bar also contains protein items. This practice increases food cost and reduces efficiency at the serving line.

When students come through the serving line, they pick up trays that have all items on them unless the student indicates they do not want something. They can refuse an item but must take the required number of components for the meal to qualify as reimbursable. A kitchen staff person monitors each tray to ensure it contains the required components. The student then leaves the serving line and enters the cafeteria where they can select items from the fruit/vegetable bar.

Since they already have a tray that contains the required number of components, any items selected from the bar are an extra item.

On day one of lunch observations, students were given pickle spears and banana pudding on the serving line. The bar contained shredded lettuce, carrots, tomatoes, broccoli, pink pineapple, and diced ham. On day two, the line had cooked potato wedges, tossed salad, and peaches. The bar choices were oranges, pink pineapple, broccoli, carrots, and spinach. With the exception of the cooked potato wedges, all other vegetable and fruit items could be put on the bar.

Most students were observed making selections from the bars. The consulting team observed a considerable amount of fresh fruit and vegetables in the plate waste containers. Putting items on the tray on the serving line frequently results in increased plate waste. When students self-select from choices at a bar, they are less likely to take items they will not eat, reducing plate waste. The current LWPS practice of allowing students to select extra fruit and vegetables as well as additional protein items results in unnecessary and excessive food costs.

Additional labor costs are also incurred with the practice of serving fruits and vegetables in two places. Positioning fruit, and vegetables on the serving line as well as on the bars results in decreased efficiency. Staff labor can be reduced if the bar is the sole source of cold fruit and vegetable components. Less staff time is required on the serving line, the lines should move quicker, and preparation of additional food items can be reduced. Staff on the line would not be tasked with monitoring whether each tray contains the required number of components.

USDA encourages the use of salad bars in the breakfast and lunch program because they are effective at increasing access to and consumption of a variety of fruits and vegetables. In addition to the nutritional benefits, fruit and vegetable bars may lower plate waste by allowing students to take only items they will eat.

USDA provides further guidance to the use of these bars. To ensure that each student's selections from the salad bar meet the required portions for a reimbursable meal, the POS should be stationed after the bar. Schools could post visual reminders such as posters to help students determine how to select food from the bar and appropriately sized serving utensils should be provided.

In a discussion about food and beverage trends, the School Nutrition Association (SNA) 2014 *Operations Report* stated 62.9 percent of all schools are using salad or produce bars. *Keys to Excellence*, SNA's self-assessment of best practices, recommends concepts such as self-service and food bars as a best practice.

RECOMMENDATION

Incorporate the fruit/vegetable bar as part of the reimbursable meal.

To do this, the district should discontinue the practice of serving fresh fruit and vegetables on the serving line and instead offer these items on the fruit and vegetable bar. The bar should be positioned so students choose items after the serving line and prior to the POS.

This recommendation will require several changes to current practices. Daily lunch menus will no longer state a specific fresh fruit or fresh vegetable. Instead, the menu would note the availability of a fruit and vegetable bar. Only hot vegetables would be listed on the lunch menu. Serving lines will contain the protein, grain, and milk components. No protein items will be available on the bars.

The bars will need to be positioned before the POS in the cafeteria. The cashier at the POS will then be responsible for ensuring all plates contain the required components.

FISCAL IMPACT

Given the limited data available, it is difficult to estimate cost savings. If each student selects one less fruit or vegetable item (which is currently often then thrown away), the consulting team estimates an average net savings of \$0.15 per serving per day. With an average of 80 lunches served daily, the district will save \$1,908 over the course of a school year (\$0.15 x 80 meals x 159 serving days).

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Discontinue fresh fruit and vegetables on the serving line.	\$1,908	\$1,908	\$1,908	\$1,908	\$1,908

FINDING 5-10

The current breakfast service is problematic. Teachers in the serving area are not monitoring or assisting students. This task is assumed by the child nutrition manager. As a result, the serving area has periods when it is unmanned, and students were observed taking a meal that did not contain enough components to meet requirements of a reimbursable meal. A student and teacher were observed sitting at the serving table and eating their breakfast.

On the day of observations, the consulting team observed several adults in the auditorium where breakfast is served. All had gotten a breakfast burrito and were eating. One was sitting at the serving area and the rest were standing. Although they were present, they were not actively interacting with students and providing supervision. The superintendent stated teachers were assigned lunchroom duty; however, there have been continual problems in teachers complying with this assignment.

After serving the students in line, the child nutrition manager walked amongst the students and helped them open their milk and juice cartons. When the manager was circulating in the eating area, additional students arrived and were observed grabbing a breakfast burrito from the serving line. They did not select the correct number of components to meet the requirements for a reimbursable breakfast. It was unclear whether the manager recorded these students on the roster.

It was obvious students were not accustomed to taking the required number of components. The manager had to tell many of them to take another item. Two orange wedges were served as the fruit component. When asked, the manager stated this was a one-half cup fruit serving. After meal service the consulting team cut the fruit from the peel and the measurement was half the

required portion size. The manager seemed unaware the size was incorrect. Staff in the meals program are required to provide meals that contain the correct portion size and meet the required number of components.

Parents expect their children will be safe during the entire school day and students have a right to a safe school environment. Teachers and administrators have an obligation to keep children safe while in school and that means not leaving a group of students without adult supervision. The duties of the cafeteria staff are to serve the meals and not provide assistance or supervision to students. When they assume this task, they neglect their assigned child nutrition duties. Adults must be present to observe conduct and ensure inappropriate behavior is immediately addressed. In addition, districts may be liable for the non-supervision of students.

Adult interaction with students during mealtimes can be a powerful tool and an extension of the classroom. Informal teaching of appropriate social skills, healthy food choices, reinforcement of good behavior, and personal responsibility for keeping the eating area clean are all lessons adults can provide to students as they eat.

RECOMMENDATION

Ensure adequate teacher supervision during breakfast mealtime.

The child nutrition manager should discontinue the practice of assisting students and remain at the serving area. The serving area should not be used by teachers and students for meal consumption in order to maintain a sanitary serving area.

The superintendent should ensure teachers are assigned supervision duty during the breakfast meal service and are complying with this assignment. The manager should discontinue the practice of assisting students in the eating area. No adult or student should sit at the serving table. The manager should review the requirements of breakfast meals and ensure correct portion sizes are offered. The district should create and display posters for students showing the correct number of items they should take to meet a reimbursable meal.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-11

LWPS has not implemented automation in the child nutrition office and cafeteria. Manual processes are used for POS, meal prepayments, ordering, menus, inventory, and recordkeeping. This is inefficient and prone to error.

There is no computer in the kitchen. The manager stated she does not know how to use a computer; however, the other kitchen employee feels comfortable using a computer and has one at home.

A paper roster is used for the POS. Teachers make a check mark beside their students who eat, and the manager does the roster for the high school students. At the end of the week, the roster is

given to the assistant treasurer who inputs each student into WenGage. Then the CFO does the required edit check and at the end of the month prepares the claim for reimbursement. Using a computer at the POS would result in a more efficient process.

There is no system for parents to make payments online for their student's meals. Cash for meal prepayments is received by the assistant treasurer who writes a receipt and gives the student's name and amount to the CFO. This information is not passed on to the kitchen manager and as a result all students receive a free meal at the POS whether they have money in their account or not. The CFO tabulates student accounts using information from the daily rosters and notifies parents who owe money. Charging has been a serious problem, most likely due to this inefficient process. As of March 2023, the 2022-23 unpaid charges were \$6,641. There are only 53 students who qualify for reduced price or full pay meals, yielding an average amount owed of approximately \$125 per student. The superintendent and CFO stated most likely most of the charges will have to be absorbed by the general fund. An automated POS would provide a more efficient process and a solution to the excessive charges.

Vendors come to the kitchen to receive and place orders in their laptop. The manager stated she does not find out if an item is being substituted until the order is delivered. If she needs to add to her order, she takes a picture of a handwritten order and sends via text to the vendor. Placing orders via direct vendor contact is an inefficient process for both the manager as well as the vendor. If the manager placed orders online, the process could be completed when it best met her optimal time frame as opposed to when the vendor visited the kitchen and overall could be completed in less time than the current system. The existing process provides an opportunity for error as the actual order is input into the vendor's system by the vendor rather than the manager.

Menus are handwritten and given to a secretary in the office to type, print out, and put on the district website. There is no nutritional analysis done on these menus. The daily production records are handwritten as are the monthly inventories. Both are just filed, and neither are used for analysis of trends for menu making or future orders.

The district uses WenGage which is a student information system. This product contains programs specifically for the lunchroom. There is a parent portal where parents can complete online meal applications as well as make online meal payments and see their child's account. There is a POS program that can be used by the cashier to collect names of students who eat a meal and view their eligibility status and money in their account. The system assists in preparation of the claim.

School food service programs must meet strict standards of accountability. Federal and state requirements dictate a great number of data reports be prepared to demonstrate accountability and fiscal responsibility. Some of the benefits of automation in a food service program are increased efficiency, better speed of data handling and more timely report processing. POS terminals for school meal programs have been in use since the mid 80's and were one of the first areas to be automated. A wise use of technology and automated processes ensures that a district is meeting regulations and requirements and doing so in a cost effective and efficient manner.

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. Surveys conducted for this

review found that 77 percent of LWPS parents regularly use the Internet, while 93 percent of students reported they regularly use technology at school. Providing automated processes for parents such as online payments and meal applications is an effective way to ensure that all eligible students are enrolled in the free and reduced program and paying students do not have to bring cash to purchase meals. An online payment system provides the added benefit of parents being able to monitor their child’s purchases and make payments before a child has to charge their meal. Providing this kind of data to parents can serve to prevent overcharging and problems in the collection process

In their 2018 *Operations Report*, the School Nutrition Association (SNA) notes the following regarding automated POS and meal payments. The percentage of districts that use an automated POS system is 97 percent. The percentage that uses an online payment system is 83.5 percent. As reported by 90 percent of school districts, the most common tactic used to prevent or minimize unpaid student meal debt is to offer an online meal payment/monitoring of account balances

RECOMMENDATION

Improve the use of technology in the child nutrition program.

To implement this recommendation, the district should:

- purchase a laptop for the kitchen and install available programs for POS, menus, nutritional analysis, inventory, and recordkeeping;
- work with vendors to implement an automated ordering system; and
- train the manager to use all of these systems.

The consulting team recommends the district purchase a Surface Pro 7 and Surface Pro Type Cover Bundle for the cafeteria. The district should work with the software provider to secure and install available lunchroom programs on this laptop. The district should make the necessary changes for consistent, reliable Wi-Fi capability to be available at both the POS area as well as in the cafeteria manager’s office. The manager should be trained using a combination of direct vendor instruction as well as available online sessions. Other district employees using the software can also provide training assistance.

FISCAL IMPACT

The cost of a Microsoft Surface Pro is currently \$799.

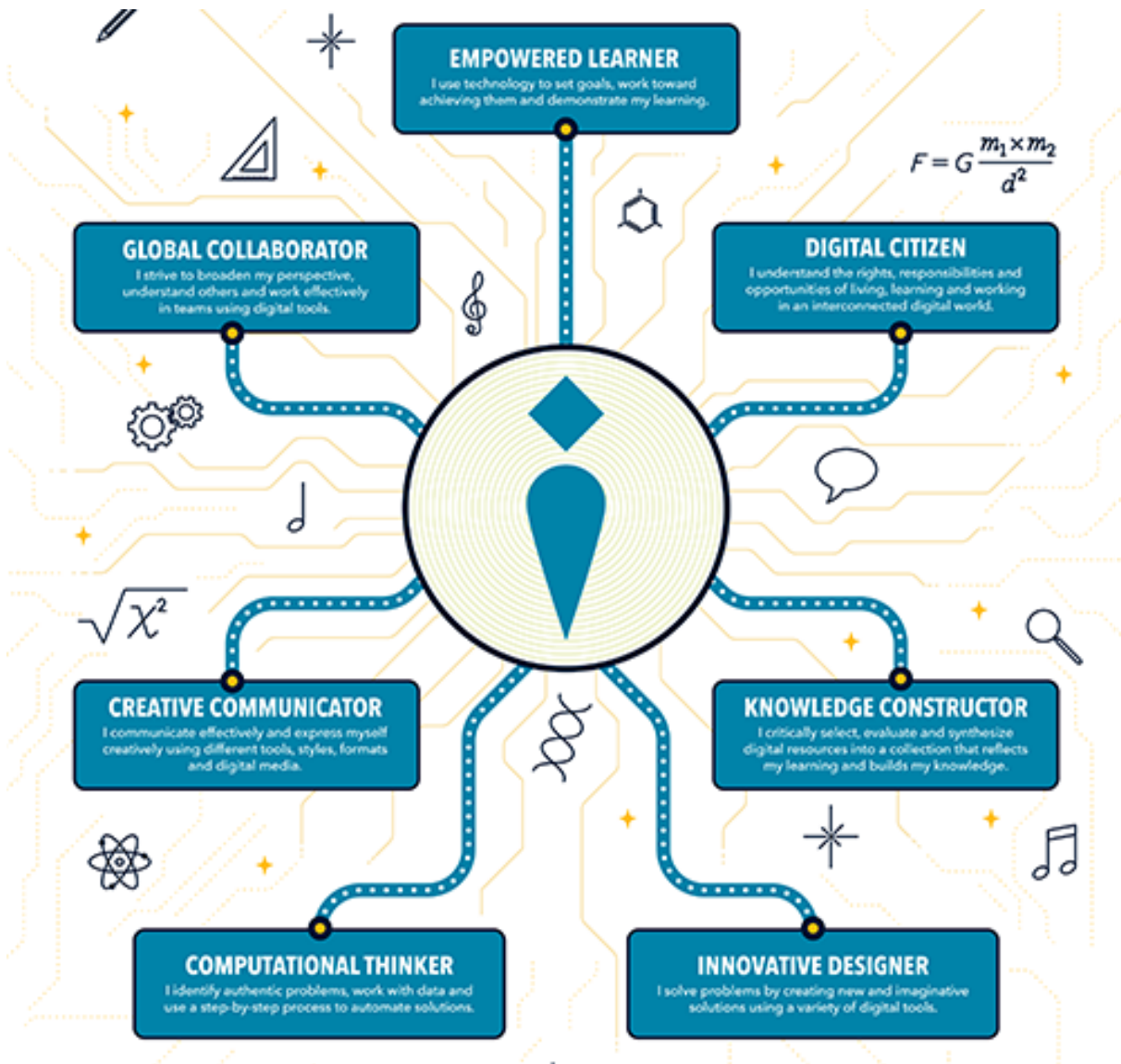
Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Purchase a laptop for the kitchen.	(\$799)	0	0	0	0

B. TECHNOLOGY

The International Society for Technology in Education (ISTE) created standards for the use of technology to enhance education. Part of preparing students for the digital age includes helping them become responsible consumers and curators of online content. For this reason, digital citizenship is a benchmark integrated into the ISTE Standards for Students, ISTE Standards for Education Leaders, and ISTE Standards for Coaches. Oklahoma has adopted the International Society for Technology in Education's Student Standards for the Oklahoma Academic Standards.¹³ These standards are designed to empower student voice and promote learning as a student-driven process and have evolved from just using technology to learn to transformative learning with technology. **Exhibit 5-14** displays the seven key standards for students to follow.

¹³ <https://www.iste.org/standards/for-students>

Exhibit 5-14
ISTE Standards for Students



Source: <https://www.iste.org/standards/for-students>

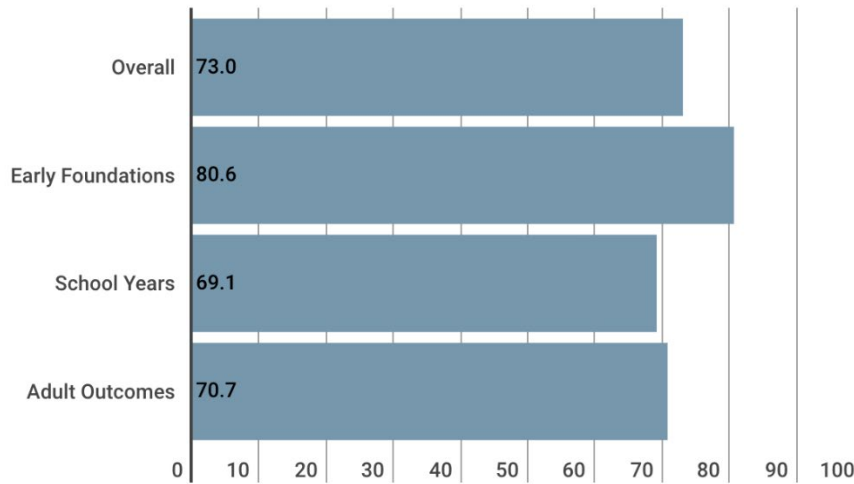
The implementation of technology in schools follows a broader societal trend – teens’ technology use is creeping up. In 2015, 29 percent of teens said they used a computer for homework, but by 2019, 59 percent of teens said the same, according to a media census from Common Sense Media.¹⁴ Since the 2010 report card, on which Oklahoma earned a C+, Oklahoma has worked to develop various aspects of education to improve these areas of concern and to emphasize the role of technology in digital citizenship. In 2019, there were 163 districts with a one-to-one program in which at least one grade at one school has Internet-connected device for each student.¹⁵ Oklahoma continues to make advances in online assessment practices

¹⁴ https://www.common Sense Media.org/sites/default/files/uploads/research/census_researchreport.pdf

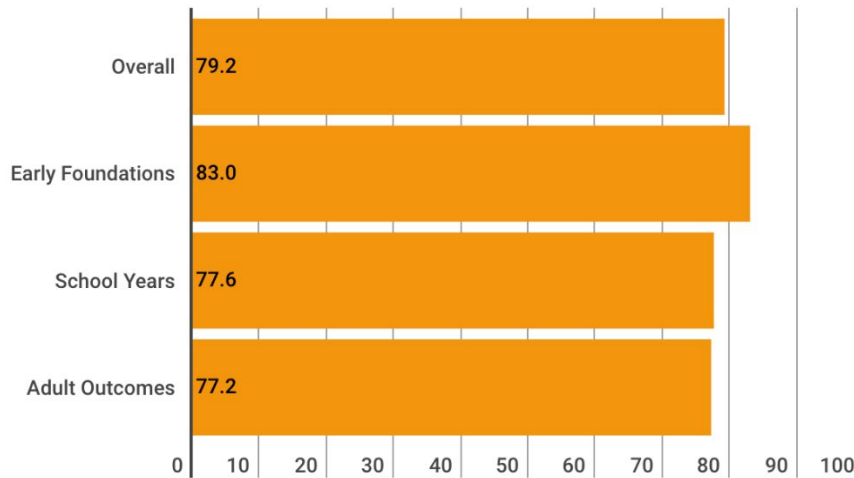
¹⁵ <https://sde.ok.gov/sites/default/files/documents/files/Fast%20Facts%20July%202019.pdf>

and in the use of instructional technology in the PK-12 classroom. Despite the heavy focus the state has placed on transformational learning with technology, Oklahoma’s overall score earned on the Chance-for-Success Index in Quality Counts 2020 was a C¹⁶ (**Exhibit 5-15**). The purpose of this report card is to rank states on educational opportunities and performance.

Exhibit 5-15
Chance-for-Success Results by State



U.S. Score



Source: <https://www.edweek.org/ew/collections/quality-counts-2020/state-grades-on-chance-for-success-2020.html>

Oklahoma was previously one of 22 states and one territory to create K-12 assessments aligned to Common Core State Standards through the Partnership for the Assessment of Readiness for

¹⁶ <https://www.edweek.org/ew/collections/quality-counts-2020/state-grades-on-chance-for-success-2020.html>

College and Careers (PARCC).¹⁷ A major impact of PARCC's Common Core assessments, and a concern of many Oklahoma school districts, involved technology. Oklahoma transitioned to a new vendor, Measured Progress, now called Cognia, for the Online Oklahoma School Testing Program (OSTP) to assess student mastery of the Oklahoma Academic Standards rather than the Common Core Standards; however, technology remains a major component of the assessment process. The State Department of Education (SDE) has released technology guidelines for the Cognia assessments for schools so they will be properly equipped and ready to administer the tests.¹⁸

Exhibit 5-16 illustrates the most current assessment technology specifications that districts in Oklahoma must meet as they administer assessments from 2019-20 forward. Unlike specifications provided in previous years, these technology guidelines are required. These specifications provide the levels of computer and network capacity that are required to provide a smooth testing experience for students. The Oklahoma technology requirements further illustrate the importance of an adequate technology infrastructure and effective long-range planning to accommodate an increasing number of students participating in online testing in the coming years.

¹⁷ <http://www.parcconline.org/>

¹⁸ <https://oklahoma.onlinehelp.cognia.org/>

Exhibit 5-16
Oklahoma Spring 2020 Assessment Technology Specifications

System Requirements – All Hardware	
Connectivity	Student devices must be able to connect to the Internet via wired or wireless networks
Screen Size	9.7” screen size or larger 10-inch class” tablets or larger
Screen Resolution	1024 x 768
Browsers ^{19,20} (used for practice test only)	Chrome™ 79 or newer Firefox® 70 or newer Microsoft Edge™ 44.18 or newer Safari® 13 or newer
Headphone/Earphone/ Ear Buds	Required for students who have a text-to-speech accommodation
Desktop and Laptop Specific Requirements	
CPU	1.3 Ghz
Memory	2 GB 4 GB is strongly recommended for best performance
Input Device	Keyboard – wired or wireless Bluetooth® enabled mouse or touchpad
Windows®	Windows® 8.1, and 10 (32-bit and 64-bit)
macOS®	10.13 – 10.15 (64-bit only)
Linux®	Ubuntu® 16.04.3 LTS (64-bit only) Fedora™ 27 (64-bit only)
Tablet/Netbook/2-in-1 Specific Requirements	
iOS®	12.4, 13.1 - 13.3
Chromebook™ notebook computer	Chrome OS™ 74 - 79
Windows®-based tablets/netbooks/2-in-1	Windows® 10 (32-bit and 64-bit) ²¹

Source: <https://oklahoma.onlinehelp.cognia.org/guides/>

LWPS has an Internet Use Policy in place, as well as backup system servers. The district has server maintenance outsourced to Pioneer. LWPS utilized E-rate funding for wireless. The district has electronic whiteboards in place; staff has received some initial training on them.

Wireless internet access is available in every classroom and is accessible to students or staff. LWPS has implemented a district-wide wireless access system to increase internet access. Access points are positioned in all buildings. Students and staff access the network and internet by utilizing district owned technology including laptops, Chromebooks, Smartphones, etc.

¹⁹ Text-to-speech on browsers is partially supported.

²⁰ As new operating system and browser versions are released, eMetric will update technology guidelines following successful compatibility testing.

²¹ Windows 10 S is not supported.

Students were observed utilizing the network in classrooms (**Exhibit 5-17**). Additional access points and increased infrastructure have been added as needed.

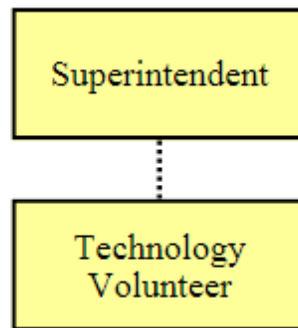
**Exhibit 5-17
Wireless Access**



Source: Prismatic, March 2023

The current technology organization for LWPS is shown in **Exhibit 5-18**.

**Exhibit 5-18
Lone Wolf Technology Services Organizational Chart**



Source: Created by Prismatic, March 2023

On the stakeholder survey conducted for this review, staff was asked to assign a letter grade to various LWPS functional areas. **Exhibit 5-19** provides the results for technology. At least half gave each technology area an A or B.

Exhibit 5-19
Staff Survey Results Regarding Technology

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Administrative technology	20%	40%	20%	0%	10%	10%
Instructional technology	20%	60%	10%	0%	10%	0%
Technology management and support	20%	30%	40%	10%	0%	0%

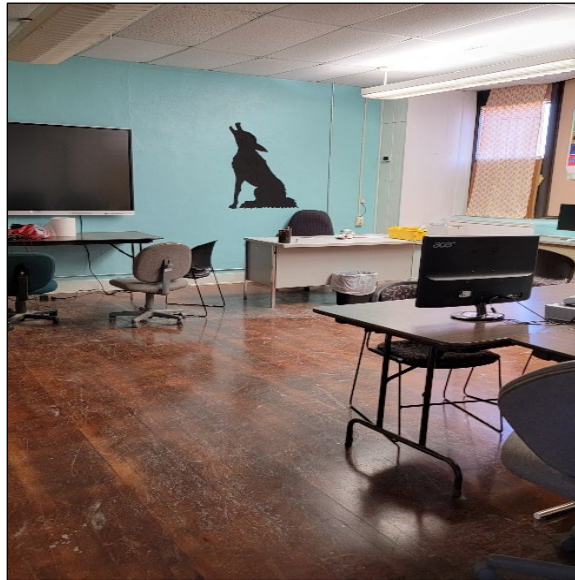
Source: Prismatic Survey Results, March 2023.

FINDING 5-12

LWPS has implemented an Esports program for students. A teacher serves as the coordinator and sponsor for Lone Wolf PS Esports program.

Students meet in the Esports room after school on Tuesdays and Thursdays from 3:35-4:00 pm. Equipment includes 10 Xbox consoles, 10 gaming monitors and an Elmo Board. **(Exhibit 5-20).**

Exhibit 5-20
Esports Classroom



Source: Prismatic, March 2023

A recent article, *Why Esports in Schools is a Good Thing*, lists the benefits of Esports in schools:

- Esports in schools brings success to more students;
- inclusion is good for students and the community;
- students learn valuable skills playing esports in school;

- Esports in schools fosters stem learning; and
- Esports in schools expands college and career opportunities²²

COMMENDATION

LWPS is commended for implementing an Esports program for students.

FINDING 5-13

No staff are assigned to support technology. A community volunteer handles internet and Chromebook issues only. No one, internal or external, exists to support the electronic whiteboards or other instructional technology.

The district has not addressed support for critical technology functions. LWPS has only one part-time volunteer to support technology. While LWPS is striving to save money by using a volunteer, a number of support issues go unresolved. Plans or procedures for cross-training do not exist. No district staff member is trained to assist, take over duties or supplement support.

ISTE developed a Technology Support Index rubric in 2008 to assist school districts in determining their needs in a variety of technology support areas. According to ISTE, “the Technology Support Index is designed to provide school districts with models for an efficient and effective technology support system based upon best practices in nationally recognized school districts.”²³ In one version of the ISTE Index, four domains are assessed including equipment standards, staffing and processes, professional development, and enterprise management. School districts are ranked into one of four categories for various aspects of technology use and support. The assessment levels of efficiency are:

- low efficiency — a strategy or domain that needs attention and improvement;
- moderate efficiency — these strategies address major technical support issues but with incomplete implementation or inadequate resources;
- satisfactory efficiency — these strategies are generally effective in sustaining the technology infrastructure and promoting the integration of technology in teaching and learning; and
- high efficiency — these strategies make the most of available technology support resources, emergent problems are rapidly detected, solutions are quickly implemented, and problem sources are identified and corrected.

Exhibit 5-21 shows the ISTE Technology Support Index for technician staffing. With its current technology staffing, LWPS falls into the low category.

²² <https://www.viewsonic.com/library/education/esports-schools-good/>

²³ <https://www.iste.org/standards/essential-conditions/assessment-and-evaluation>

Exhibit 5-21
ISTE Technology Support Index

Index Area	Efficiency of Technology			
	Low	Moderate	Satisfactory	High
Computer to Technician Staffing Ratio (# of computers: technician).	250:1	150:1 to 250:1	75:1 to 150:1	Less than 75:1

Source: www.iste.org, 2008

An article in Edutopia Magazine, “Technology Integration Research Review: Avoiding Pitfalls,” points to the most common complaints teachers make about technology integration. Specifically cited was a lack of adequate support, “hardware is purchased in bulk but then left to gather dust, or software is mandated but there is no tech support to make sure it runs smoothly.”²⁴

RECOMMENDATION

Address problems with technology support by contracting with a technical support vendor and developing teacher leaders to supplement technology support at the sites.

Maintaining district equipment and troubleshooting assistance should be primarily handled through a technology department. However, given current budget constraints, hiring additional support staff is likely not feasible. To assist with basic troubleshooting at the sites, the district should implement a cross-training program for teacher technicians. The district should contract with a local vendor, such as Advanced Technology Solutions of Burns Flat, to provide support either through a contracted service agreement or on an as-needed basis.

The district should consider a teacher technician program with staff members cross-training for password and system management, as well as helping support instructional practices through technology integration. Having sufficient technical support is critical to successful technology use, both in classrooms and in administrative offices.

FISCAL IMPACT

The fiscal impact of this recommendation depends on the number of teacher technicians in the program and the number of contracted hours from the vendor. The consulting team recommends two teacher technicians. That would allow for assignments to early childhood/elementary and middle/high school. A \$500 stipend is recommended for the teacher technicians and 10 hours per month for the vendor. An estimate is \$50 per contracted hour.

²⁴ <https://www.edutopia.org/technology-integration-research-avoiding-pitfalls>

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Develop a teacher technician program.	(\$1,000)	(\$1,000)	(\$1,000)	(\$1,000)	(\$1,000)
Contract with a technology support vendor	(\$6,000)	(\$6,000)	(\$6,000)	(\$6,000)	(\$6,000)
TOTAL	(\$7,000)	(\$7,000)	(\$7,000)	(\$7,000)	(\$7,000)

FINDING 5-14

No district technology plan exists. Equipment has been ordered and assigned to students and teachers; however, no actual technology plan or documentation exists.

LWPS has not formalized a process for including multiple stakeholders on a technology committee or the development of a current technology plan. Multiple stakeholders include parents, teachers, students, community members, and businesses. Community and business partnerships could provide additional perspective in planning, implementation, and evaluation.

There is no evidence of a technology planning committee with participation by parents or community members and currently no such committee exists. Including stakeholders such as parents, students, teachers, community members, and businesses could provide additional perspective in planning, implementation, and evaluation.

A number of articles exist on technology planning including the Office of Technology Planning’s “Reimagining the Role of Technology in Education.”²⁵ The National Center for Technology Planning previously recommended five phases for an effective planning model:

- **Phase 1: Recruit and organize the planning team.** It is important that the planning team consists of all stakeholder groups, and members should excel in planning and communication skills. Stakeholders may include technology specialists, district leaders, parents, students, community members, and business leaders;
- **Phase 2: Research.** This phase consists of a needs assessment and an effort to identify the technologies that can be applied to those needs and ascertain how they can be applied;
- **Phase 3: Construct the technology plan.** This phase focuses on applying the research to establish the district’s vision/mission and to define the goals and objectives that will lead to fulfilling that vision and mission;
- **Phase 4: Formalize the planning.** This phase culminates into a comprehensive document that analyzes the present state of the district with respect to technology, articulates specific goals and objectives, incorporates clearly defined strategies and budgetary plans to realize the desired state of technology in the district, and includes a process for evaluation; and

²⁵ <https://tech.ed.gov/files/2017/01/NETP17.pdf>

-
- **Phase 5: Continually implement, evaluate, and revise.** This phase deals with the ongoing implementation, evaluation, and revision of the plan to ensure progress is made.

Key to the planning process is conducting periodic needs assessments and structuring the plan around the results. During the review, the consulting team found no evidence of a technology planning document or committee in place. The consulting team found no evidence that LWPS has a technology plan. Additionally, there are no parents, students, teachers, community members, or business leaders on a planning team.

RECOMMENDATION

Create a long-term strategic plan for technology with input from a variety of stakeholders.

Establishing a committee that includes staff and outside stakeholders should provide additional perspectives in planning, implementation, and evaluation of technology. Such stakeholders could include parents, students, community members, and businesses as partners. Including teacher leaders on the technology committee could also enhance opportunities for strategic planning and could increase buy-in among staff members, as well as increase understanding of what is possible.

The LWPS technology plan should be a current, comprehensive document that drives technology expenditures, implementation, and decision-making. The plan should be tied to the district strategic plan and professional development plan. The district should formalize and utilize a process for including a technology committee in technology strategic planning and the development of a long-term planning document. The superintendent should direct the technology committee to develop and periodically update a comprehensive technology plan. The plan should be achievable and based upon the current state of the district. By incorporating clearly articulated vision and mission statements, followed by specific goals, measurable objectives, adequate funding, and a detailed evaluation process, the district ensures that technology purchases and services are in line with the goals set forth in the plan and result in student achievement gains. The plan and progress should then be communicated to all stakeholders to ensure a common understanding and purpose. To facilitate effective use of technology funds, the technology committee should:

- periodically review the technology plan for accuracy and make necessary additions and deletions;
- develop hardware and software standards, and review them with all personnel;
- centralize the software purchasing process to avoid purchases that cannot be supported or will not function properly on the district's equipment;
- recommend the types of computer equipment that should be purchased and the most effective distribution of that equipment;
- develop a training program for all staff; and

- establish a policy on the purchase of extended warranties for hardware and the standardization of operating systems, antivirus, applications, and office software.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-15

LWPS lacks a disaster recovery plan. In the event of a natural disaster or severe power surge, the district does not have procedures in place to ensure that its critical data, systems, and programs can be brought back to pre-disaster status.

The limited district procedures currently in practice have not been formalized and are inadequate considering the large amounts of data and equipment that could be lost. Lost data could include administrative work, emails, student data and work, and data from instructional applications. The district has not established policies and procedures adequate to mitigate the damage. No written plans are in place for documenting cloud-based back-ups, putting district data at risk.

A disaster recovery plan would aid the district in reloading district data, programs, and systems, as well as recovery of hardware and software, in the event of a loss. **Exhibit 5-22** defines the process of developing an effective disaster recovery plan.

Exhibit 5-22
Key Elements of a Disaster Recovery Plan

Step	Details
Build the disaster recovery team.	Identify a disaster recovery team that includes key policymakers, building management, end-users, key outside contractors, and technical staff.
Obtain and/or approximate key information.	Develop an exhaustive list of critical activities performed within the system.
	Develop an estimate of the minimum space and equipment necessary for restoring essential operations.
	Develop a timeframe for starting initial operations after a security incident.
Perform and/or delegate key duties.	Develop a list of key personnel and their responsibilities.
	Develop an inventory of all computer technology assets, including data, software, hardware, documentation, and supplies.
	Set up a reciprocal agreement with comparable organizations to share each other's equipment or lease backup equipment to allow the system to operate critical functions in the event of a disaster.
	Make plans to procure hardware, software, and other equipment as necessary to ensure that critical operations are resumed as soon as possible.
	Establish procedures for obtaining off-site backup records.
	Locate support resources that might be needed, such as equipment repair, trucking, and cleaning companies.
	Arrange with vendors to provide priority delivery for emergency orders.
Specify details within the plan.	Identify data recovery specialists and establish emergency agreements.
	Identify individual roles and responsibilities by name and job title so that everyone knows exactly what needs to be done.
	Define actions to be taken in advance of an occurrence or undesirable event.
	Define actions to be taken at the onset of an undesirable event to limit damage, loss, and compromised data integrity.
	Identify actions to be taken to restore critical functions.
Test the plan.	Define actions to be taken to re-establish normal operations.
	Test the plan frequently and completely.
Deal with damage appropriately.	Analyze the results to improve the plan and identify further needs.
	If a disaster actually occurs, document all costs and videotape the damage.
Give consideration to other substantial issues.	Be prepared to overcome downtime on your own; insurance settlements can take time to resolve.
	Do not make a plan unnecessarily complicated.
	Make one individual responsible for maintaining the plan, but have it structured so that others are authorized and prepared to implement if it is needed.
	Update the plan regularly and whenever changes are made to your system.

Source: National Center for Education Statistics, "Safeguarding Your Technology," April 2003

RECOMMENDATION

Develop and implement a disaster recovery plan that includes the district's critical data, systems, and programs.

The district should address this problem immediately. The district should develop and test a

disaster recovery plan that includes critical data, systems, and programs through cloud-based storage. The district technology designee can lead the process of developing a plan adequate to meet the needs of LWPS. The costs associated with losing vital information, services, and equipment in the event of a disaster could greatly impact the district.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-16

The district offers students limited course options. It has not capitalized on online learning opportunities for curriculum expansion or student elective courses.

Students are currently restricted in course choices and are missing opportunities to use technology and collaborate with others. A need for expanded course offerings was expressed in the parent and student comments section of the surveys. The district has course content available through Edmentum but is not fully using it. During onsite interviews, staff indicated that only two students are full-time virtual students. Three instructors monitor individual courses online through Edmentum. While the district intends to continue its efforts to offer online courses, staff indicated dissatisfaction with Edmentum and an inability to adequately assist students enrolled in the program.

There is a lack of academic opportunities and electives for students at Lone Wolf. Available resources to expand the curriculum are not being fully used. According to **Exhibit 5-23**, over half of LWPS students surveyed do not think they have enough choices for academic and elective courses. The district has not sufficiently utilized online options to address these gaps.

**Exhibit 5-23
Student Survey Results Regarding Course Options**

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
I have plenty of choices when selecting academic and elective courses.	5%	20%	35%	23%	18%

Source: Prismatic Survey Results, March 2023

LWPS survey results indicate that 93 percent of students use computers regularly at school, but these are largely not online educational experiences. Additionally, 84 percent of students have internet access at home. LWPS is not taking advantage of the access and experience a majority of students have with technology or the opportunities provided by online learning.

According to a 2009 report from Sloan-C, online student enrollments in higher education are growing faster than overall enrollments (17.0 percent for online versus 1.2 percent overall). Additionally, “more than one in four higher education students now take at least one course

online.”²⁶

The growth seen in the K-12 market is even more dramatic according to the International Association for K-12 Online Learning (iNACOL). In 2008, 30 states and over half the U.S. school districts provided online offerings for students with an estimated annual growth of 30 percent expected.

Project Tomorrow, a nonprofit organization, publishes a national annual research project, “Speak Up.” The purpose of “Speak Up” is to collect and report feedback from students, parents, and teachers on key educational issues and raise awareness of those issues. The research report, *Learning in the 21st Century: 2010 Trends Update*, points to online learning as the center of students’ vision for 21st Century education. Project Tomorrow cited four key statistics:

- the number of students taking online courses for credit since the 2008 report;
- almost double an increase in teachers teaching online;
- almost triple an administrative shift from teacher professional development to student online courses; and
- growth in parents’ personal and professional experiences with online learning.

One of Project Tomorrow’s Speak Up publications, *Learning in the 21st Century: A 5-Year Retrospective on the Growth of Online Learning*²⁷, notes the increase and growth of online learning over a five-year period. Two key findings are important when looking at educator professional development. First, a majority of teachers and administrators report participation in professional development through an online class, a 148 percent increase for teachers since 2007. Second, 30 percent of teachers prefer online professional development for their continuing education with one in five teachers taking online classes on their own.

Online learning is an accepted delivery system for education, teaching, and learning. Learner demands for offerings that are collaborative, flexible, and that appropriately use new technologies will continue to grow. In order to be successful, schools must continue to prepare and equip staff to meet the demands while providing and supporting students with opportunities to learn online.

RECOMMENDATION

Expand and utilize more extensively online learning opportunities for curriculum expansion and student courses.

Though online classes and internet access are viable opportunities, these resources are not being fully used in LWPS. The growth of internet use and widespread access make providing increased and varied learning options for students not only possible but also expected. Lone Wolf should consider changing online course providers or forming an online school consortium with nearby

²⁶ <https://files.eric.ed.gov/fulltext/ED529931.pdf>

²⁷ <https://www.slideshare.net/ProjectTomorrow/speak-up-online-learning-report-release-62612>

schools. An existing consortium to look at is Tri-City Learning Academy.²⁸

FISCAL IMPACT

This recommendation can be implemented with existing resources. Lone Wolf is currently spending \$28,600 per semester on courses through Edmentum. Those funds should be reallocated to a different online course provider or for forming a consortium with a goal of serving more students and achieving a higher success rate.

FINDING 5-17

Little or no staff development or plan exists around technology. No technology integration sessions are planned or scheduled for staff.

During focus groups and interviews, staff reported a wide range of technology skills among the teaching staff. Some instructors received training when interactive whiteboards were purchased but no follow-up training has been made available. Currently staff development sessions are held at the start of school and focus on state requirements such as school security, and classroom management. Additionally, some software specific training has been offered, for example, Google Classroom. The need for practical sessions on existing equipment and software were highlighted in focus groups and interviews.

The impact of technology on student achievement revolves around how well technology is integrated into everyday activities that support student instructional objectives. This requires not only placing computers in schools and classrooms but also providing the resources needed to incorporate technology into lesson plans and other educational activities. Substantial professional development emphasizing both technology applications and its integration into curriculum and classroom instruction is necessary in LWPS.

Exhibit 5-24 shows staff comfort levels with the use of technology in the classroom and for communication. While staff members indicate an understanding of technology and its utilization, the consulting team found in onsite observations and interviews that this knowledge is at a basic level. Implementing technology effectively into classroom instruction requires a teacher have a higher level of understanding, redirected teaching methodology, much practice, and continuous training. This is compounded by the lack of support for new and varied equipment and software.

²⁸ <https://www.tricitylearning.org/>

Exhibit 5-24
Staff Survey Results Regarding Technology

Survey Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Our district provides adequate technology training.	10%	20%	10%	60%	0%
Our district provides adequate technical support.	10%	20%	30%	30%	10%
I have adequate equipment and computer support to conduct my work.	20%	60%	0%	20%	0%
Administrative computer systems are easy to use.	0%	50%	40%	10%	0%
Instructional computer systems are easy to use.	10%	70%	10%	10%	0%

Source: Prismatic Survey Results, March 2023.

During the onsite interviews and focus groups, all LWPS instructors and administrators indicated a need for additional professional development or training focused on the use of existing technology and software packages. Specifically, the need for practical training on existing equipment and applications was noted.

The ISTE Standards (2019) are a framework for innovation and excellence in learning, teaching and leading. The standards have evolved from the National Education Technology Standards (NETS) and include four sections: Students, Educators, Educational Leaders and Coaches.

ISTE Standards for Educators include:

Empowered Professional

- 2.1 Learner – Teachers continually improve their practice by learning from and with others and exploring proven and promising practices that leverage technology to improve student learning.
- 2.2 Leader – Teachers seek out opportunities for leadership to support student empowerment and success and to improve teaching and learning.
- 2.3 Citizen – Teachers inspire students to positively contribute and responsibly participate in the digital world.

Learning Catalyst

- 2.4 Collaborator – Teachers dedicate time to collaborate with both colleagues and students to improve practice, discover and share resources and ideas, and solve problems.

-
- 2.5 Designer – Teachers design authentic, learner-driven activities and environments that recognize and accommodate learner variability.
 - 2.6 Facilitator – Teachers facilitate learning with technology to support student achievement of the 2016 ISTE Standards for Students.
 - 2.7 Analyst – Teachers understand and use data to drive their instruction and support students in achieving their learning goals.

ISTE Standards for Educator Leaders include:

- 3.1 Equity and Citizenship Advocate – Leaders use technology to increase equity, inclusion, and digital citizenship practice.
- 3.2 Visionary Planner – Leaders engage others in establishing a vision, strategic plan and ongoing evaluation cycle for transforming learning with technology.
- 3.3 Empowering Leader – Leaders create a creating and supporting effective digital-age learning environments to maximize the learning of all students.
- 3.4 Systems Designer – Leaders build teams and systems to implement, sustain, and continually improve the use of technology to support learning.
- 3.5 Connected Learner – Leaders model and promote continuous professional learning for themselves and others.

Data from the National Science Foundation (NSF)²⁹ indicate that the actual impact technology has on classroom instruction is causally related to the amount of quality professional development an educator receives in a targeted context. NSF studies indicate that at least 80 hours of professional development extended across time were needed to develop, enhance, and change the practices of teachers. Ongoing opportunities for professional development must be available to teachers, administrators, and support personnel at all levels. Successful professional development focuses on the specific needs of individual staff and is sustained through coaching and periodic updates. A technology-training plan outlines the opportunities afforded to district staff for learning job specific technology skills. This information is essential in developing the technology professional development plan that meets the needs of LWPS and is aligned with data-driven goals supported by long-term professional development activities.

RECOMMENDATION

Provide technology professional development focused on increasing staff technology skills and understanding.

The district should move beyond mere technology acquisition and ensure that the hardware and software tools are being used in ways that result in continuous improvement of classroom instruction and practices and higher student achievement. Ongoing opportunities for professional

²⁹ <http://www.nsf.gov/statistics/seind06/c1/c1s3.htm> - c1s312

development should be made available to teachers and administrators at all skill and development levels.

The technology committee and a cross-section of teachers should work to develop a district-wide program for teacher training and technology integration. Consideration should also be given to providing training opportunities for all staff in their specific job needs. This technology-training program should be part of an overall professional development plan. A first step should be for each staff member to complete a needs assessment. The committee might consider looking at “Different Ways of Looking at How to Use Edtech,”³⁰ which provides links to a number of frameworks. The frameworks for integrating educational technology help teachers plan for the best uses of digital tools in the classroom.

A second step should be to discuss and define technology integration for LWPS classrooms. Based upon this definition and interview results, the program should seek to increase teacher competencies and levels of technology integration. The program should also identify software and hardware needs necessary for successful integration. The program should be submitted to the superintendent and school board for approval.

Several online professional development resources should be considered including:

- TED: Ideas Worth Spreading;³¹
- Classroom 2.0 Live;³²
- the K12 Online Conference;³³
- the Global Education Conference;³⁴ and
- Simple K12 Webinars.³⁵

The district should also consider tapping into additional resources offered through the Oklahoma State Department of Education, the Oklahoma Department of Career and Technology Education or partnering with Western Technology Center. Additionally, area colleges and universities and vendors provide customized training, continuing education, professional development and other resources for pre-K-12 teachers and administrators.³⁶ LWPS should also continue forming partnerships with neighboring school districts and formalize the implementation of a shared professional development initiative.

³⁰ <https://www.edutopia.org/article/different-ways-looking-how-use-edtech>

³¹ <https://www.ted.com/>

³² <http://live.classroom20.com/index.html>

³³ <http://k12onlineconference.org/>

³⁴ <https://conferenceindex.org/conferences/global-education>

³⁵ <https://www.simplek12.com/upcoming-free-webinars/>

³⁶ <http://www.okhighered.org/econ-dev/business-services/>

FISCAL IMPACT

This recommendation can be implemented with existing resources.

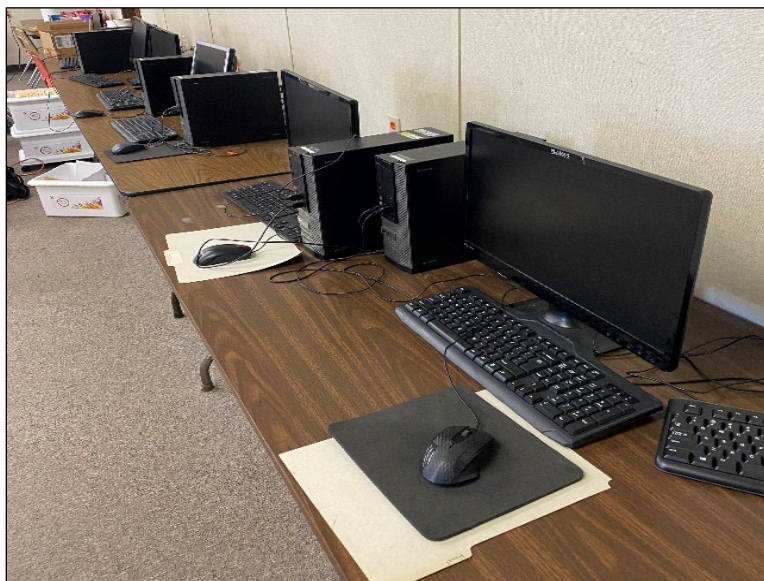
FINDING 5-18

The district lacks a replacement cycle and disposal plan for its technology assets and obsolete equipment. As a result, classrooms, offices, and work areas are equipped with computers, monitors, and other devices, some of which make Internet use impractical, are no longer in working order, or are awaiting repair. Equipping classrooms and offices with obsolete equipment does not increase the use or accessibility of technology in the district. In fact, such equipment impedes student access, increases the backlog of support issues and adds to staff frustration.

Because no standard exists, obsolete equipment remains in use or is stored. No framework for equipment replacement or lifecycle exists, resulting in equipment in classrooms that is past its usefulness, kept in storage, or repurposed.

The district does not have a plan for replacing its current computers or disposing of obsolete equipment. Equipment no longer in use is stored rather than surplus or sold. These factors and more impact the volume and timeliness of technology support, the resulting budget, and facility usage. The review team observed an unused computer lab (**Exhibit 5-25**) and other technology stored in closets. Surveys, interviews, and focus groups indicate equipment is stored throughout the district.

Exhibit 5-25 Unused Computer Lab



Source: Prismatic, March 2023

A large amount of equipment has been purchased over the last couple of years due to successful grants and bonds. While this currently provides a positive technology environment, no plan

exists for replacing the equipment once its usefulness cycle has been reached. Additionally, old equipment is not being prepared for surplus. No plan is in place to dispose of this or other obsolete equipment.

In staff surveys, when asked about the lifespan of district technology equipment, 20 percent agreed and 10 percent strongly agreed that equipment was operated past its usefulness. According to The Gartner Group, an independent technology research and consulting firm, the useful life of computers in public education is four to five years.

To achieve satisfactory efficiency status on the ISTE Index, equipment should be placed on a four to five-year life cycle. Some categories, such as student lab or classroom computers, may require more frequent replacement than those computers used in administrative capacities. Additionally, the ISTE Index indicates that lacking a computer replacement schedule of any kind falls into the low efficiency category. Failing to surplus equipment until it is no longer usable and continuing to service obsolete equipment, also falls in the low efficiency category.

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 Oklahoma School Code (OSC) does not specifically provide direction for the disposal of surplus school district computer equipment, except during district annexation. Some districts have adopted policies, such as this one from Hobart Public Schools:

Disposal of Surplus District Property: When the Board determines that any real or personal property of the District is no longer needed for District purposes, it may direct the disposal of such property by sale, exchange, lease, lease-purchase, sale and partial lease-back, or as otherwise allowed by law. Real property shall be disposed of by utilizing the procedures provided for by law. In the disposing of surplus District property, the District shall utilize procedures to maximize, to the extent practicable, the price received for such surplus property.

RECOMMENDATION

Develop policies, procedures, and a disposal plan for surplus, obsolete, and inoperable equipment.

To implement this recommendation, the district should:

- adopt a surplus disposal policy and procedure;
- adopt a technology replacement cycle; and
- annually link district general funds designated for computer replacement to the number of computers to be replaced.

LWPS may consider selling surplus equipment in an online auction and utilizing a complete surplus management system. One option to consider is Public Surplus.³⁷ The company:

- provides a detailed audit record of all activity;
- automatically reallocates surplus items internally; and
- provides a dynamic bid auction for those items not internally reallocated.

FISCAL IMPACT

This recommendation can be implemented with existing resources. Depending on the specifics of the adopted replacement cycle, that will have a fiscal impact.

FINDING 5-19

No document exists that states what teachers are expected to know and use. Teachers struggle with a lack of clear expectations of how and when to use technology in the classroom.

The district has equipment in place but there has been no evaluation of whether it is being used fully. As a result, the district is not ensuring it is maximizing its technology use or expenditures. The district has no structured procedures in place to assess staff, student, or parent use of, and satisfaction with, technology available in the district. There is no formal process in place for evaluating technology implementation and use. LWPS has made a number of technology investments in infrastructure, hardware, and software, and continues to invest in technology.

However, by not following up after the initial purchase and set up to determine the use of technology or the problems preventing its use, the district lacks the kind of information that leads to sound decision-making and improvement. With the onset of online assessments, web-based textbooks, and college and workplace requirements, students must be comfortable and adept at using computers, the internet, and other technology resources. In order for students to develop and build the necessary skills and comfort level, students must have reliable, consistent access and integrated use of technology. In addition to providing access to students, it is critical that the district identify what technologies are being used, provide teachers with the tools and training to integrate those technologies into instruction, and evaluate whether or not these strategies result in student achievement gains.

RECOMMENDATION

Adopt expectations for teacher and administrator competencies in technology.

The district should frequently gauge user satisfaction and adjust, in order to ensure optimal technology service. The district should track and analyze technology use in classrooms, in order to ensure it has used its technology resources most effectively. This will also identify whether additional support, such as training or improved infrastructure, are needed. The district could also implement a method to assess staff, student, and community satisfaction with technology

³⁷ <http://www.publicsurplus.com/sms/browse/home>

integrated classes and instruction. This knowledge could help inform future planning in technology acquisition and implementation.

Using the ISTE Standards for Educators, the superintendent and a group of teacher representatives should develop technology guidelines for Lone Wolf teachers. These guidelines should then be used to develop a rubric or needs assessment to determine teachers' level of understanding and their implementation of technology in the classroom. The next step is to match professional development opportunities with the goal of moving teachers deeper into an integration of technology.

ISTE has developed a Classroom Observation Tool³⁸ that provides districts with a mechanism to record and analyze technology use in classrooms. This free tool is built in Microsoft Excel and allows district personnel to record Lone Wolf Public Schools Support Services information on classroom groupings, teacher roles, time, types of technology used, and compliance with the ISTE. 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 5-20

The district lacks written documentation regarding technology practices and procedures. Many processes are still paper based or nonexistent. No complete district-wide inventory is available.

LWPS lacks standards, procedures, and processes for most administrative technology areas. There is currently no district standard for hardware or software and no system for tracking data. Only a partial inventory of existing technology, student Chromebooks, was found. However, additional technology devices exist throughout the district but are not documented.

A lack of coordination and guidelines results in equipment and software that no longer meet user needs or are obsolete and unusable for the designated purpose. While the initial tendency may be to hold onto technology if it has any functionality or repurposing old equipment. That practice typically leads to more user frustration than high quality learning experiences and substantial troubleshooting time for technology staff. This absence of processes and procedures leads to additional costs and an increased backlog of support issues.

RECOMMENDATION

Develop formal written technology standards, procedures, and processes for inventory, administrative tasks, equipment and software purchases, implementation, and upgrades.

The responsibility and technical expertise needed to meet user demands can no longer be performed in a fragmented fashion. All district technology needs should be prioritized and

³⁸ <https://stellar.edc.org/instruments/iste-classroom-observation-tool-icot>

addressed in a systematic manner beginning with the development of standards.

The district should develop district standards for all hardware, software, and network purchases. The *Oklahoma Technology Guidelines for 2019* should be the starting point of the discussion on district needs and standards.

The next step is to use the current inventory. Using the existing partial inventory, the technology coordinator or other designated staff member should establish a priority list of which types of computers/devices are to be replaced first and with what type of device. The technology designee should also establish the expected longevity and scheduled replacement for each computer category.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-21

Limited funds for technology initiatives exist. The district would benefit from continuing to identify and seek additional funding sources for technology purchases, upgrades, and particularly professional development.

Lone Wolf has received grants in the past through School Improvement funds, Title I, IDEA, American Rescue Plan Act, ESSER funds, CARES Act and others. This practice has allowed the district to provide a positive technology environment for students.

During onsite focus groups and interviews, participants expressed concerns about the lack of professional development and future expenditures. Staff surveys indicated concerns about implementing and maintaining devices within the classrooms. Given the current needs in technology, professional development, technology replacement costs and the impact of decreasing school funding, a variety of additional funding entities need to be identified and pursued. Concerns also exist as to how to replace the devices once they are no longer useful.

In addition to the K20 Center, grants are available through a number of sources including the Office of Educational Technology³⁹, Oklahoma State Department of Education and the Oklahoma Department of Career and Technology Education.⁴⁰

RECOMMENDATION

Seek additional funding sources and grants to support long-range planning in technology.

Moving forward, and given the current needs in technology and professional development and

³⁹ <https://tech.ed.gov/funding/>

⁴⁰ 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.

the impact of decreasing school funding, LWPS should identify and pursue additional grants. Grants are available through a number of sources, including the Oklahoma State Department of Education and the Oklahoma Department of Career and Technology Education.⁴¹

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 The primary objective of school transportation is to provide safe, timely, and efficient transportation services to students. Oklahoma's 7,600 school buses travel more than 67 million miles a year, carrying nearly 369,000 children every day.

The Oklahoma School Code (OSC) authorizes school districts to provide student transportation services between school and home, from school to career and technology location, and for approved extracurricular activities. The federal *Individuals with Disabilities Education Act (IDEA)* requires districts to provide transportation services to students who must travel to receive special education services if the districts provide regular school transportation services.

The Oklahoma State Department of Education (SDE) provides some funding for regular transportation of students who live more than 1.5 miles from the assigned school. Oklahoma school districts receive a transportation supplement that is calculated based upon a per capita allowance, the district's student density, and the number of students who live more than 1.5 miles from school (considered the average daily haul or ADH). These factors are multiplied by a state funding figure of \$1.39 (transportation factor), a figure that has not been updated since 1983.

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. Every dollar saved in a school district's transportation program can instead be spent on other district programs, including classroom instruction. However, state funding is covering most LWPS transportation expenses. LWPS is a sparsely populated school district. Its per capita population density figure, used in the transportation aid formula, increased from 154 in 2021-22 to 161 in 2022-23, signifying a decline in district population. Lone Wolf's per capita rating of 161 ranks it among the least densely populated school districts in the state. As a result of its declining population, Lone Wolf's transportation aid declined slightly from \$13,537 in 2021-22 to \$12,391 in 2022-23. This latest amount of transportation aid is still a predominant portion of the district's transportation operating expenses. In 2021-22 Lone Wolf's transportation operating expenses, excluding property expenses, were reported as \$12,255. In recent years, state transportation aid has paid for all or nearly all of Lone Wolf's busing program. The only notable exception is 2021-22 when the district purchased a new bus. The new bus purchase was afforded by use of an American Rescue

⁴¹ <https://OklahomaGrantsforNonprofits-GrantWatch>

Plan (Covid recovery) ESSER grant. Special needs transportation is currently provided by the two, daily, in-district routes. The district owns all vehicles in its fleet and does not lease any.

The Oklahoma Department of Public Safety (ODPS) requires bus drivers to obtain a specialized bus driver's license, a Commercial Driver's License (CDL) B class (for large bus) or C class (for a school van) with P (passenger) and S (school) endorsements. The SDE requires bus drivers to obtain bus driver certification and training and to pass a license history review. LWPS 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 a pre-employment alcohol and drug test and submit to random drug tests that are administered to all drivers throughout the year, as defined by the Federal Motor Carrier Safety Administration's regulation § 382.305.

The LWPS transportation department provides route and extracurricular transportation for its students. With approximately 220 square miles to cover, the district uses two regular bus routes and a third route to carry a few students to and from their morning only vocational-technical (vo-tech) program. **Exhibit 5-26** provides an aerial view of the bus barn.

**Exhibit 5-26
LWPS Aerial View Bus Barn**



Source: Google Maps, April 2023

Currently, the district has three, known Oklahoma Commercial Driver’s License (CDL) certified drivers to operate school buses and an unknown number but at least three additional staff who transport groups of 14 or fewer students without a CDL. The number of bus drivers fluctuates as they enter and leave LWPS employment. One CDL driver and one non-CDL driver are the regular, in-district route drivers. A non-CDL driver does the vo-tech route for just two students.

The exact license status of all Lone Wolf PS drivers, and the number of them could not be determined from the incomplete driver records on file. The LWPS CDL drivers maintain a current Oklahoma CDL, with the proper endorsements, passenger (P) and school bus (S). The non-CDL drivers who transport groups of 14 or less must undergo the same four hours of annual retraining as CDL drivers and be included in the random drug testing pool. 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 history review (MVR). LWPS then reviews the licenses for proper endorsement and driving infraction history. The district maintains and files drivers’ training and testing records that comply with the ODPS, though on an incomplete basis. The district has driver records from as far back as 2017-18, but each year’s records are incomplete. All Oklahoma bus drivers are required to undergo four hours of annual retraining, using a training curriculum provided by SDE. Two emergency evacuation bus safety drills are required each year for all bus riders. There is documented evidence that the annual training and two emergency evacuations have been conducted, but there is insufficient documentation to confirm that all training requirements have been completed every year for the past five years.

LWPS transportation expenses are a small part of total LWPS expenditures. In 2019-20, transportation expenses were less than one percent of total district expenses. The same was true in 2020-21. Nationally recognized school busing expert Dan Roberts recommended in his 2013 study, *Best Practices in Student Transportation*, that districts try to keep their transportation expenditures at or below five percent.

Exhibits 5-27 and 5-28 compare the change in LWPS and the peer districts’ transportation costs over time, with and without property expenses, respectively. The second exhibit provides a better ongoing expenditure comparison due to the removal of large, single year expenses (typically school buses).

**Exhibit 5-27
Comparison of Transportation Costs Over Time (Including Property Expenses)**

Entity	2017-18	2018-19	2019-20	2020-21	2021-22	Percent Change
Lone Wolf	\$17,289	\$9,218	\$13,926	\$12,408	\$106,522	516.1%▲
Wynona	\$84,903	\$23,858	\$16,845	\$9,921	\$12,894	-84.8%▼
Panola	\$94,135	\$73,558	\$63,233	\$46,397	\$79,838	-15.2%▼
Gracemont	\$41,278	\$115,664	\$107,556	\$27,773	\$23,452	-43.2%▼
Wanette	\$58,017	\$83,642	\$108,529	\$109,024	\$62,142	7.1%▲
Buffalo Valley	\$43,574	\$53,545	\$63,964	\$227,041.97	\$327,592	651.8%▲
Peer Average	\$56,533	\$59,914	\$62,342	\$72,094	\$102,073	

Source: SDE, OCAS, School District Expenditures, All Funds, 2017 through 2021, and Prismatic calculations

Exhibit 5-28
Comparison of Transportation Over Time (Excluding Property Expenses)

Entity	2017-18	2018-19	2019-20	2020-21	2021-22	Percent Change
Lone Wolf	\$17,114	\$9,218	\$10,770	\$8,960	\$12,255	-28.4% ▼
Wynona	\$15,338	\$19,508	\$12,482	\$9,908	\$12,894	15.9% ▼
Panola	\$52,135	\$73,558	\$63,233	\$18,197	\$20,138	61.4% ▼
Gracemont	\$41,278	\$30,868	\$22,760	\$27,772	\$23,452	43.2% ▼
Wanette	\$37,016	\$39,309	\$39,547	\$26,654	\$22,697	38.7% ▼
Buffalo Valley	\$43,574	\$53,545	\$36,764	\$38,544	\$71,368	63.8% ▲
Peer Average	\$37,868	\$43,358	\$34,957	\$24,215	\$30,110	-20.5% ▼

Source: SDE, OCAS, School District Expenditures, All Funds, 2017 through 2021, and Prismatic calculations

Exhibit 5-29 provides a comparison of cost per rider per day in LWPS and the peers for 2021-22. As shown, LWPS had one of the lowest daily costs per student and a cost substantially below the peer average.

Exhibit 5-29
Comparison of Cost per Rider per Day, 2021-22⁴²

Entity	Total Annual Operating Cost ⁴³	ADH	Overall Cost per Rider per Day
Lone Wolf	\$12,254	63	\$1.18
Wynona	\$12,893	48	\$1.63
Panola	\$20,138	47	\$2.60
Gracemont	\$23,452	53	\$2.68
Wanette	\$22,697	75	\$1.83
Buffalo Valley	\$71,368	54	\$8.00
Peer Average	\$27,133	57	\$2.98

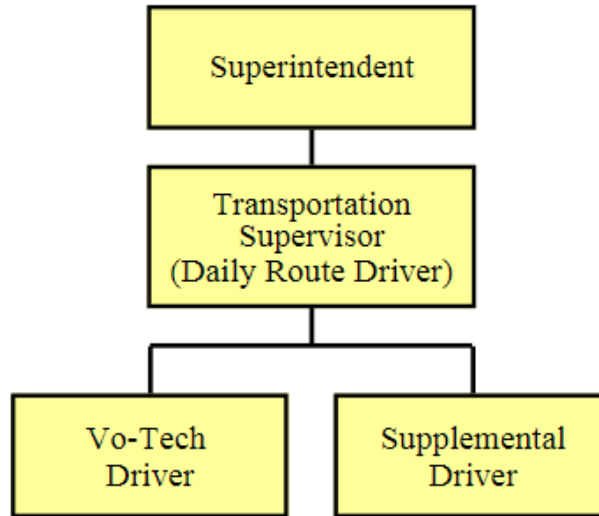
Source: SDE, OCAS, School District Expenditures, All Funds, 2021-22, and Prismatic calculations

The organization of the LWPS transportation function is shown in **Exhibit 5-30**.

⁴² The consulting team was unable to obtain the number of school days of each district and has therefore assumed them to be an equal 165 days.

⁴³ Excluding property expenses.

**Exhibit 5-30
LWPS Transportation Organization**



Source: Created by Prismatic, March 2023

On the stakeholder survey conducted for this review, staff were asked to assign a letter grade to various LWPS functional areas. **Exhibit 5-31** provides the results for transportation. Most staff graded transportation as an *A* or a *B*.

**Exhibit 5-31
Staff Survey Results Regarding Transportation**

Department/Functional Area	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Transportation	42%	17%	17%	0%	8%	17%

Source: Prismatic Survey Results, March 2023.

The few students who ride a school bus reported overwhelmingly that their bus is on time all or most of the time, that they feel safe on the bus, and that effective discipline is provided on the bus (**Exhibit 5-32**). Only one parent survey respondent indicated that their children regularly ride the school bus.

**Exhibit 5-32
Student Survey Results Regarding Transportation**

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
My bus runs on time nearly every day.	40%	60%	0%	0%	0%
Students feel safe riding the bus.	60%	20%	20%	0%	0%
Bus drivers effectively handle discipline issues on the bus.	60%	20%	20%	0%	0%

Source: Prismatic Survey Results, March 2023.

FINDING 5-22

Lone Wolf operates a small pupil transportation program that meets the requirements of Oklahoma SDE for home to school, vo-tech, and activities trips transportation. Lone Wolf PS transportation expenditures are consistently less than one percent of total district expenditures.

A review of expenditure reports from recent years shows that LWPS spends about one percent of total expenditures on its school busing program. The low level of transportation expenses, excepting those years when a new vehicle is purchased, is a reflection of the small size of the LWPS pupil transportation program as well as its management. On a typical day in 2022-23, LWPS bused only a dozen or fewer students, two of which go to a morning-only vo-tech program about a 30-minute drive from the district.

Generally, transportation expenditures that are less than five percent of total district expenses is the desired benchmark for school busing costs. In *Best Practices in Student Transportation* (2013) author and recognized school busing expert Dan Roberts wrote that transportation expenses should be in the range of five percent.

COMMENDATION**LWPS operates a low-cost, effective transportation program.**

Moving forward, the district should continue to operate the LWPS transportation program economically and efficiently while striving for continuous improvement. This should include making provisions for any student with disabilities to be included on field trip buses or home to school transportation when required. Special accommodations might include a child safety seat, safety vest/harness, or school bus monitor to ride with a student.

FINDING 5-12

Lone Wolf Public Schools lacks needed policies to govern and direct its transportation operations.

For the transportation department, district policy can identify who is eligible for busing, set the distance from school for eligibility, establish reasonable walking distances to bus stops for each age group, and set a standard for maximum ride time on home to school bus routes, although a rigid rule for maximum ride time is not recommended. LWPS lacks all of these policies.

Some districts also set seating capacity limits on their buses via policy, because they recognize that larger students in grades five through 12 can only fit two students per seat. Other districts have seat belt policies. In LWPS, a seat belt policy would apply to those non-bus vehicles that are equipped with seat belts because these vehicles do not provide the same level of safety and structural protection as a school bus. To compensate somewhat for the lower level of safety that a Suburban and a passenger van provide, the district could consider requiring riders to wear their seat belts.

Two other areas where LWPS lacks transportation policies are:

- Stopping at railroad crossings. There are several sets of tracks, some having multiple tracks, that Lone Wolf school buses and vehicles cross daily. School buses and smaller school vehicles carrying smaller numbers of students are required to stop, look, listen, and proceed cautiously at all railroad crossings per 47 O.S. 11-702. During observation by the consulting team, one of the LWPS school vehicles carrying students did not stop in either instance in which it crossed railroad tracks.
- Location of bus stops along Route 59 and any similar roads where the speed limit is above 40 mph, there are multiple lanes, and there is a high volume of truck traffic. In the few cases where students live along Route 59 or similar roads, the district can consider permitting the school van or school vehicle (Suburban or van) to go into the student's driveway for pick up and drop off. Doing so will get the school vehicle off the hazardous roadway and provide a higher level of safety for the student. In conjunction with deciding to not have bus stops on Route 59, the district can also establish "no cross" streets that students will not be allowed to cross to or from their bus stop. In deciding which streets will be "no cross" streets, speed, the width of street, the presence of sidewalks or road shoulders, sight distance and volume and nature of traffic can all be factors in the decision.

If the district decides to go onto private property to provide safer bus service for a student, the district should enter into a written, legal agreement, sometimes called a "hold harmless agreement" with the property owner, granting permission for use of the private property. A sample legal agreement for private property use is shown in **Exhibit 5-33**.

Exhibit 5-33 Sample Turn-Around Agreement Form

[] 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 owner(s) of the property hereinafter described: _____
 (LEGAL LAND DESCRIPTION)

 (ADDRESS/ BOX) (TOWN) (STATE) (POSTAL CODE)

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 [] Public Schools division.

WHEREAS the Parent/Guardian has requested that the board provide School Bus Turn-Around Service to the above noted Legal Land Description upon the terms and subject to the conditions herein stated.

WITNESSEED 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 regular 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 of service;

IN CONSIDERATION of the Agreement of the Board to transport the forenamed child(ren), we/I agree to 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 nature whatsoever arising out of any act or omission, in relation to any damage to the real property described 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/Guardian

Source: Prismatic, January 2022



A district's policies proclaims publicly what the district will do and how it will do it. A policy book can be an essential guide to annual planning and daily operations for all departments.

RECOMMENDATION

Develop transportation policies and regulations that require LWPS to be in compliance with federal and state laws and regulations regarding pupil transportation, and that fit local, reasonable expectations for its school busing program.

The minimum requirement for any school busing program should be compliance with federal and state laws and regulations that govern pupil transportation. Local school districts can exceed federal and state requirements if they decide to do so, for example, requiring seat belt use. The Oklahoma State Department of Education and the Oklahoma Association for Pupil Transportation are the most reliable and readily accessible sources for information about state and federal requirements for school busing.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-24

The LWPS transportation supervisor lacks sufficient, updated knowledge about operating and managing a transportation program. This puts the district at risk for programmatic inefficiency or unsafety.

The transportation supervisor has been employed by the district for about five years primarily as a history teacher. He drives a 29-passenger school bus before and after classes. Although he indicated that he has prior experience with transportation operations, in interviews he demonstrated a lack of current knowledge about pupil transportation. Furthermore, the supervisor:

- does not provide transportation budget planning information to the central administration;
- was insufficiently knowledgeable regarding drug and alcohol abuse recognition. The SDE website lists several of the primary requirements for a transportation director, including obtaining certification in drug and alcohol abuse recognition. SDE notes that this certification is a federal requirement,
- does not maintain maps of the district that shows where transportation eligible and non-eligible students live. A map of the district that identifies student residences is a standard tool for bus route planning; and
- was not familiar with the Oklahoma Association for Pupil Transportation and its resources.

Prior to the current superintendent, the former superintendent led LWPS for over 30 years and handled many of the district's responsibilities, including transportation, in his own way. His

tenure overlapped that of the current transportation supervisor by three or four years. The former superintendent's "do it all" leadership style may have left the transportation supervisor ill-prepared to assume supervisory duties and with the impression that someone else, perhaps the new superintendent, would take control of school bus matters just as the prior superintendent had.

There is an abundance of daily tasks in school busing, from doing pre-trip inspections, to checking other drivers for fitness for duty to cleaning buses, that someone, the supervisor of his/her designee, if appropriate, is obliged to complete. Employing a professional transportation supervisor who is committed to safety and efficiency, and his/her own continued professional development is a vital component in a compliant, well-run pupil transportation program. The importance of having a committed professional administrator to oversee school busing is cited as a "best practice" by Roberts in *Best Practices in Student Transportation* (2013) and in the 2004 and 2006 editions of the *Pupil Transportation District Safety Review Program* produced by the New York State Education Department.

The school bus world is changing, and it is important to keep up with the changes, especially those that affect student safety and the district's liability. In just the past decade, there have been changes in the medical exams of bus drivers, how new bus drivers must be trained, and pre-kindergarten busing requirements. It is vital for a professional transportation supervisor to keep up with the changes, and the best means of doing so is to join and participate in the state's Association for Pupil Transportation. The Oklahoma Association for Pupil Transportation (OAPT) provides "mutual aid" - a mentor to members who request assistance. OAPT also conducts annual summer conferences, provides updates on Oklahoma SDE requirements, and links to school bus vendors who can provide vital parts and supplies. On the local level OAPT members commonly meet monthly in person or via a Zoom meeting and stay in touch with one another as needs arise. In the course of studying other school district's busing programs, the common denominator that separates well-run, safe, and efficient busing programs from "fly by the seat of your pants" operations is active membership in the state's association.

RECOMMENDATION

Require the transportation supervisor to join and participate in OAPT activities regularly.

The superintendent should require the transportation supervisor to join OAPT and then provide time for the supervisor to attend OAPT activities. The supervisor should bring back to the district resources and lessons learned to share with drivers and district staff.

FISCAL IMPACT

The annual membership fee in OAPT is \$100.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Join and participate in OAPT.	(\$100)	(\$100)	(\$100)	(\$100)	(\$100)

FINDING 5-25

The school site safety at the LWPS campus is jeopardized by cracked sidewalks, few well-marked street crossings, little traffic control signage, and its perpendicular parking pattern. A conscientious transportation supervisor is concerned with than just school busing. S/he is concerned also about how those who do not ride a school bus get to and from school, and about how all students, staff, and visitors get safely around school.

One of the basic principles of school site safety is that school buses, cars, and pedestrians are kept separate from one another. LWPS has many of the features of a safe school site; however, some of these features are not in good condition (**Exhibit 5-34**). LWPS has sidewalks around most of the campus, but the sidewalks are so cracked, heaved, and broken that some sections cannot be safely walked, compelling a person to walk in the street or on the grass. LWPS has crosswalks marked in white paint between the main school building and the gymnasium/cafeteria, and between the main building and the kindergarten annex. However, these crossings do not appear to have been recently or more prominently painted.

Exhibit 5-34
Safety Signs, Parking Lot and Trip Hazards



Source: Prismatic, March 2023

LWPS effectively controls vehicular traffic near the school buildings by closing 6th Street and marking the street closure with signs on either end of the street and a chain or rope across both ends of the street. There is a stop sign, school sign, and 20 mph speed limit sign “when students are present” posted on the corner between the annex and the Griffin building at the corner of 7th Street and Low Street. These features would be enhanced by additional stop signs at each corner near school.

No speed bumps are present near the school. Speed bumps are an effective measure against excessive speed.

On the district website, a sketch of the campus describes the desired flow of parent drop-off and pick-up traffic around the school (**Exhibit 5-35**). The sketch shows traffic moving in a counterclockwise manner around the main building. This results in many students having to cross a street to gain access to their school building. The preferable school traffic pattern would enable students to get out of their car and exit directly onto a school sidewalk without having to cross a street.

Exhibit 5-35
Current LWPS Site Circulation Plan



Source: LWPS, 2023

The situation at LWPS is complicated by there being three buildings (four if the gym is also counted) on opposite sides of the street where students are dropped off and picked up. It is understood that the district decided to provide breakfast in the morning in the auditorium, rather than in the cafeteria, because the district did not want students to have to cross the street to the main building or annex for instruction. In the morning and afternoon, the school van and other school vehicles that transport students travel in a clockwise manner and drop off and pick up on the school side of the street so that riders do not have to cross a street when using the bus.

Adding to the counterclockwise flow of parent traffic around the school is the perpendicular to curb parking pattern at the school. This pattern requires parked vehicles to either back out of or back into a parking space. Accidents are more likely to happen when a vehicle backs up. Even a slow backing incident that knocks down a young student could result in a serious injury. There appears to be sufficient space along the roads adjacent to the school to provide parallel parking instead of perpendicular parking. Using 6th St for staff parking, while keeping 6th St closed during school hours, would provide additional parallel parking space.

RECOMMENDATION

Improve site safety by minimizing trip hazards on sidewalks, backing out of parking spaces, crossing of the streets by students, and traffic by the school.

School site safety is the sum of many small parts, perhaps even greater than the sum of the small parts. Small improvements such as painting the crosswalks more boldly can make a big difference.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-26

As a school district, LWPS is exempt from paying state and federal taxes on gasoline and diesel fuel. However, a check of recent gasoline purchase invoices showed that LWPS is paying full retail price for gasoline. The same might be true of its diesel fuel purchases.

LWPS purchases its gasoline and diesel fuel for its school buses, vans, and school vehicles at a local fueling station, Planters' Cooperative Association (PCA). It also has some bus and vehicle maintenance and repair work completed at PCA. LWPS does not have its own gasoline and diesel fuel tanks.

The consulting team found district records showing that the district appeared to be paying full retail price, close to \$3.25 per gallon, for gasoline. According to the American Petroleum Institute,⁴⁴ the federal tax on gasoline is \$0.184 per gallon and \$0.244 on a gallon of diesel fuel. The Oklahoma state tax on gasoline is \$0.19 per gallon and \$0.444 on diesel fuel. Combined, state and federal taxes amount to \$0.374 per gallon of gasoline and \$0.684 on a gallon of diesel fuel. According to a regional representative of OAPT, school districts' exemption from fuel taxes holds for all but the federal DSL LUST tax of \$0.0001 per gallon, the federal Superfund Fee Recovery tax of \$0.0039 per gallon, an oil spill tax of \$0.00214 per gallon and the Oklahoma petroleum underground tank release tax of \$0.01 per gallon. Added together, these non-exempt taxes amount to less than \$0.02 per gallon.

When asked about paying taxes on fuel purchases, the transportation supervisor said he was sure the district did not and that the PCA fueling station was well aware that the school district was

⁴⁴ api.org

exempt from taxes and recognized the school buses and school vehicles when they came in for fueling. However, the available documentation appears to contradict this statement. Questions remain about LWPS unnecessarily paying state and federal taxes on gasoline and perhaps on diesel fuel too.

RECOMMENDATION

Review past gasoline and diesel fuel purchases to ensure that LWPS is not paying state and federal taxes on gasoline and diesel fuel.

LWPS should double check its gasoline and diesel fuel purchase invoices to determine whether it has been paying state and federal taxes unnecessarily. It should search back in its records for as many years as possible to find out how long this practice has gone on. If it is found that LWPS has been unnecessarily paying fuel taxes, the district should seek refunds.

Going forward, LWPS should clarify with PCA or any other business from which it buys fuel that as a school district it is exempt from state and federal fuel taxes. LWPS may need to present a tax exemption certificate to document their relief from taxes. If PCA does not honor the district's tax exemption, the district should take its business elsewhere. In addition, if it is discovered that the district has been paying fuel taxes, it should calculate how much tax it has paid and seek refunds from PCA, or the state and federal governments.

FISCAL IMPACT

To estimate the cost of the taxes, and the potential savings for LWPS from not paying taxes, the consulting team used these estimates:

- The Suburban and white van are each driven about 5,000 miles each year and get approximately 15 mpg, resulting in 333 gallons of gasoline being used. With the total gasoline tax of \$0.374, this results in a total annual tax cost of \$125 per vehicle.
- The yellow, gasoline powered school van is driven about 7,000 miles each year and gets approximately 12 mpg. This results in the use of 583.3 gallons of gasoline. Multiplying this figure by the \$0.374 total gas taxes results in \$218 in annual gas taxes for the yellow van.
- The new diesel bus might be driven about 5,000 miles per year and should expect approximately 8 mpg. This results in expected fuel use of 625 gallons of diesel fuel. With total diesel fuel taxes of \$0.684 pr gallon, the total annual cost of diesel taxes would be \$428.

The sum of these projected fuel tax costs for four school vehicles, the new diesel bus, the yellow school van, the Suburban and the white van, is \$896.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Ensure district does not pay fuel taxes.	\$896	\$896	\$896	\$896	\$896

FINDING 5-27

The consulting team observed LWPS bus drivers violating several basic school bus safety rules and best practices. This puts students and others at risk of injury.

During the onsite period in March 2023, the consulting team observed three areas where LWPS bus drivers did not adhere to standard safety practices:

- An LWPS driver failed to follow safe railroad track crossing procedures while students were being transported. On two occasions, the school vehicle failed to stop, look, listen, and then proceed across railroad tracks. In one instance there were three sets of tracks at the site, adding to the level of risk. It is permissible for a driver to not stop at a railroad crossing if the tracks are marked “exempt,” indicating that the tracks are not active. Even if the tracks are known locally to be inactive, if the tracks do not have an “exempt” sign, then the school vehicle or bus must stop. The tracks in question were not observed to be marked “exempt”.

One of the most fundamental school bus safety rules is that school buses stop at railroad crossings before proceeding across the tracks. This rule is explained in 47 O.S. 11-702 and includes all school vehicles (not just buses) that transport students, either for home to school transport or on field and sports trips. The requirement that school buses and school vehicles must stop at railroad crossings is covered in the Oklahoma “Bus Driver Training for Non-CDL Vehicles” manual (p.6) which the transportation supervisor should have reviewed and signed off on with the district’s non-CDL drivers.

Safe railroad crossing procedures is a topic for review listed on the state’s annual verification form for four hours of refresher training for every school bus and vehicle driver. The *National School Transportation Specifications and Procedures* manual, a national reference for school bus operations, includes a section on safe railroad crossing procedures. A copy of the 2010 edition of “the yellow book” is available on the Oklahoma SDE website. Safe railroad crossing procedures get further attention from a national program “Operation Life Saver” sponsored by CSX railroads.

- An LWPS driver violated basic principles to avoid distracted driving. The driver held and sipped from a large cup of coffee, driving with only one hand, while operating the vehicle. Students were on board at the time.

Beyond increasing the likelihood of an accident due to distracted driving, a spilled drink on and into a school bus or vehicle dashboard can cause hundreds of dollars of damage to electrical components and take a vehicle out of service.

The topic of “sound driving practices” on the state’s list of annual refresher lessons would include driving without distractions - no cell phone, no texting, no eating, and no drinking of any beverage. The airline industry credits its safety record in part to its insistence that a “sterile cockpit” environment without newspapers, books, snacks, or drinks be maintained during take-off and landing procedures.

- Multiple drivers failed to complete pre-trip inspection forms every day. At the time of observation, the most current pre-trip inspection form found on the clipboard inside the school van listed mileage on the day of inspection as 49,135. The current mileage on the van was 52,836, suggesting that a pre-trip inspection had not been recorded in months.

Properly completed pre-trip inspection forms are an important part of an effective preventive maintenance program, saving the district money and possibly helping it avoid a breakdown or accident. Of the completed pre-trip inspection forms that were seen, none of them noted a defect. This is unusual and suggests that pre-trip inspections have not been conducted rigorously, when they are conducted.

All Oklahoma school bus drivers are required to receive four hours of retraining each year to ensure safe operations. All of these topics are included in available state training materials.

RECOMMENDATION

Review daily driving behaviors by Lone Wolf bus drivers and correct them as needed to adhere to federal and Oklahoma school bus driving requirements and recommended practices.

This should include direct observation by a school administrator of driving behaviors, either by riding along in the bus or vehicle or by following the vehicle during one of its bus runs. Driving behaviors to be noted should include speed, stopping at railroad crossing, driving defensively, proper use of red flashing lights and extension of side stop signs at bus stops, and proper signaling when turning. Direct, personal, frequent observation of drivers will provide more valuable insight into a driver's habits than merely completing the annual, required review of the MVR, motor vehicle (driving) record of the bus driver. The next four-hour, annual refresher class, and subsequent classes, should emphasize safe railroad crossing procedures, distracted driving and completion of pre-trip inspection forms.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-28

There is no bus fleet replacement schedule. As a small district, LWPS has a small transportation program. It uses three vehicles to transport approximately ten daily student riders and has a 53-passenger bus for field and sports trips. For a district that transports so few students, it owns a number of school buses, vans, and school vehicles with way more seating capacity than students it carries. Added together, all of the LWPS buses and vehicles have a legal seating capacity of 171 students.

LWPS is not able to reduce the number of its daily, in-district routes because of the distance one route would have to travel between all students' addresses. Further, LWPS is obliged by

Oklahoma SDE law to provide transportation for its vo-tech students, even if there are just two of them.

Two of the LWPS school buses are good candidates for declaration as surplus and auction sale. Bus 7 is a 2001, 47-passenger, diesel engine bus that still runs but is rarely used. School van 4 is a 2009, 29-seat vehicle with seat belts that outwardly appears to be in good condition, but has engine and radiator problems that keep it out of service. The district does not need either of these vehicles.

The district's brown Suburban and white Dodge van have over 135,000 miles and will likely need to be replaced soon. Based on the evidence the consulting team could find, it does not appear that either vehicle has had sufficient preventive maintenance in the past.

The NASDPTS recommended in their January 2002 position paper, "School Bus Replacement Considerations," that full-sized conventional and transit buses be replaced every 12 to 15 years.⁴⁵ Smaller school vans that often have longer, out-of-district routes and accumulate more mileage more quickly, should be replaced every eight to ten years.

RECOMMENDATION

Assess the district's transportation needs and develop an appropriate fleet replacement schedule.

A critical element in adopting a fleet replacement schedule is acquiring the funding for new buses. If fleet replacement is not already part of the general fund budget, it is difficult to add \$100,000 or more without a large, negative impact on the budget, especially one as small as LWPS's.

Currently, LWPS district needs three vehicles for its daily, home-to-school needs; the only question is what type of vehicle. Vehicles with a seating capacity of just seven, such as a Suburban or minivan, could be adequate if the two in-district routes can be modified to carry no more than seven students. Another option with more flexibility would be a yellow school van with seating capacity for 14 students or less; this type of vehicle will not require a CDL driver.

A new Suburban in yellow paint might well cost \$50,000. A new minivan, also recommended to be in school bus yellow, may cost closer to \$40,000. The smaller the school vehicle, the more the cost per seat for seating capacity. Full-sized school buses are a better value per student seat but are not needed in LWPS's case.

FISCAL IMPACT

This recommendation can be implemented with existing resources. The sale of Bus 7 and Van 4 might generate several thousand dollars for LWPS to reinvest in its busing program.

⁴⁵ <https://www.nasdpts.org/resources/Documents/Paper-BusReplacement.pdf>

FINDING 5-29

The district demonstrated its commitment to continued provision of extra-curricular and sports trips by buying a new 53-passenger school bus. By purchasing the new bus though, LWPS was demonstrating its commitment to higher performance and to serve more students with meaningful, memorable trips beyond the district's borders.

The new bus has far more carrying capacity than the LWPS daily home-to-school busing program requires. However, the district's 47-passenger bus is 22 years old and likely can no longer be depended upon. The district's other smaller school vehicles that are used for home-to-school busing are still serviceable and only used by less than a dozen students. The new bus is good for the district's instructional, athletics and social programs (**Exhibit 5-36**). As of late March 2023, this new bus had just 1,300 miles on it, so it has not seen much use yet.

**Exhibit 5-36
LWPS Trips Bus**

Source: Prismatic, March 2023

RECOMMENDATION

Continue to provide the Lone Wolf school community with activities and athletic trips, and access to learning beyond Lone Wolf's borders.

The purchase of the new bus only makes sense if it is used often. There are a large number of sites within a two-hour drive of Lone Wolf that are potential locations for worthwhile educational trips. These sites range from Oklahoma City, multiple museums to state parks.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-30

LWPS uses a 29-passenger school van to pick up and drop off ten or fewer students on a daily basis. This 2015 school van's seating capacity far exceeds its need for seats on its daily, home to school route. The extra seating space on the van affords the students a chance to have their own seat on the van, but it is an inefficient means of transporting so few students.

The expected miles per gallon for a school van of this size is approximately 10-12 mpg. A smaller van could get 15-18 mpg. The large school van also does not fit easily in some of the road and turnaround conditions that the daily route encounters. The school van was observed going into several, confined private property areas to drop off students. Backing up at these sites would be easier and safer if the school vehicle was smaller. The current school van also travels on many narrow back roads, making it more challenging to go past oncoming traffic. A smaller van would be more suitable in these situations.

RECOMMENDATION

Research the possibility of acquiring an under 14-passenger capacity school van to replace the 29-passenger van for daily home to school bus service, and more efficient operations.

The 29-passenger van is more than halfway through its expected life. As of March 2023, it was about seven years old and has about 53,000 miles. It would be ill-advised to dispose of it prematurely, especially since it is capable of handling many field and sports trips groups that cannot be accommodated by the Suburban or minivan. The 29-passenger van should be maintained for an extended life while a new or refurbished smaller vehicle is added to the district's fleet for home to school service. The 29-passenger van then becomes a spare vehicle, capable of fulfilling a variety of assignments for the district.

As LWPS considers alternatives to the 29-passenger van for daily home to school use, it must keep in mind that purchase or lease of a new, 10-15 passenger, non-conforming van by the school district is not permitted. This is due to the less than safe driving characteristics of a non-conforming van that make it prone to tipping over when loaded with passengers. The district's regional school bus vendors will be able to provide more guidance on suitable small vans that have a carrying capacity greater than a Suburban or minivan, but that do not require a CDL license to drive.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING 5-31

Some LWPS school vehicles, especially those used daily, are dirty on the outside and inside. The dirty condition of the vehicles can pose a health risk to students and conveys a negative impression of the district. Dirty buses can give the appearance that they are not mechanically well maintained and can also send a signal that there is a lack of pride in school district property.

As shown in **Exhibit 5-37**, the 29-passenger school van was covered in dust and dirt during the late March observation period. Its rear was so caked in dirt that its rear flashing red and amber lights might have been barely visible. The rear windows were so dirty that vision out the back was impaired. The inside of the van was likewise quite dusty.

Exhibit 5-37
Dirty LWPS Vehicles



Source: Prismatic, March 2023

To the students' credit, there were no cut seats and very little trash in the van, a sign that the students help take care of the van. The Suburban's interior was fairly clean, but its exterior needed a wash, particularly in the front where bugs will collect. The white van was clean, inside and out, indicating that someone has been taking care of it.

RECOMMENDATION

Purchase and use a power washer and shop-vac to clean the inside and outside of school vehicles at least weekly during the school year.

When used in conjunction with regular mopping, a shop-vac and wipe down of the seats will keep a school bus clean and provide a healthier and safer environment for the riders and driver. Clean buses can be one of the simplest ways to show students that the district cares about their health and welfare.

FISCAL IMPACT

The district should hire responsible high school students for this work. A team of two students could clean a school van or vehicle well, in and out, in less than half an hour. In 1.5 hours all three daily use vehicles could be cleaned. At \$10 per hour for two students, the three daily buses can be cleaned for \$30 per week.

Existing school cleaning supplies - mop, bucket, rags - would likely meet most washing needs. A mild car wash soap should be used so that the paint does not fade. A shop vac will cost about \$100; a power washer, \$170. The garage has a hose near the door that can be used for washing. There is also a drain by the garage door, but it appeared to be clogged.

Recommendation	2023-24	2024-25	2025-26	2026-27	2027-28
Buy shop-vac and power washer; hire two washers.	(\$1,170)	(\$900)	(\$900)	(\$900)	(\$900)

FINDING 5-32

The district lacks a system for tracking the maintenance and repair costs of its school vehicles.

LWPS does little or no bus maintenance or repair work on its own. It has a local auto and truck repair station perform the work. LWPS has such a small transportation program that it does not need a computer software package to track its bus maintenance and repair costs. A simple spreadsheet would suffice; the district is not currently maintaining one.

Repair and maintenance costs for each vehicle are vital bits of information for deciding when it is appropriate to replace a vehicle. The tracking of costs should follow the establishment of estimated costs of repair in the transportation budget. Budget projections of maintenance costs can be based on past experience. Repair costs can be harder to predict since they are usually unexpected. Unless preventive maintenance is conducted, larger repair costs can be expected.

Rough road conditions will shorten the life of a bus. Having accurate records on bus maintenance costs is necessary to complete an informed cost-benefit analysis of whether to keep an old bus or replace it.

RECOMMENDATION

Develop and maintain a system to track maintenance and repair costs of each individual school vehicle.

The transportation supervisor should maintain paper files for each vehicle that contain invoices for maintenance and repairs. From these invoices, the supervisor or assistant should develop and maintain a spreadsheet that summarizes costs for each bus.

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Appendix A:
Staff Survey Results

Staff Survey

Surveys Completed: 12

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	83%
6 – 10 years	8%
11 – 15 years	0%
16 – 20 years	0%
21 years or more	8%
What is your role in the school district?	
School Administrator	8%
Classroom Teacher	50%
Other Certified (Librarian, Guidance Counselor)	17%
School Aide/Nurse	0%
Instructional Aide	8%
Other Support Staff (Cafeteria, Office, Custodial)	17%

Survey Questions

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
1	Administrative decisions are made promptly and decisively.	9%	64%	18%	9%	0%
2	Administrators are easily accessible and open to input.	8%	67%	0%	25%	0%
3	The district ensures adequate input from teachers and staff on most important decisions.	9%	64%	9%	18%	0%
4	The district gives student needs a high priority when making major decisions.	25%	50%	17%	8%	0%
5	Most district administrative processes (e.g., purchasing, travel requests, leave applications, personnel, etc.) are highly efficient.	25%	67%	0%	8%	0%

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
6	School-based personnel play an important role in making decisions that affect schools in our district.	17%	50%	8%	17%	8%
7	Parents/families play an active role in decision making in our schools.	8%	33%	17%	33%	8%
8	School-based personnel value parent/family input and engagement.	8%	67%	17%	8%	0%
9	Parents/families participate in school activities and organizations.	9%	36%	27%	18%	9%
10	Parents/families receive regular communications from the district.	17%	58%	17%	8%	0%
11	The curriculum is broad and appropriately challenging for most students.	17%	33%	17%	25%	8%
12	The district's curriculum is aligned from grade to grade and from class to class.	17%	33%	33%	8%	8%
13	Teachers in our schools know the material they teach.	17%	58%	25%	0%	0%
14	Teachers have adequate supplies and equipment needed to perform their jobs effectively.	8%	50%	8%	33%	0%
15	Teachers know how to use the technology they have for teaching.	9%	73%	18%	0%	0%
16	The district lacks sufficient instructional technology.	0%	25%	17%	58%	0%
17	Test data from district-adopted benchmarks and mandated end-of-year tests are used to improve the district's curriculum.	17%	25%	42%	17%	0%
18	Teachers effectively use student data to improve instructional practices.	8%	42%	42%	0%	8%

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
19	Sufficient student services are provided in this district (e.g., counseling, speech therapy, health).	8%	50%	17%	25%	0%
20	The district adequately implements policies and procedures for the administration and coordination of special education.	17%	75%	8%	0%	0%
21	There is generally cooperation and collaboration regarding special education issues in our district.	17%	75%	8%	0%	0%
22	Most staff in our school/department are intentional in honoring the cultural differences within our student body.	42%	50%	0%	8%	0%
23	Most staff in our school/department treat student diversity as an asset and not a deficit.	33%	58%	0%	8%	0%
24	Most staff in our school/department have high expectations for all students regardless of their race, ethnicity, or language.	25%	67%	0%	8%	0%
25	Salary levels in this district are competitive.	0%	42%	50%	0%	8%
26	This district values diversity in its employees.	25%	50%	17%	8%	0%
27	My supervisor evaluates my job performance annually.	33%	58%	8%	0%	0%
28	My salary level is adequate for my level of work and experience.	17%	33%	8%	33%	8%
29	I am actively looking for a job outside of this district.	8%	17%	25%	42%	8%
30	District leaders enforce high work standards.	8%	50%	17%	25%	0%
31	I feel that my work is appreciated by my supervisor.	25%	50%	0%	25%	0%

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
32	Teachers who do not meet expected work standards are reprimanded.	0%	17%	58%	8%	17%
33	Staff (excluding teachers) who do not meet expected work standards are reprimanded.	0%	27%	55%	9%	9%
34	I feel that I am an integral part of the team here.	18%	55%	9%	18%	0%
35	The work standards and expectations in this district are equal to or above those of most other school districts.	17%	42%	17%	25%	0%
36	There is adequate high quality professional development for principals and teachers.	8%	50%	25%	17%	0%
37	Non-teaching staff has opportunities for professional development relevant to their responsibilities.	8%	50%	25%	17%	0%
38	Funds are managed wisely to support education in this district.	8%	50%	33%	8%	0%
39	The budgeting process effectively involves administrators and staff.	8%	25%	33%	25%	8%
40	My school/department allocates financial resources equitably and fairly.	9%	55%	27%	9%	0%
41	The purchasing process takes too long.	0%	0%	58%	33%	8%
42	Our schools have sufficient space and facilities to support the instructional programs.	8%	58%	17%	17%	0%
43	Our facilities are clean.	8%	33%	8%	25%	25%
44	Our facilities are well maintained.	8%	17%	8%	33%	33%
45	Parents, citizens, students, faculty, and staff have opportunities to provide input into facility planning.	8%	17%	42%	25%	8%

	Survey Questions	Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
46	There are facility concerns throughout the campus.	25%	50%	17%	8%	0%
47	I know what to do during a crisis or an emergency on campus.	33%	58%	8%	0%	0%
48	Students in this district are accepting of other students who are different.	17%	50%	25%	8%	0%
49	Adult bullying is a problem in this district.	8%	17%	25%	33%	17%
50	Poor student behavior is a problem in this district.	17%	42%	25%	8%	8%
51	The food services department provides nutritious and appealing meals.	50%	42%	8%	0%	0%
52	Cafeteria staff are helpful and friendly.	17%	67%	17%	0%	0%
53	The school cafeterias is calm environments in which to eat.	8%	58%	25%	8%	0%
54	Buses arrive and depart on time each day.	33%	58%	8%	0%	0%
55	There are enough working buses to meet the needs of the district.	25%	25%	33%	17%	0%
56	Bus drivers maintain adequate discipline on the buses.	25%	50%	17%	8%	0%
57	Buses arrive early enough for students to eat breakfast at school.	25%	58%	17%	0%	0%
58	Our district provides adequate technology training.	8%	25%	17%	50%	0%
59	Our district provides adequate technical support.	8%	25%	33%	25%	8%
60	I have adequate equipment and computer support to conduct my work.	17%	58%	0%	25%	0%
61	Administrative computer systems are easy to use.	0%	50%	33%	17%	0%
62	Instructional computer systems are easy to use.	8%	67%	17%	8%	0%
63	The district's technology equipment is often used past its useful lifespan.	8%	17%	50%	25%	0%

Survey Questions		Strongly Agree	Agree	Don't Know/No Opinion	Disagree	Strongly Disagree
64	Many administrative processes are still paper-based.	0%	17%	50%	33%	0%

Department/Topic	Grade A	Grade B	Grade C	Grade D	Grade F	No Opinion
Strategic planning	17%	58%	8%	8%	8%	0%
Community relations and communication	42%	8%	33%	17%	0%	0%
Internal communications	17%	17%	42%	17%	8%	0%
Budgeting	42%	25%	8%	8%	0%	17%
Financial management	50%	17%	8%	8%	0%	17%
Purchasing	42%	17%	17%	0%	0%	25%
Personnel management	33%	25%	17%	0%	8%	17%
Staff development	42%	8%	25%	17%	0%	8%
Special education	42%	42%	8%	0%	0%	8%
Elementary education	67%	8%	25%	0%	0%	0%
Middle school education	33%	17%	42%	8%	0%	0%
High school education	42%	8%	33%	0%	17%	0%
Custodial services	8%	33%	25%	25%	8%	0%
Food services	50%	42%	8%	0%	0%	0%
Administrative technology	25%	33%	17%	0%	8%	17%
Instructional technology	25%	50%	8%	0%	8%	8%
Technology management and support	25%	25%	33%	8%	0%	8%
Transportation	42%	17%	17%	0%	8%	17%
School Board members' knowledge of educational needs of students	17%	8%	25%	17%	17%	17%
School Board members' knowledge of operational needs in the district	17%	8%	25%	8%	17%	25%
Superintendent's work as the educational leader of the district	50%	33%	8%	8%	0%	0%
Superintendent's work as the chief administrator of the district	50%	33%	8%	8%	0%	0%
Principal's work as an instructional leader	42%	17%	25%	17%	0%	0%
Principal's work as a manager of the staff and teachers	42%	17%	25%	8%	8%	0%
Overall quality of education in this district, compared to other districts in Oklahoma	17%	25%	17%	25%	0%	17%

Written Responses

If you would like to provide any additional comments about the district, please do so here. Where is the district doing well? In what areas could it be improved?

- The district could be improved by having a strong music and athletic department. The teachers and staff work together for the benefit of the students.

- Family environment for teachers/staff and students.
- The district has many new administrators and support personnel this school year, so many of these questions result from years of neglect. Things are moving forward but takes some time to remedy each area within less than a year's time. Morale is low due to the change and lack of progress in many years preceding this school year.

Appendix B:
Parent Survey Results

Parent Survey

Surveys Completed: 17

Totals may not add to 100 percent due to rounding.

Grades of Students

Grade	Percentage
Kindergarten	12%
1	18%
2	29%
3	12%
4	18%
5	6%
6	0%
7	18%
8	6%
9	6%
10	12%
11	18%
12	12%
Other	18%

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.	6%	35%	35%	6%	18%
2	School board members know and understand the educational needs of students in the district.	18%	29%	35%	6%	12%
3	The superintendent is a respected and effective leader.	18%	29%	18%	0%	35%
4	District and school staffs are accessible to parents.	35%	29%	6%	18%	12%

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
5	Parents play an active role in decision-making in our schools.	12%	24%	12%	18%	35%
6	Education is the main priority in our school district.	24%	41%	18%	6%	12%
7	In this district, students learn the necessary material to be prepared for the next grade.	24%	71%	6%	0%	0%
8	Teachers are held accountable for ensuring that students learn.	12%	53%	29%	6%	0%
9	Students are treated equitably in this district.	29%	41%	6%	6%	18%
10	Our school can be described as a “good place to learn.”	35%	47%	6%	6%	6%
11	Students in this district are accepting of other students who are different.	35%	35%	12%	0%	18%
12	Poor student behavior is a problem in this district.	18%	24%	35%	24%	0%
13	The school buildings and grounds are safe and secure.	29%	41%	12%	12%	6%
14	I regularly use technology to keep up-to-date on my child’s education (emailing teachers, online gradebook, etc.).	18%	59%	12%	12%	0%
15	Teachers know how to use technology in the classroom.	35%	53%	12%	0%	0%
16	I feel welcome at my child’s school.	47%	24%	6%	0%	24%
17	My child feels welcome and accepted at school.	41%	41%	12%	6%	0%
18	I receive timely communications from my child’s teachers regarding his/her progress in school.	41%	41%	0%	12%	6%
19	My child’s school encourages parents to be involved in the school and offers a variety of ways to do so.	24%	41%	0%	12%	24%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
20	Teachers have high expectations for my child.	35%	59%	6%	0%	0%
21	My child is appropriately challenged by his/her schoolwork.	24%	59%	12%	6%	0%
22	I am satisfied with the education my child is receiving.	41%	53%	0%	6%	0%
23	My child's school is clean.	41%	29%	18%	6%	6%
24	My child's school is attractive and welcoming.	24%	53%	0%	6%	18%
25	My child's school is well maintained.	24%	41%	18%	12%	6%
26	My child feels safe and secure at school.	29%	47%	6%	12%	6%
27	Discipline is fairly and equitably administered in my child's school.	24%	47%	12%	6%	12%
28	My child regularly uses technology at school.	24%	65%	12%	0%	0%
29	My child has regular internet access at home.	41%	53%	6%	0%	0%
30	The school lunch period is long enough for my child to eat.	24%	53%	24%	0%	0%
31	My child often waits longer than five minutes in the lunch line.	0%	0%	59%	18%	24%
32	My child likes the food served in the cafeteria.	24%	29%	18%	18%	12%

Survey Question		Yes	No
43	Does your oldest child regularly ride the bus?	6%	94%

If child rides the bus:

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
44	My oldest child’s school bus runs on time nearly every day.	10%	0%	90%	0%	0%
45	My oldest child feels safe riding the bus.	20%	10%	70%	0%	0%
45	Bus drivers effectively handle discipline issues on the bus.	10%	10%	80%	0%	0%

Written Responses

If you would like to provide any additional comments about the district, please do so here. Where is the district doing well? In what areas could it be improved?

- The teachers are wonderful.
- Parents should be allowed to meet their children on field trips or attend class parties.
- The safety has been addressed. The upgrade to the phone system has been great. Incorporating Esports and tennis I think will benefit. However, the school needs a coach qualified to teach basketball, track, baseball, or football, to draw athletes, to engage and reestablish dwindling athletics, we need them in the community with vigor, energy, motivation, a plan and desire to keep athletics. The same for Agriculture, Home Ec. We have a great community, we need our school, we need sports, and other interest to draw more to stay in town. We have a great staff, Board members but unless the Superintendent motivates and has a vision, the Board seems powerless. We have a good Super now but struggles. Because being outside the community living elsewhere, they miss core love it seems for the town, it all goes hand in hand. It’s just a proven fact families will gravitate where there is extra for the students, and that covers a big area. Thankful we have good, intelligent, hardworking teachers and staff that do a great job, and they all care about their students. Thanks
- I felt like this school year did not start off good. I sent my child to school without me knowing the teacher. There was not a “meet the teacher” day and parents were not allowed in the building the first day of school. A lot of my issues with the teacher could have been prevented had I known what was expected of my child and me, as a parent, before the first parent teacher conference. I do not feel like the school wants to include parents in anything.
- More shade outside for kids when it’s hot outside, and a chain link fence around the playground outside. My child often tells me that they don’t have enough time to eat lunch at times. Not sure of the accuracy on that.

- The superintendent is never available. She doesn't return phone calls, ever. Nobody ever answers the phone when called. You have to call multiple times before anyone answers. The teachers are willing to help with just about anything.
- Often times my student has heard conversations between teachers that should have taken place in a private setting. Conversations that have been heard were sometimes loud gossiping and other times they were discussing information that students did not need to hear.
- Should have had a basketball season of some sort for the levels where there were enough students to participate canceling the entire program for the year was a very bad decision.
- The staff and school board. Are all related or best friends. If you are not a farming family with a few hundred acres, a John Deere tractor and a horse, you mean nothing, and your opinion means nothing teachers that are parents of students are treated differently and it really shows.

Appendix C:
Students Survey Results

Student Survey

Surveys Completed: 42

Totals may not add to 100 percent due to rounding.

Grades

Grade	Percentage
Grade 6	14%
Grade 7	17%
Grade 8	5%
Grade 9	10%
Grade 10	12%
Grade 11	21%
Grade 12	14%
Other	7%

Survey Questions

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1	Education is the main priority in our school district.	5%	50%	26%	12%	7%
2	Students learn the necessary material to be prepared for the next grade.	10%	49%	24%	15%	2%
3	I have plenty of choices when selecting academic and elective courses.	5%	20%	35%	23%	18%
4	My school can be described as a “good place to learn.”	7%	24%	34%	22%	12%
5	I feel that I am challenged in my classes.	5%	29%	34%	29%	2%
6	My teachers have high expectations for me.	19%	40%	29%	5%	7%
7	Most staff in our school have high expectations for all students regardless of their race, ethnicity, or language.	26%	40%	21%	10%	2%
8	All students have equitable access to courses offered at my school.	17%	31%	36%	14%	2%

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
9	Most adults in my school treat student diversity as a good thing, not a bad thing.	24%	20%	44%	10%	2%
10	I knew what to expect on the state tests.	10%	33%	45%	12%	0%
11	There is at least one adult at school to whom I can go when I have a problem.	44%	32%	7%	5%	12%
12	I have at least one adult in this school who cares about me.	36%	40%	12%	10%	2%
13	I have at least one adult in this school who mentors me.	19%	31%	33%	17%	0%
14	I feel welcomed and accepted by other students in this school.	21%	40%	31%	2%	5%
15	I feel welcomed and accepted by the adults in this school.	22%	32%	27%	12%	7%
16	The school library meets my needs for books and other resources.	0%	21%	43%	17%	19%
17	I have access to good college counseling at this school.	12%	22%	41%	15%	10%
18	I have access to good career counseling at this school.	14%	29%	38%	12%	7%
19	My school connects me to real-world issues and experiences.	7%	24%	32%	27%	10%
20	My teachers communicate regularly with me about my academic progress.	14%	40%	21%	17%	7%
21	My school is clean.	0%	24%	21%	19%	36%
22	My school is attractive and welcoming.	2%	17%	27%	29%	24%
23	My school building is well maintained.	2%	12%	31%	33%	21%
24	My school building needs a lot of repairs.	45%	33%	12%	7%	2%
25	I feel safe and secure at school.	5%	29%	29%	17%	21%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
26	Student bullying is a problem in this school.	10%	15%	41%	20%	15%
27	Students in this school accept each other's differences.	7%	37%	32%	20%	5%
28	The school buildings and grounds are safe and secure.	5%	26%	31%	19%	19%
29	Discipline is fairly and equitably administered in this school.	10%	39%	32%	10%	10%
30	Teachers and staff respect students in this school.	12%	38%	21%	10%	19%
31	Drugs are a problem in this school.	7%	14%	48%	19%	12%
32	Discipline and order are maintained in the school cafeteria.	17%	37%	32%	10%	5%
33	I have enough time to eat my lunch each day.	12%	39%	22%	17%	10%
34	I usually have to wait in line longer than five minutes to get a school lunch.	2%	10%	27%	44%	17%
35	I like the food served in the cafeteria.	2%	37%	37%	15%	10%
36	The cafeteria serves a good variety of food for breakfast.	5%	31%	36%	17%	12%
37	The cafeteria serves a good variety of food for lunch.	5%	48%	30%	10%	8%
38	I regularly use technology to keep up-to-date on schoolwork (emailing teachers, using online gradebook, etc.).	7%	43%	36%	7%	7%
39	I regularly use computers or other technology at school.	27%	66%	7%	0%	0%
40	The technology available to me at my school is new enough to be useful.	22%	41%	32%	2%	2%
41	Teachers know how to use the technology they have for teaching.	12%	54%	17%	15%	2%
42	I have regular Internet access at home.	36%	48%	10%	5%	2%

Survey Question		Yes	No
43	Do you regularly ride the bus?	12%	88%

If student rides the bus:

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
44	My bus runs on time nearly every day.	40%	60%	0%	0%	0%
45	Students feel safe riding the bus.	60%	20%	20%	0%	0%
46	Bus drivers effectively handle discipline issues on the bus.	60%	20%	20%	0%	0%

Written Responses

If you would like to provide any additional comments about the district, please do so here. Where is the district doing well? In what areas could it be improved?

- It's gross and unorganized, they don't know how to handle problems that work out for the students, and it doesn't make sense. 0/5 I don't recommend it.
- THE TEACHERS. The teachers here are not very nice. They hire anyone and everyone to work here. One of the "coaches" ripped a big hole in the back of a kid's shirt "just playing with him" but was aggressively mad that he lost in basketball to the kids. Nothing was done with the coach. There have been multiple problems with this coach, and nothing gets done. It's always the teachers over the kids, but don't you think teachers lie too? So they don't get in trouble by the school board and/or superintendent.? Let's not talk about how [redacted – staff member] comes back every day from lunch smelling like straight marijuana. And then gets on to the kid for saying something about it. He calls the girls pervs when they do a dance or how he makes us work out and do squats while he's behind us. The girl's bathroom in the high school has holes in the walls. They've been there and nothing's gotten fixed after being told multiple times. There is no ac in this school. There are teachers here that admit that they are only here for the money. Bullying here is a big problem, but they DON'T CARE. In all honesty I'm surprised the department of education hasn't got called on this place. [Redacted] is one of the best teachers here. From making sure everyone's doing okay mentally to doing well in the classroom. Hands up to her though. If you were to ask anybody in this school "who do you really think cares about you and does well with teaching?" it would be her. But seriously, something needs to be done.
- The lights need to be fixed, the floors are very loud and there's holes in the floor, the science room smells like poop, and the bathrooms need a fix up like the doors and how it looks.
- Staff could be improved.
- The water fountains need to be fixed. The water fountain by Mrs. Ramsey's room needs a new filter.
- Esports is good. Please keep that for next year.

- this school is very pathetic and worthless in my opinion they should shut down<<<<<<<< and that is the truth. This school has no sports. None of my friends want to be at this bum school. It's a very pitiful school... no one likes lone wolf schools they should shut down all the way forever.
- This is easily the worst school I have gone to. It feels like I come to work every day just to not get paid. I feel like students are treated unfairly. I can't use the restroom in the middle of class to keep me safe from any harm, but the little kids can play outside. This school is filthy. A lot of food is either out of date or has been eaten by mice. There were rat feces all in our home ec room. The rooms stink half the time. I have to be escorted everywhere I go by a teacher while being a grown adult. We get 5 minutes in between classes to use the restroom while an adult sits in the bathroom to make sure we don't do anything that we are not supposed to do. The janitors rarely clean I don't know why they're even here if they're not doing their job. I personally think this school needs to shut down, it is more of a problem and a hassle to deal with this school then to go to a better and more up to date school. There are way better options for schooling and a better environment for learning. I also do not see the reason for the school to say no to a basketball and track team but then get tennis. We need more sports and more options if this school stays open.
- school+[redacted]=trash
- This is a small area and I know that there is not much we can do, but I'd love to see our school and town much cleaner. There is a lot of trash laying on the ground and at school recently we found rat turds. I am highly allergic to dust, rodents and basically dirty places, that's why I insist to keep everything clean for students safety and health and because it's visually more pleasing.
- Cleanliness needs improvement.
- The terrible smells in the science class room, needs new flooring done, gym needs new floor it has hole on the ground, walls need repaired it has holes, bathrooms need repaired too because it smells bad stalls need fixed, new playground equipment.
- Most teachers have an uncontrolled voice level. The school needs a lot of repairs and it need floor repair. I feel teachers don't have respect for students. In [redacted] room she has asked for new carpet many times and was told no it also has a horrible stink in the room. We need to be able to go to the weight room. I feel our school needs more upgraded cameras. We also need a new counselor that we can really talk to. Teachers do not respect boundaries on the students. We need a real gym coach. We also need a new upgraded playground.
- The bullying in this school could be improved this is a big problem and the cleanliness is a problem the girls bathroom is disgusting and it even has a whole spider-web and the smell is horrible and the teachers are allowed to cuss at the students and most kids here are flipping the teachers off and [redacted] is a bad teacher she is disrespectful to every one she makes us feel bad and the is a whole rat hole in every room the air smells like poop and the floor creaks there's a line in the middle of [redacted] class and they keep denying to fix it. The auditorium is nasty, history class has a buzzing sound, there are no boundaries in this school. As a new kid I am highly disgusted.
- [redacted] rooms stinks like [redacted] and sewer and if u keep [redacted] lights on for a while it will start to buzz and its very annoying and the squeaky floors in the auditorium and in [redacted] and [redacted] room.
- We need to be more respected and I'm saying this in particular [redacted]. She needs to respect people's boundaries especially the students including me and all the other students.

- I feel as if the school needs more sports, I think it needs a new paint job and floor repairs, [redacted] light needs to be replaced, [redacted] needs new carpet and it smells like [redacted], we need to be able to go the weight room.
- [redacted] needs a new carpet because it smells like [redacted] and [redacted] needs a light fixed in his room because it keeps buzzing, and some classrooms have missing ceiling tiles
- New computers but could use some new sidewalks and a new outdoor basketball court.
- More training to teachers on how to use stuff that they are given.

Appendix D:
Community Input Focus Group

Community Input Focus Group

The Community Input Focus Group was held on March 21, 2023. There were six participants (community members) who were asked to provide their opinions and concerns regarding most areas of the school district. The comments below are those provided by the participants.

GENERAL

Parents love this school system.

MANAGEMENT, PERSONNEL, AND COMMUNICATIONS

Management

School Board

- Board president thinks the only thing the board can do is hire the president. That's not true. Board should be more interactive with parent and teachers.
- The only time for public comment is at the beginning. It's not like they do it at the city. In the city meeting they give you a copy of the agenda. Here, parents get nothing. If you're not on the agenda you cannot talk. Some disagree with that.
- Past board president didn't follow board meeting rules, so he would overstep his bounds. Used to try to run over the superintendent.
- There are no physical year books this year, supposedly due to a lack of money. Or maybe it was due to timing. Rumor was they only sold four last year. Historically they have cost \$15, so that more community members could afford it. This year it will be an online-only yearbook.

Superintendent

- Not communicative.
- In her first year here and she's quitting. Parents understand the situation, but are frustrated nonetheless.
- She has done a good job with the books and getting things organized for the next superintendent.

Communications

- If it's not on the Remind app, parents don't hear anything about it.
- Special events are always during times working parents cannot come. Awards are handed out in the mornings, even when the students are not there to receive their awards.

- There is an unofficial FaceBook page – the Howler. There is an official FaceBook page, just started this year.
- There is a new website, but it is missing stuff.
- They love Wengage to keep up with student grades.

INSTRUCTIONAL DELIVERY SYSTEM

- The [redacted] teacher lacks patience with kids. She is also insensitive with students.
- Those with graduates from the district noted that Lone Wolf graduated students who were prepared for college. One now has high school students in Lone Wolf and there are concerns as to their level of preparation for college.
- Some parents wait months for an opportunity to talk with a teacher.
- Some teachers reduce students' grade if they feel the student is not paying attention.
- Some teachers lose papers that students turn in. Students are now taking photos of work before they turn it in. Some staff members are also keeping copies of student work as well because of the situation.
- LWPS is not a dual credit school. Because it is not, concurrently enrolled students are not eligible to be valedictorian. That's a point of contention. Why isn't the district awarding credits for concurrent enrollment?
- Parents don't like third and fourth graders in the same class because they feel their children are not getting as much attention.
- The parents in this district are paying attention to state assessment results and noted numerous deficiencies among elementary students.
- There was no opportunity for parents to meet the teacher at the beginning of the year and that made for a rough start.
- Some teachers go way above and beyond in working for students here.
- The 5th/6th grade online geography class was way above the heads of the students.
- Online instruction has not been handled well this year. Parents have been told their children were failing, but they were in fact not. The teachers seemed to not understand that the online courses were full year rather than one semester.
- Online education is good for some students, but not all students.
- Virtual Fridays are not well used by all teachers. Some students have only 10 minutes of online learning games to play. Parents believe that learning how to learn online and how to

use technology is necessary for students to be prepared for the future. Students are not given sufficient time to do repeated tasks in online learning – they are not given enough time to actually learn before they are locked out.

- Some teachers are offering Friday tutoring times on their own, outside of the virtual Fridays.

Counseling

- The counselor knows nothing about Wengage or is way behind in keeping up with students and Wengage.
- There are students not getting credit for hours they are enrolled in because their records are not loaded properly in Wengage. In another case, a student who has typically always had great grades was suddenly given an F in a class without an explanation.
- Wengage is a mess.
- Several students wanted to do Vo-Tech but the district dropped the ball on submitting their information and they ended up on a waiting list.

Extracurricular Activities

- This is the first year in memory that the district has not fielded a basketball team. They had enough for a boys basketball team, but not enough for a girls team. The district is on the third coach this year alone.
- Students have left the district due to a lack of sports. Basketball players go to Hobart, football players go to Granite.
- Why is there no track this year?
- There has historically been a community potluck dinner at the start of each school year. That didn't happen this year.
- The Halloween festival was extremely well done this year.

BUSINESS OPERATIONS

- There are a few wealthy farmers and that makes the average income look higher than reality. Perception is that the district misses out grants as a result.
- The superintendent and board swept clean the outstanding “class of” accounts from decades past and used it to address needs. This was a good thing and long overdue.

FACILITIES USE AND MANAGEMENT

- Prior administration left a few things undone.

- The district has historically “redneck engineered” the facilities.
- There seems to be no hot water anywhere.
- Some miss the pool. However, Granite has a pool that families can access in the summer.

Safety and Security

- There is no discipline or the discipline is too lax. Vaping only gets a student one hour of detention.
- People look at Lone Wolf as the place where the students who were kicked out of other schools go, so there are security concerns. There was a transfer student who made threats and the district ended up going into a lockdown.
- The previous superintendent used to interview transfer students and their parents before approving the transfer. Not sure if this is still going on.
- Children report all kinds of behaviors to their parents but also say they the students are not being disciplined.
- Some teachers use group punishment when the individual offenders are known.
- Some teachers are slow to tell parents when there is a discipline issue with their child; other teachers tell parents immediately.
- Bullying is addressed when it occurs.

SUPPORT SERVICES

Child Nutrition

- Last superintendent did not file some paperwork to get free lunches for all students. They believe this has been corrected for next year. They think it was the CEP program.
- Their children love the school meals.
- Salad bar has not been here all year. The children were happy to see it return.
- They have heard the district got a grant for fruits and vegetables. There was a hiccup with the change of superintendents, so it has not been in place all year this year.
- Retired teachers manage a weekend backpack program with meals. It may not be enough to cover the 3-day weekends.

Technology

- We are behind in technology because the previous administration did not believe in it – primarily administrative technology and use of technology to support communications with parents.
- COVID allowed the district to achieve 1-to-1 with technology. There was some before, but not completely 1:1.
- There is insufficient online security – students report that other students are viewing inappropriate content during class time.

Transportation

- Challenges when there are snow days in the district but the Vo-Tech is not shut down. The Vo-Tech expects the parents to transport in those cases, unless someone from the district contacts the Vo-Tech program. The new superintendent was initially unaware of this.
- Several days when the driver was apparently out sick, families were not notified and no one came to pick them up.
- The students love the bus driver.

Appendix E:
Enrollment Projections

Lone Wolf Public Schools Cohort Fall Enrollment Projection Model

SY	PK	KG	1	2	3	4	5	6	7	8	9	10	11	12	Class of	PK to 8	9 to 12	TOTAL
96-97	0	9	15	16	12	15	15	17	24	18	22	21	16	14	1997	141	73	214
97-98	0	13	10	15	16	13	16	15	21	20	16	18	20	16	1998	139	70	209
98-99	10	11	16	13	14	13	12	16	18	18	18	14	15	20	1999	141	67	208
99-00	0	20	10	12	7	11	11	13	11	11	12	11	9	13	2000	106	45	151
00-01	0	9	9	7	14	7	11	10	10	7	13	14	10	9	2001	84	46	130
01-02	0	15	4	9	7	13	9	11	10	9	11	11	13	10	2002	87	45	132
02-03	0	18	10	4	8	7	17	11	10	9	22	24	26	24	2003	94	96	190
03-04	7	8	9	11	6	11	7	16	15	8	11	8	11	10	2004	98	40	138
04-05	7	8	7	5	8	7	10	9	20	12	10	12	9	12	2005	93	43	136
05-06	5	8	5	7	5	8	5	12	11	15	14	7	8	14	2006	81	43	124
06-07	8	5	10	8	4	4	10	3	12	6	14	15	7	12	2007	70	48	118
07-08	4	9	4	9	9	2	4	5	4	11	10	13	10	6	2008	61	39	100
08-09	13	5	10	5	9	7	4	4	7	3	10	11	12	12	2009	67	45	112
09-10	4	12	6	9	5	11	7	4	4	3	5	12	9	13	2010	65	39	104
10-11	9	5	11	8	7	6	7	8	4	3	4	7	11	6	2011	68	28	96
11-12	5	7	6	7	4	6	6	8	8	3	5	6	4	10	2012	60	25	85
12-13	14	6	7	5	9	3	5	5	7	10	2	2	2	7	2019	71	13	84
13-14	20	14	8	8	5	10	3	6	6	5	8	3	3	2	2014	85	16	101
14-15	13	5	8	1	7	3	9	2	6	8	4	5	5	1	2015	62	15	77
15-16	28	9	5	11	7	7	3	13	7	13	7	10	7	5	2016	103	29	132
16-17	13	13	9	6	11	8	5	6	12	3	11	7	5	9	2017	86	32	118
17-18	14	8	9	8	8	9	7	7	6	14	4	10	5	5	2018	90	24	114
18-19	19	8	9	8	5	7	7	6	5	6	11	2	5	2	2019	80	20	100
19-20	23	6	8	9	8	5	5	7	6	5	5	14	3	3	2020	82	25	107
20-21	17	11	6	7	9	9	8	6	4	6	6	8	20	1	2021	83	35	118
21-22	17	12	7	4	11	5	8	9	7	9	10	8	10	18	2022	89	46	135
22-23	13	5	12	6	5	8	4	5	6	7	7	9	14	8	2023	71	38	109
23-24	20	11	5	10	7	4	8	4	4	8	7	8	12	8	2018	80	35	115
24-25	18	9	10	4	11	6	4	7	3	5	8	8	10	7	2025	77	33	111
25-26	19	8	9	9	4	10	5	4	6	4	5	9	11	6	2026	78	31	109
26-27	26	9	8	7	9	4	9	5	3	8	4	6	11	6	2027	88	28	116
27-28	16	12	8	7	8	8	4	9	4	4	8	5	8	7	2028	79	27	107
28-29		7	11	7	7	7	8	4	7	5	4	9	6	5	2029			24
29-30			7	10	8	6	7	7	3	9	6	5	11	4	2030			26
30-31				6	10	7	6	6	6	4	10	6	6	7	2031			29
31-32					6	9	6	6	5	8	4	11	8	4	2032			26
32-33						6	9	6	5	7	8	4	14	5	2033			31
33-34							5	8	5	6	7	9	5	8	2034			30
34-35								5	7	6	6	8	12	3	2035			29
35-36									4	8	6	7	10	7	2036			30
36-37										5	9	7	9	6	2037			31
37-38											6	10	9	5	2038			30
38-39												6	13	6	2039			
39-40													8	8	2040			
40-41														5	2041			

Enrollment projections based on five year retention rate.
Does not include non-graded or out-of-home placement.

	K to 1	1 to 2	2 to 3	3 to 4	4 to 5	5 to 6	6 to 7	7 to 8	8 to 9	9 to 10	10 to 11	11 to 12
5 Year Retention	0.95	0.86	1.09	0.86	0.96	0.96	0.82	1.25	1.05	1.12	1.29	0.61

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