LEANDER ISD
LEADING TO A BRIGHT FUTURE

Regular Meeting Agenda
Thursday, September 5, 2024
Concordia University Texas
11400 Concordia University Drive
Austin, TX 78726
6:15 PM

The Board meeting protocols are available at **https://bit.ly/3DHAR4v**.

Doors will open to the public at 5:30 PM.
Members of the public may access this meeting via live stream at **https://live.myvrspot.com/st?cid=MmVlZD**. Please note, this link will not be active until approximately 5 minutes before the scheduled meeting time.

Citizens wishing to address the Board of Trustees may do so in person at the meeting location noted on the agenda. In order to address the Board, individuals must sign up online at **https://bit.ly/3Z3Jhkl**, between noon the day prior to the meeting and noon the day of the meeting and be present at the meeting when their number is called.

Citizens who need special accommodations or assistance with sign-up should contact the office of the Superintendent (512-570-0000) during regular business hours.

The notice for this meeting was posted in compliance with the Texas Open Meetings Act on August 30, 2024, at 11:45 AM.

The subjects to be discussed or considered or upon which any formal action may be taken are as listed below. Items do not have to be taken in the order shown on this meeting notice. Unless removed from the consent agenda, items identified within the consent agenda will be acted on at one time.

1. **CALL TO ORDER AND DECLARATION OF QUORUM**
2. **OPENING CEREMONY**
   A. Pledge of Allegiance
   B. Moment of Silence
3. **RECOGNITION**
   A. Spotlight on Learning: Hisle Elementary School
   B. Video Recognitions
      1. Hill Country Community Ministries "Sunshine in Education" Award - Denise Geiger, Leander ISD Senior Coordinator, Special Education Transition Services
      2. Journalism Education Association Rising Star - Shelby Nickells, Journalism Teacher, Rouse HS
      3. Leader in Me Lighthouse Recertification - Reed Elementary School
      4. Solution Tree Model Professional Learning Community (PLC) - Block House Creek Elementary
      5. Texas High School Coaches Association (THSCA) President-Elect - Drew Sanders, Athletic Coordinator, Head Football Coach, Vandegrift HS
4. **CITIZEN COMMENTS** *(See the notes at the top of the agenda for instructions on how to sign up and details regarding speaking.)*
5. **CONSENT AGENDA**
   A. Consider Adoption of Local Policies CKE, CKEC, CSA, DGBA, FFB, FNG, and GF 3
   B. Consider Approval of Internal Audit Plan for 2024-2025 School Year 35

8. **CLOSED SESSION**
     A. Texas Government Code 551.071: consultation with attorney regarding, pending or contemplated litigation, and/or attorney client privileged matter
     B. Texas Government Code 551.074: deliberation regarding resignations, terminations, employment, reassignments, duties, and evaluation of personnel and public officers
     C. Texas Government Code 551.0821: deliberation regarding matters whereby personally identifiable information regarding one or more students will be disclosed
     D. Texas Government Code 551.074: deliberation and consideration of employment of Leander Middle School Principal
9. **ACTION PURSUANT TO CLOSED SESSION**
     A. Consider Employment of Leander Middle School Principal
10. **BOARD MEETING DEBRIEF**
11. **ADJOURNMENT**

If, during the course of the meeting, discussion of any item on the agenda should be held in a closed meeting, the board will conduct a closed meeting in accordance with the Texas Open Meetings Act, Government Code, Chapter 551, Subchapters D and E or Texas Government Code section 418.183(f). Before any closed meeting is convened, the presiding officer will publicly identify the section or sections of the Act authorizing the closed meeting. All final votes, actions, or decisions will be taken in open meeting. [*See* BEC(LEGAL)]

Leander ISD Board Meeting Agenda Item Information
Meeting Date: Thursday, September 5, 2024

Agenda Item:	Consider Adoption of Local Policies CKE, CKEC, CSA, DGBA, FFB, FNG, and GF
Purpose (this meeting):	☐ Discussion Item/Report Only ☒ Action Requested
Administrator Responsible:	Shawn Swisher, J.D., General Counsel
Attachments:	Consider Approval of Local Policies CKE, CKEC, CSA, DGBA, FFB, FNG, and GF

Background Information:

Administration met with the policy committee and reviewed the following Local Policies: CKE, CKEC, CSA, DGBA, FFB, FNG, and GF, which are presented for Board consideration this evening.

CKE(LOCAL) – Update 123: Proposed revisions and additions incorporate changes related to the District starting a police department, the potential use of school marshals. Additionally, language including the provision for the use of School Resource Officers is being moved from Policy CKEC(LOCAL).

CKEC(LOCAL) – Update 123: This policy is proposed for deletion, with its relevant provisions moved into policy CKE(LOCAL).

CSA(LOCAL) – Update 122: This new local policy on facility safety and security includes recommended provisions addressing audits of building access control to comply with the commissioner's school safety rules for facilities.

DGBA(LOCAL) – Update 123: Proposed revisions include language for alignment with the CKE series of policy and references to Policy EFA(LOCAL) and Policy EFB(LOCAL) for challenges to instructional materials and library materials.

FFB(LOCAL) – Update 122: Recommended revisions to this local policy on crisis intervention include the following:

• In accordance with HB 3, provisions have been added at Student Reports to require each campus to establish a clear procedure for students to report concerning behavior by another student.

• Revisions at Employee Confidentiality are based on SB 1720 and allow employees who report a potential threat to elect to keep their identities confidential.

FNG(LOCAL) – Update 123: Proposed revisions include language for alignment with the CKE series of policy, references to Policy EFA(LOCAL) and Policy EFB(LOCAL) for challenges to instructional materials and library materials, and clarification on the Board's role related to complaints about extracurricular participation.

GF(LOCAL) – Update 123: Proposed revisions include language for alignment with the CKE series of policy.

Administrative Recommendation:

Administration recommends adoption of Local Policies CKE, CKEC, CSA, DGBA, FFB, FNG, and GF as presented.

Sample Motion:

I move that the Board adopt Local Policies CKE, CKEC, CSA, DGBA, FFB, FNG, and GF as presented.

LEANDER ISD
LEADING TO A BRIGHT FUTURE

District Police Department

The District desires to enhance the safety and security of the entire District, and to ensure a safe learning and teaching environment, including all of its campuses through a police department. To ensure sufficient security and protection of students, staff, and property, the Board authorizes the formation of a District police department and shall employ and commission police officers.

Supervisory Authority

The chief of police shall be accountable to and shall report to the Superintendent. In accordance with law, the Superintendent shall not delegate this supervisory responsibility.

Jurisdiction

The jurisdiction of District police officers shall include all territory within District boundaries, as well as all real and personal property outside the boundaries of the District that is owned, leased, or rented by the District, or is otherwise under the District's control.

Police Authority and Duties

~~Police officers employed by~~ the Each District ~~police officer~~ shall have all the powers, privileges, and immunities of police officers on or off duty within the jurisdiction of the District. Subject to limitations in law, each District police ~~officers~~ officer shall ~~have the authority to~~:

1. Protect the safety and welfare of any person in the jurisdiction of the District and protect the property of the District.

2. Enforce all laws, including municipal ordinances, county ordinances, and state laws, and investigate violations of law as needed. In doing so, District police officers may serve search warrants and arrest warrants in connection with District-related investigations in compliance with the Texas Code of Criminal Procedure.

3. Arrest suspects consistent with state and federal statutory and constitutional standards governing arrests, including arrests without warrant, for offenses that occur in the officer's presence or under the other rules set out in the Texas Code of Criminal Procedure.

4. Coordinate and cooperate with commissioned officers of all other law enforcement agencies in the enforcement of this policy as necessary.

5. Enforce District policies, rules, and regulations on District property, in school zones, at bus stops, or at District functions.

6. Investigate violations of District policy, rules, and regulations as requested by the Superintendent and participate in hearings concerning alleged violations.

7. Carry weapons as directed by the chief of police and approved by the Superintendent.

8. Carry out all other duties as directed by the chief of police or Superintendent.

A District police ~~officers~~ officer shall not be assigned routine classroom discipline or administrative tasks.

Temporary Assignment

~~District police officers shall enforce all laws, including municipal ordinances, county ordinances, and state laws within another law enforcement agency's jurisdiction while temporarily assigned to the other agency.~~

Limitations on Nonschool Employment

No officer commissioned under this policy shall provide law enforcement or security services for an outside employer without prior written approval from the chief of police and Superintendent. Each District police officer shall enforce all laws, including municipal ordinances, county ordinances, and state laws within another law enforcement agency's jurisdiction while working off-duty or temporarily assigned to another agency.

Relationship with Outside Agencies

The District's police department and the law enforcement agencies with which it has overlapping jurisdiction shall enter into ~~a memorandum~~ memoranda of understanding and other appropriate interlocal agreements that ~~outlines~~ outline reasonable communication and coordination efforts among the department and the agencies. The chief of police and the Superintendent shall review the ~~memorandum~~ memoranda of understanding and other agreements at least once every year. ~~The memorandum of understanding~~ All such agreements shall be approved by the Board.

Interlocal Agreement for Mutual Aid

While operating pursuant to an interlocal agreement for mutual aid or other support for another law enforcement agency, each District police officer shall perform the duties and have the authorities set out in the agreement, including enforcing all laws within the other agency's jurisdiction.

Video Monitoring

If available, video equipment shall be used on a District police car for safety purposes whenever the flashing lights on the car are in use.

Access to Recordings

Recordings shall be considered law enforcement records, shall remain in the custody of the chief of police, and shall be maintained as required by the department regulations manual and law. A parent or student who wishes to view a video recording in response to disciplinary action taken against the student may request such access under the procedures set out by law. [See FL(LEGAL)]

Body-Worn Cameras

A District ~~officers~~ police officer shall use a body-worn ~~cameras~~ camera only when performing official law enforcement duties for

Leander ISD
246913

SAFETY PROGRAM/RISK MANAGEMENT
SECURITY PERSONNEL

CKE
(LOCAL)

the District and in accordance with the provisions of the District police department's body-worn camera program. ~~Officers~~ Each District police officer shall receive training on the program, including proper use and operation of cameras. Any District employee who has access to data from body-worn cameras shall receive training on storage, retention, and release of recordings.

Training

~~All~~ Each District ~~officers~~ police officer shall receive at least the minimum amount of education and training required by law.

Department Regulations Manual

To carry out the provisions in this policy, the police department shall compile and maintain a manual that describes and sets forth operational procedures, rules, and regulations pertaining to the administration of police services. The chief of police and the Superintendent shall review the manual annually and make any appropriate revisions.

Racial Profiling

The chief of police shall develop and implement regulations to ensure compliance with ~~state law~~ laws regarding racial profiling. ~~Police officers employed by the~~ A District police officer shall not initiate any law enforcement action based on an individual's race, ethnicity, or national origin.

Use of Force

The use of force, including deadly force, shall be authorized only when reasonable and necessary, as outlined in the department regulations manual.

High-Speed Pursuit

~~Officers~~ A District police officer shall not engage in high-speed chases in a motor vehicle when the immediate danger to the public or the officer created by the pursuit exceeds the immediate or potential danger presented by the offenders remaining at large. Guidelines for high-speed pursuits shall be addressed in the department regulations manual.

Complaints

Complaints against a District police officer shall be in writing on a form provided by the District police department and shall be signed by the person making the complaint. In accordance with law, the District shall provide to the police officer a copy of the complaint.

Appeals regarding this complaint process shall be filed in accordance with DGBA, FNG, or GF, as appropriate.

[See COMPLAINTS AGAINST PEACE OFFICERS at CKE(LEGAL) and CKEA(LEGAL)]

School Resource Officers

To implement the District's comprehensive safety programs, the District has entered into a memorandum of understanding (MOU) with each local law enforcement agency that provides the District with school resource officers. School resource officers shall provide

services consistent with the terms of the agreement, the comprehensive safety programs, and Board policy.

Jurisdiction

The jurisdiction of school resource officers shall include all territory within District boundaries, as well as all real and personal property outside the boundaries of the District that is owned, leased, or rented by the District, or is otherwise under the District's control.

Authority and Duties

A school resource officer shall perform duties as described in the MOU and as included in the District improvement plan and the Student Code of Conduct. Pursuant to the MOU a school resource officer shall:

1. Protect the safety and welfare of any person in the jurisdiction of the District and protect the property of the District.

2. Enforce all laws, including municipal ordinances, county ordinances, and state laws, and investigate violations of law as needed. In doing so, school resource officers may serve search warrants in connection with District-related investigations in compliance with the Texas Code of Criminal Procedure.

3. Arrest suspects consistent with state and federal statutory and constitutional standards governing arrests, including arrests without warrant, for offenses that occur in the officer's presence or under the other rules set out in the Texas Code of Criminal Procedure.

4. Coordinate and cooperate with commissioned officers of all other law enforcement agencies in the enforcement of this policy as necessary.

5. Enforce District policies, rules, and regulations on District property, in school zones, at bus stops, or at District functions.

6. Investigate violations of District policy, rules, and regulations as requested by the Superintendent and participate in hearings concerning alleged violations.

7. Carry a firearm in accordance with the MOU and the directives with the commissioning entity.

8. Carry out all other duties in accordance with the MOU.

A school resource officer shall not be assigned routine classroom discipline or administrative tasks. Each school resource officer shall receive at least the minimum amount of education and training required by law.

[See CKE(LEGAL) and CKEC(LEGAL)]

School Marshals

Authorization

Pursuant to its authority under state law, the Board may appoint an employee of the District to serve as a school marshal if the employee is certified as eligible by the Texas Commission on Law Enforcement (TCOLE). A school marshal shall be authorized to possess certain firearms in schools, at Board meetings, and at school-sponsored or school-related events on District property, to the extent allowed by law. Each school marshal shall have immunities as provided by law.

Each specifically authorized school marshal shall be approved by action of the Board. The Superintendent shall issue written authorization to each approved employee. The written authorization shall specify the District premises and other property where the employee is authorized to carry a firearm, as well as the means of carrying and storing the firearm.

Serving as a school marshal shall be strictly voluntary.

Revocation

The Superintendent, as well as the Board, shall have the authority to revoke at any time a school marshal's authorization to possess a firearm under this policy.

In addition, authorization for a school marshal to possess a firearm under this policy shall be automatically revoked if the employee is no longer authorized by law to serve as a school marshal or is placed on administrative leave or separates from employment with the District, regardless of the reason.

Jurisdiction

The jurisdiction of school marshals shall include all territory within District boundaries, as well as all real and personal property outside the boundaries of the District that is owned, leased, or rented by the District, or is otherwise under the District's control.

Authority and Duty

Subject to limitations in law, a school marshal shall:

1. Act as necessary to prevent or abate the commission of an offense that poses a threat of death or serious bodily injury to a person in the jurisdiction of the District;

2. Make arrests and exercise all authority given peace officers as necessary to prevent or abate the commission of an offense that poses a threat of death or serious bodily injury to a person in the jurisdiction of the District;

3. Coordinate and cooperate with commissioned officers of all other law enforcement agencies in the enforcement of this policy as necessary; and

4. Carry out all other lawful duties as directed by the Superintendent.

Training	The District shall provide to each school marshal who is authorized to possess a firearm on District property specialized training in crisis intervention, management of hostage situations, and other topics the Board may determine necessary or appropriate.
Permitted Weapons and Ammunition	Only District-approved firearms and ammunition shall be authorized for possession and use under this policy and the District's emergency operations procedures.
Implementation	The Superintendent shall ensure that procedures to implement this safety and security program are detailed in the District's emergency operations plan.

[See CKE(LEGAL) and CKEB(LEGAL)]

To implement the District's comprehensive safety programs, the District has entered into an agreement with a local law enforcement agency for school resource officers. School resource officers shall provide services consistent with the terms of the agreement, the comprehensive safety programs, and Board policy.

A school resource officer shall perform duties as described in the agreement and as included in the District improvement plan and the Student Code of Conduct. A school resource officer shall not be assigned routine classroom discipline or administrative tasks.

All school resource officers shall receive at least the minimum amount of education and training required by law.

Building Access Control

Audits of building access control shall include weekly inspections of instructional facilities during school hours to certify all exterior doors are, by default, set to closed, latched, and locked status and cannot be opened from the outside without a key.

The Superintendent shall ensure that the findings of the weekly inspections are:

1. Reported to the District safety and security committee; and

2. Reported to the campus principal or lead administrator of the instructional facility to ensure awareness of any deficiencies identified.

The campus principal or lead administrator shall assign appropriate staff to take action to reduce the likelihood of similar deficiencies in the future.

The results of the weekly reports shall be kept for review as part of the required safety and security audit.

The District's building access control procedures shall not be interpreted as discouraging parents or guardians who have been properly verified as authorized visitors from visiting their student's campus. [See GKC]

Complaints

In this policy, the terms "complaint" and "grievance" shall have the same meaning.

Other Complaint Processes

Employee complaints shall be filed in accordance with this policy, except as required by the policies listed below. Some of these policies require appeals to be submitted in accordance with DGBA after the relevant complaint process:

1. Complaints alleging discrimination, including violations of Title IX (gender), Title VII (sex, race, color, religion, national origin), ADEA (age), or Section 504 (disability), shall be submitted in accordance with the DIA series.

2. Complaints alleging certain forms of harassment, including harassment by a supervisor and violation of Title VII, shall be submitted in accordance with the DIA series.

3. Complaints concerning retaliation relating to discrimination and harassment shall be submitted in accordance with the DIA series.

4. Complaints concerning instructional resources shall be submitted in accordance with the EF series. Specifically, complaints concerning instructional materials shall be processed in accordance with Policy EFA, and complaints concerning library materials shall be processed in accordance with Policy EFB.

5. Complaints concerning a commissioned peace officer who is an employee of the District shall be submitted in accordance with the CKE series.

6. Complaints concerning the proposed nonrenewal of a term contract issued under Chapter 21 of the Education Code shall be submitted in accordance with DFBB.

7. Complaints concerning the proposed termination or suspension without pay of an employee on a probationary, term, or continuing contract issued under Chapter 21 of the Education Code during the contract term shall be submitted in accordance with DFAA, DFBA, or DFCA.

The Board will not address a complaint concerning a student's par-ticipation in an extracurricular activity that does not involve a viola-tion of a right guaranteed by Education Code Chapter 26. Educa-tion Code 26.011.

Notice to Employees

The District shall inform employees of this policy through appropriate District publications.

Guiding Principles

   Informal Process

The Board encourages employees to discuss their concerns with their supervisor, principal, or other appropriate administrator who has the authority to address the concerns. Concerns should be expressed as soon as possible to allow early resolution at the lowest possible administrative level.

Informal resolution shall be encouraged but shall not extend any deadlines in this policy, except by mutual written consent.

Direct Communication with Board Members

Employees shall not be prohibited from communicating with a member of the Board regarding District operations except when communication between an employee and a Board member would be inappropriate because of a pending hearing or appeal related to the employee.

Formal Process

An employee may initiate the formal process described below by timely filing a written complaint form.

Even after initiating the formal complaint process, employees are encouraged to seek informal resolution of their concerns. An employee whose concerns are resolved may withdraw a formal complaint at any time.

The process described in this policy shall not be construed to create new or additional rights beyond those granted by law or Board policy, nor to require a full evidentiary hearing or "mini-trial" at any level.

Freedom from Retaliation

Neither the Board nor any District employee shall unlawfully retaliate against an employee for bringing a concern or complaint.

Whistleblower Complaints

Whistleblower complaints shall be filed within the time specified by law and may be made to the Superintendent or designee beginning at Level Two. Timelines for the employee and the District set out in this policy may be shortened to allow the Board to make a final decision within 60 calendar days of the initiation of the complaint. [See DG]

Complaints Against Supervisors

Complaints alleging a violation of law by a supervisor may be made to the Superintendent or designee. Complaint forms alleging a violation of law by the Superintendent may be submitted directly to the Board or designee.

General Provisions

   Filing

Complaint forms and appeal notices may be filed by hand-delivery, by electronic communication, including email and fax, or by U.S. Mail. Hand-delivered filings shall be timely filed if received by the appropriate administrator or designee by the close of business on the deadline. Filings submitted by electronic communication shall be timely filed if they are received by the close of business on the deadline, as indicated by the date/time shown on the electronic

communication. Mail filings shall be timely filed if they are post-marked by U.S. Mail on or before the deadline and received by the appropriate administrator or designated representative no more than three days after the deadline.

Scheduling Conferences

The District shall make reasonable attempts to schedule confer-ences at a mutually agreeable time. If the employee fails to appear at a scheduled conference, the District may consider the complaint and issue a decision in the employee's absence.

Response

At Levels One and Two, "response" shall mean a written communi-cation to the employee from the appropriate administrator. Re-sponses may be hand-delivered, sent by electronic communication to the employee's e-mail address of record, or sent by U.S. Mail to the employee's mailing address of record. Mailed responses shall be timely if they are postmarked by U.S. Mail on or before the deadline.

Days

"Days" shall mean District business days, unless otherwise noted. In calculating timelines under this policy, the day a document is filed is "day zero." The following business day is "day one."

Representative

"Representative" shall mean any person who or an organization that does not claim the right to strike and is designated by the em-ployee to represent him or her in the complaint process.

The employee may designate a representative through written no-tice to the District at any level of this process. The representative may participate in person or by telephone conference call. If the employee designates a representative with fewer than three days' notice to the District before a scheduled conference or hearing, the District may reschedule the conference or hearing to a later date, if desired, in order to include the District's counsel. The District may be represented by counsel at any level of the process.

Consolidating Complaints

Complaints arising out of an event or a series of related events shall be addressed in one complaint. Employees shall not file sep-arate or serial complaints arising from any event or series of events that have been or could have been addressed in a previous com-plaint.

When two or more complaints are sufficiently similar in nature and remedy sought to permit their resolution through one proceeding, the District may consolidate the complaints.

Untimely Filings

All time limits shall be strictly followed unless modified by mutual written consent.

If a complaint form or appeal notice is not timely filed, the com-plaint may be dismissed, on written notice to the employee, at any

point during the complaint process. The employee may appeal the dismissal by seeking review in writing within ten days from the date of the written dismissal notice, starting at the level at which the complaint was dismissed. Such appeal shall be limited to the issue of timeliness.

Costs Incurred

Each party shall pay its own costs incurred in the course of the complaint.

Complaint and Appeal Forms

Complaints and appeals under this policy shall be submitted in writing on a form provided by the District.

Copies of any documents that support the complaint should be attached to the complaint form. If the employee does not have copies of these documents, they may be presented at the Level One conference. After the Level One conference, no new documents may be submitted by the employee unless the employee did not know the documents existed before the Level One conference.

A complaint or appeal form that is incomplete in any material aspect may be dismissed but may be refiled with all the required information if the refiling is within the designated time for filing.

Audio Recording

As provided by law, an employee shall be permitted to make an audio recording of a conference or hearing under this policy at which the substance of the employee's complaint is discussed. The employee shall notify all attendees present that an audio recording is taking place. The District may, but shall not be required to, make an audio recording of any conference or hearing conducted under this policy.

Level One

Complaint forms must be filed:

1. Within 15 days of the date the employee first knew, or with reasonable diligence should have known, of the decision or action giving rise to the complaint or grievance; and

2. With the lowest level administrator who has the authority to remedy the alleged problem.

    In most circumstances, employees on a school campus shall file Level One complaints with the campus principal; other District employees shall file Level One complaints with their immediate supervisor.

    If the only administrator who has authority to remedy the alleged problem is the Superintendent or designee, the complaint may begin at Level Two following the procedure, including deadlines, for filing the complaint form at Level One. The

District reserves the authority to determine whether a complaint would more appropriately be addressed at Level Two.

If the complaint is not filed with the appropriate administrator, the receiving administrator must note the date and time that the complaint form was received and immediately forward the complaint form to the appropriate administrator. The District reserves the authority to determine which administrator is most appropriate to handle each complaint.

The appropriate administrator shall investigate as necessary and schedule a conference with the employee within ten days after receipt of the written complaint. The administrator may set reasonable time limits for the conference.

Absent extenuating circumstances, the administrator shall provide the employee a written response within ten days following the conference. The written response shall set forth the basis of the decision. In reaching a decision, the administrator may consider information provided at the Level One conference and any other relevant documents or information the administrator believes will help resolve the complaint.

Level Two

If the employee did not receive the relief requested at Level One or if the time for a response has expired, the employee may request a conference with the Superintendent or designee to appeal the Level One decision. The District reserves the authority to determine whether the Superintendent or a designee shall participate in a conference.

The appeal notice must be filed in writing, on a form provided by the District, within ten days of the date of the written Level One response or, if no response was received, within ten days of the Level One response deadline.

After receiving notice of the appeal, the Level One administrator shall prepare and forward a record of the Level One complaint to the Level Two administrator. The employee may request a copy of the Level One record.

The Level One record shall include:

1. The original complaint form and any attachments.

2. All other documents submitted by the employee at Level One.

3. The written response issued at Level One and any attachments.

4. The audio recording, if any, of the Level One conference.

5.   All other documents relied upon by the Level One administrator in reaching the Level One decision.

The Superintendent or designee shall schedule a conference within ten days after the appeal notice is filed. The conference shall be limited to the issues and documents considered at Level One. At the conference, the employee may provide information concerning any documents or information relied upon by the administration for the Level One decision. The Superintendent or designee may set reasonable time limits for the conference.

The Superintendent or designee shall provide the employee a written response within ten days following the conference. The written response shall set forth the basis of the decision. In reaching a decision, the Superintendent or designee may consider the Level One record, information provided at the Level Two conference, and any other relevant documents or information the Superintendent or designee believes will help resolve the complaint.

Level Three

If the employee did not receive the relief requested at Level Two or if the time for a response has expired, the employee may appeal the decision to the Board.

The appeal notice must be filed in writing, on a form provided by the District, within ten days of the date of the written Level Two response or, if no response was received, within ten days of the Level Two response deadline.

The Superintendent or designee shall inform the employee of the date, time, and place of the Board meeting at which the complaint will be on the agenda for presentation to the Board.

The Superintendent or designee shall provide the Board the record of the Level Two appeal. The employee may request a copy of the Level Two record.

The Level Two record shall include:

1.   The Level One record.

2.   The notice of appeal from Level One to Level Two.

3.   The written response issued at Level Two and any attachments.

4.   The audio recording, if any, of the Level Two conference.

5.   All other documents relied upon by the administration in reaching the Level Two decision.

The appeal shall be limited to the issues and documents considered at Level Two, except that if at the Level Three hearing the administration intends to rely on evidence not included in the Level Two record, the administration shall provide the employee notice of the nature of the evidence at least three days before the hearing.

The District shall determine whether the complaint will be presented in open or closed meeting in accordance with the Texas Open Meetings Act and other applicable law. [See BE]

The presiding officer may set reasonable time limits and guidelines for the presentation, including an opportunity for the employee and administration to each make a presentation and provide rebuttal and an opportunity for questioning by the Board. The Board shall hear the complaint and may request that the administration provide an explanation for the decisions at the preceding levels.

In addition to any other record of the Board meeting required by law, the Board shall prepare a separate record of the Level Three presentation. The Level Three presentation, including the presentation by the employee or the employee's representative, any presentation from the administration, and questions from the Board with responses, shall be recorded by audio recording, video/audio recording, or court reporter.

The Board shall then consider the complaint. It may give notice of its decision orally or in writing at any time up to and including the next regularly scheduled Board meeting. If the Board does not make a decision regarding the complaint by the end of the next regularly scheduled meeting, the lack of a response by the Board upholds the administrative decision at Level Two.

When reviewing a Level Three grievance, the Board's role is not to replace the administration's judgment. The Board's role is to review the administrative steps taken at Level I and II to ensure that the matter has been decided correctly and according to policy and the law.

Frequent Appeals

If an employee has presented five Level Three appeals to the Board within a calendar year, the Board shall consider any subsequent Level Three appeal from the employee during that calendar year only upon written submission, with no Level Three presentation made to the Board by the complainant or the administration. In such an event, the Board shall consider the written record and give notice of its decision in writing.

Upon a motion by any Board member, however, the presiding officer shall call for a vote to suspend this rule and allow an oral presentation of the Level Three appeal.

Threat Assessment and Safe and Supportive Team

In compliance with law, the Superintendent shall ensure that a multidisciplinary threat assessment and safe and supportive team is established to serve each campus. The Superintendent shall appoint team members. The team shall be responsible for developing and implementing a safe and supportive school program at each campus served by the team and shall support the District in implementing its multi-hazard emergency operations plan.

Training

Each team shall complete training provided by an approved provider on evidence-based threat assessment programs.

Student Reports

Each campus shall establish a clear procedure for a student to report concerning behavior exhibited by another student for assessment by the team or other appropriate District employee.

Employee Confidentiality

A District employee who reports a potential threat may elect for the employee's identity to remain confidential and not be subject to disclosure under the state's public information law. The employee's identity shall only be revealed when necessary for the team, the District, or law enforcement to investigate the reported threat.

The District shall maintain a record of the identity of a District employee who elects for the employee's identity to remain confidential.

Imminent Threats or Emergencies

A member of the team or any District employee may act immediately to prevent an imminent threat or respond to an emergency, including contacting law enforcement directly.

Threat Assessment Process

The District shall develop procedures as recommended by the Texas School Safety Center. In accordance with those procedures, the threat assessment and safe and supportive team shall conduct threat assessments using a process that includes:

1. Identifying individuals, based on referrals, tips, or observations, whose behavior has raised concerns due to threats of violence or exhibition of behavior that is harmful, threatening, or violent.

2. Conducting an individualized assessment based on reasonably available information to determine whether the individual poses a threat of violence or poses a risk of harm to self or others and the level of risk.

3. Implementing appropriate intervention and monitoring strategies, if the team determines an individual poses a threat of harm to self or others. These strategies may include referral of a student for a mental health assessment and escalation procedures as appropriate.

For a student or other individual the team determines poses a serious risk of violence to self or others, the team shall immediately report to the Superintendent, who shall immediately attempt to contact the student's parent or guardian. Additionally, the Superintendent shall coordinate with law enforcement authorities as necessary and take other appropriate action in accordance with the District's multihazard emergency operations plan.

For a student the team identifies as at risk of suicide, the team shall follow the District's suicide prevention program.

For a student the team identifies as having a substance abuse issue, the team shall follow the District's substance abuse program.

For a student whose conduct may constitute a violation of the District's Student Code of Conduct, the team shall make a referral to the campus behavior coordinator or other appropriate administrator to consider disciplinary action.

As appropriate, the team may refer a student:

1.   To a local mental health authority or health-care provider for evaluation or treatment; or

2.   For a full individualized and initial evaluation for special education services.

The team shall not provide any mental health-care services, except as permitted by law.

Guidance to School Community

The team shall provide guidance to students and District employees on recognizing harmful, threatening, or violent behavior that may pose a threat to another person, the campus, or the community and methods to report such behavior to the team, including through anonymous reporting.

Reports

The team shall provide reports to the Texas Education Agency as required by law.

Complaints

In this policy, the terms "complaint" and "grievance" shall have the same meaning.

Other Complaint Processes

Student or parent complaints shall be filed in accordance with this policy, except as required by the policies listed below. Some of these policies require appeals to be submitted in accordance with FNG after the relevant complaint process:

1. Complaints alleging discrimination or harassment based on race, color, religion, sex, gender, national origin, age, or disability shall be submitted in accordance with the FFH series.

2. Complaints concerning dating violence shall be submitted in accordance with the FFH series.

3. Complaints concerning retaliation related to discrimination and harassment shall be submitted in accordance with the FFH series.

4. Complaints concerning bullying or retaliation related to bullying shall be submitted in accordance with FFI.

5. Complaints concerning failure to award credit or a final grade on the basis of attendance shall be submitted in accordance with FEC.

6. Complaints concerning expulsion shall be submitted in accordance with FOD and the Student Code of Conduct.

7. Complaints concerning any final decisions of the gifted and talented selection committee regarding selection for or exit from the gifted program shall be submitted in accordance with EHBB.

8. Complaints within the scope of Section 504, including complaints concerning identification, evaluation, or educational placement of a student with a disability, shall be submitted in accordance with FB and the procedural safeguards handbook.

9. Complaints within the scope of the Individuals with Disabilities Education Act, including complaints concerning identification, evaluation, educational placement, or discipline of a student with a disability, shall be submitted in accordance with EHBAE, FOF, and the procedural safeguards handbook provided to parents of all students referred to special education.

10. Complaints concerning instructional resources shall be submitted in accordance with the EF series. Specifically, complaints concerning instructional materials shall be processed

in accordance with Policy EFA, and complaints concerning library materials shall be processed in accordance with Policy EFB.

11. Complaints concerning a commissioned peace officer who is an employee of the District shall be submitted in accordance with the CKE series.

12. Complaints concerning intradistrict transfers or campus assignment shall be submitted in accordance with FDB.

13. Complaints concerning admission, placement, or services provided for a homeless student shall be submitted in accordance with FDC.

14. Complaints concerning disputes regarding a student's eligibility for free or reduced-priced meal programs shall be submitted in accordance with COB.

Complaints regarding refusal of entry to or ejection from District property based on Education Code 37.105 shall be filed in accordance with this policy. However, the timelines shall be adjusted as necessary to permit the complainant to address the Board in person within 90 calendar days of filing the initial complaint, unless the complaint is resolved before the Board considers it. [See GKA(LEGAL)]

The Board will not address a complaint concerning a student's participation in an extracurricular activity that does not involve a violation of a right guaranteed by Education Code Chapter 26. Education Code 26.011.

Notice to Students and Parents

The District shall inform students and parents of this policy through appropriate District publications.

Guiding Principles

Informal Process

The Board encourages students and parents to discuss their concerns with the appropriate teacher, principal, or other campus administrator who has the authority to address the concerns. Concerns should be expressed as soon as possible to allow early resolution at the lowest possible administrative level.

Informal resolution shall be encouraged but shall not extend any deadlines in this policy, except by mutual written consent.

Formal Process

A student or parent may initiate the formal process described below by timely filing a written complaint form.

Even after initiating the formal complaint process, students and parents are encouraged to seek informal resolution of their concerns. A student or parent whose concerns are resolved may withdraw a formal complaint at any time.

The process described in this policy shall not be construed to create new or additional rights beyond those granted by law or Board policy, nor to require a full evidentiary hearing or "mini-trial" at any level.

Freedom from Retaliation

Neither the Board nor any District employee shall unlawfully retaliate against any student or parent for bringing a concern or complaint.

General Provisions

Filing

Complaint forms and appeal notices may be filed by hand-delivery, by electronic communication, including email and fax, or by U.S. Mail. Hand-delivered filings shall be timely filed if received by the appropriate administrator or designee by the close of business on the deadline. Filings submitted by electronic communication shall be timely filed if they are received by the close of business on the deadline, as indicated by the date/time shown on the electronic communication. Mail filings shall be timely filed if they are postmarked by U.S. Mail on or before the deadline and received by the appropriate administrator or designated representative no more than three days after the deadline.

Scheduling Conferences

The District shall make reasonable attempts to schedule conferences at a mutually agreeable time. If a student or parent fails to appear at a scheduled conference, the District may consider the complaint and issue a decision in the student's or parent's absence.

Response

At Levels One and Two, "response" shall mean a written communication to the student or parent from the appropriate administrator. Responses may be hand-delivered, sent by electronic communication to the student's or parent's email address of record, or sent by U.S. Mail to the student's or parent's mailing address of record. Mailed responses shall be timely if they are postmarked by U.S. Mail on or before the deadline.

Days

"Days" shall mean District business days, unless otherwise noted. In calculating timelines under this policy, the day a document is filed is "day zero." The following business day is "day one."

Representative

"Representative" shall mean any person who or organization that is designated by the student or parent to represent the student or parent in the complaint process. A student may be represented by an adult at any level of the complaint.

The student or parent may designate a representative through written notice to the District at any level of this process. If the student or parent designates a representative with fewer than three days' notice to the District before a scheduled conference or hearing, the District may reschedule the conference or hearing to a later date, if desired, in order to include the District's counsel. The District may be represented by counsel at any level of the process.

Consolidating Complaints

Complaints arising out of an event or a series of related events shall be addressed in one complaint. A student or parent shall not file separate or serial complaints arising from any event or series of events that have been or could have been addressed in a previous complaint.

Untimely Filings

All time limits shall be strictly followed unless modified by mutual written consent.

If a complaint form or appeal notice is not timely filed, the complaint may be dismissed, on written notice to the student or parent, at any point during the complaint process. The student or parent may appeal the dismissal by seeking review in writing within ten days from the date of the written dismissal notice, starting at the level at which the complaint was dismissed. Such appeal shall be limited to the issue of timeliness.

Costs Incurred

Each party shall pay its own costs incurred in the course of the complaint.

Complaint and Appeal Forms

Complaints and appeals under this policy shall be submitted in writing on a form provided by the District.

Copies of any documents that support the complaint should be attached to the complaint form. If the student or parent does not have copies of these documents, copies may be presented at the Level One conference. After the Level One conference, no new documents may be submitted by the student or parent unless the student or parent did not know the documents existed before the Level One conference.

A complaint or appeal form that is incomplete in any material aspect may be dismissed but may be refiled with all the required information if the refiling is within the designated time for filing.

Level One

Complaint forms must be filed:

1. Within 15 days of the date the student or parent first knew, or with reasonable diligence should have known, of the decision or action giving rise to the complaint or grievance; and

2. With the lowest level administrator who has the authority to remedy the alleged problem.

    In most circumstances, students and parents shall file Level One complaints with the campus principal.

    If the only administrator who has authority to remedy the alleged problem is the Superintendent or designee, the complaint may begin at Level Two following the procedure, including deadlines, for filing the complaint form at Level One.

If the complaint is not filed with the appropriate administrator, the receiving administrator must note the date and time the complaint form was received and immediately forward the complaint form to the appropriate administrator.

The appropriate administrator shall investigate as necessary and schedule a conference with the student or parent within ten days after receipt of the written complaint. The administrator may set reasonable time limits for the conference.

Absent extenuating circumstances, the administrator shall provide the student or parent a written response within ten days following the conference. The written response shall set forth the basis of the decision. In reaching a decision, the administrator may consider information provided at the Level One conference and any other relevant documents or information the administrator believes will help resolve the complaint.

Level Two If the student or parent did not receive the relief requested at Level One or if the time for a response has expired, the student or parent may request a conference with the Superintendent or designee to appeal the Level One decision.

The appeal notice must be filed in writing, on a form provided by the District, within ten days of the date of the written Level One response or, if no response was received, within ten days of the Level One response deadline.

After receiving notice of the appeal, the Level One administrator shall prepare and forward a record of the Level One complaint to the Level Two administrator. The student or parent may request a copy of the Level One record.

The Level One record shall include:

1. The original complaint form and any attachments.

2. All other documents submitted by the student or parent at Level One.

3.   The written response issued at Level One and any attachments.

4.   All other documents relied upon by the Level One administrator in reaching the Level One decision.

The Superintendent or designee shall schedule a conference within ten days after the appeal notice is filed. The conference shall be limited to the issues and documents considered at Level One. At the conference, the student or parent may provide information concerning any documents or information relied upon by the administration for the Level One decision. The Superintendent or designee may set reasonable time limits for the conference.

The Superintendent or designee shall provide the student or parent a written response within ten days following the conference. The written response shall set forth the basis of the decision. In reaching a decision, the Superintendent or designee may consider the Level One record, information provided at the Level Two conference, and any other relevant documents or information the Superintendent or designee believes will help resolve the complaint.

Recordings of the Level One and Level Two conferences, if any, shall be maintained with the Level One and Level Two records.

Level Three   If the student or parent did not receive the relief requested at Level Two or if the time for a response has expired, the student or parent may appeal the decision to the Board.

The appeal notice must be filed in writing, on a form provided by the District, within ten days of the date of the written Level Two response or, if no response was received, within ten days of the Level Two response deadline.

The Superintendent or designee shall inform the student or parent of the date, time, and place of the Board meeting at which the complaint will be on the agenda for presentation to the Board.

The Superintendent or designee shall provide the Board the record of the Level Two appeal. The student or parent may request a copy of the Level Two record.

The Level Two record shall include:

1.   The Level One record.

2.   The notice of appeal from Level One to Level Two.

3.   The written response issued at Level Two and any attachments.

4. All other documents relied upon by the administration in reaching the Level Two decision.

The appeal shall be limited to the issues and documents considered at Level Two, except that if at the Level Three hearing the administration intends to rely on evidence not included in the Level Two record, the administration shall provide the student or parent notice of the nature of the evidence at least three days before the hearing.

The District shall determine whether the complaint will be presented in open or closed meeting in accordance with the Texas Open Meetings Act and other applicable law. [See BE]

The presiding officer may set reasonable time limits and guidelines for the presentation, including an opportunity for the student or parent and administration to each make a presentation and provide rebuttal and an opportunity for questioning by the Board. The Board shall hear the complaint and may request that the administration provide an explanation for the decisions at the preceding levels.

In addition to any other record of the Board meeting required by law, the Board shall prepare a separate record of the Level Three presentation. The Level Three presentation, including the presentation by the student or parent or the student's representative, any presentation from the administration, and questions from the Board with responses, shall be recorded by audio recording, video/audio recording, or court reporter.

The Board shall then consider the complaint. It may give notice of its decision orally or in writing at any time up to and including the next regularly scheduled Board meeting. If the Board does not make a decision regarding the complaint by the end of the next regularly scheduled meeting, the lack of a response by the Board upholds the administrative decision at Level Two.

When reviewing a Level Three grievance, the Board's role is not to replace the administration's judgment. The Board's role is to review the administrative steps taken at Level I and II to ensure that the matter has been decided correctly and according to policy and the law.

Frequent Appeals

If a student, a parent, or a student's representative has presented five Level Three appeals to the Board within a calendar year, the Board shall consider any subsequent Level Three appeal from the complainant during that calendar year only upon written submission, with no Level Three presentation made to the Board by the complainant or the administration. In such an event, the Board

shall consider the written record and give notice of its decision in writing.

Upon a motion by any Board member, however, the presiding officer shall call for a vote to suspend this rule and allow an oral presentation of the Level Three appeal.

Complaints

In this policy, the terms "complaint" and "grievance" shall have the same meaning.

Other Complaint Processes

Complaints by members of the public shall be filed in accordance with this policy, except as required by the policies listed below. Some of these policies require appeals to be submitted in accordance with GF after the relevant complaint process:

1.   Complaints concerning instructional resources shall be filed in accordance with the EF series.

2.   Complaints concerning a commissioned peace officer who is an employee of the District shall be filed in accordance with the CKE series.

Complaints regarding refusal of entry to or ejection from District property based on Education Code 37.105 shall be filed in accordance with this policy. However, the timelines shall be adjusted as necessary to permit the complainant to address the Board in person within 90 calendar days of filing the initial complaint, unless the complaint is resolved before the Board considers it. [See GKA(LEGAL)]

Guiding Principles

Informal Process

The Board encourages the public to discuss concerns with an appropriate administrator who has the authority to address the concerns. Concerns should be expressed as soon as possible to allow early resolution at the lowest possible administrative level.

Informal resolution shall be encouraged but shall not extend any deadlines in this policy, except by mutual written consent.

Formal Process

An individual may initiate the formal process described below by timely filing a written complaint form.

Even after initiating the formal complaint process, individuals are encouraged to seek informal resolution of their concerns. An individual whose concerns are resolved may withdraw a formal complaint at any time.

The process described in this policy shall not be construed to create new or additional rights beyond those granted by law or Board policy, nor to require a full evidentiary hearing or "mini-trial" at any level.

Freedom from Retaliation

Neither the Board nor any District employee shall unlawfully retaliate against any individual for bringing a concern or complaint.

General Provisions

Filing

Complaint forms and appeal notices may be filed by hand-delivery, by electronic communication, including email and fax, or by U.S. Mail. Hand-delivered filings shall be timely filed if received by the appropriate administrator or designee by the close of business on

the deadline. Filings submitted by electronic communication shall be timely filed if they are received by the close of business on the deadline, as indicated by the date/time shown on the electronic communication. Mail filings shall be timely filed if they are postmarked by U.S. Mail on or before the deadline and received by the appropriate administrator or designated representative no more than three days after the deadline.

Scheduling Conferences

The District shall make reasonable attempts to schedule conferences at a mutually agreeable time. If the individual fails to appear at a scheduled conference, the District may consider the complaint and issue a decision in the individual's absence.

Response

At Levels One and Two, "response" shall mean a written communication to the individual from the appropriate administrator. Responses may be hand-delivered, sent by electronic communication to the individual's email address of record, or sent by U.S. Mail to the individual's mailing address of record. Mailed responses shall be timely if they are postmarked by U.S. Mail on or before the deadline.

Days

"Days" shall mean District business days, unless otherwise noted. In calculating timelines under this policy, the day a document is filed is "day zero." The following business day is "day one."

Representative

"Representative" shall mean any person who or organization that is designated by an individual to represent the individual in the complaint process.

The individual may designate a representative through written notice to the District at any level of this process. If the individual designates a representative with fewer than three days' notice to the District before a scheduled conference or hearing, the District may reschedule the conference or hearing to a later date, if desired, in order to include the District's counsel. The District may be represented by counsel at any level of the process.

Consolidating Complaints

Complaints arising out of an event or a series of related events shall be addressed in one complaint. An individual shall not file separate or serial complaints arising from any event or series of events that have been or could have been addressed in a previous complaint.

Untimely Filings

All time limits shall be strictly followed unless modified by mutual written consent.

If a complaint form or appeal notice is not timely filed, the complaint may be dismissed, on written notice to the individual, at any point during the complaint process. The individual may appeal the dismissal by seeking review in writing within ten days from the date

of the written dismissal notice, starting at the level at which the complaint was dismissed. Such appeal shall be limited to the issue of timeliness.

Costs Incurred

Each party shall pay its own costs incurred in the course of the complaint.

Complaint and Appeal Forms

Complaints and appeals under this policy shall be submitted in writing on a form provided by the District.

Copies of any documents that support the complaint should be attached to the complaint form. If the individual does not have copies of these documents, they may be presented at the Level One conference. After the Level One conference, no new documents may be submitted by the individual unless the individual did not know the documents existed before the Level One conference.

A complaint or appeal form that is incomplete in any material aspect may be dismissed but may be refiled with all the required information if the refiling is within the designated time for filing.

Level One

Complaint forms must be filed:

1. Within 15 days of the date the individual first knew, or with reasonable diligence should have known, of the decision or action giving rise to the complaint or grievance; and

2. With the lowest level administrator who has the authority to remedy the alleged problem.

    If the only administrator who has authority to remedy the alleged problem is the Superintendent or designee, the complaint may begin at Level Two following the procedure, including deadlines, for filing the complaint form at Level One.

If the complaint is not filed with the appropriate administrator, the receiving administrator must note the date and time the complaint form was received and immediately forward the complaint form to the appropriate administrator.

The appropriate administrator shall investigate as necessary and schedule a conference with the individual within ten days after receipt of the written complaint. The administrator may set reasonable time limits for the conference.

Absent extenuating circumstances, the administrator shall provide the individual a written response within ten days following the conference. The written response shall set forth the basis of the decision. In reaching a decision, the administrator may consider information provided at the Level One conference and any other

relevant documents or information the administrator believes will help resolve the complaint.

Level Two

If the individual did not receive the relief requested at Level One or if the time for a response has expired, he or she may request a conference with the Superintendent or designee to appeal the Level One decision.

The appeal notice must be filed in writing, on a form provided by the District, within ten days of the date of the written Level One response or, if no response was received, within ten days of the Level One response deadline.

After receiving notice of the appeal, the Level One administrator shall prepare and forward a record of the Level One complaint to the Level Two administrator. The individual may request a copy of the Level One record.

The Level One record shall include:

1. The original complaint form and any attachments.

2. All other documents submitted by the individual at Level One.

3. The written response issued at Level One and any attachments.

4. All other documents relied upon by the Level One administrator in reaching the Level One decision.

The Superintendent or designee shall schedule a conference within ten days after the appeal notice is filed. The conference shall be limited to the issues and documents considered at Level One. At the conference, the individual may provide information concerning any documents or information relied upon by the administration for the Level One decision. The Superintendent or designee may set reasonable time limits for the conference.

The Superintendent or designee shall provide the individual a written response within ten days following the conference. The written response shall set forth the basis of the decision. In reaching a decision, the Superintendent or designee may consider the Level One record, information provided at the Level Two conference, and any other relevant documents or information the Superintendent or designee believes will help resolve the complaint.

Recordings of the Level One and Level Two conferences, if any, shall be maintained with the Level One and Level Two records.

Level Three

If the individual did not receive the relief requested at Level Two or if the time for a response has expired, he or she may appeal the decision to the Board.

The appeal notice must be filed in writing, on a form provided by the District, within ten days of the date of the written Level Two response or, if no response was received, within ten days of the Level Two response deadline.

The Superintendent or designee shall inform the individual of the date, time, and place of the Board meeting at which the complaint will be on the agenda for presentation to the Board.

The Superintendent or designee shall provide the Board the record of the Level Two appeal. The individual may request a copy of the Level Two record.

The Level Two record shall include:

1.   The Level One record.

2.   The notice of appeal from Level One to Level Two.

3.   The written response issued at Level Two and any attachments.

4.   All other documents relied upon by the administration in reaching the Level Two decision.

The appeal shall be limited to the issues and documents considered at Level Two, except that if at the Level Three hearing the administration intends to rely on evidence not included in the Level Two record, the administration shall provide the individual notice of the nature of the evidence at least three days before the hearing.

The District shall determine whether the complaint will be presented in open or closed meeting in accordance with the Texas Open Meetings Act and other applicable law. [See BE]

The presiding officer may set reasonable time limits and guidelines for the presentation, including an opportunity for the individual and administration to each make a presentation and provide rebuttal and an opportunity for questioning by the Board. The Board shall hear the complaint and may request that the administration provide an explanation for the decisions at the preceding levels.

In addition to any other record of the Board meeting required by law, the Board shall prepare a separate record of the Level Three presentation. The Level Three presentation, including the presentation by the individual or his or her representative, any presentation

from the administration, and questions from the Board with responses, shall be recorded by audio recording, video/audio recording, or court reporter.

The Board shall then consider the complaint. It may give notice of its decision orally or in writing at any time up to and including the next regularly scheduled Board meeting. If the Board does not make a decision regarding the complaint by the end of the next regularly scheduled meeting, the lack of a response by the Board upholds the administrative decision at Level Two.

Frequent Appeals

If a member of the public has presented five Level Three appeals to the Board within a calendar year, the Board shall consider any subsequent Level Three appeal from the complainant during that calendar year only upon written submission, with no Level Three presentation made to the Board by the complainant or the administration. In such an event, the Board shall consider the written record and give notice of its decision in writing.

Upon a motion by any Board member, however, the presiding officer shall call for a vote to suspend this rule and allow an oral presentation of the Level Three appeal.

Leander ISD Board Meeting Agenda Item Information
Meeting Date: Thursday, September 5, 2024

Agenda Item:	Consider Approval of Internal Audit Plan for 2024-2025 School Year
Purpose:	☐ Discussion Item/Report Only ☒ Action Requested
Administrator Responsible:	Pete Pape, Ed.D., CPA, Chief Financial Officer
Attachments:	Gibson Consulting Group Combined Cost Proposal for Leander ISD - FY 2025
	Gibson Consulting Group June 2024 Internal Audit Risk Assessment Final Report
	June 27, 2024 Gibson Consulting Group Internal Audit Risk Assessment Presentation

Background Information:
During the June 27, 2024 Regular Board Meeting, Gibson Consulting Group recommended audit activities based on findings from the internal audit risk assessment, which was conducted in the spring. Attached is Gibson Consulting Group's internal audit cost proposal for Leander ISD for Fiscal Year (FY) 2025. The Internal Audit committee recommends Gibson Consulting perform audit and program management services for the Academic Program Management and Federal Program areas for the 2024-2025 school year.

Administrative Recommendation:
Administration recommends the Board approve the Internal Audit Committee's 2024-2025 school year plan for Gibson Consulting to conduct internal audits and program management services for the Academic Program Management and Federal Program areas.

Sample Motion:
I move that the Board approve the Internal Audit Committee's 2024-2025 school year plan for Gibson Consulting to conduct internal audits and program management services for the Academic Program Management and Federal Program areas.

AN EDUCATION CONSULTING & RESEARCH GROUP

August 7, 2024

Leander Independent School District
Attn: Board Audit Committee
204 W. South Street P.O. Box 218
Leander, Texas 78646-0218

Re: Gibson Internal Audit Cost Proposals for Fiscal Year 2025

Members of the Leander ISD Board Audit Committee:

At your request, Gibson Consulting Group (Gibson) presents our cost proposals to provide internal audit services to the Leander Independent School District (Leander ISD) Board of Trustees for Fiscal Year (FY) 2025. The Board Audit Committee requested cost proposals for multiple audits, as well as internal audit program management services, and may select one or more audits based on budget constraints and other factors. The audits listed below are based on the audit plan presented to the Board in June 2024:

- Academic Program Management Audit

- Construction Management Audit

- Federal Programs Audit

- Human Resources Audit

The remainder of this proposal presents the scope and approach of each audit, our proposed (recurring) audit program management activities for FY 2025, and the timing and cost of our services.

Overall Audit Approach

The general approach for our audits is presented in Figure 1 and discussed in greater depth below.

Figure 1. Audit Project Overview

Task 1: Planning	Task 2: Fieldwork	Task 3: Testing and Analysis	Task 4: Reporting

Project Initiation

Data Collection and Review

Staff Interviews

Classroom Observations

Surveys

Data Analysis

Audit Testing

Best Practices Comparison

Preliminary Issues List

Draft Report

Final Report

Board Presentation
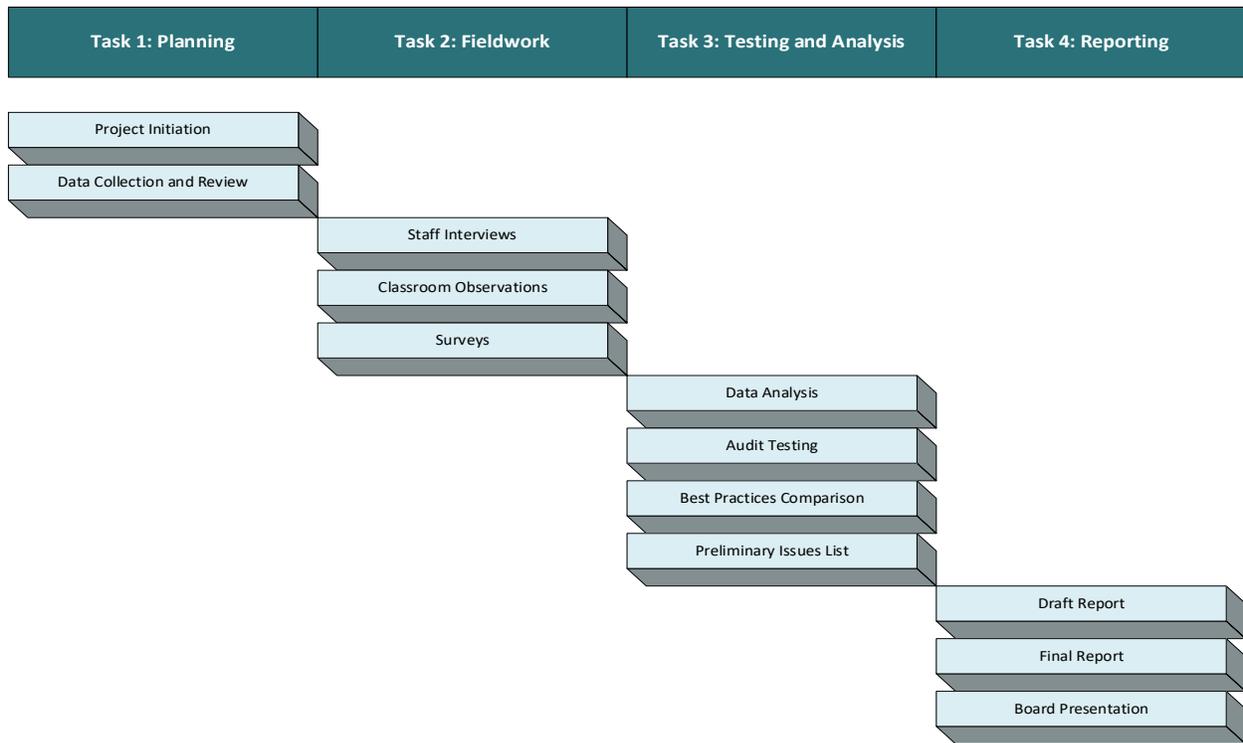
Source. Gibson Consulting Group

Task 1: Planning

We will conduct a project orientation meeting with the Leander ISD project liaison to discuss the scope and objectives of the audit and to finalize the schedule.

We will provide a data request to the district for these audits, and will use the project orientation meeting to answer any questions regarding the request. Some of this information may be available through the district's website, the Texas Education Agency (TEA) website, or another third-party source. We expect that it will take up to two weeks for Leander ISD to provide all of the requested data for the audit, and we will begin analyzing the data as soon as it becomes available, in order to prepare for the fieldwork.

Task 2: Fieldwork

The exact audit procedures for fieldwork will vary based on the scope of the individual audit, which is discussed in detail within each project overview later in this proposal. Generally, fieldwork will include interviews with district leadership, departmental staff, and a sample of district staff. Other aspects of fieldwork, such as school visits and interviews, classroom observations, and surveys, are discussed under each applicable audit project overview in subsequent sections of this proposal.

Task 3: Analysis

This task includes the analysis and corroboration of information obtained through the initial and supplemental data requests, interviews, classroom observations, and transaction testing. The specific analyses and testing approaches will vary based on project and are discussed in detail under each audit project overview.

Task 4: Reporting

We will use the results of our analysis and interviews to form the basis for possible audit findings and recommendations, recognizing any best practices in place as well as identifying opportunities for improvement. We will develop a draft audit report that contains an executive summary, a description of the project objectives and scope, descriptions of district practices, as well as findings and recommendations to improve the efficiency, effectiveness, and compliance of the areas being audited.

We will submit the draft report to the administration for their management responses to our recommendations (expressing agreement, partial agreement, or disagreement), and to ensure that there are no factual misrepresentations. Upon receiving a single, consolidated set of comments from the district, we will make appropriate modifications and present the results to the Board Audit Committee. We will also present the final report to the Board of Trustees.

The following sections discuss the scope and analysis attributes of each requested audit.

Academic Program Management Audit

The Academic Program Management Audit assesses how effectively the district organizes its resources to ensure that (1) all students have access to rigorous curricula and assessments aligned to the state's standards, and (2) all teachers have access to the resources and supports they need to deliver high-quality instruction. This audit is *not* a "program evaluation." It is not designed to show any statistically significant correlations between district inputs (e.g., programs or practices) and student, teacher, or school outcomes. Instead, this audit **focuses on how the district organizes resources, systems, and processes to support the implementation of effective instructional practices and student learning across the district.**

The scope of this review will primarily focus on the responsibilities under the Deputy Superintendent of Learning and Innovation but will include relevant input from other departments as it relates to accountability systems and processes, technology and information systems, and professional development activities.

Academic Program Management Audit Areas

District Profile

To set the context for the audit findings and recommendations, Gibson will first provide a historical profile of Leander ISD's trends in student enrollment, demographics, and academic performance. Gibson will also

provide a profile of the district's teacher and principal workforce. The profile will address the following questions:

- How has the district's portfolio of schools changed over the past five years?

- What changes in enrollment has the district experienced regarding student demographics and special populations (e.g., students with disabilities, English language learners, students who are at risk of academic failure, students who are economically disadvantaged)?

- How are the district and schools performing according to the TEA's academic accountability ratings?

- How are students performing on the State of Texas Assessments of Academic Readiness (STAAR) assessment and other performance indicators?

- What is the current profile of the district's teacher workforce regarding their certification, highest degree earned, and average years of teaching experience? What is the teacher turnover rate, and how do these metrics compare to benchmark districts?

- What is the current profile of the district's principals with regard to their years in the principalship and turnover rates?

Instructional Leadership and Accountability

- Does the district have a comprehensive policy framework that clearly communicates the board's educational philosophy and expectations for curriculum and instruction?

- Is there a clear vision and strategy for achieving the board's academic goals and objectives? Do strategic planning documents include defined metrics and milestones aligned to the board's academic goals and objectives?

- Does the central office organization and staffing enable effective oversight and management of all academic programs and resources?

- In what ways does the district support school leaders and then hold them accountable for student performance? What degree of autonomy do principals have regarding implementation of the district's curriculum?

Curriculum Management

- Is there a curriculum management plan that communicates the intentions of the district in the areas of curriculum, instruction, and assessment?

- Is there a well-defined and cyclical process for developing, reviewing, and revising the district's curriculum? Are decisions about improvements and updates to the curriculum guided by feedback from stakeholders?

- Does the district have a comprehensive and coherent curriculum to support teachers in planning and delivering high-quality instruction?

- Is there consistency in the organization of the curriculum components in the district's learning management system (LMS) and alignment across grade levels and content areas?

- Has the district identified a preferred instructional model (or models) to support the delivery of instruction in each content area?

- Do teachers routinely develop unit and/or lesson plans that outline their objectives for what students will accomplish during a unit of instruction or lesson? Do campus administrators periodically review them and provide feedback?

- Are there well-defined processes for requesting, approving, procuring, and retiring instructional materials and supplemental resources to support the district's curriculum?

- Does the district have an assessment strategy that includes short-cycle formative assessments, interim assessments, and a system for progress monitoring?

- What systems and processes are in place to ensure that the written, taught, and tested curricula are aligned? What processes and tools are used to monitor the fidelity of implementation?

Professional Learning and Instructional Supports

- Does the district have an effective program for supporting new and beginning teachers through induction and mentoring?

- Does the district have a comprehensive professional learning plan that aligns resources and guides the professional learning for all administrators, teachers, and instructional support staff?

- Are district-led professional learning opportunities meeting the diverse needs of the district's teacher workforce?

- What campus-based instructional support models (i.e., coaching model) are used to build the capacity of teachers to implement the curriculum using research-based, data-driven instruction?

- Are teacher professional learning communities (PLCs) widely implemented across the district? Are the conditions for highly effective PLCs in place?

- Does the district have established career pathways or leadership development programs to identify and prepare aspiring school- or district-level leaders?

- Do principals have the opportunity to routinely collaborate with their peers to improve their leadership and learning skills?

Academic Program Management Audit Activities

We will perform the following activities for the Academic Program Management audit.

Data Analysis

The approach to this audit will involve the analysis and triangulation of data from multiple sources, including district-provided data and documentation, comparisons to peers and best practices, and corroboration of information received through individual and group interviews. Examples of Gibson's analyses are included below. Figure 2 shows the distribution of principals by their years of experience in the principalship in a district and the percentage of students who are economically disadvantaged at their campus.

40

Figure 2. Principal Years of Experience in Current District Principalship and Campus Economically Disadvantaged Percentage, 2022-23
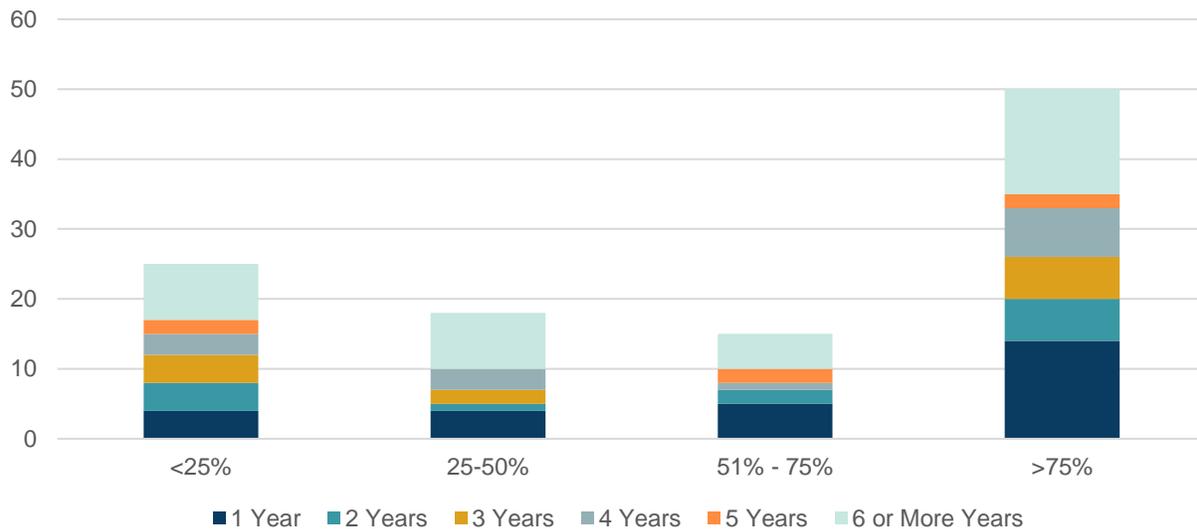
Source. Position data provided by the district and 2021-22 Texas Academic Performance Reports (TAPR) Report

Figure 3 illustrates the percentage of students at "Approaches Grade Level or Above" on the STAAR tests from 2018-19 to 2021-22. Gibson reviews these percentages as part of our analysis to determine district student performance level trends.

Figure 3. STAAR Percent at "Approaches Grade Level or Above," All Grades and Subjects, 2018-19 to 2021-22
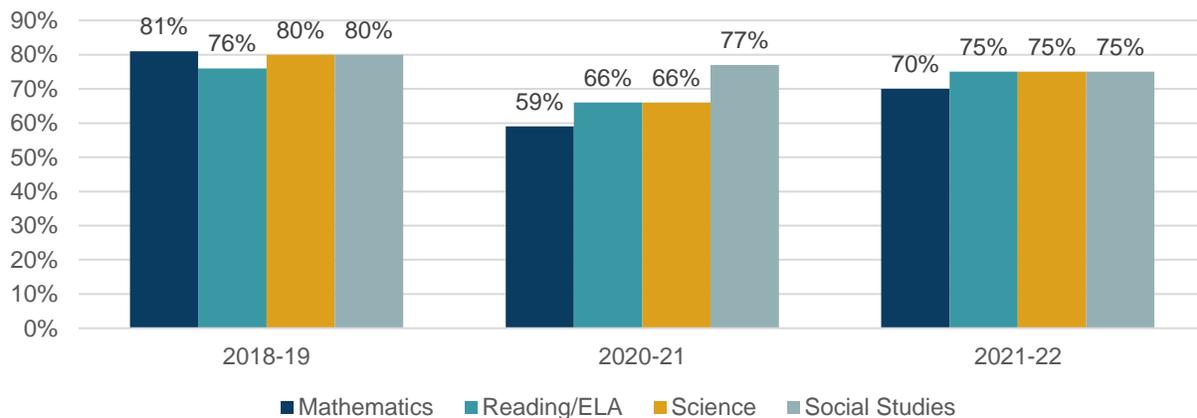
Note. The 2019-20 school year is missing due to the COVID-19 pandemic.

Source. TEA TAPR Reports, 2018-19 to 2021-22

Figure 4 shows, on a per student basis, a district's Curriculum Development and Instructional Staff Development expenditure trends.

41

Figure 4. Curriculum Development and Instructional Staff Development Expenditures per Student, 2017-18 to 2021-22
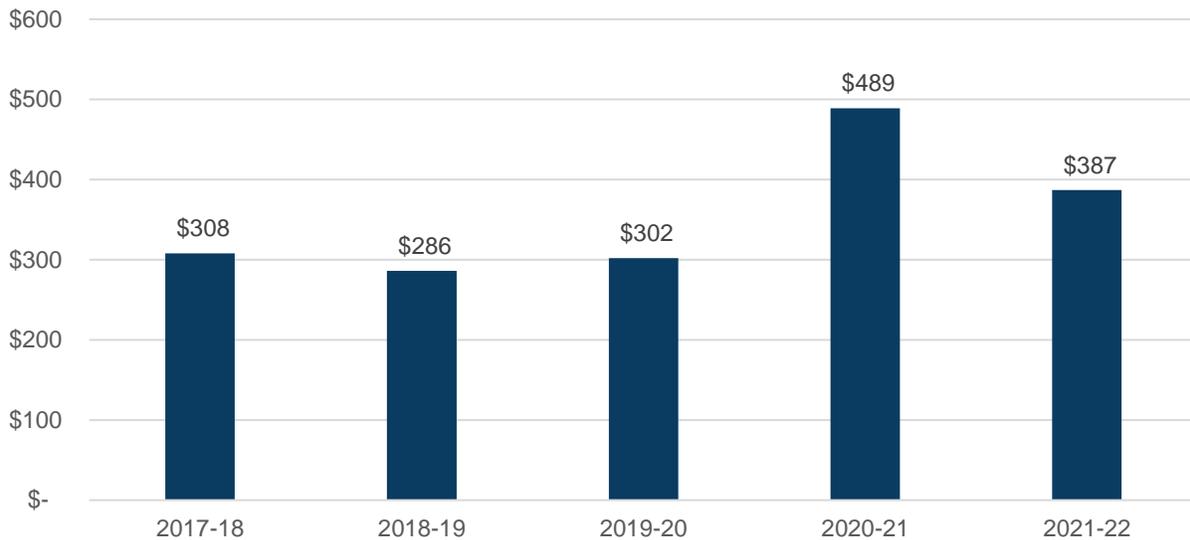
Source. TEA Public Education Information Management System (PEIMS) Financial Data, 2017-18 to 2021-22

The audit will also include document analysis of the following:

- Board policies, including relevant legal and local board policies related to Academic Program Management;

- District Improvement Plan (DIP) and Campus Improvement Plans (CIP), including all district initiatives that may be relevant to the scope of this academic audit;

- Organizational Charts, including job descriptions;

- Standard Operating Procedures, and any documentation that describes district processes for monitoring fidelity of curriculum implementation and instructional practices;

- Curriculum Framework;

- Unit and Lesson Plans;

- Instructional Resources; and

- District Assessment Calendar.

Interviews and Focus Groups

We will conduct interviews with key leadership and staff to understand their roles, responsibilities, and processes related to the scope areas outlined above. Additionally, we will facilitate group interviews with other district staff, such as principals, teachers, and instructional coaches to document their views on professional learning, instructional leadership, and curriculum management.

42

Classroom Observations

School visits and classroom observations will be an important component of this evaluation, as they will enable the review team to evaluate school-based practices related to teaching and learning, and teacher professional learning communities (PLCs), as well as to observe first-hand the delivery of Tier 1 instruction. Schools visited will be selected by the audit team and will be chosen based on their geographic location, student demographics, and school performance.

Campus Administration and Teacher Surveys

Gibson will develop two online surveys and administer them to all campus administrators (i.e., principals and assistant principals) and teachers to solicit feedback related to the district's current instructional approach and perceptions regarding district successes and systemic barriers to effective instruction. Our team will then analyze the data and generate tables with frequencies for each item and/or calculate descriptive statistics for each item. We will also create cross-tabulations to make comparisons across groups, such as by position type, school level, or time in the district. Figure 5 represents an example of our survey analysis.

Figure 5. Teacher Survey: "How would you rate the consistency of curriculum implementation in your content area/grade level on your campus?" by School Type (SAMPLE ONLY)
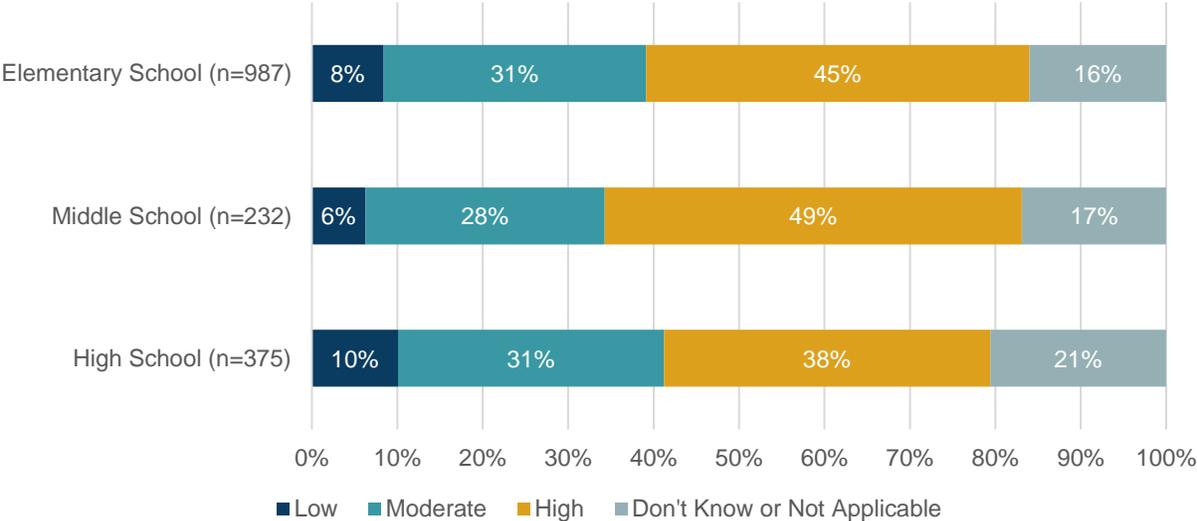
Source. Gibson Teacher Survey

Construction Management Audit

A Construction Management Audit evaluates the processes, practices, and controls of construction projects to ensure they are completed on time, within budget, and meet quality standards and contractual obligations. This audit provides an objective assessment, identifies areas for improvement, and ensures compliance with standards and regulations, enhancing project efficiency, effectiveness, and accountability.

Specifically, the audit will review Leander ISD's 2023 Bond Program (Propositions A and C), focusing on construction controls and expenditures for campus renovations and modernization projects.

This audit is pre-emptive in nature, in that it will evaluate the district's readiness for the construction and renovation programs outlined in Propositions A and C, which were approved by voters in May 2024. Information relating to these propositions is reflected below.

Proposition A:

Proposition A allocates $698.33 million for various school facility projects, including:

- Construction of two new elementary schools;
- Acquisition of land for future school sites; and
- Renovations and modernization projects at numerous campuses.

Proposition C:

Proposition C allocates $13.67 million specifically for the renovation and modernization of:

- Don Tew Performing Arts Center
- South Performing Arts Center

By conducting this audit, Gibson aims to ensure that its significant investment in school facilities is managed effectively and delivers the intended results in a timely and cost-effective manner.

Project Scope

Construction projects represent considerable investments of time and money for school systems. Phases of a construction project include but are not limited to vendor and material selection, project management, bidding and award administration, cost management, and change management.

This audit will address the following questions, by audit area:

Program Management and Oversight

- Have adequate policies (legal and local) and administrative regulations been established for the Facilities Department? How does the district ensure compliance with policies and administrative regulations?
- Are the Facilities Department staff levels sufficient to support in-house construction and renovation projects, and program manager oversight? Have sufficient Program Manager resources been provided?
- How is the district using key performance indicators (KPIs) to ensure success of the bond program?

- How does the district effectively monitor staff augmentation performance and value? What is the cost/benefit analysis of using internal staff versus outside consultants in managing the bond program?

- Is the data that is submitted to the Bond Oversight Committee (BOC) adequate to support their oversight role? Does the data provide enough valuable information for the BOC to be able to perform their oversight functions?

- How is the Board of Trustees kept up to date on construction program information by the Facilities Department and the BOC?

Cost Estimation

- Is the approved bond amount adequate to deliver the defined scope of work?

- Have construction projects and programs been adequately planned, budgeted, and estimated based on the scope presented to the public?

- Are there reasonable price estimates and contingencies at the project and program level?

- Are there reasonable considerations for price escalation? Are cost estimates inclusive of current and forecasted industry conditions?

- Are the monitoring and controlling processes for reviewing, verifying, and approving these estimates being adequately followed?

Project Controls

- Are there adequate controls in place for monitoring and controlling project budgets?

- Are the district's information systems adequate to monitor and control project budgets?

- Are reasonable controls in place to limit construction expenditures to defined budget limits?

- Are construction project issues quickly identified, tracked, and communicated towards resolution?

Contracting

- What standard contracts are applied? Does the district modify industry standard contracts to meet its needs?

- Who is contractually responsible for adhering to and maintaining budgets? Have contractual recourses been properly utilized to manage and maintain budgets?

- Have contractors, architects, engineers and project managers complied with contract provisions? Are district staff conducting necessary activities to ensure contract compliance?

- Under certain delivery methods, such as Construction Manager at Risk (CmaR), does the Construction Manager bid the work out through an open bid process to ensure the district is getting the best value?

- How are Architectural and Engineer (A&E) firms identified and selected by the district? How are projects assigned to A&E firms?

- Is there a mechanism for contractors to be able to communicate and escalate issues when they arise?
- Was there a cost/benefit analysis conducted to identify the best "value" prototype schools?

Construction Management Audit Activities

We will perform the following activities for the Construction Management Audit.

Interviews

We will conduct interviews with key district leadership, Construction Management leadership and staff, and other district-level administrators (e.g. general counsel, Business Office staff) to understand their roles, responsibilities, and processes related to the scope areas outlined above.

Data Analysis

The approach to this audit will involve the analysis and triangulation of data from multiple sources, including district-provided data and documentation, comparisons to industry standards, and corroboration of information received through interviews and focus groups. Gibson's data analysis will focus on the following areas:

- **Construction Controls:** Evaluating the adequacy and effectiveness of controls in place to manage and oversee construction activities.
- **Expenditures:** Ensuring that planned expenditures are appropriate, properly documented, and in line with the budgetary allocations for the construction and renovation projects.
- **Project Timelines:** Verifying that project schedules are reasonable and consider the impact of any delays or schedule deviations.
- **Quality Standards:** Ensuring that construction work meets specified quality standards and contractual obligations.
- **Compliance:** Ensuring that there are adequate levels of compliance oversight for applicable regulations, policies, and standards throughout the project lifecycle.

Process Mapping

Our team may document and map "as-is" processes for selected construction management areas. These process maps can provide a clearer understanding of the current state and help identify potential gaps, inefficiencies, or control weaknesses.

Audit Testing

The audit team will conduct a series of audit tests of recent construction projects to corroborate key construction management processes and obtain evidence of supporting documentation. Table 1 provides examples of tests that can be executed. The actual tests performed will be based on information collected early in the audit that points to potential control weaknesses.

Table 1. Construction Management Audit Transaction Tests

Audit Areas	Test	Audit Procedures
Construction: Contract Administration	Contractors Complied with Provisions Stated within Contracts	▪ Examine the contracts for completeness, adequacy, proper approval, and determine the award type (CM at-risk, CSP, CB) ▪ Examine the special contract provisions, rates, and specific terms ▪ Examine the records received from the contractor to monitor progress (inspection reports, job meeting minutes, material and equipment delivery schedules, progress reports, etc.) ▪ Examine the schedule of payment requests or progress billings ▪ Examine the underlying bid to determine necessary evidence and approval is adequately documented
Construction: Invoice Processing	"3-Way Match" Test	▪ Examine the third-party invoice to validate that it matches the approved purchase order, and contract, if applicable ▪ Examine the third-party invoice to validate that it matches the quantity of items or services received by the District ▪ Examine the third-party invoice to validate that it was issued after the purchase order ▪ Examine the evidence of payment to the vendor to validate that the payment occurred within the stipulated policy and state law ▪ Review the procedures for determining any long outstanding invoices
Construction: Change Order Process	Changes to Existing Contracts are Appropriate and Adequately Documented	▪ Examine the internal control over change orders ▪ Examine the schedule of change orders for approval and accuracy ▪ Examine the supporting change order documentation for pricing and ensure change orders represent changed or added work, not work covered under the scope of the original contract ▪ Document the changes processed and paid during the project

47

Audit Areas	Test	Audit Procedures
		▪ Verify the approval of change orders
Construction: Budget Control	Department Budget to District Accounting Reconciliation	▪ Determine the process used to track and report the costs incurred on construction projects ▪ Examine the Department budget ▪ Examine the individual project budgets and reconcile to the bond or general fund allocation ▪ Reconcile the department financial reports to the district's accounting records ▪ Ensure the controls are adequate to confirm approval and adequacy of the funds available

Source. Gibson Consulting Group

Federal Programs – Title Funds Audit

School districts have multiple funding sources to achieve their core goal of educating and growing students. Federal funding streams often have strict requirements that must be met in order to be reimbursed for expenses or maintain eligibility for receiving funds. Title funds accounted for $2.1 million of expenditures during 2022-23, as shown in Table 2.

Table 2. Title Funds Expenditures, 2022-23

Funding Stream	Expenditures
Title I, Part A	$ 1,091,752
Title II, Part A	$ 540,630
Title III, Part A	$ 409,756
Title IV, Part A	$ 52,914
Total	**$ 2,095,052**

Source. Schedule of Expenditures of Federal Awards, Annual Comprehensive Financial Report, Leander ISD 2022-23

The purpose and expected use of each funding source is described immediately below.

▪ Title I, Part A: Improving the Academic Achievement of the Disadvantaged

  – **Purpose**: To provide financial assistance to local educational agencies (LEAs) and schools with high percentages of children from low-income families to help ensure that all children meet challenging state academic standards.

  – **Use of Funds**: Funds are used to support supplemental educational services, such as after school tutoring, summer school programs, and professional development for teachers. They can also be used to reduce class size, provide preschool education, and implement school-wide or targeted assistance programs.

- Title II, Part A: Preparing, Training, and Recruiting High-Quality Teachers, Principals, or Other School Leaders

  - **Purpose**: To help LEAs ensure that all students have highly qualified teachers by improving the quality of the teaching workforce.

  - **Use of Funds**: Funds can be used for professional development, recruitment of high-quality teachers, support for new teachers, and activities to improve the quality of instruction, including the use of technology.

- Title III, Part A: Language Instruction for Limited English Proficient and Immigrant Students

  - **Purpose**: To help LEAs and schools address the needs of English Language Learners (ELL) and immigrant students by improving their English language proficiency and academic achievement in other subjects.

  - **Use of Funds**: Funds are used for professional development for teachers working with ELL students, instructional materials, and supplemental educational services, such as tutoring and after school programs.

- Title IV, Part A: Student Support and Academic Enrichment Grants

  - **Purpose**: To provide LEAs with resources to support student health, safety, and well-being; to promote the development of well-rounded individuals; and to improve the conditions for teaching and learning.

  - **Use of Funds**: Funds can be used for a wide range of activities, including programs that focus on mental and behavioral health, student support services, physical education, arts education, and technology infrastructure.

In school districts, monitoring compliance with Title statutory requirements is typically placed in a federal programs department. This function is responsible for submitting required reports, ensuring that campuses perform required stakeholder engagement and planning practices, and that expenditures are allowable and align with grant applications. In Leander ISD, this function is performed by the State and Federal Programs Department.

The objectives of this audit are to evaluate the compliance, efficiency, and effectiveness of the Leander ISD State and Federal Programs Department with respect to the use of Title I through Title IV funds, and to identify opportunities for improvement.

Title Fund Audit Areas

State and Federal Programs Department – Organization and Management

The organizational structure, roles, and responsibilities within a state and federal programs department play an integral role in departmental effectiveness, efficiency, and customer service. An analysis of the organizational aspects related to this function will identify potential gaps or areas for improvement.

Below are examples of questions that we will be addressing in this section.

- Is the Leander ISD State and Federal Programs Department organized to support accountability for key functions?

- Are Title Fund stakeholders (academic administration, campus administration) satisfied with the quality and responsiveness of department services?

- How is the district using KPIs to ensure success of the State and Federal Programs Department and its strategic objectives?

Compliance with Laws and Regulations

Laws and regulations at the federal levels regulate how school districts can use Title funds. This involves the buy-in and diligence of many positions across the district, including many outside the State and Federal Programs Department. However, the Leander ISD Board charges the State and Federal Programs Department with monitoring and ensuring compliance with these laws, regulations, and rules.

Below are examples of questions that we will be addressing in this section.

- How does Leander ISD monitor its own compliance with Title laws, policies, and regulations?

- Is staff adequately trained on current Title program policies and regulations?

- What controls are in place surrounding campus compliance requirements for Title fund use?

Information Technology

Historically, monitoring compliance with Title program requirements at Leander ISD (based on information learned during the Internal Audit Risk Assessment) has been heavily reliant on spreadsheets and manual tracking. This is often prone to error and introduces inefficiencies.

Below are examples of questions that we will be addressing in this section.

- Do automated processes exist for monitoring compliance?

- Do systems reporting capabilities meet the needs of management and district leadership?

Title Fund Audit Activities

We will perform the following activities for the Title Fund Audit.

Interviews and Focus Groups

We will conduct interviews with key State and Federal Programs Department leadership and staff to understand their roles, responsibilities, and processes related to the scope areas outlined above. Additionally, we will facilitate focus groups with other district staff, such as principals, academic administrators, and other employees to document their views on State and Federal Programs Department customer service and their understanding of key Title fund processes.

50

Data Analysis

The approach to this audit will involve the analysis and triangulation of data from multiple sources, including district-provided data and documentation, comparisons to peers and best practices, and corroboration of information received through interviews and focus groups.

Process Mapping

Our team may document and map "as-is" processes for selected Title fund areas. These process maps can provide a clearer understanding of the current state and help identify potential gaps, inefficiencies, or control weaknesses.

Audit Testing

The audit team will conduct a series of audit tests to corroborate key State and Federal processes and obtain evidence of supporting documentation. Table 3 provides examples of tests that can be executed. The actual tests performed will be based on information collected early in the audit that points to potential control weaknesses.

Table 3. State, Federal, and Private Accountability Audit Transaction Tests

Audit Areas	Test	Audit Procedures
Program Expenditures	Authorization of Expenditures	Examine the approval flow to validate the disbursement was authorized.
Program Expenditures	Alignment of Expenditures	Examine a sample of transactions to determine if they aligned with a documented District goal or initiative.
Compliance Requirements	Title I Campus Requirements	Examine, for a sample of campuses, compliance with applicable laws and regulations, and meeting documentation requirements.

Source. Gibson Consulting Group

Human Resources Audit

A school district's human resources function has an outsized impact on the organization, and in Leander ISD, salaries and benefits represent approximately 85 percent of the school district's operating expenditures. The ability to identify, recruit, hire, onboard, train, and provide stimulating careers in a positive work environment are primary success factors for a human resource function. In Leander ISD, the Human Resources Department assumes responsibility for these important activities.

The objectives of this audit are to evaluate compliance, efficiency, and effectiveness of the Leander ISD Human Resources (HR) Department, and to identify opportunities for improvement.

Human Resource Audit Areas

Six major areas of HR management will be analyzed during this audit.

Human Resources Department Organization and Management

The organizational structure, roles, and responsibilities within an HR department play an integral role in departmental effectiveness, efficiency, and customer services. An analysis of the organizational aspects related to the HR function will identify potential gaps or areas for improvement.

Below are examples of questions that we will be addressing in this section.

- Is the HR Department organized to support accountability for key functions?

- Are HR customers satisfied?

- Are job descriptions maintained by the HR Department, and are they routinely updated to reflect current job, experience, skill, and education requirements?

- How is the district using KPIs to ensure success of the HR Department and its strategic objectives?

- How does the district's HR cost per district full-time employee (FTE) compare to the median benchmark data from the Council of Great City Schools (COGCS)?

Compliance with Laws and Regulations

Laws and regulations at the federal, state, and local levels regulate how school districts ensure equal employment opportunities, make hiring decisions, determine pay wages, meet the special needs of employees, assess performance, and provide required protections. The Leander ISD Board charges the HR Department with monitoring and ensuring compliance of these laws, regulations, and rules.

Below are examples of questions that we will be addressing in this section.

- How does Leander ISD monitor its own compliance with HR laws, policies, and regulations?

- Is staff trained and current on HR polices and regulations?

- What are the controls in place surrounding personnel files to ensure compliance?

Recruitment and On-Boarding Activities

One of the most important functions an HR Department serves is the staffing of the organization. Additionally, the HR Department is traditionally the first interaction an employee has with Leander ISD, meaning its staffing practices deeply influence the overall employee experience. Effective staffing includes three main functions:

- Position Management: the strategic creation, maintenance, and control of positions in the organization, as well as the assignment of employees to those positions, and the tracking of changes to assignments.

52

- Recruitment: the attraction and recruitment of high-quality candidates, as well as the use of interview protocols to identify the best candidate for the position.

- Hiring and Onboarding: the employee transactions that allow for a timely and effective entry into the organization for a new hire. This function also includes developing and implementing a comprehensive pay structure, as well as guidelines or pay rules for setting salaries for new hires.

Below are examples of questions that we will be addressing in this section.

- Are processes in place to track needed information for all positions?
- Does the position control system allow for effective budget planning and monitoring?
- Do current practices (and timelines) allow the district to secure a diversified and highly-qualified workforce?
- Is existing technology utilized to expedite the staffing process?
- Does onboarding ensure all new hires are up-to-speed on policies, processes, culture, expectations, and day-to-day responsibilities?

Employee Relations

Employee relations involve management of employee grievances and complaints, employee investigations, management of the employee performance evaluation process, employee recognition programs, and employee discipline.

Discipline and evaluation are two concepts that are highly interconnected. To discipline an employee, principals and other supervisors must have well-prepared documentation to substantiate any adverse employment action decision. But to have good documentation, supervisors need a well-crafted disciplinary policy to enforce. Additionally, an evaluation process is an important investment in a district's workforce. It promotes professional growth, meaningful collaboration, and increases staff retention.

A healthy and productive workplace also includes transparent and well-documented protocols for employees to file complaints and grievances. A fair and robust process for dealing with employee complaints and grievances instills trust and increases overall employee satisfaction.

Below are examples of questions that we will be addressing in this section.

- Are procedures for promptly resolving employee complaints and grievances followed?
- Does professional learning align to the employee's needs as identified through the performance appraisal process?
- Is there a clear and reasonable process that exists consistently for low performers?
- Are disciplinary actions progressive and do procedures adhere to district policy and state law?

Information Technology

HR functions typically employ many information systems to facilitate their processes. This could include a separate applicant tracking system, Enterprise Resource Management (ERP) system, position control module, and a learning management system. Separate from information systems, many districts have used technology to introduce automated workflows for many HR processes, such as requesting a transfer or completing new hire paperwork.

It is critical for data integrity and departmental efficiency that systems are integrated, and manual interventions are minimized.

Below are examples of questions that we will be addressing in this section.

- Do systems reporting capabilities meet the needs of management and district leadership?

- Does the district maintain a suite of integrated HR business systems which support HR and payroll operations?

- Does the district's ERP system seamlessly integrate the HR, financial management, and budgeting processes?

- Are self-service applications used to improve transactional efficiency and customer service?

Compensation and Benefits

Compensation and benefits represent monetary and non-monetary elements of an organization's expression of value for the work performed by its employees. To attract and retain employees, school systems must offer compensation and benefits programs that compare favorably to other options in the marketplace, and fall within the spending limitations of a school district's annual operating budget. Because of the wide range of position types in an industry that is highly labor-intensive, and because of public access to employee-level compensation information, it is challenging to develop pay systems that meet internal needs and pass public scrutiny. In this context, it is important that compensation and benefits programs are fair and equitable, and communicated to current and potential employees.

This audit will also look for any evidence of salary compression. Salary compression is a situation that occurs when there is only a small difference in pay among employees with a wide range of skills or experience, or conversely when there is a large variance in pay among employees having similar experience and skill backgrounds. Salary compression can contribute to pay inequities that need to be addressed.

Below are examples of questions that we will be addressing in this section.

- Do compensation rates fall within board-approved ranges?

- Does salary compression or other pay inequities exist?

- Are there high participation rates in employee benefit programs?

Human Resources Audit Activities

We will perform the following activities for the Human Resources Audit.

Interviews and Focus Groups

We will conduct interviews with key Human Resources Department leadership and staff to understand their roles, responsibilities, and processes related to the scope areas outlined above. Additionally, we will facilitate focus groups with other district staff, such as principals, newly-hired employees, and other employees to document their views on HR customer service and their understanding of key HR processes.

Data Analysis

The approach to this audit will involve the analysis and triangulation of data from multiple sources, including district-provided data and documentation, comparisons to peers and best practices, and corroboration of information received through interviews and focus groups. Examples of Gibson's analyses are included below. Table 4 compares a sample district's HR cost per FTE employee to benchmarks from the COGCS.

Table 4. HR Cost per FTE Employee Compared to COGCS Benchmarks (SAMPLE ONLY)

Year	HR Expenditures	FTE	District HC Cost per FTE	COGCS Lower Quartile	COGCS Median	COGCS Upper Quartile
1	$9,713,297	11,099	$875	$454	$654	$989
2	$14,625,484	11,005	$1,329	$420	$583	$984
3	$13,511,730	10,940	$1,235	$403	$656	$1,005

Source. Gibson Consulting Group

In another example, Figure 6 shows responses to a survey question regarding employee satisfaction with the onboarding program.

55

Figure 6. Gibson Staff Survey Results: "The District's onboarding program adequately prepares new hires." (SAMPLE ONLY)

Legend: ■ Strongly Disagree ■ Disagree ■ Neutral ■ Agree ■ Strongly Agree
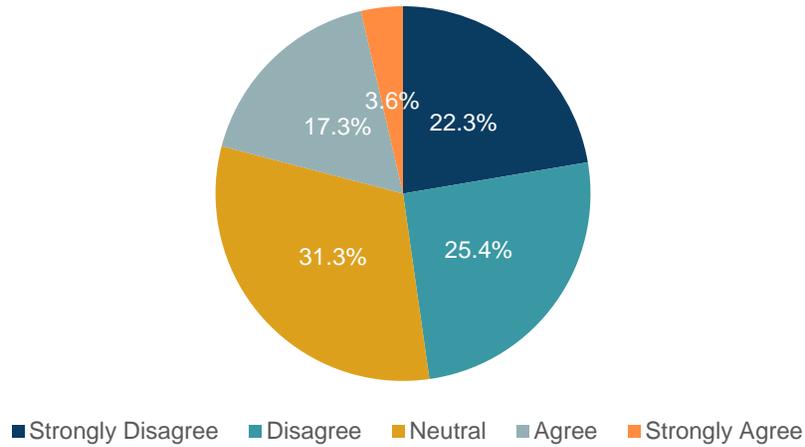
Source. Gibson Consulting Group

Figure 7 below illustrates a type of compensation analysis. This analysis shows the relationship between pay rates (vertical axis) to years of experience (horizontal axis) to identify evidence of salary compression (i.e., inconsistencies between pay and experience levels).

Figure 7. Hourly Pay and Experience Analysis – Single Paygrade
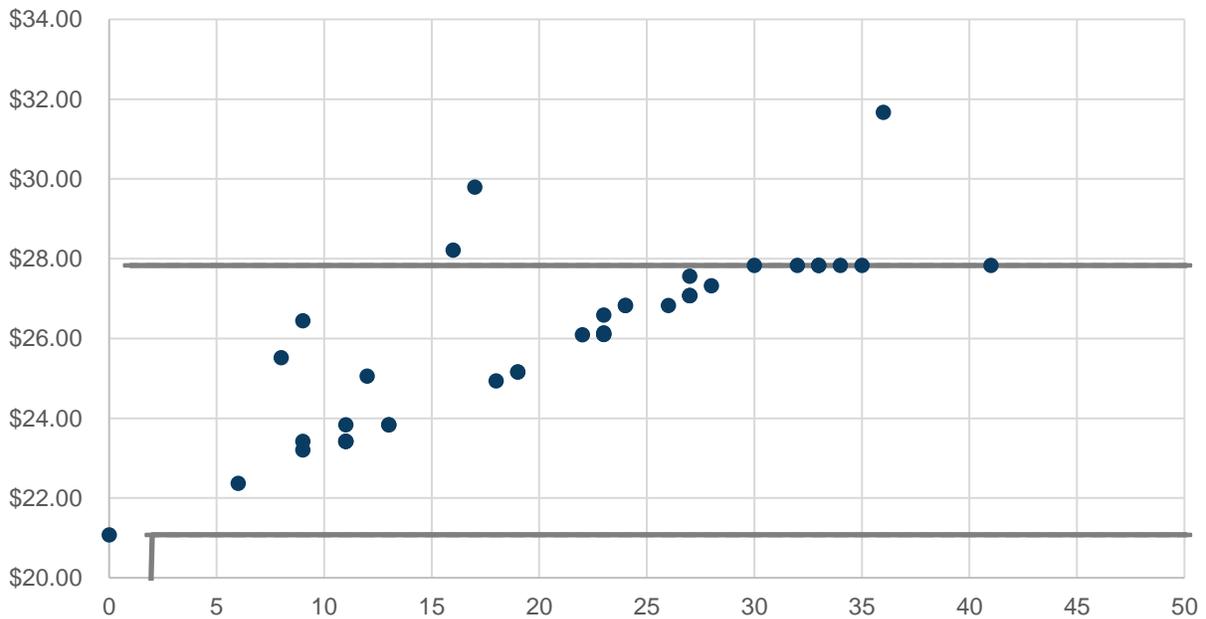
Source. Gibson Consulting Group

56

Process Mapping

Our team may document and map "as-is" processes for selected HR areas, which may include recruit-to-hire, position control (including transfers and terminations), and employee complaints and grievances. These process maps can provide a clearer understanding of the current state and help identify potential gaps, inefficiencies, or control weaknesses.

Audit Testing

The audit team will conduct a series of audit tests to corroborate key HR processes, obtain evidence of supporting documentation, and validate compliance with Leander ISD Board policies. Table 5 provides examples of tests that can be executed. The actual tests performed will be based on information collected early in the audit that points to potential control weaknesses.

Table 5. Human Resources Audit Testing

Test Name	Test Overview
Personnel Files	A sample of personnel files are reviewed to ensure that all key documents (i.e., application, employee recommendation, resume, fingerprint receipt, etc.) were retained within the file.
Hiring Timeline	A listing of employees hired are analyzed to determine the time it takes to hire new employees.
Job Fair Applicants	A listing of applicants is obtained and compared to a listing of District employees to determine the number of applicants from a job fair that were hired by the District.
Employee Appraisals	A sample of personnel files are audited to ensure that documented appraisals were conducted in accordance with Board policy.
Temporary Employees	A listing of temporary employees is analyzed to ensure that ERISA and TRS regulations pertaining to temporary employees were complied with.
Access Levels	A listing of employees with key card access to the personnel file room, and a listing of employees with access to the human resources/payroll system, are analyzed to determine the appropriateness of these access levels.
Validation of Staffing Guidelines	A sample of campuses are selected to ensure staffing guidelines were applied correctly.
Employee Mobility	Using the five (5) year history of staffing data, the audit team compares the location codes of employees from year to year to quantify the movement of employees between schools.
Workers' Compensation Claims	The support for a sample of workers' compensation claims is reviewed to ensure timely reporting of the claims and proper documentation.
Applicant Tracking	A listing of applicants is obtained to quantify the number of out-of-date applications that have not been removed from the system.

Source. Gibson Consulting Group

Internal Audit Program Management

Gibson will help guide the Board Audit Committee through each of the audits, assist in managing Board Audit Committee meetings, develop monthly program progress reports, and actively monitor recommendation implementation of prior audits. We will also develop an annual internal audit report summarizing the year's activities and making any suggestions for improvements to the Internal Audit Program.

During this school year we will also work with the Board Audit Committee to design and develop an internal audit dashboard to monitor the implementation of audit recommendations. This will help ensure accountability for implementing and achieving the desired benefits of audit recommendations.

Schedule and Fees

Below are estimated timetables for each of the above audits to be completed. The ability to meet these schedules is highly dependent on the availability and accuracy of data requested, and the availability of staff to participate in interviews, focus groups, and when applicable, school visits. Program management services will be spread out over the entire fiscal year.

- Academic Program Management Audit: Eight (8) months
- Construction Management Audit: Seven (7) months
- Federal Programs – Title Funds Audit: Five (5) months
- Human Resources Audit: Eight (8) months

After the board selects the internal audits to be performed in FY 2025, we will develop a detailed schedule for each project.

We have based the estimates of hours and fees for these projects on our understanding of the objectives of each audit and on our familiarity with the systems and processes in place at Leander ISD. Table 6 shows the estimated professional fees and expenses necessary to complete each audit. We have based our professional fees on the hourly rates for each consultant participating in the internal audit services for 2024-25. It is not anticipated that the Leander ISD will conduct all of these audits in FY 2025, but will select from this list based on existing budget constraints and other factors.

Table 6. Estimated Fees and Expenses by Audit

Audit Area	Cost
Academic Program Management	$196,420
Construction Management*	$168,742
Federal Programs – Title Funds	$89,945
Human Resources	$139,050
Program Management	$35,000

Note. (*) Other Gibson clients have used Bond Program contingency funds to support the investment in Construction Management Audits. This may be an option for Leander ISD.

58

Gibson will be applying the following hourly rates for professional fees, which are the same rates as those applied during 2023-24.

Table 7. Hourly Rates, 2024-25

Project Role	Hourly Rate
Director	$250
Senior Auditor	$220
Auditor	$195
Professional Support	$145
Subcontractors	At Cost

Professional fees and expenses for the cost of selected audits and program management services will be billed in ten equal amounts from September 30, 2024, through June 30, 2025. Payment of invoices is due within 30 days of receipt, and will be remitted to Gibson's lockbox address with Gulf Coast Bank and Trust.

In the table at the end of this letter, please indicate which audit services you would like to select for FY 2025 (in column three – with a "yes"). For the audits selected, please extend the dollar amount in column four, and calculate the total of all selected audits. Program management services are required. Upon selection of audit projects, and if you are in agreement with the terms of this cost proposal, please sign in the space provided below the table and return to us.

* * * * *

We look forward to working with you and the members of the Leander ISD School Board as your internal auditors and advisors in FY 2025. Gibson will devote its best efforts to the work to be performed under this assignment, and any findings, recommendations, or other written materials will represent our best professional judgment based on the information made available to us.

If you have any questions, please contact me at 512.694.6704 or ggibson@gibsonconsult.com.

Sincerely,

Greg Gibson, President
Gibson Consulting Group, Inc.

Audit Selection

Please indicate which audit services you would like to select for FY 2025 (in column three – with a "yes"). For the audits selected, please extend the dollar amount in column four, and calculate the total of all selected audits. Program management services are required. Upon selection of audit projects, and your agreement with the terms of this cost proposal, please sign in the space provided below and return to us.

Area	Estimated Budget	Selected for FY 2025?	Extended Amount
Academic Program Management	$196,420		
Construction Management	$168,742		
Federal Programs – Title Funds	$89,945		
Human Resources	$139,050		
Internal Audit Program Management	$35,000	Yes	$35,000
Total (of selected audits)			

Accepted:

Leander Independent School District

_____   _____

Signature   Title

_____

Date

Internal Audit Risk Assessment
Final Report

Prepared for:
Leander Independent
School District

June 2024

Submitted By:
Gibson Consulting Group, Inc.
P.O. Box 300816
Austin, Texas 78703
512.328.0884
www.gibsonconsult.com

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

Table of Contents

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

Chapter 1: Executive Summary

The Leander Independent School District (Leander ISD, LISD, the district) engaged Gibson Consulting Group (Gibson) in December 2023 to conduct a risk assessment to help guide future internal audit efforts. Gibson has provided internal audit services to Texas school systems since 2012, with the overriding objective of continuous improvement.

The Institute of Internal Auditors (IIA) defines internal audit as an independent, objective assurance and consulting activity designed to add value and improve an organization's operations. Internal audits help an organization accomplish its objectives by bringing a systematic, disciplined approach to evaluating and improving the effectiveness of risk management, control, and governance processes. IIA standards also require that internal audit plans must be based on a documented risk assessment.[1]

The primary purpose of a risk assessment is to drive the sequencing of specific internal audit projects and related follow-up audits, based on their relative risk to the organization. These projects are scheduled through an audit plan over a period of multiple years, depending primarily on the desired annual investment and the internal capacity of the organization to support the internal audit process. Each year, the risk assessment and audit plan should be updated based on events, changing priorities, and other factors. Figure 1 depicts the internal audit life cycle and the relationship of the risk assessment to the audit plan and audit projects.

Figure 1. Internal Audit Life Cycle

Source. Gibson Consulting Group

---

[1] Institute of Internal Auditors website: https://na.theiia.org/standards-guidance/mandatory-guidance/Pages/Definition-of-Internal-Auditing.aspx.

Gibson established a list of auditable areas – often referred to as the audit universe – for the risk assessment (Table 1). Many organizations view internal audits only through a financial lens, focusing exclusively on financial risks. However, the IIA standards speak of risks in the context of any organizational objective, and include not only internal controls and compliance, but also efficiency and effectiveness of all programs and operations.

Table 1. Leander ISD Audit Universe

Administrative	Operational	Programs
Accounts Payable	Construction Management	Academic Program Management
Asset Management	Facilities Management	Bilingual/English as a Second Language (ESL)
Communications Management	Nutrition Services	Career and Technical Education (CTE)
Financial Management	Safety and Security	Co-curricular Activities
Governance	School Activity Funds	Federal Programs
Human Resources	Transportation	Gifted and Talented (G/T)
Payroll		Research and Evaluation
Student Information System (SIS)/Public Education Information Management System (PEIMS)		Special Education
Procurement/Contracts		Student Services
Risk Management		
Technology		

Source. Gibson Consulting Group

Each of the selected areas shown in Table 1 above was evaluated against nine risk factors identified by Gibson. The nine risk factors are:

1. Potential for fraud or theft;

2. Risk of inaccurate data and reporting;

3. Risk of non-compliance;

4. Risk of failing to meet program or project goals and objectives;

5. Health and safety risk;

6. Risk of being inefficient;

7. Management risk;

8. Potential for litigation; and

9. Risk of negative public sentiment.

Each risk factor is described in more detail in *Chapter 3: Methodology* of this report.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

Gibson performed extensive data analysis and conducted interviews to form the foundation of the risk assessment and establish a basis for risk scoring and ranking each area. Several global themes emerged from this risk assessment for Leander ISD:

- New leadership in many departments has increased management risk across the district.

- Documented procedures and procedural training exist in many areas, but are not implemented systemwide.

- Manual processes and review controls exist in many areas, either due to potential system limitations or a reliance upon previous operating philosophies. Multiple interviewees stated that the district is trying to modernize systems and processes to better fit a large district, but is still holding on to potentially outdated approaches in some areas.

The five audit areas with the highest scaled risk scores are presented below, along with the primary factors driving the assessment of risk for each area.

1. **Construction Management** – Construction projects, specifically those funded by bonds, are highly visible to the public and require a substantial investment by the district, increasing inherent risks. In May 2023, voters approved three bond proposals supporting a $694.5 million investment in constructing, modernizing, or repurposing district facilities, the largest program to date. Specific to Leander ISD, project management practices are unstandardized and primarily reliant on institutional knowledge. Substantial turnover has occurred in the Construction Department, and the current bond is significantly larger than previous bonds managed by the group.

2. **Human Resources** – A highly complex regulatory environment increases the inherent risk of the human resources function. The risk factors within human resources are magnified by the fact that over 80% of general fund expenditures are for personnel. Nationally, a labor shortage for education has increased pressures on recruitment and onboarding activities for every school district human resource function. Specific to Leander ISD, interviewees expressed concerns around data inaccuracies in personnel files and the reasonableness of compensation structures. Additionally, a reliance on paper personnel files greatly hinders departmental efficiency.

3. **Academic Program Management** – Similar to human resources, the regulatory environment surrounding academic program management is highly complex, with many data reporting requirements. Pressures on this audit area can be immense, as districts are ultimately graded by the Texas Education Agency (TEA) based on academic results and progress. Specific to Leander ISD, there appears to be a lack of clear, well-defined processes for ensuring data accuracy across the various assessments given, such as curriculum-based assessments (CBAs), the Measures of Academic Progress (MAP) tests, and the State of Texas Assessments of Academic Readiness (STAAR). Additionally, high staff turnover increases the risk of sustaining consistent processes and making progress towards achieving the district's instructional goals over time.

4. **Special Education** – The inherent risk in special education is high due to the nature of the services provided and the complex regulatory requirements that govern them. Specific to Leander ISD, several lawsuits and formal parent complaints regarding eligibility, Individualized Education Plan (IEP) quality, and service provisions have occurred during the previous five years, indicating

potential areas of concern. Additionally, high turnover rates were noted, especially in self-contained and behavior classrooms, increasing the risk of service implementation fidelity.

5. **Facilities** – Districts have large building footprints that must be efficiently cleaned and maintained. The current labor environment has resulted in staff shortages in trades and grounds crews nationwide. Specific to Leander ISD, an inefficient and manual work order system is used, contributing to data integrity risks as well as insufficient information to effectively manage this function's efficiency and effectiveness. A new work order system will be implemented in FY 2025, which will mitigate this specific risk, but prompts system implementation risks as well. Further, staffing challenges have limited the achievement of preventive maintenance goals, putting equipment and facilities at risk for greater repairs in future years.

Based on this risk assessment, Gibson has proposed a sequence of internal audit activities in Table 2. This sequence differs slightly from the risk ranking due to the existence of current or recent consulting efforts initiated by the LISD administration and other variables described in the comments section.

Table 2. Proposed Sequence of Internal Audit Activities

Audit Area	Risk Ranking	2024-25	2025-26	2026-27	2027-28	Comments
Construction Management	1	X				
Human Resources	2	X				
Federal Programs	9	X				Included in 2024-25 due to a lower estimated level of effort for audit completion.
Academic Program Management	3		X			
Special Education	4		X			Proposed for 2025-26 due to recent consulting efforts in this area.
Facilities Management	5		X			
Financial Management	6			X		
Safety and Security	7			X		
Transportation	8				X	Proposed for 2027-28 due to recent consulting efforts in this area.
Procurement and Contracts	10				X	

Source. Gibson Consulting Group

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

The suggested next steps for the board are to incorporate the information contained in this Risk Assessment Report, along with any other factors deemed relevant by the board, into the development of a long-range internal audit plan.

The remainder of this report is organized into the following three chapters:

- Chapter 2: Leander ISD Historical Profile

- Chapter 3: Methodology

- Chapter 4: Risk Assessment Results

Gibson wishes to express its thanks to the Leander ISD superintendent and management team for their efforts and responsiveness in providing data to support the risk assessment, and for their time – as well as the board's – in providing valuable insights through interviews.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

Chapter 2: Leander ISD Historical Profile

Leander ISD is located in Williamson and Travis Counties and serves students from Leander, as well as parts of Cedar Park and Austin. Leander ISD is comprised of 29 elementary schools, nine middle schools, six high schools, and three alternative campuses.

In 2021-22, Leander ISD received an overall "B" rating in the TEA accountability system, with an overall score of 89 out of 100. According to TEA, "The 2023 accountability reports are not yet publicly available. The release of these reports is pending judicial ruling and decisions from the 88th Legislature during a special called session."

Student Profile

Figure 2 presents Leander ISD student membership from 2018-19 to 2022-23. Since 2018-19, membership has increased by 2,381 students (6.0%). The largest annual percentage increase occurred between 2018-19 and 2019-20, when membership rose by 3.4%. LISD experienced a 2.5% decline between 2019-20 and 2020-21, due to the impact of COVID-19. Since then, however, student membership rebounded with the addition of more than 2,000 students, an increase of 5.1%, to a level that exceeds pre-pandemic student membership.

Figure 2. LISD Student Membership, 2018-19 to 2022-23
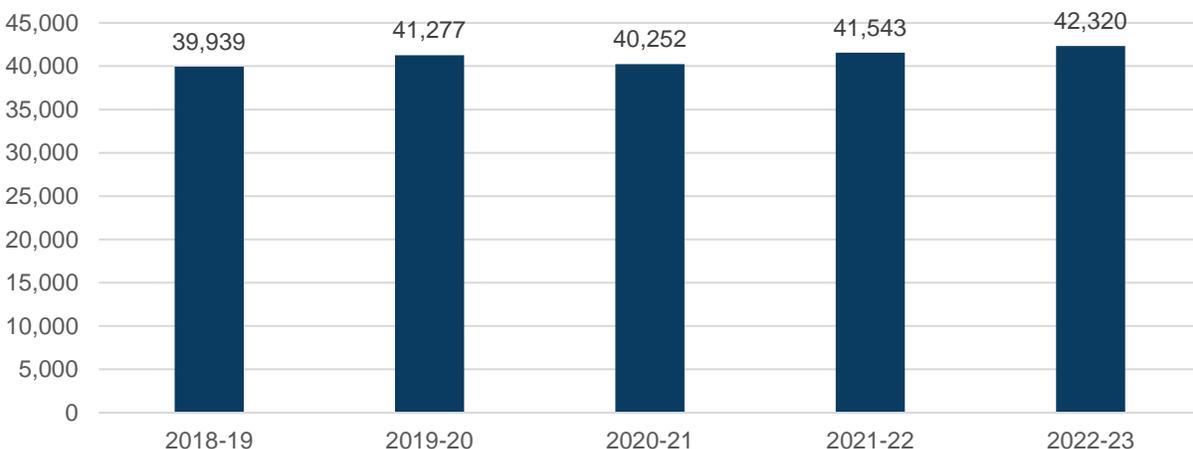
Source. TEA Texas Academic Performance Reports (TAPRs), 2018-19 to 2022-23

Figure 3 shows the district's student population by ethnicity over the past five years. The percentage of African-American students remained relatively stable over the years, with a slight fluctuation from 4.1% in 2018-19 to 4.5% in 2021-22, and then back to 4.4% in 2022-23. The percentage of Asian students increased steadily from 8.5% in 2018-19 to 14.9% in 2022-23, showing a consistent upward trend. The percentage of Hispanic students also showed a slight increase from 25.7% in 2018-19 to 26.3% in 2022-23, with some fluctuations in between. The percentage of White students decreased from 56.2% in 2018-19 to 47.8% in 2022-23. The percentage of students in the "Other" category, which includes Pacific Islander students, Native American students, and students with two or more races, showed a slight increase from 5.5% in

2018-19 to 6.7% in 2022-23. Overall, the data reflects changes in the demographic composition of students at LISD, with notable increases in the Asian and "Other" categories, a slight increase in the Hispanic category, and a decrease in the White category over the years.

Figure 3. LISD Percentages of Students by Ethnicity Demographics, 2018-19 to 2022-23
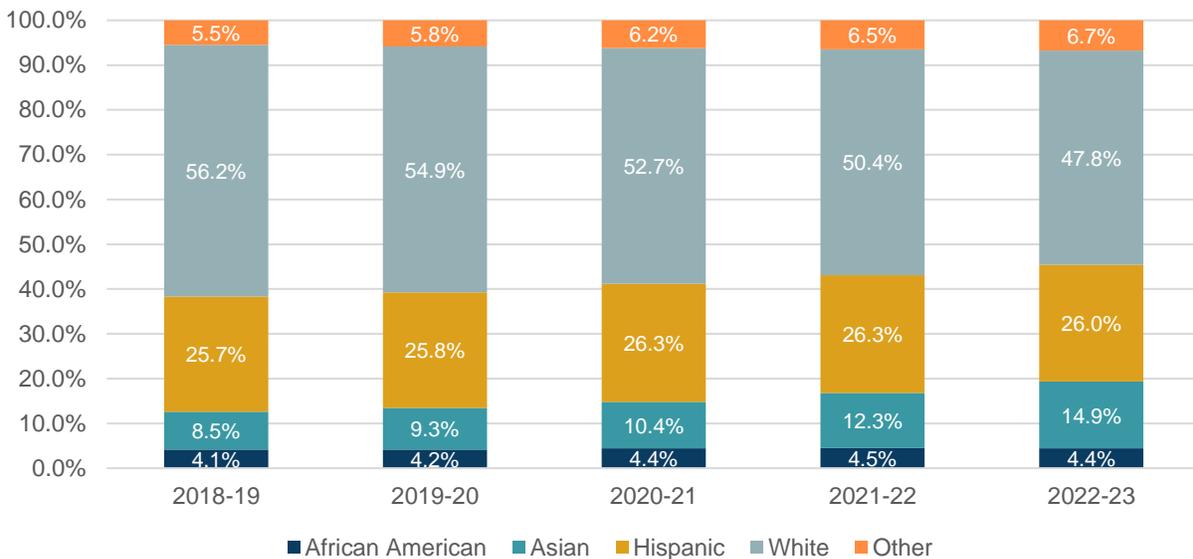
Note. The "Other" category includes the percentages of Pacific Islander students, Native American students, and students with two or more races.

Source. TEA TAPRs, 2018-19 to 2022-23

Figure 4 compares the percentage of students enrolled in special education at LISD to the state average during the past five years. From 2018-19 to 2022-23, the percentage of students with disabilities in the district increased from 11.8% to 14.0%. Over the same period, the percentage of students with disabilities in the state increased from 9.6% to 12.6%. LISD levels have consistently been higher than the state average, but to a lesser degree since 2020-21.

Figure 4. LISD and State Average Special Education Population, 2018-19 to 2022-23

Source. TEA TAPRs, 2018-19 to 2022-23

Figure 5 shows the percentage of students identified as bilingual learners at LISD. The percentage of bilingual learner students increased from 6.8% in 2018-19 to 12.3% in 2022-23, representing an increase of 5.5 percentage points (reflecting 81% growth) over the five-year period. Over the same period, the percentage of bilingual learners in the state increased from 19.5% in 2018-19 to 23.2% in 2022-23, or 3.7 percentage points (reflecting 18% growth).

Figure 5. Percentage of Bilingual Learners, 2018-19 to 2022-23, LISD and State Average
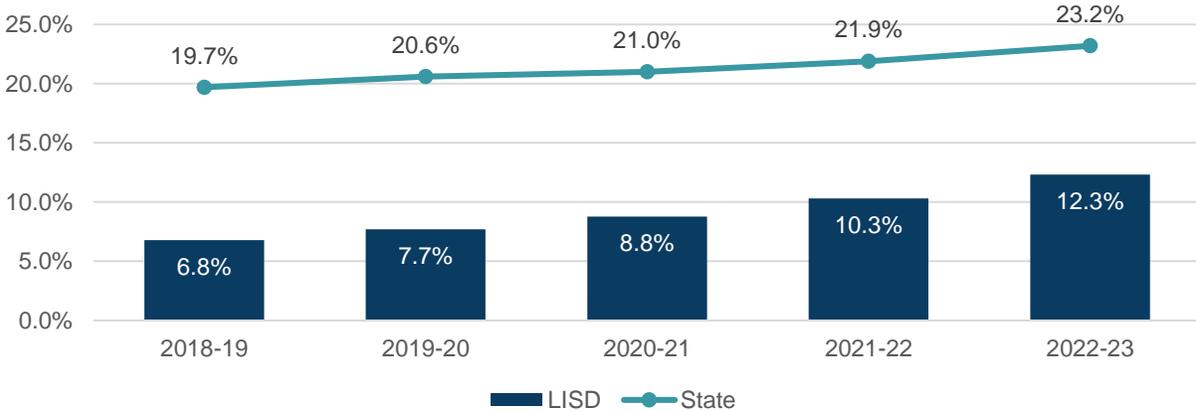
Source. TEA TAPRs, 2018-19 to 2022-23

Figure 6 compares the percentage of economically disadvantaged students at LISD to the state average since 2018-19. Leander ISD's percentages have been significantly lower than the state average across all years shown. LISD's percentage declined slightly from 20.3% in 2018-19 to 18.0% in 2020-21, but then increased to 19.9% in 2022-23. The state average has increased slightly, ranging from 60.3% to 62.1% during the period covered.

Figure 6. Percentage of Economically Disadvantaged Students, 2018-19 to 2022-23, LISD and State Average

Source. TEA TAPRs, 2018-19 to 2022-23

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP
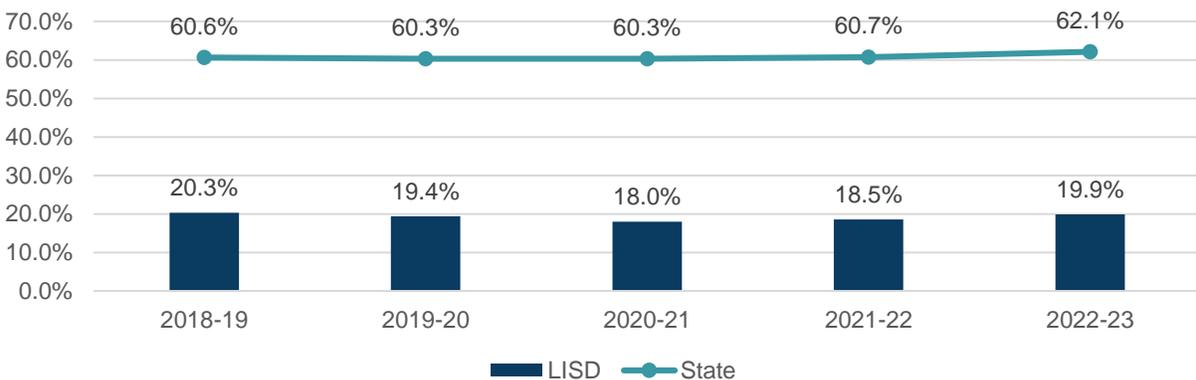
Staffing and Spending

Figure 7 presents the number of full-time equivalent (FTE) staff at Leander ISD from 2018-19 to 2022-23. FTE counts increased annually, from 4,947 in 2018-19 to 5,290 in 2021-22, an increase of 343 FTE staff, or 6.9%. The greatest increase during this time occurred between 2019-20 and 2020-21 (during the pandemic), when FTEs increased by 236 staff, or 4.7%. A slight FTE reduction (of 13 FTEs) occurred between 2021-22 and 2022-23.

Figure 7. Leander ISD All Staff FTE Count, 2018-19 to 2022-23
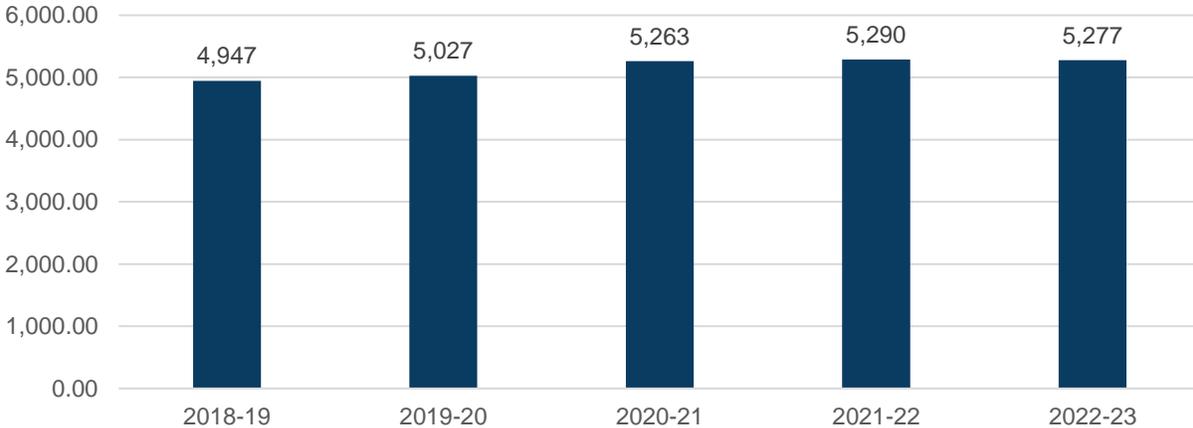
Source. TEA TAPRs, 2018-19 to 2022-23

Figure 8 shows LISD's student-to-total staff ratio compared to the state ratios. This measure serves as an indicator of overall staffing efficiency. A higher ratio indicates higher staffing efficiency, as there are fewer staff relative to the student population. Leander ISD's student-to-total staff ratio has remained higher than the state average across all years shown, indicating higher staffing efficiency. In 2018-19, Leander ISD's ratio was 8.1 students per staff, compared to 7.5 for the state. The ratio of LISD peaked in 2019-20, followed by a large decrease in 2020-21 due to the enrollment reductions and staff increases during the pandemic. The ratio increased in 2021-22 and 2022-23, as more students returned to LISD while staffing remained constant.

Figure 8. Student-to-Staff Ratio, 2018-19 to 2022-23, LISD and State Average
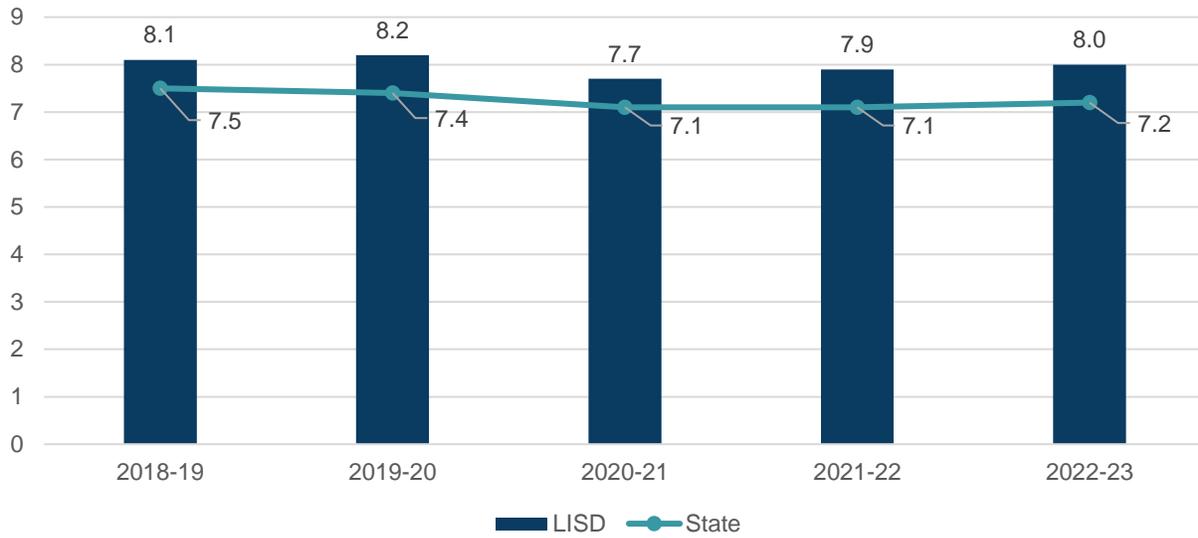
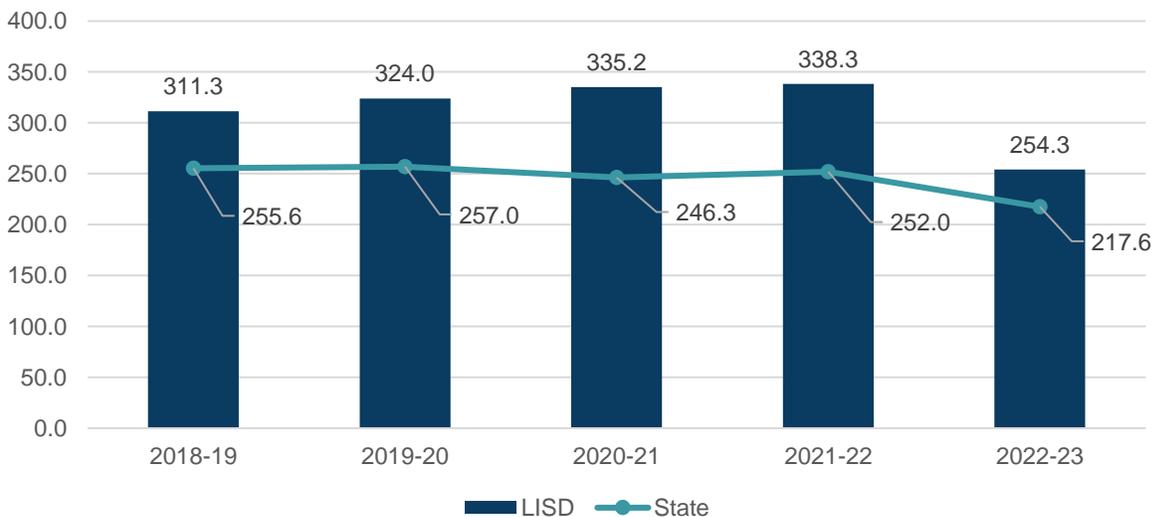Source. TEA TAPRs, 2018-19 to 2022-23

Figure 9 compares LISD's student-to-teacher ratio to the state average for the past five years. Overall, Leander ISD has maintained a lower student-to-teacher ratio than the state average across four of the five years shown, which indicates more teachers for the student population relative to the state.

Figure 9. Student-to-Teacher Ratio, 2018-19 to 2022-23, LISD and State Average
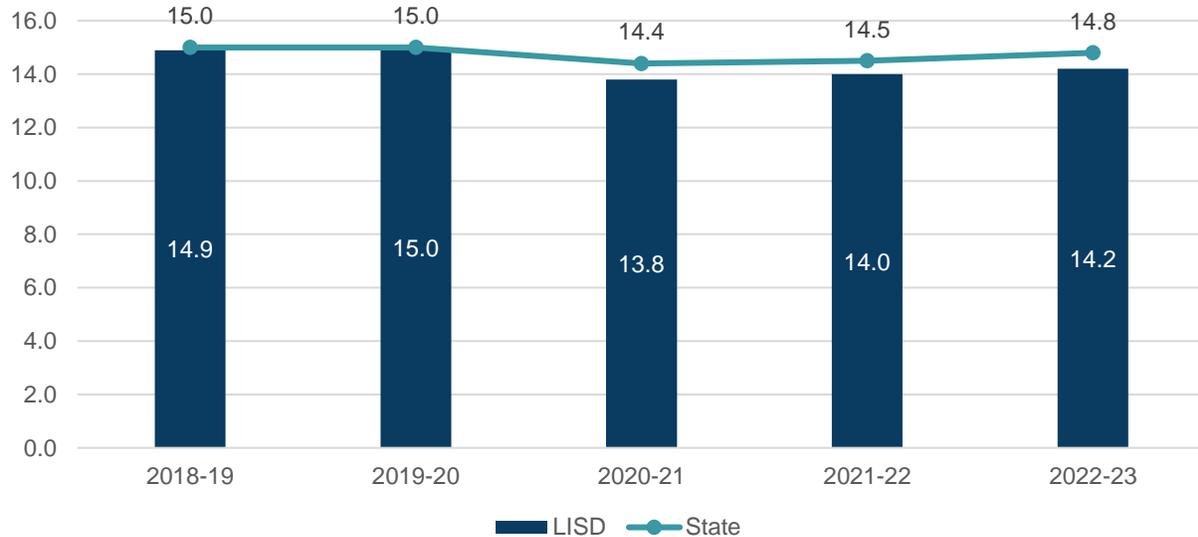
Source. TEA TAPRs, 2018-19 to 2022-23

Figure 10 presents the student-to-non-teacher ratio compared to the state average since 2018-19. Leander ISD has consistently shown a higher student-to-non-teaching staff ratio than the state average. This indicates that LISD has fewer staff to support their student population relative to the state.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

While Leander ISD's ratio has fluctuated year to year, increasing by about 5.7% overall from 17.5 in 2018-19 to 18.5 in 2022-23, the state average has remained more stable, decreasing slightly from 14.8 to 14.0 over that same five-year period.

Figure 10. Student-to-Non-Teacher Ratio, 2018-19 to 2022-23, LISD and State Average
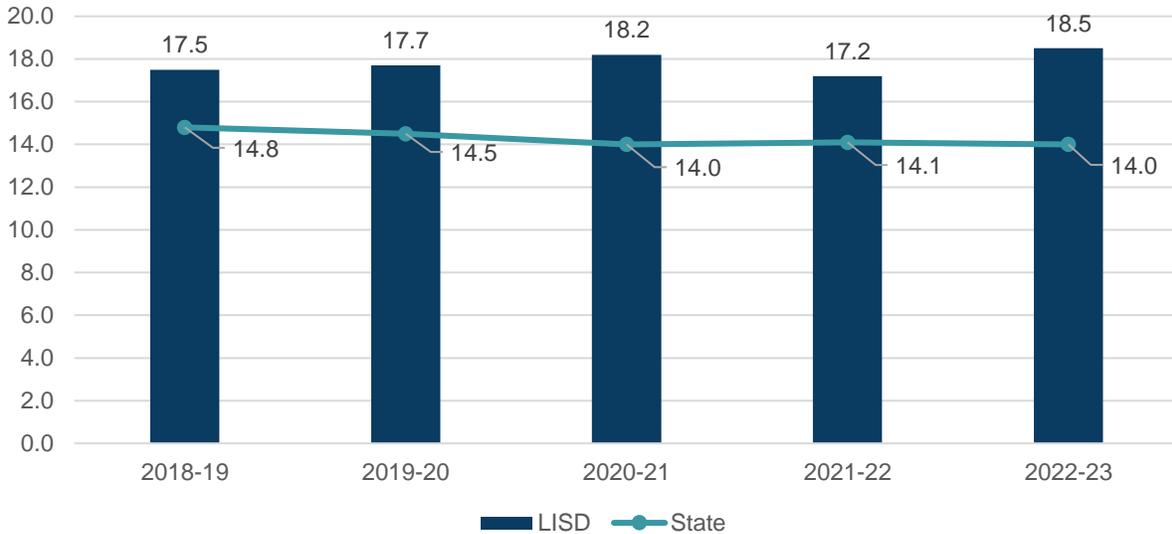
Source. TEA TAPRs, 2018-19 to 2022-23

Figure 11 provides the student-to-school administrator ratio compared to the state ratio since 2018-19. Leander ISD has consistently exceeded the state average in each year shown. However, the district's ratio sharply declined in 2022-23. A coding change occurred where Instructional Coaches were previously recorded as Professional Support staff. LISD's ratio change mirrors the state change in this ratio.

Figure 11. Student-to-School Administrator Ratio, 2018-19 to 2022-23, LISD and State Average

Source. TEA TAPRs, 2018-19 to 2022-23

Figure 12 compares LISD's total operating revenue per student (general fund) to the state average for the past five years. During each of the past five years, LISD has fallen behind the state average.

Figure 12. Total Operating Revenues per Student, TEA Snapshot, (General Fund) 2018-19 to 2022-23
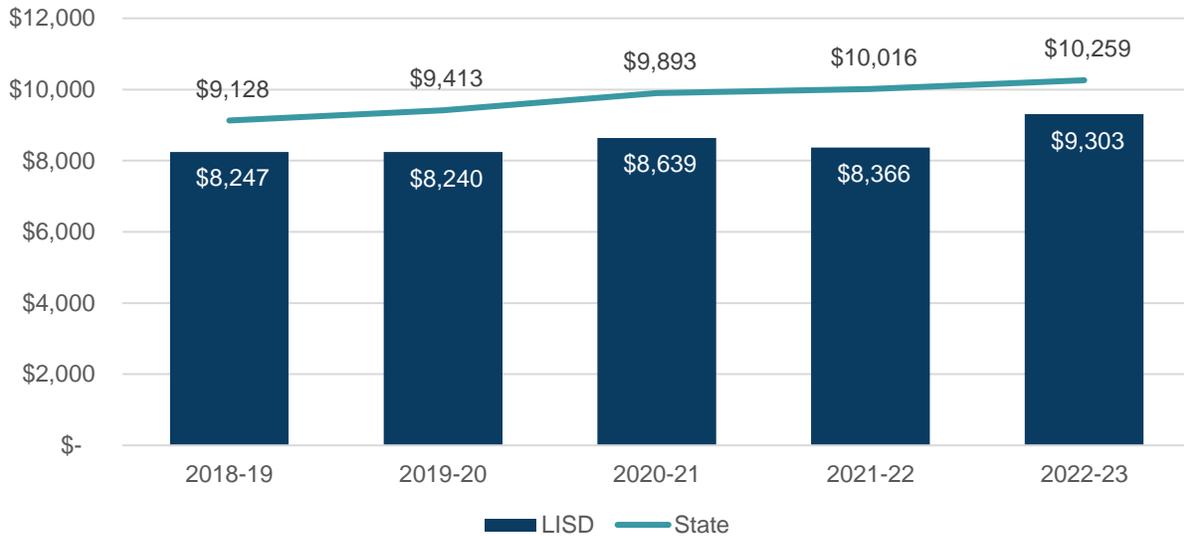
Source. TEA PEIMS District Financial Actual Reports, 2018-19 to 2022-23

Figure 13 compares LISD's total operating expenditures per student to the state average for the past five years. LISD's expenditures per student (all funds) has been consistently lower than the state average in each year shown.

Figure 13. Total Operating Expenditures per Student, TEA Snapshot, (All Funds) 2018-19 to 2022-23
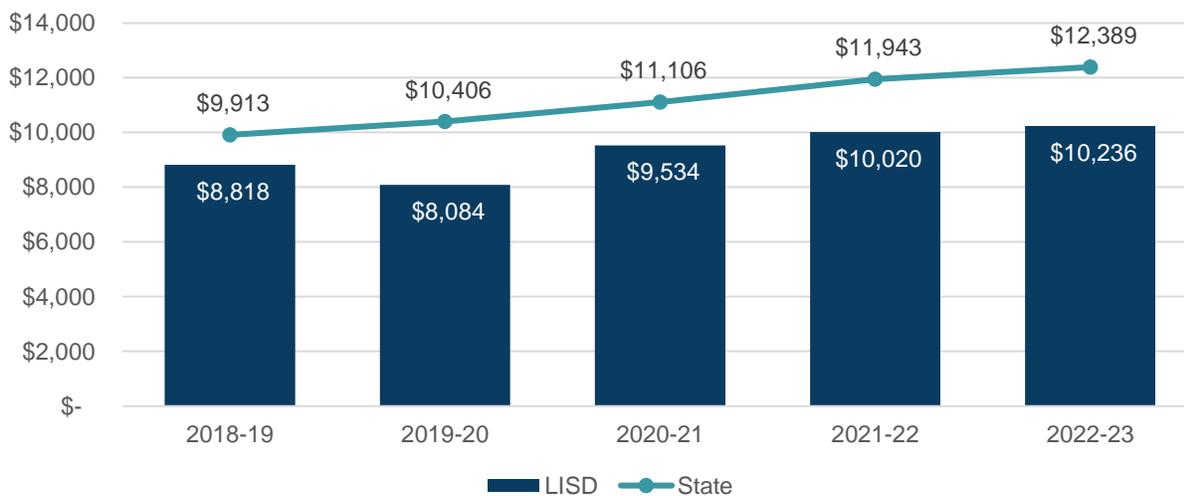
Source. TEA TAPRs, 2018-19 to 2022-23

Figure 14 depicts the total operating expenditures within the general fund per student at LISD from 2018-19 to 2022-23. Overall, the total operating expenditures within the general fund per student have increased over this five-year period. The largest increase occurred between 2019-20 to 2020-21, with an increase of $1,550 per student, or 20.9%. When compared to the state average, LISD has expended fewer general fund dollars per student in each of the presented years.

Figure 14. Total Operating Expenditures per Student, TEA Snapshot, (General Fund) 2018-19 to 2022-23
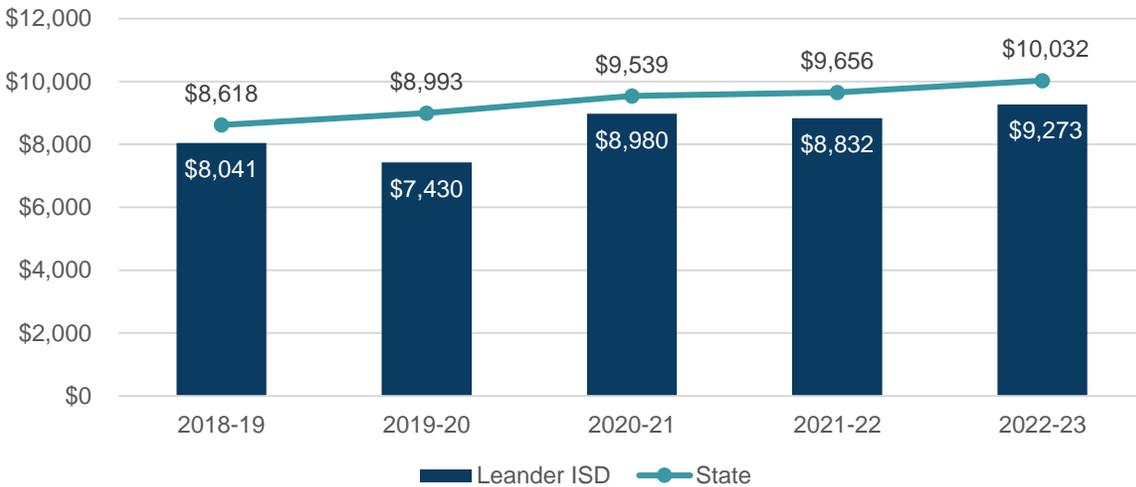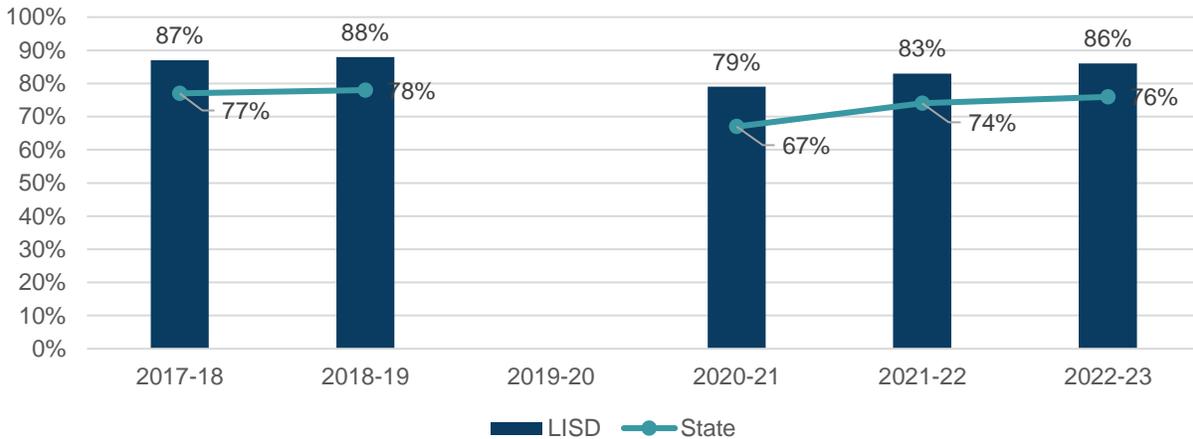

Source. TEA TAPRs, 2018-19 to 2022-23

Student Achievement

Figure 15 presents the percentage of students across all grade levels and subjects who met the "Approaches Grade Level or Above" standard on the STAAR exams. Overall, Leander ISD has outperformed the state average across all years shown in terms of the percentage of students meeting this standard. In 2018-19, 88% of Leander ISD students met this standard, compared to 78% for the state. Both Leander ISD and the state saw declines in 2020-21, with Leander ISD outperforming the state average. LISD has improved each year since the pandemic, nearly approximating its pre-pandemic performance by this measure.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

Figure 15. "STAAR Approaches Grade Level" – All Grades All Subjects, 2017-18 to 2022-23
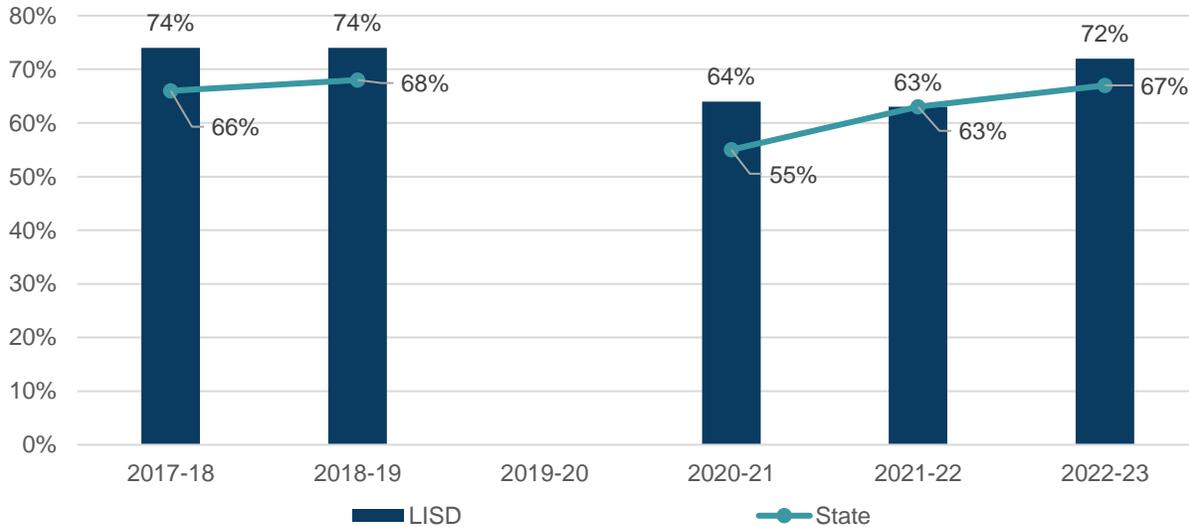

Note. The 2019-20 school year is missing due to the COVID-19 pandemic.

Source. TEA TAPRs, 2017-18 to 2022-23

Figure 16 shows the percentage of African-American students across all grade levels and subjects who met the "Approaches Grade Level or Above" standard on the STAAR exams. With the exception of 2021-22, African-American students in Leander ISD have outperformed the state average.

Figure 16. African-American Students, STAAR "Approaches Grade Level" – All Grades All Subjects, 2017-18 to 2022-23
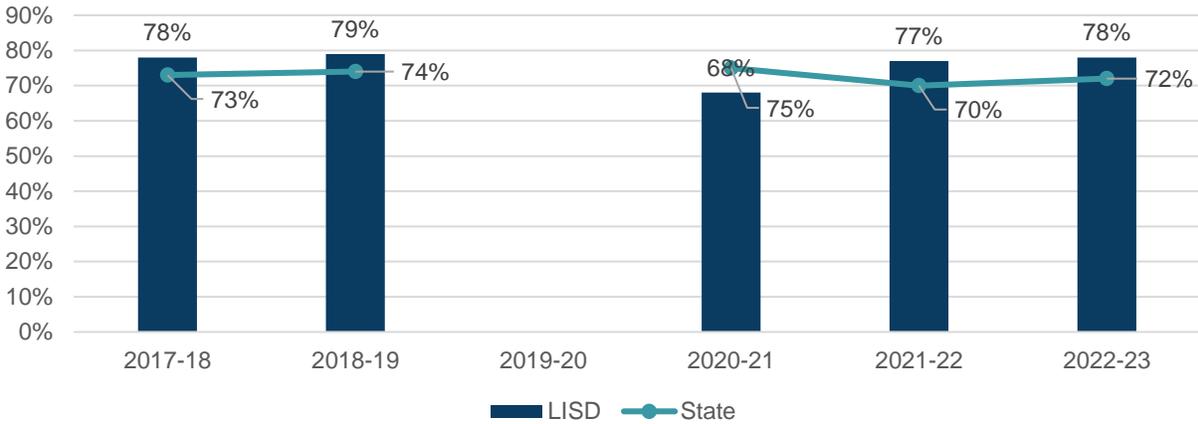

Note. The 2019-20 school year is missing due to the COVID-19 pandemic.

Source. TEA TAPRs, 2017-18 to 2022-23

Figure 17 shows the percentage of Hispanic students across all grade levels and subjects who met the "Approaches Grade Level or Above" standard on the STAAR exams. Hispanic students in Leander ISD outperformed the state average in four of the five years shown. Hispanic student performance was the lowest in 2020-21, and seven percentage points below the state average.

Figure 17. Hispanic Students, STAAR "Approaches Grade Level" – All Grades All Subjects, 2017-18 to 2022-23
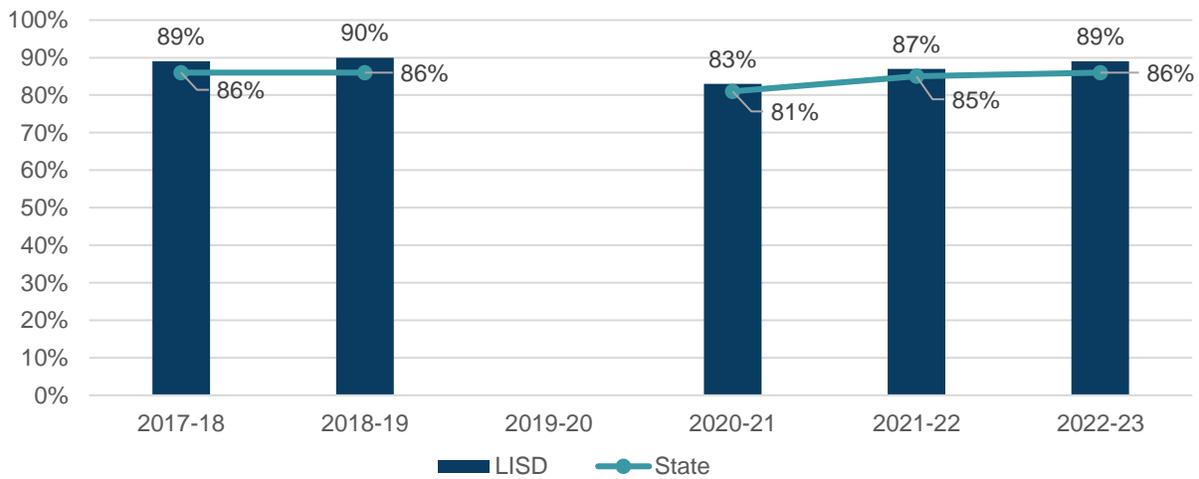

Note. The 2019-20 school year is missing due to the COVID-19 pandemic.

Source. TEA TAPRs, 2017-18 to 2022-23

Figure 18 shows the percentage of White students across all grade levels and subjects who met the "Approaches Grade Level or Above" standard on the STAAR exams. Overall, White students in Leander ISD have outperformed their White peers statewide across all years shown.

Figure 18. White Students, STAAR "Approaches Grade Level" – All Grades All Subjects, 2017-18 to 2022-23
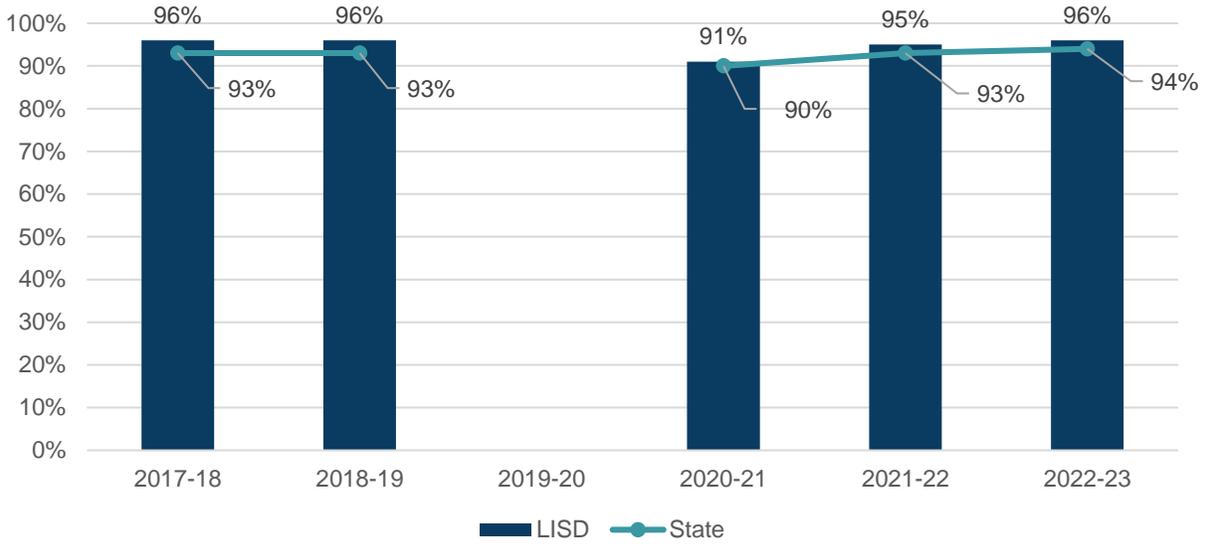

Note. The 2019-20 school year is missing due to the COVID-19 pandemic.

Source. TEA TAPRs, 2017-18 to 2022-23

Figure 19 shows the percentage of Asian students across all grade levels and subjects who met the "Approaches Grade Level or Above" standard on the STAAR exams. Overall, Asian students in Leander ISD have outperformed their Asian peers statewide across all years shown.

Figure 19. Asian Students, STAAR "Approaches Grade Level" – All Grades All Subjects, 2017-18 to 2022-23
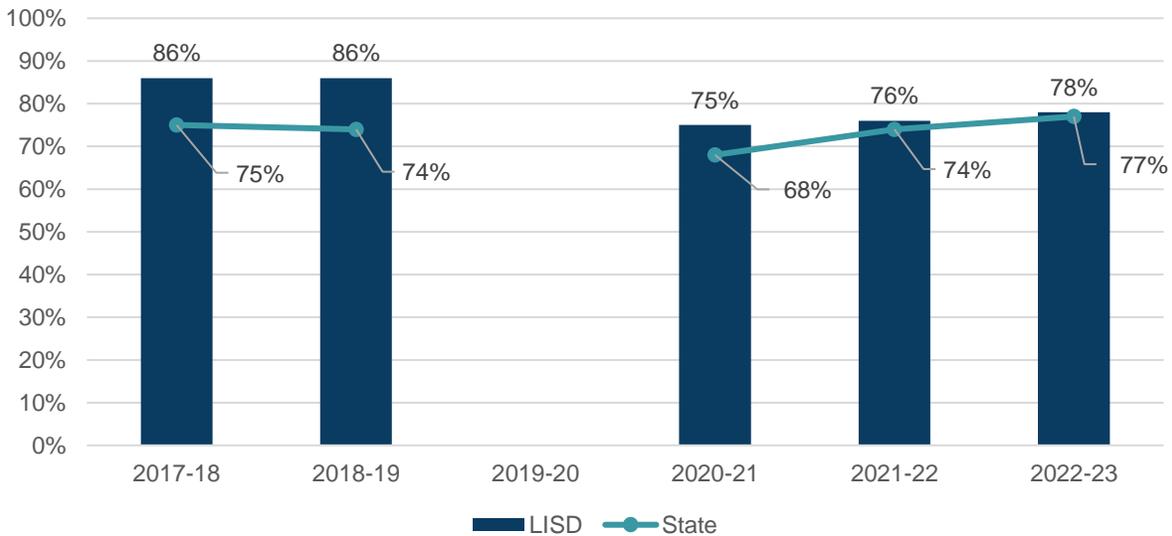

Note. The 2019-20 school year is missing due to the COVID-19 pandemic.

Source. TEA TAPRs, 2017-18 to 2022-23

Figure 20 shows the percentage of American Indian students across all grade levels and subjects who met the "Approaches Grade Level or Above" standard on the STAAR exams. Overall, American Indian students in Leander ISD have outperformed their American Indian peers statewide across all years shown.

Figure 20. American Indian Students, STAAR "Approaches Grade Level" – All Grades All Subjects, 2017-18 to 2022-23
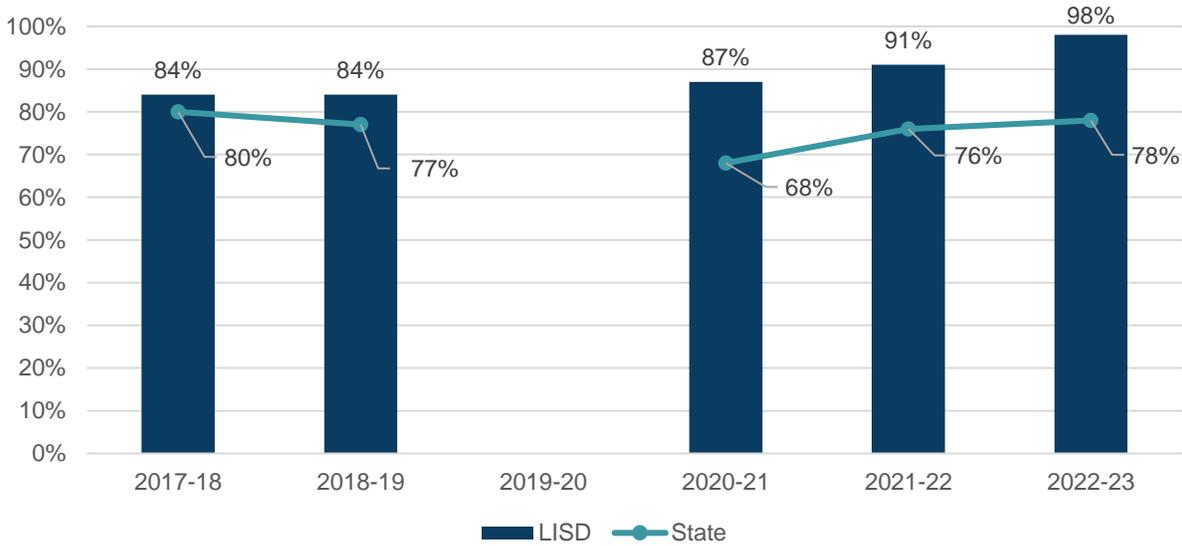

Note. The 2019-20 school year is missing due to the COVID-19 pandemic.

Source. TEA TAPRs, 2017-18 to 2022-23

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

Figure 21 shows the percentage of Pacific Islander students across all grade levels and subjects who met the "Approaches Grade Level or Above" standard on the STAAR exams. Overall, Pacific Islander students in Leander ISD have outperformed their Pacific Islanders peers statewide across all years shown.

Figure 21. Pacific Islander Students, STAAR "Approaches Grade Level" – All Grades All Subjects, 2017-18 to 2022-23

Note. The 2019-20 school year is missing due to the COVID-19 pandemic.

Source. TEA TAPRs, 2017-18 to 2022-23

Figure 22 shows the percentage of students identifying as two mor more races across all grade levels and subjects who met the "Approaches Grade Level or Above" standard on the STAAR exams. Overall, students with two or more races in Leander ISD have outperformed their peers statewide across all years shown.

Figure 22. Students Identifying as Two or More Races, STAAR "Approaches Grade Level" – All Grades All Subjects, 2017-18 to 2022-23
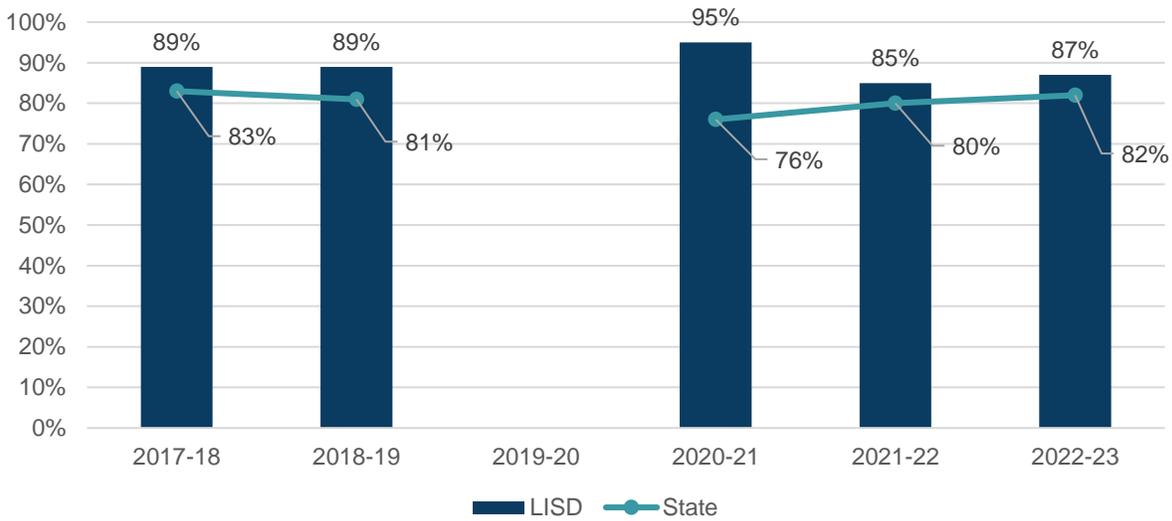

Note. The 2019-20 school year is missing due to the COVID-19 pandemic.

Source. TEA TAPRs, 2017-18 to 2022-23

Figure 23 shows the percentage of students in special education across all grade levels and subjects who met the "Approaches Grade Level or Above" standard on the STAAR exams. Students in special education in Leander ISD have outperformed the state average for special education students across all years shown in terms of meeting the "Approaches Grade Level" standard. The percentages of special education students for both Leander ISD and the state are well below the overall averages for all students in the district and state.

Figure 23. Special Education, STAAR "Approaches Grade Level" – All Grades All Subjects, 2017-18 to 2022-23
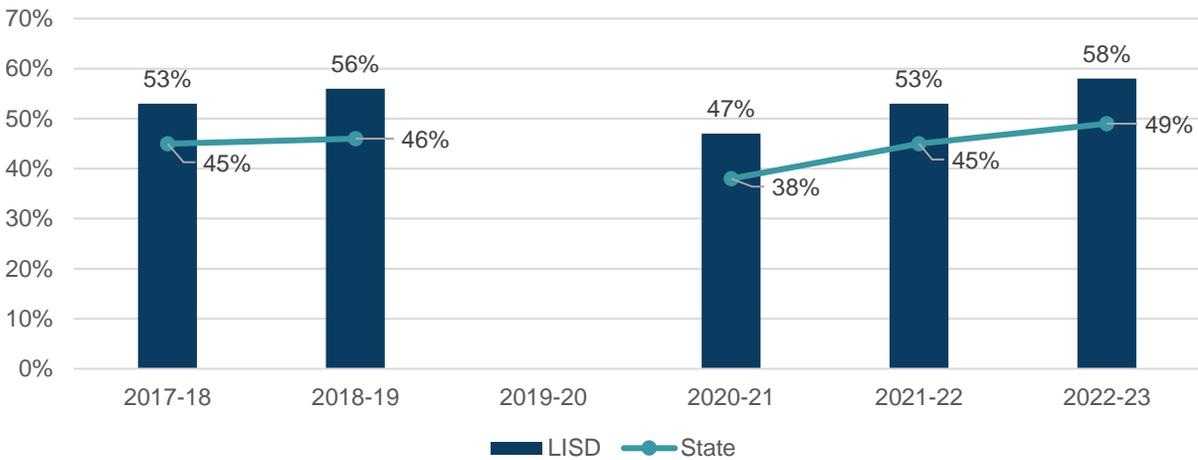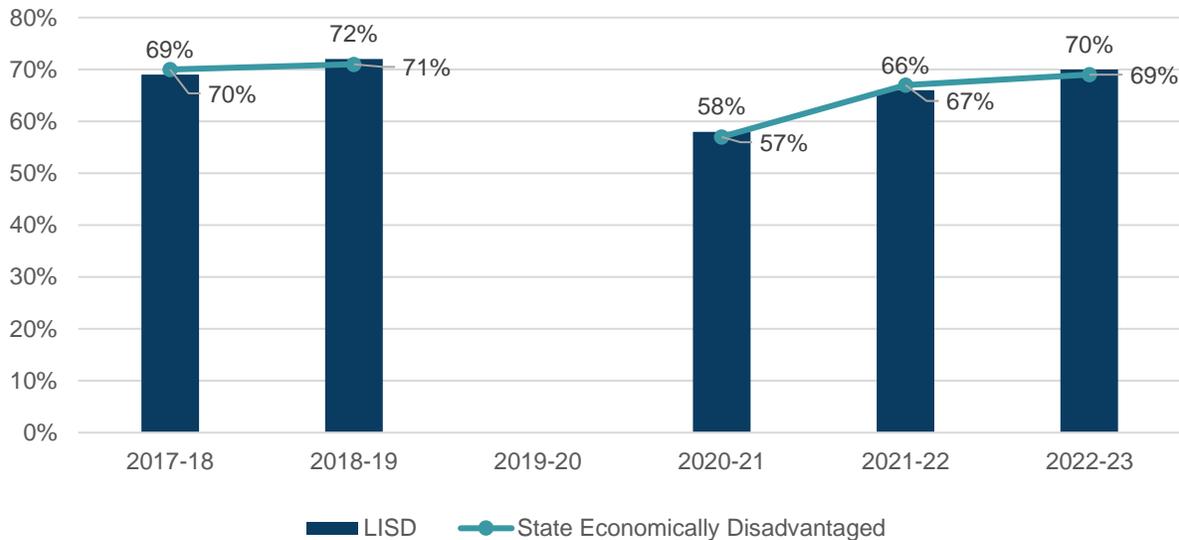

Note. The 2019-20 school year is missing due to the COVID-19 pandemic.

Source. TEA TAPRs, 2017-18 to 2022-23

Figure 24 shows the percentage of students who are economically disadvantaged across all grade levels and subjects who met the "Approaches Grade Level or Above" standard on the STAAR exams. In 2018-19, 72% of economically disadvantaged students in Leander ISD met the standard, compared to 71% of economically disadvantaged students statewide. LISD's performance in this measure approximated the state average in all years shown, either exceeding the average by one percentage point or lagging by one percentage point.

Figure 24. Economically Disadvantaged, STAAR "Approaches Grade Level" – All Grades All Subjects, 2017-18 to 2022-23

Note. The 2019-20 school year is missing due to the COVID-19 pandemic.

Source. TEA TAPRs, 2017-18 to 2022-23

Below is a summary of the key takeaways from this historical profile:

- When compared to state averages, LISD has appeared to recover from COVID-19 at a quicker pace. A greater percentage of students returned to the district, and academic performance continued to make up ground from the impact of the pandemic.

- With the exception of the student-to-teacher ratio, staffing ratios at LISD are higher than the state average. As membership increases, LISD appears to be supporting more students with the same staff resources, as these ratios have largely increased each year, with a notable exception occurring in the student-to-school administrator ratio.

- Operating expenditures per student are below the state average. This is a logical extension of the staffing ratio comment above, as payroll typically accounts for greater than 80% of school district expenditures.

Chapter 3: Methodology

The methodology for conducting an internal audit risk assessment involves three primary activities: collection and analysis of data, conducting interviews with district administrators and board members, and risk scoring each audit area based on the analysis and corroboration of information from all sources. These three phases of work are discussed in greater detail below.

Phase 1: Data Collection and Analysis

Risk assessments require the analysis of a broad spectrum of school district data, including organizational charts, historical financial and staffing data, budget and staffing formulas, operating statistics, performance reports, prior external and internal audit reports and management letters, prior consulting reports, board policies, board meeting minutes, lists of major software applications, and descriptions of project initiatives for each applicable area, among others. Much of the information was available through the district website, the TEA website, or other publicly available sources. News articles about the district were independently obtained by Gibson from multiple sources.

The audit team analyzed these data, made preliminary observations, and used these observations to generate questions for Phase 2 of the project.

Phase 2: Interviews

Gibson conducted board interviews on February 5, 2024 and interviewed district staff between March 25, 2024 and April 5, 2024. Gibson interviewed the superintendent, the executive leadership team, and departmental leaders who are involved in the LISD audit universe areas. A complete list of interviewees appears in *Appendix A: List of Interviews*.

Interview questions included general background information of the interviewee, history of their involvement with the district and applicable audit area, specific areas of interest generated by the data request, and specific risk factors applicable to the audit area(s).

Phase 3: Data Analysis and Risk Scoring

All of the information collected through the data request and interviews was analyzed and corroborated for each audit area. The observations from this analysis were used to assign risk scores based on a defined framework. This framework involved two types of risk across nine different risk factors. The two types of risk that were assessed are inherent risk and district-specific risk. Inherent risk is the innate risk that exists in each auditable area in the absence of controls and district practices. District-specific risks, also referred to as residual risks, are those risks that remain after the district's controls and practices are taken into account.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

Each type of risk was evaluated for each audit area included in the audit universe (see Table 1 on page 2) across nine categories of risk. Below are examples of inherent and district-specific risks for each risk factor:

1. Potential for fraud or theft

    a. Inherent Risk – Areas that handle cash or that purchase movable goods and assets are subject to higher levels of risk than other areas under this risk category.

    b. District-Specific Risk – Areas that have actually reported stolen property have higher district-specific risk than those that have not.

2. Risk of inaccurate data and reporting

    a. Inherent Risk – Areas that have state or other external reporting requirements have higher risk than those that do not. Where state reporting drives funding, the risks are the highest.

    b. District-Specific Risk – Areas that have been cited for data quality issues by external agencies or internal reviews receive a higher score under this risk factor.

3. Risk of non-compliance

    a. Inherent Risk – Areas that have more state and federal regulatory complexity have higher risk than those that are driven more by local policy and administrative regulations.

    b. District-Specific Risk – Areas that have been cited by regulatory bodies for non-compliance have higher scores under this risk factor.

4. Risk of failing to meet program or project goals and objectives

    a. Inherent Risk – Every audit area has this risk, but the impact of not achieving stated goals or objectives in some areas, such as in academic program management, financial management, and construction management, presents higher risks than others.

    b. District-Specific Risk – Areas that do not have stated goals or objectives or have consistently fallen short of stated goals and objectives receive higher risk scores.

5. Health and safety risk

    a. Inherent Risk – Operational areas that involve riskier activities in terms of health and safety, such as maintenance or transportation, tend to have higher risk than a central office or school-based position.

    b. District-Specific Risk – Areas that have reported staff injuries beyond what is actuarially expected would receive higher risk scores.

6. Risk of being inefficient

    a. Inherent Risk – Each area has this risk, but the impact of being inefficient is greater in some areas due to their size and their corresponding impact on the budget.

    b. District-Specific Risk – Areas that either cannot demonstrate efficiency (through metrics) or that fall below industry standards or other benchmarks receive a higher risk rating under this category.

83

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

7. Management risk

   a. Inherent Risk – Generally, the larger the area in terms of the number of positions, levels of supervision, and complexity of information management, the higher the risk.

   b. District-Specific Risk – Areas that have higher management or staff turnover generally receive higher risk scores, as well as those areas that recently implemented major information systems.

8. Potential for litigation

   a. Inherent Risk – Some areas have higher litigation risks than others, such as human resources, purchasing, and construction.

   b. District-Specific Risk – Areas with recurring lawsuits and/or lawsuits with sizeable judgments against the district have higher risk scores.

9. Risk of negative public sentiment

   a. Inherent Risk – Those areas that are more visible to the community tend to have higher publicity risk.

   b. District-Specific Risk – Those areas receiving unfavorable publicity have higher risk scores than those that do not.

There were several elements used to calculate a risk score for each audit area. Scores and weight factors were developed separately for risk impact or significance and audit area impact or significance. The "risk" weight factor is based on the significance of the risk relative to other risks, meaning the magnitude of impact on the district if something were to occur. Accordingly, individual risk weight factors do not vary across the audit areas. For example, risk factor one, "potential for fraud or theft," is weighted lower than the "health and safety" risk, but has the same weight factor across all audit areas. The "audit area" weight factor is based on the impact each individual audit area has on the district, relative to other areas. The audit area weight factor is the same across all risk factors in an individual audit area. For example, the weight factor for communications is lower than that of academic program management due to its smaller operating budget and staff levels.

Gibson assessed and scored the inherent risk for each risk factor within each audit area. Gibson then assessed the district-specific or residual risk for each risk factor within each audit area. Inherent risk and district-specific risk were scored on a five-point scale:

1. Very Low

2. Low

3. Moderate

4. High

5. Very High

Data analysis and observations made through interviews drove the scoring of each risk factor's residual risk.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

Risk Assessment Report

The audit team developed this Risk Assessment Report that shows risk scores for each audit area, and includes observations made by the audit team for the higher risk areas. A draft report was presented to the district administration for review and comment, and a final report was presented to the LISD Board of Trustees.

GIBSON

AN EDUCATION CONSULTING & RESEARCH GROUP

Chapter 4: Risk Assessment Results

The risk assessment results presented in this Chapter evaluate relative levels of risk, not performance. This project was not an audit of any function or program area; consequently, there are no findings or recommendations. Audit areas that received higher risk scores should not be viewed as lower performing or less efficient areas, only that they have areas with higher risks than others based on data provided by the district and input received from interviews. It is important that the risk assessment results be viewed in this context.

The risk assessment scored each of the 26 audit areas on a 100-point scale based on the methodology defined in *Chapter 3: Methodology*. Scale scores ranged from 48 for co-curricular activities (lowest risk) to 91 for construction management (highest risk). The average scale score was 70.

A narrative discussion of the top 10 audit areas and the key factors influencing their risk assessment is provided first, followed by a brief discussion of the remaining 16 audit areas.

The Chapter concludes with the Risk Assessment Summary Matrix. Please note that some audit areas include a discussion of positive factors that mitigate risk at LISD.

Construction Management – Risk Score: 91

The construction management audit area focuses on the planning, executing, and controlling of renovation projects and new construction projects. The chief operating officer (COO) oversees this function and is supported by three project managers. The current organization chart includes a vacant project manager position and a vacant business solutions developer position.

Inherent risk accounted for 60% of the raw risk score, and district-specific risk accounted for 40% of the raw risk score. The risks of non-compliance, management risk, and risk of failing to meet program or project goals and objectives were the highest scored in this area. The risk factors with the highest district-specific scores were also management risk, risk of non-compliance, and risk of failing to meet program or project goals and objectives. Notes for the scoring of the top risk factors are presented below.

- Risk 1: Potential for fraud or theft
  - Inherent risk (high):
    - The size of project budgets and uncertain nature of cost estimation and planning increase risk.
    - The industry has a history of budget padding and cash embezzlement.
  - District-specific risk (low)
    - Key controls are in place for mitigating fraud risk, such as multiple parties reviewing pay applications.
    - No evidence was observed or internal concerns noted about prior or current fraudulent activity.

- Risk 3: Risk of non-compliance
  - Inherent risk (very high)
    - There are large legal complexities associated with bond programs.
  - District-specific risk (high)
    - No internal audit activities or other performance audits have occurred in the previous five years.
    - There is a lack of standardized project management processes, increasing risk in this area.
- Risk 4: Failing to meet program or project goals and objectives
  - Inherent risk (high)
    - Projects and programs can easily get off schedule or go over budget if strong internal controls are not in place.
    - Project overruns are common in the industry.
  - District-specific risk (moderate)
    - The data presented to the Community Bond Oversight Committee, based on Gibson's review of public documents, does provide some detail regarding overall project phases and expenditure.
    - Projects have appeared to be completed on time and on budget based on the status reports.
    - The audit team is unsure if more detailed tracking is used by project managers and the COO to monitor specific construction phase timelines (e.g., design documents, construction trades).
    - Some internal concerns were noted during interviews regarding the completeness of project and program data.
- Risk 5: Health and safety risk
  - Inherent risk (high)
    - District employees are frequently on active construction sites, which include many hazards.
    - Injuries can be significant and create large financial obligations for the district.
  - District-specific risk (very low)
    - There have been no significant injuries of district employees and minimal lost time due to injuries.
- Risk 7: Management risk
  - Inherent risk (high)
    - The financial significance of the bond programs under management cannot be understated.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

- Projects and programs require a substantial investment of financial and human capital by the district, increasing inherent risks.
- Data generated by projects and programs can be cumbersome and difficult to manage.
– District-specific risk (high)
- There has been substantial turnover of project managers, with most being replaced in the previous two to three years.
- There is a lack of standardized, documented processes (e.g., site visit observations). A Project Management Manual has not been updated in many years.
- The 2023 Bond Program is a significant increase from the previous bond programs, with a similar-sized team managing the construction program, based on interviews. The construction related budgets for the current and previous bond are included below.
  o 2023 construction – $694.5M
  o 2017 construction – $405.5M
  o 2007 construction – $559.0M
  o 2006 construction – $286.1M

Human Resources – Risk Score: 88

Leander ISD's human resources (HR) function falls under the responsibility of the chief human resources officer, who reports directly to the superintendent. This unit is responsible for recruitment and hiring of employees, compensation planning, substitute management, certification, and employee relations.

This area received the second highest risk score, 88. Inherent risk accounted for 58% of the raw risk score, and district-specific risk accounted for 42% of the raw risk score. The highest inherent risks identified in this area were the risk of failing to meet program or project goals and objectives, risk of non-compliance with regulations, and management risk. The risk factors with the highest district-specific scores were risk of being inefficient, risk of failing to meet program or project goals and objectives, and management risk. Notes for the scoring of the top risk factors are presented below.

- Risk 2: Risk of inaccurate data and reporting
  – Inherent risk (very high)
    - The human resources functions within an organization own and maintain many important data elements, which drive and inform numerous critical decisions across the district.
    - Service records and other details related to an employee's past work experience can sometimes be incorrectly entered or poorly vetted, potentially leading to negative impacts on the accuracy of that employee's pay and compensation.
    - The data associated with tracking and reporting on job positions can often be complex in nature, thereby diminishing the district's ability to have a fully accurate and up-to-date picture of their current staffing levels broken down by position titles and departments.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

- District-specific risk (low)

  · The reliance on paper-based personnel files, as opposed to electronic records, has the potential to lead to inaccuracies and discrepancies in employee records such as performance evaluations and training records.

- Risk 3: Risk of non-compliance

  - Inherent risk (very high)

    · The legal and regulatory environment where human resources operate within is complex.

    · Non-compliance with employment laws, regulations, and district policies – despite efforts to ensure compliance through employee handbooks, training, and updates on laws and best practices – are common.

  - District-specific risk (low)

    · Interviews suggested there may be inadequate accountability measures in place for monitoring HR activities and verifying consistent adherence to established policies and procedures.

- Risk 4: Failing to meet program or project goals and objectives

  - Inherent risk (very high)

    · Labor supply shortages across most educational positions have increased pressures on K-12 districts.

    · The competitive environment for hiring and retaining staff members puts significant stress on existing processes and resources that are devoted to human resources functions.

  - District-specific risk (high)

    · Interviewees indicated that the Human Resources Department may not have formal goals outlined, apart from those included in the District Improvement Plan (DIP). The DIP goals for HR only speak to recruitment and retention of staff; however, this does not comprehensively cover the multiple other functions performed within the department.

- Risk 6: Risk of being inefficient

  - Inherent risk (high)

    · The processes involved in recruiting and hiring new staff members must be efficient in order to expediently capture qualified candidates, as slow or drawn-out processes could result in a qualified candidate seeking out other employment opportunities elsewhere.

    · The processes for modifying employee records and information, such as handling transfers between positions or locations, processing salary adjustments, or carrying out terminations, are often highly paper-intensive undertakings that require touching base with and conducting hand-offs between multiple different groups and teams.

  - District-specific risk (very high)

    · The HR Department currently relies on a paper-based system for personnel files, which may contribute to inefficiencies in data management and record-keeping.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

- There is a focus on constantly looking for more efficient ways to do things and a desire to automate and improve automation; however, the absence of written, documented processes and formal timelines for reviewing HR processes and practices for potential inefficiencies or opportunities for improvement limits the effectiveness of this initiative.

- Risk 7: Management risk

  – Inherent risk (high)

    - The impact that human resources have on the district is substantial, in spite of the HR Department's small size. Over 85% of general fund expenditures relate to personnel costs, which are directly impacted by departmental operations.

  – District-specific risk (moderate)

    - The turnover of the department was reported as high during the COVID-19 pandemic but has been steady in the previous two years.

    - Performance data is being used in certain areas, typically where a DIP goal exists, but is not part of a comprehensive performance management plan for the Human Resources Department.

Academic Program Management – Risk Score: 85

Academic program management is defined as the systems and processes that are applied to establish educational goals, provide leadership and direction in achieving those goals, and ensure that leadership is held accountable for attaining them. Program management also serves to identify, prioritize, and address academic needs using effective information, decision-making, and communication systems. For this review, academic program management is restricted to general education, as special programs are captured in other program areas. At LISD, the chief academic officer and assistant superintendent of curriculum are responsible for academic program management and implementation.

Inherent risk accounted for 54% of the raw risk score, and district-specific risk accounted for 46% of the raw risk score. The management risk, risk of failing to meet program or project goals and objectives, risk of inaccurate data and reporting, and risk of non-compliance were the highest scored in this area. The risk factors with the highest district-specific scores were risk of inaccurate data and reporting and management risk. Notes for the scoring of the top risk factors are included immediately below.

- Risk 2: Risk of inaccurate data and reporting

  – Inherent risk (very high)

    - Academic programs rely heavily on accurate student data, test scores, and performance metrics for planning, decision making, and external reporting.

    - Inaccuracies in data can lead to flawed decisions, non-compliance with state reporting requirements, and potential impacts on funding.

    - Areas with complex data collection and reporting processes involving multiple stakeholders (e.g., teachers, administrators, support staff) are inherently at a higher risk for data inaccuracies.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

- District-specific risk (high)

  - According to interviews, instances of inaccurate data or unreasonable data have occurred in the past, requiring corrections. Specifically, an interview mentioned there was a mistake last year related to the reporting of economically disadvantaged students. LISD reported this to TEA and developed an internal improvement plan.

  - There is a potential duplication of effort and inconsistencies in the data collected during observations and walkthroughs. General guidelines exist for campus administrators, though campuses can determine how best to capture this data.

- Risk 3: Risk of non-compliance

  - Inherent risk (moderate)

    - The breadth of regulations and reporting requirements inherent to academic programs results in a moderate risk level compared to other district operations.

  - District-specific risk (moderate)

    - There is a lack of clear, established processes to ensure that the district's graduation standards fully align with and satisfy all state requirements for graduation.

    - The interviewees expressed that they were not certain if there exists a standard operating procedure (SOP) for methodically vetting each individual student's file before graduation to verify that all graduation requirements have been properly met.

- Risk 4: Risk of failing to meet program or project goals and objectives

  - Inherent risk (very high)

    - The core mission of academic programs is to ensure students meet educational goals and achieve adequate academic progress. Failing to meet these objectives can have significant consequences for student outcomes.

    - Academic program goals and objectives are often tied to state standards, accountability measures, and DIPs, increasing the inherent risk.

    - There may be numerous contributing factors that can impact the ability to meet goals, such as curriculum implementation, teacher effectiveness, resource allocation, and student factors.

  - District-specific risk (low)

    - Administrator guidelines and procedures exist around classroom observations and walk-throughs. However, interviewees expressed some concerns regarding the various ways these guidelines are deployed within each campus at the district.

    - Concerns were raised about the ability to appropriately meet target staffing ratios and adequately serve the entire student population with the current staffing levels.

- Risk 7: Management risk

  - Inherent risk (very high)

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

- Academic programs typically involve many staff members across multiple levels (e.g., teachers, instructional coaches, administrators) and multiple campuses, increasing the complexity of management and oversight.

- There may be frequent changes or updates to academic standards, curricula, and instructional methodologies that require effective communication and training across the district.

- Maintaining consistency in program implementation and monitoring across various campuses and classrooms can be challenging from a management perspective.

- Turnover in academic leadership positions or key instructional roles can disrupt continuity and institutional knowledge, posing a management risk.

– District-specific risk (very high)

- Monitoring the quality of professional development opportunities provided appears to be ineffective. Internal concerns were noted around the ineffective monitoring of professional development quality for teachers and principals, rather than referencing specific systems or programs used for tracking.

- High turnover rates amongst staff create challenges in sustaining consistent processes and making progress towards achieving the district's instructional goals over time.

- Multiple interviewees mentioned the lack of clear, documented SOPs and workflows for various processes within academic program management. There is a reliance on institutional knowledge that is not formally documented.

- The practices around knowledge transfer and succession planning for central academic leadership positions appear to be limited.

- The potential impacts of administrative turnover on maintaining consistency in program management and strategic planning efforts are an area of concern.

Special Education – Risk Score: 83

The special education audit area focuses on the academic performance of students enrolled in special education, related data entry and verification, and overall programmatic compliance. At LISD, the assistant superintendent of special programs and services oversees the Special Education program. The assistant superintendent of special programs and services reports to the chief academic officer, who then reports directly to the superintendent.

Inherent risk accounted for 60% of the raw risk score, and district-specific risk accounted for 40% of the raw risk score. The risk of non-compliance, risk of failing to meet program or project goals and objectives, and potential for litigation were the highest scored in this area. The risk factors with the highest district-specific scores were potential for litigation, risk of negative public sentiment, and risk of failing to meet program or project goals and objectives. Notes for the scoring of the top risk factors are included immediately below.

- Risk 3: Risk of non-compliance

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

- Inherent risk (very high)

  - There are potential compliance risks around allowable expenditures on the revised guidelines regarding federal funds for special education.

  - The Special Education program is governed by numerous complex federal regulations under the Individuals with Disabilities Education Act (IDEA) as well as state regulations, all specifying intricate requirements around student evaluations, IEP development processes, provision of services, adhering to timelines, and procedural safeguards.

  - If a district is found to be non-compliant with any of these special education regulations, the consequences can be severe, potentially resulting in monitoring findings from regulators, the requirement to undertake corrective action plans, and even the risk of losing federal/state funds.

  - Because the regulations governing special education are frequently updated and changed, the district must provide ongoing training and make necessary adjustments to ensure staff maintain compliance with the latest requirements.

- District-specific risk (moderate)

  - There were moderate compliance issues arising from training gaps due to high turnover and limited training time for new staff. These gaps could negatively impact areas with high compliance requirements, such as evaluation timelines, IEP development procedures, and documentation standards.

  - In 2022-23, the district was out of compliance with "SPP 11" which refers to the State Performance Plan Indicator 11 on timely initial evaluations. Under IDEA, school districts must complete initial evaluations within 60 calendar days of receiving parental consent for evaluation (or within the state-established timeline, which in Texas is 30 school days). However, the department tracks every student and the reason for missing the timeline on a spreadsheet, demonstrating they are attempting to identify the root causes of the problem.

- Risk 4: Failing to meet program or project goals and objectives

  - Inherent risk (high)

    - The primary goals for the district's Special Education program are centered on facilitating student achievement and academic progress, while also ensuring students with disabilities have access to a free appropriate public education (FAPE) as mandated by federal law.

    - If the district fails to meet its established goals related to properly implementing students' IEPs, achieving performance targets, and other key metrics, this can significantly and negatively impact the educational outcomes for special education students.

    - In situations where a school district displays sustained and unresolved deficiencies in providing special education services and meeting requirements, this can prompt state and federal agencies to initiate enforcement actions, such as withholding funds, mandating corrective action plans, or implementing other sanctions until compliance is achieved.

  - District-specific risk (moderate)

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

- · High turnover rates were noted, especially in self-contained and behavior classrooms, leading to potential disruptions and knowledge gaps.

- · Figure 25 presents LISD's special education STAAR 3-8 passing rate performance levels (PL) by content area since 2020-21. TEA Results Driven Accountability (RDA) indicators apply a range of PLs for special education. PL-0 is the highest performing level, and PL-4 is the lowest performing level. LISD showed PL-1 or PL-2 indicators in each of the previous three years across all subject areas.

Figure 25. LISD Special Education Student Passing Rate Performance Levels, 2020-21 to 2022-23
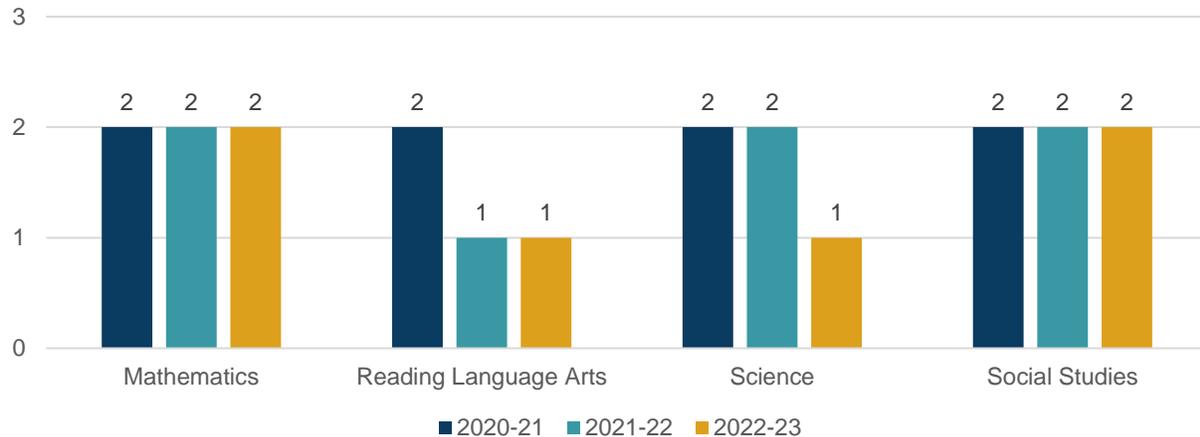
Source. TEA RDA Report, 2021-23

- – Other 2023 RDA Report information:

  - · **Special Education (SPED) Regular Class <40% Rate (school-aged)** – measures the placement of students in an educational setting, specifically for SPED students in a regular class less than 40% of the time. In 2022-23, LISD was in Year 3 of a significant disproportionality finding related to Asian students.

  - · **SPED Representation (ages three through 12)** – measures the identification (representation) of students with a particular disability. In 2022-23, LISD was in Year 2 of a significant disproportionality finding related to Asian students diagnosed with autism.

  - · **OSS and Expulsion** – measures the disaggregated percentage of students ages three through 21 served in special education reported as suspended out-of-school (OSS) or expelled for 10 or fewer school days. In 2022-23, LISD was in Year 1 of a significant disproportionality finding related to African-American students.

- – Recent consulting services provided in this area reduce this risk factor.

- ▪ Risk 8: Risk for litigation

  - – Inherent risk (very high)

    - · Under special education law, parents have extensive due process rights that allow them to formally dispute decisions made by the school district regarding their child's eligibility for

> services, the appropriateness of the IEP developed, any disciplinary actions taken against the student, and other areas.

- Litigation involving special education is quite common, as parents will often pursue legal action if they feel the school district has violated any of the requirements laid out in IDEA with regards to their child.

- If litigation results in adverse rulings against the school district, the consequences can be quite severe, potentially requiring the district to provide expensive compensatory education services or even reimbursement to parents for private school tuition, in some cases.

  – District-specific risk (moderate)

  - A few lawsuits were highlighted during interviews and parent due process complaints regarding eligibility, IEP quality, and service provision were noted during the risk assessment, indicating potential areas of concern.

- Risk of negative public sentiment

  – Inherent risk (high)

  - The Special Education program in a school district is highly visible to the public, as it directly impacts students with disabilities and their families in the community.

  - If there are perceived deficiencies in staffing, resources, and/or inclusion efforts for special education students, it can draw criticism from the public.

  - Any negative publicity or news coverage surrounding perceived problems in how a district manages or provides special education services can significantly damage the reputation of the school district within the local community it serves.

  – District-specific risk (moderate)

  - As stated above, there have been several lawsuits and formal parent complaints regarding the Special Education Department at LISD. While there are currently few media articles regarding the Special Education Department at LISD, there is the risk of these lawsuits or formal parent complaints going to the media.

Facilities – Risk Score: 81

Facilities management is the responsibility of the Facilities Services Department, which reports to the chief operations officer. This department is primarily charged with maintaining facilities and equipment, cleaning existing facilities, and monitoring and conserving energy.

Inherent risk accounted for 50% of the raw risk score, and residual risk accounted for 50% of the raw risk score. The risk of failing to meet program or project goals and objectives, health and safety risk, and management risk were the highest scored in this area. The risk factors with the highest district-specific scores were risk of inaccurate data and reporting, risk of failing to meet program or project goals and objectives, and risk of being inefficient. Notes for the scoring of the top risk factors are included immediately below.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

- Risk 2: Risk of inaccurate data and reporting
  - Inherent risk (low)
    - There are few requirements for reporting data from the facilities function in school districts.
  - District-specific risk (high)
    - LISD has an inefficient and manual work order system, leading to data inaccuracies as well as difficulties addressing discrepancies or errors in maintenance. Work orders are handwritten initially, and then someone must input that data into the system later, leading to lags and potential inaccuracies in the data.
    - The department is in the process of switching to a new work order system over the summer. While upgrading to this new system should help address inefficiencies, there are risks involved, including data migration risks, user adoption risks, and implementation risks.
    - There is a lack of robust controls for verifying contractor or vendor billing and work completed. This includes no well-defined processes for verifying materials and/or services that were provided as billed by vendors or contractors. Interviewees indicated that staff may check invoices against proposals and look for small things like labor rates, but no robust auditing process was described.
- Risk 4: Risk of failing to meet program or project goals and objectives
  - Inherent risk (high)
    - There is the possibility of deferred maintenance backlog that makes it difficult to maintain facilities adequately.
    - Lack of funding and/or resources to fully meet maintenance and operational needs is an inherent risk.
  - District-specific risk (very high)
    - Interviewees mentioned a lack of processes to validate data inputs used for budgeting and resource allocation, noting that department managers typically look at last year's rates and adjust based on those figures to create the budget.
    - Formal goals for monitoring effectiveness and efficiency of maintenance and custodial functions do not exist.
- Risk 6: Risk of being inefficient
  - Inherent risk (high)
    - A large facility footprint requires sufficient staffing levels for maintenance and custodial staff.
    - Aging facilities and equipment require more maintenance and repair.
    - Lack of preventive maintenance programs can lead to reactive, rather than proactive, repairs.
  - District-specific risk (very high)

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

- Interviewees mentioned challenges in ensuring compliance with building codes, safety regulations, and accessibility requirements. Processes are manual, using spreadsheets that have to be physically updated.

- There is a lack of frequent process reviews for identifying inefficiencies and improvement opportunities.

- Risk 7: Management risk
    - Inherent risk (high)

        - Managing a large, dispersed workforce across multiple facilities can present challenges.

        - Ensuring consistent procedures and training across all locations can be difficult.

        - Tracking and utilizing maintenance data effectively is essential for operational efficiency.

        - There is difficulty in retaining staff, especially in skilled trades like HVAC, with competitive pay.

    - District-specific risk (high)

        - There are significant staffing shortages, leading to reactive rather than preventive maintenance. It is estimated that LISD is 30-40 people short on technician staffing levels for efficient preventive maintenance. The shortages force LISD facilities to be reactive, rather than proactive, on maintenance.

Transportation – Risk Score: 77

The transportation function is responsible for all student transportation and the maintenance of all vehicles. The senior director of transportation leads this function at LISD, reporting to the senior executive director of operations and facilities, who then reports directly to the chief operations officer.

Inherent risk accounted for 62% of the raw risk score, and district-specific risk accounted for 38% of the raw risk score. The risk of failing to meet program or project goals and objectives, health and safety risk, management risk, and potential for litigation were the highest risk scores. The risk factors with the highest district-specific scores were failing to meet program or project goals and objectives and risk of negative public sentiment. Notes for the scoring of the top risk factors are included immediately below.

- Risk 4: Risk of failing to meet program or project goals and objectives
    - Inherent risk (moderate)

        - The primary objectives of student transportation are to provide safe, efficient, and reliable services. Failure to meet these objectives can have significant consequences for student safety and district operations.

    - District-specific risk (moderate)

        - There are no stated goals and objectives for the Transportation Department.

        - Performance measures or targets related to on-time performance, route optimization, or cost-effectiveness are not currently tracked.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

- Recent audits have reduced the risk.

- Risk 5: Health and safety risk

  – Inherent risk (very high)

    - Transporting students, whether from home to campus or off-campus for special programs or field trips, is inherently a higher risk than other operations due to the potential of safety incidents that can occur.

    - Transporting students inherently carries safety risks from vehicle accidents, student injuries getting on/off buses, or other safety risks.

    - Proper maintenance of bus fleets is critical to avoid breakdowns or vehicle issues that could endanger safety.

    - Student behavior and discipline on buses can pose risks if not properly managed.

  – District-specific risk (low)

    - Accidents reported through TEA's Bus Accident Reporting System (BARS) have increased over the past five years; however, no injuries were reported.

- Risk 7: Management risk

  – Inherent risk (high)

    - Effective management of transportation operations is complex, involving coordination of personnel, assets, schedules, and regulations across multiple locations.

    - Large transportation staff with drivers, monitors, mechanics, routing specialists, and other staff increases management complexity.

    - Compliance with various regulations from multiple agencies adds management burden.

    - Effectively utilizing software systems and technologies for routing, tracking, and reporting can lead to higher risk, including data security and privacy risks, complexity and user error, compliance and regulatory risks, and adaptation and training challenges.

  – District-specific risk (low)

    - Turnover of drivers has reduced significantly from the prior year.

    - Interviewees described training opportunities as plentiful.

- Risk 8: Potential for litigation

  – Inherent risk (very high)

    - There is a high possibility of potential legal risks related to policies, procedures, and accidents. Transportation operations carry risks of potential litigation from vehicle accidents, student incidents, or regulatory non-compliance. Proper policies and training are needed to mitigate risks.

    - Accidents involving buses and vehicles can lead to lawsuits from injured parties.

    - Alleged discrimination or mishandling of student incidents could lead to litigation.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

· Non-compliance with regulations could lead to penalties or litigation.

– District-specific risk (moderate)

· Interviewees mentioned being sued for two different bus accidents for which they were at fault in the past few years. No safeguards were mentioned to protect against legal challenges related to transportation practices, with the implication that there could be risks due to lack of comprehensive safety measures and protocols.

- Risk 9: Risk of negative public sentiment

– Inherent risk (moderate)

· Transportation directly impacts students and families daily. Issues like bus delays, driver conduct, or vehicle safety can quickly garner negative public attention.

· Late or missed bus routes can generate extremely negative sentiment from parents.

· Bus accidents, especially if involving student injuries, quickly make the news.

– District-specific risk (high)

· There were public board comments and media attention related to transportation issues, accidents, and hazardous routes.

Financial Management – Risk Score: 78

The financial management audit area falls under the responsibility of the chief financial officer. For the purposes of this risk assessment, financial management includes general accounting, budgeting, and treasury functions. The Financial Services Department is responsible for preparing financial statements, reconciling general ledger accounts, and ensuring transactions are appropriately recorded in MUNIS. The department is also responsible for the accounts payable function, though this is separately considered in the risk assessment. The Treasury and Debt Management Department is responsible for the district investments, ensuring cash on hand is sufficient each day to cover obligations, and working with advisors to manage the district's debt portfolio. Additionally, the Budget and Compliance Department is tasked with preparing the annual budget and any necessary amendments, forecasting revenue, and analyzing financial data. There are 13 FTE employees responsible for financial management.

Inherent risk accounted for 64% of the raw risk score, and residual risk accounted for 36% of the district-specific risk score. The potential for fraud or theft, risk of non-compliance, risk of failing to meet program or project goals and objectives, and management risk were the highest scored in this area. The risk factors with the highest district-specific scores were risk of non-compliance and management risk. Notes for the scoring of the top risk factors are included immediately below.

- Risk 1: Potential for fraud or theft

– Inherent risk (high)

· Funding uncertainty in Texas districts places pressure on finding cost savings.

· Inappropriate access to financial systems can provide opportunities to embezzle funds.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

- Manual journal entries could be used to 'hide' errors outside of the normal budget transfer process.

  – District-specific risk (very low)

    - The audit team did not learn of any historical financial management fraud.

    - Controls over high-risk areas (e.g., wire payments, budget transfers, journal entries) appear to be implemented, based on interviews and procedural documentation.

- Risk 3: Risk of non-compliance

  – Inherent risk (very high)

    - The legal and regulatory environment is complex.

    - If non-compliance with laws and regulations occurs in this domain, the reputational damage can be great. Public trust in this function largely lies in the effective use of public funds and tight compliance with laws to safeguard assets.

  – District-specific risk (moderate)

    - Multiple interviewees expressed concerns that employees are not being paid with the correct special program coding. This necessitates manual journal entries to correct errors, which are more subject to error since they rely upon staff to catch an incorrect code.

    - Audit opinions for the previous five years have been clean, and no internal control matters relevant to financial management were noted.

- Risk 4: Risk of failing to meet program or project goals and objectives

  – Inherent risk (very high)

    - A high-performing financial management function is critical to the success of a district in today's environment.

    - Strategies for managing district expenditures must be aligned with overall district goals to ensure that educated decisions are made.

  – District-specific risk (moderate)

    - Financial Integrity Rating Systems of Texas (FIRST) scores have improved over time, though an 'F' rating was given based on 2018-19 data. Figure 26 provides this trend. In 2019-20, an 'F' was given automatically due to a warrant hold issued by the Texas Retirement System (TRS) for untimely payments. The rating in 2021-22 was negatively impacted by the long-term liabilities to total assets. This is primarily due to the debt profile of LISD. As seen in 2022-23, an increase occurred. LISD partnered with a third party to help restructure its debt, which improved its long-term liability ratio. Presentations were observed from the third party.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

Figure 26. FIRST Ratings, LISD 2018-19 to 2022-23

Source. https://tealprod.tea.state.tx.us/First/forms/District.aspx.
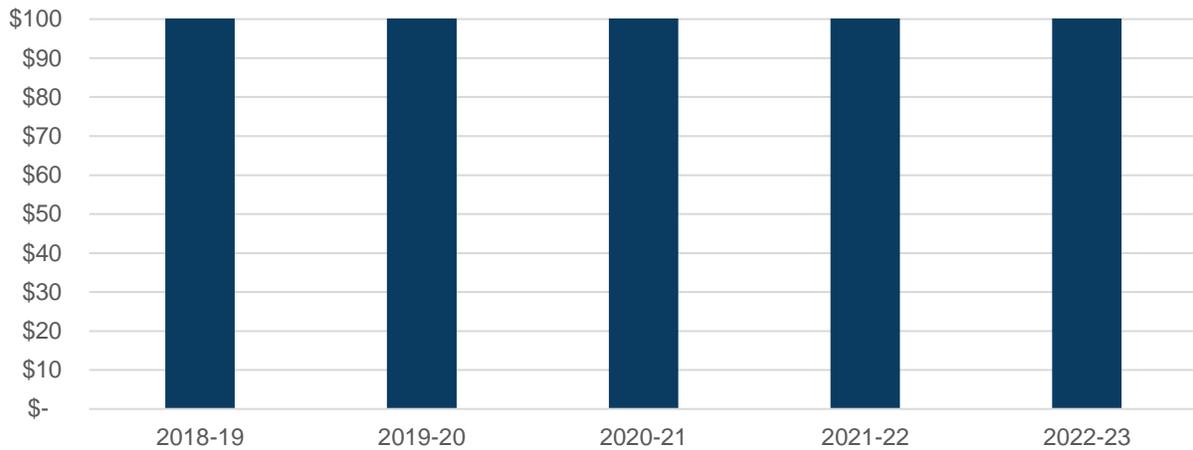
- New leaders in financial management have implemented changes in the budgeting process. These changes are likely positive; however, this increases risk, since staff must be trained on new methods and tools.

- Multiple concerns were mentioned around the accuracy of demography projections, which further complicates revenue forecasting.

- Risk 7: Management risk

  – Inherent risk (very high)

    - This function involves numerous staff members, including secretaries, campus administrators, departmental leaders, and finance staff. This increases the complexity of ensuring consistent practices across a district.

  – District-specific risk (high)

    - There is new leadership in this function, new accounting technicians, and a new treasury specialist.

    - Centralizing secondary activity funds will likely reduce risk in the long term, but it is a large project that is requiring a lot of staff time.

    - Standard operating procedures exist for some key processes (e.g., cash receipting, bank reconciliations) but are lacking in some key areas (e.g., budget for campus/department personnel).

Safety and Security – Risk Score: 78

The safety and security audit area falls under the director of emergency management, who reports to the executive director of student services. The director is supported by an emergency management coordinator, emergency management specialist, and an emergency management technician. This department is responsible for emergency preparedness and security. This includes the development of emergency

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

response protocols, implementation of drills and training, performance of required school audits, and implementation and oversight of physical access controls, such as access cards, door locks, and cameras.

Inherent risk accounted for 62% of the raw risk score, and district-specific risk accounted for 38% of the raw risk score. The risk of failing to meet program or project goals and objectives, health and safety risk, and management risk were the highest scored in this area. The risk factors with the highest district-specific scores were failing to meet program or project goals and objectives and management risk. Notes for the scoring of the top risk factors are included immediately below.

- Risk 4: Risk of failing to meet program or project goals and objectives
    - Inherent risk (high)
        - Meeting safety objectives relies upon the repeated actions of nearly all staff in the district.
        - The basic objectives of keeping students and staff safe is critically important to any school system.
    - District-specific risk (moderate)
        - Formal goals and performance measures have not been implemented because a new leader is in place, though these are being developed.
        - Incident data is not currently tracked and analyzed.
        - Safety audits mandated by Texas Education Code 37.108 have been completed in a timely fashion, with no correspondence from TEA being received by Leander ISD. This reduces the risk to the department.
        - Interviewees expressed concerns with the district being too reactive to managing safety, with not enough of a focus on hazard and threat assessments.
- Risk 5: Health and safety risk
    - Inherent risk (very high)
        - Gibson applied an inherent risk scoring based on the eventual development of an LISD police force, which would be comprised of district employees and included in this function, though likely not in the Emergency Management Department.
        - Security personnel are consistently placed in situations that could result in bodily harm.
        - The social and emotional impact of the COVID-19 pandemic on students and staff has increased safety risks nationwide.
    - District-specific risk (low)
        - The district currently employs a student resource officer approach, using memoranda of understanding with local police departments for police presence on campuses. This essentially assigns most of the risk for LISD to these third parties.
- Risk 7: Management risk
    - Inherent risk (high)

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

- · As stated in Risk 4, management of this function is complex because it involves buy in from nearly every district employee.

  – District-specific risk (very high)

  - · There is new leadership in this function, and most of the department staff have fewer than five years of experience in the district.

  - · Standard operating procedures for departmental processes do not exist.

  - · Interviewees pointed to a lack of training for departmental staff and an over-reliance of on-the-job training.

  - · The implementation of an LISD Police Department will require a high degree of collaboration and necessitate the creation of new processes, communication protocols, and numerous other aspects associated with safety and security.

Federal Programs – Risk Score: 76

The federal programs function is responsible for monitoring compliance with federal, state, and private grants; applying for additional grants; submitting and storing required documentation; and identifying additional funding opportunities. The director of federal programs is supported by a coordinator, a homeless liaison clerk, a budget specialist, and an administrative assistant.

Inherent risk accounted for 51% of the raw risk score, and residual risk accounted for 49% of the raw risk score. The potential for fraud or theft, risk of non-compliance, risk of failing to meet program or project goals and objectives, and management risk were the highest scored in this area. The risk factors with the highest district-specific scores were risk of being inefficient and management risk. Notes for the scoring of the top risk factors are included immediately below.

- ▪ Risk 1: Potential for fraud or theft

  – Inherent risk (moderate)

  - · The management of federal grants is often given less oversight in a school system, compared to the general operating funds.

  - · Though major grants are subjected to annual audits, many federal grants may be infrequently audited, solely relying on district controls to ensure that expenditures are allowable.

  – District-specific risk (moderate)

  - · Interviewees noted a concern with the allowability of expenditures for a few federal programs.

- ▪ Risk 3: Risk of non-compliance

  – Inherent risk (very high)

  - · Federal grant regulations are highly complex.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

- Many grants have multiple reporting deadlines that must be met, or a district risks losing funding.

  – District-specific risk (moderate)

    - Similar to the risk of fraud, the concerns expressed surrounding the allowability of expenditures negatively impact the risk of non-compliance.

    - Department personnel are new to their roles, which include major compliance-related responsibilities.

    - Manual spreadsheets are used to track federal grant expenditures and perform compliance monitoring, which are more susceptible to error, increasing risk of non-compliance.

- Risk 4: Risk of failing to meet program or project goals and objectives

  – Inherent risk (high)

    - Determining the appropriate use of federal funds often involves multiple stakeholders and intricate processes, making it challenging to align objectives and outcomes.

    - Some grants are contingent on meeting and proving eligibility or performance criteria.

  – District-specific risk (moderate)

    - Interviewees expressed a concern with the amount of training provided to campus personnel involved in federal programs.

- Risk 6: Risk of being inefficient

  – Inherent risk (low)

    - Transactions using federal funds are typically included in a district's enterprise resource planning (ERP) workflow, similar to transactions using operating funds.

    - The size of the function responsible for monitoring federal programs is usually small.

  – District-specific risk (high)

    - Grants are tracked using multiple spreadsheets, which likely results in duplicative reviews of data included in the ERP and spreadsheets.

- Risk 7: Management risk

  – Inherent risk (high)

    - As discussed in Risk 4, many stakeholders are involved in the use and oversight of federal funds, which increases the complexity associated with managing the function.

    - Campus positions typically involved in the use of federal funds (i.e., financial secretaries) tend to experience high turnover.

  – District-specific risk (very high)

    - This department has experienced high turnover, with previous leadership exiting.

    - A lack of standard operating procedures was noted by interviewees.

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

Procurement and Contracts – Risk Score: 76

The procurement and contracts function falls under the responsibility of the chief financial officer. The senior director of business process improvement leads both the procurement and contracting function as well as the asset management and distribution center.

The procurement and contracting function is comprised of three buyers, two purchasing specialists, and one records management specialist. Leander ISD added a senior director of business improvement position, which manages both procurement and contracting and asset management and distribution center functions. LISD also added one additional purchasing specialist position to the procurement and contracting function in 2023-24. The procurement and contracting function is responsible for buying goods and services for LISD and managing service contracts.

Inherent risk accounted for 57% of the raw risk score, and district-specific risk accounted for 43% of the raw risk score. The risk factors with the highest district-specific scores were the risk of inaccurate data and reporting, risk of non-compliance, and risk of being inefficient. Notes for the scoring of the top risk factors are included immediately below.

- Risk 2: Risk of inaccurate data and reporting
  - Inherent risk (very high)
    - The procurement and contracting function is responsible for many important data elements that impact the district financially.
    - Inaccurate data in this function may cause compliance issues with state and federal regulations.
    - Data issues may cause legal issues with district vendors.
  - District-specific risk (high)
    - There were management letters in 2019 and 2020 regarding purchasing card (p-card) policy and procedures. The district has not implemented the p-card module of the district ERP system, MUNIS. The district p-card vendor reports the p-card transactions with limited and inconsistent Merchant Commodity Codes (MCC).
- Risk 3: Risk of non-compliance
  - Inherent risk (very high)
    - Procurement in any school district is heavily regulated by state and federal law.
  - District-specific risk (very high)
    - After-the-fact purchase orders (when goods or services are acquired outside of purchasing processes) for school purchases are common. Procedural changes were recently made to limit these occurrences.
- Risk 6: Risk of being inefficient
  - Inherent risk (high)

105

- · The procurement and contracting function must be efficient to fulfill the goods and services needs of the district because unnecessary delays may significantly disrupt or hinder district activities.
  - – District-specific risk (high)
    - · The department uses a form software called Frevo for vendor creation, but it is mostly a manual process.
    - · There is no contract management software or tool used to track and manage contracts. It is a manual process.
    - · The p-card process is a paper intensive process including signatures and receipts.
    - · Key performance indicators are not used by the department to measure and monitor performance.

Other Audit Areas

The remaining audit areas are presented in Table 3 below. This table includes each area's inherent risk, residual risk, and scaled risk score. Audit areas are presented from highest risk score to lowest risk score.

Table 3. Other Audit Areas Summary Table

Auditable Area	Inherent Risk %	Residual Risk %	Scaled Risk Score
PEIMS/SIS	53%	47%	76
Student Services	53%	47%	75
Payroll	50%	50%	73
Governance	56%	44%	72
Asset Management	60%	40%	71
School Activity Funds	47%	53%	70
Accounts Payable	61%	39%	67
Technology	53%	47%	67
Bilingual/ESL Education	63%	37%	64
Nutrition Services	70%	30%	62
Risk Management	46%	54%	60
Career and Technology Education	49%	51%	59
Gifted and Talented	45%	55%	52
Research and Evaluation	42%	58%	51

106

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

Auditable Area	Inherent Risk %	Residual Risk %	Scaled Risk Score
Communication Management	50%	50%	50
Co-curricular Activities	53%	47%	48

Source. Gibson Consulting Group

Risk Assessment Summary Matrix

Figure 27 presents a summary matrix of the scores for each audit area against each of the nine risk factors. Each box in the matrix contains the raw score. The risk factors are numbered based on the following definitions:

1. Potential for fraud or theft;

2. Risk of inaccurate data and reporting;

3. Risk of non-compliance;

4. Risk of failing to meet program or project goals and objectives

5. Health and safety risk;

6. Risk of being inefficient;

7. Management risk;

8. Potential for litigation; and

9. Risk of negative public sentiment.

Figure 27. Summary of Leander ISD Risk Assessment Results

Auditable Area	Risk Factor 1	Risk Factor 2	Risk Factor 3	Risk Factor 4	Risk Factor 5	Risk Factor 6	Risk Factor 7	Risk Factor 8	Risk Factor 9	Total	Highest Possible Score	100 Point Scale
Construction Management	21	18	33	27	21	13	30	18	11	192	210	91
Human Resources	15	20	27	33	12	15	27	22	13	184	210	88
Academic Program Management	18	24	24	27	12	12	36	10	16	179	210	85
Special Education	12	18	30	27	21	10	21	22	13	174	210	83
Facilities Management	22	16	16	31	22	13	28	12	10	170	210	81
Financial Management	19	18	28	28	10	12	31	8	10	164	210	78
Safety and Security	16	10	19	25	25	8	31	18	11	163	210	78
Transportation	16	16	19	22	25	10	22	20	11	161	210	77
Federal Programs	22	18	28	25	10	10	31	8	8	160	210	76
Procurement / Contracts	22	18	34	28	10	13	16	10	8	159	210	76
PEIMS/SIS	24	20	27	18	12	13	24	12	9	159	210	76
Student Services	10	16	25	19	25	10	25	16	11	157	210	75
Payroll	22	20	28	22	10	12	25	8	7	154	210	73
Governance	16	14	25	25	10	11	25	14	12	152	210	72
Asset Management	22	16	13	25	16	12	25	10	10	149	210	71
School Activity Funds	28	16	22	16	10	10	22	14	10	148	210	70
Accounts Payable	22	16	19	28	10	11	19	10	6	141	210	67
Technology	19	10	22	28	10	10	25	10	7	141	210	67
Bilingual / ESL Education	13	14	22	25	10	10	22	10	9	135	210	64
Nutrition Services	13	12	19	19	22	10	19	10	7	131	210	62
Risk Management	14	14	20	20	8	9	23	12	5	125	210	60
Career and Technology Education	10	12	19	25	13	9	19	10	7	124	210	59
Gifted and Talented	8	12	14	20	11	7	23	6	8	109	210	52
Research and Evaluation	14	10	14	26	8	5	20	6	5	108	210	51
Communication Management	8	6	20	17	8	7	23	6	9	104	210	50
Co-curricular Activities	8	6	14	11	20	5	17	10	9	100	210	48

Source. Gibson Consulting Group

108

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

Appendix A: List of Interviewees

- Amy Rudd - Director, Special Education

- Angela Hodges - Area Superintendent

- Becky Garcia - Director, Treasury and Debt Management

- Bella Mestoeva - Executive Director, Total Rewards

- Brandon Evans - Sr. Executive Director, Operations

- Brenda Cruz - Director, Assessment and Academic Measures

- Bryan Miller - Executive Director, Student Support

- Dr. Bruce Gearing - Superintendent

- Camille Clay - Sr. Director, College and Career Transition Programs

- Dr. Chris Clark - Assistant Superintendent, Curriculum

- Dr. Chrysta Carlin - Assistant Superintendent, Pathways & Innovation

- Craig Trask - Director, Custodial Services

- Crestina Hardie - Chief Communications Officer

- Cristin Wicketts - Director, Health Services

- Dana Klein - Accountant, Finance Trainer

- Dana Paulson - Sr. Director, Financial Services

- DeWayne Street - Chief, Office of Educational Access

- Donna Simons - Sr. Director, IT Projects & Development

- James Watson - Sr. Director, Cybersecurity & MDM

- Jamie Spiegel - Sr. Director, Business Process Improvement

- Jason Johnston - Sr. Director, Student Information & Integration Systems

- Jason Miller - Chief Technology Officer

- Jennifer Anderson - Manager, Materials Management

- Jimmy Disler - Chief Operations Officer

- Jodi Levie - Director, Budget & Compliance

- Joey Garner - Director, Facilities

- John West - Sr. Director, Support Services Staffing & Employee Relations

- Jonathan Lamb - Director, Athletics

- Karie Lynn Eggeling - Chief Human Resources Officer

- Kimberly Waltmon - Assistant Superintendent, Special Programs

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

- Lisa Gibbs - Executive Director, Talent Acquisition/Employee Support
- Dr. Matt Bentz - Chief Academic Officer
- Dr. Matthew Gutierrez - Chief of Schools
- Matt Prause - Sr. Director, Client Support
- Megan Liles - Director, Music and Performing arts/Visual and Performing Arts
- Miguel Escobedo - Director, Emergency Management
- Mike Howard - Director, Music and Performing Arts/Visual and Performing Arts
- Nicole Thomas - Coordinator, Payroll
- Paul Johnson - Area Superintendent
- Pete Pape - Chief Financial Officer
- Rachel Mackey - Executive Director, Human Resources
- Dr. Sarah Grissom - Chief of Staff
- Dr. Sarah Martinez - Director, Research and Program Evaluation
- Shannon White - Director, State and Federal Programs
- Shawn Swisher - General Counsel
- Shirley Bachus - Director, Advanced Programs
- Sonya McCuen-Burney - Coordinator, PEIMS
- Steve Clark - Director, Counseling Services
- Terrece Harris - Sr. Director, Infrastructure
- Tina Dozier - Director, Global Languages and Cultures
- Tracie Franco - Sr. Director, Transportation

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

GIBSON

AN EDUCATION CONSULTING & RESEARCH GROUP

Our mission is to better the lives of students by providing exemplary educational consulting and research services that make educational systems more efficient and effective.

For more information, please visit:

http://www.gibsonconsult.com

Internal Audit Risk Assessment Presentation

LEANDER ISD
LEADING TO A BRIGHT FUTURE

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

June 27, 2024

Agenda

- Introduction

- Objectives and Approach

- Leander ISD Audit Universe

- Risks and Scoring Methodology

- Risk Assessment Matrix

- Observations – Higher Risk Areas

- Proposed Sequence of Internal Audits

113

Introduction

- Greg Gibson, CPA – President, Gibson Consulting Group

- Kent Ingram, CPA – Consulting Director, Gibson Consulting Group

- Gretchen Stibich – Consulting Analyst, Gibson Consulting Group

- Gibson Consulting Group was engaged to conduct a risk assessment for the Leander Independent School District (LISD)

114

- The Institute of Internal Auditors promulgates standards that require an internal audit program to be conducted according to a risk-based plan

Before We Start

This project is not an audit

- A risk assessment does not involve the development of audit findings or recommendations

- Observations made reflect only an assessment of risk, not an assessment of the area

- Information presented may or may not reflect actual problems or best practices – this cannot be determined until the area is subject to audit

115

Objectives

What do we audit first?

- Evaluate the risk of the LISD program, operating, and administrative areas against defined risk factors

- Assign risk scores based on defined criteria and rank the areas

- Develop proposed audit plan sequencing based on risk ranking

116

Approach

- Requested and analyzed district data

- Analyzed state data on LISD

- Conducted interviews

- Conducted news article search

- Performed the risk assessment and scoring against the audit universe

117

Leander ISD Audit Universe

Administrative	Operational	Programs
Accounts Payable	Construction Management	Academic Program Management
Asset Management	Facilities Management	Bilingual/English as a Second Language (ESL)
Communications Management	Nutrition Services	Career and Technical Education (CTE)
Financial Management	Safety and Security	Co-curricular Activities
Governance	School Activity Funds	Federal Programs
Human Resources	Transportation	Gifted and Talented (G/T)
Payroll		Research and Evaluation
Student Information System (SIS)/Public Education Information Management System (PEIMS)		Special Education
Procurement/Contracts		Student Services
Risk Management		
Technology		

What are the risk factors?

1. Potential for fraud or theft

2. Risk of inaccurate data and reporting

3. Risk of non-compliance

4. Risk of failing to meet program or project goals and objectives

5. Health and safety risk

6. Risk of being inefficient

7. Management risk

8. Potential for litigation

9. Risk of negative public sentiment

119

Risk Scoring

- Weight of each risk factor based on significance, and each auditable area based on their perceived impact to the district

- Evaluate and score the inherent and district-specific risk (i.e., residual risk) components of each risk factor for the 26 auditable areas

  - Inherent risk: the innate risk that exists in each auditable area in the absence of controls and district practices (e.g., regulatory complexity)

  - District-specific risk: the risk that remains after the district's controls and practices are considered (e.g., high number of lawsuits)

- Calculate the total weighted scores and convert to a 100-point scale

120

Risk Scoring

- Risk scores determine the priority for audit – the higher the score, the higher the priority

- The risk ranking does not necessarily specify the order of the audits – the Board has the freedom to modify the proposed sequencing of audits based on other factors it deems important

- New information or events may prompt mid-year revision

121

Global Themes

- Leadership turnover in many departments has increased management risk across the district.

- Manual processes and review controls exist in many areas, either due to potential system limitations or a reliance upon previous operating philosophies. Multiple interviewees stated that the district is trying to modernize systems and processes to better fit a large district but is still holding on to potentially outdated approaches in some areas.

  122

- Documented procedures and procedural training exist in many areas but are not implemented systemwide.

Risk Assessment Matrix

Auditable Area	Risk Factor 1	Risk Factor 2	Risk Factor 3	Risk Factor 4	Risk Factor 5	Risk Factor 6	Risk Factor 7	Risk Factor 8	Risk Factor 9	Total	Highest Possible Score	100 Point Scale
Construction Management	21	18	33	27	21	13	30	18	11	192	210	91
Human Resources	15	20	27	33	12	15	27	22	13	184	210	88
Academic Program Management	18	24	24	27	12	12	36	10	16	179	210	85
Special Education	12	18	30	27	21	10	21	22	13	174	210	83
Facilities Management	22	16	16	31	22	13	28	12	10	170	210	81
Financial Management	19	18	28	28	10	12	31	8	10	164	210	78
Safety and Security	16	10	19	25	25	8	31	18	11	163	210	78
Transportation	16	16	19	22	25	10	22	20	11	161	210	77
Federal Programs	22	18	28	25	10	10	31	8	8	160	210	76
Procurement / Contracts	22	18	34	28	10	13	16	10	8	159	210	76
PEIMS/SIS	24	20	27	18	12	13	24	12	9	159	210	76
Student Services	10	16	25	19	25	10	25	16	11	157	210	75
Payroll	22	20	28	22	10	12	25	8	7	154	210	73
Governance	16	14	25	25	10	11	25	14	12	152	210	72
Asset Management	22	16	13	25	16	12	25	10	10	149	210	71
School Activity Funds	28	16	22	16	10	10	22	14	10	148	210	70
Accounts Payable	22	16	19	28	10	11	19	10	6	141	210	67
Technology	19	10	22	28	10	10	25	10	7	141	210	67
Bilingual / ESL Education	13	14	22	25	10	10	22	10	9	135	210	64
Nutrition Services	13	12	19	19	22	10	19	10	7	131	210	62
Risk Management	14	14	20	20	8	9	23	12	5	125	210	60
Career and Technology Education	10	12	19	25	13	9	19	10	7	124	210	59
Gifted and Talented	8	12	14	20	11	7	23	6	8	109	210	52
Research and Evaluation	14	10	14	26	8	5	20	6	5	108	210	51
Communication Management	8	6	20	17	8	7	23	6	9	104	210	50
Co-curricular Activities	8	6	14	11	20	5	17	10	9	100	210	48

123

Observations – Higher Risk Areas

- Construction Management (91)

  - Risk 1: Potential for fraud or theft

    - Inherent risk (high)

      - The industry has a history of budget padding and cash embezzlement.

    - District-specific risk (low)

      - Key controls are in place for mitigating fraud risk, such as multiple parties reviewing pay applications. 124

  - Risk 3: Risk of non-compliance

    - Inherent risk (very high)

      - There are significant legal complexities associated with bond programs.

    - District-specific risk (high)

      - No internal audit activities have occurred in five years.

Observations – Higher Risk Areas

- Construction Management – Risk Score: 91
  - Risk 7: Management risk
    - Inherent risk (high)
      - Projects and programs require a substantial investment of financial and human capital by the district, increasing inherent risks.
      - Data generated by projects can be cumbersome and difficult to manage.
    - District-specific risk (high)
      - There has been substantial turnover of project managers, with most being replaced in the previous two to three years.

125

Observations – Higher Risk Areas

- Human Resources – Risk Score: 88

  - Risk 2: Risk of inaccurate data and reporting

    - Inherent risk (very high)

      - The position data tracking requirements are complex, and these data are not required to be audited by the state (like financial data).

      - Service records and other details related to an employee's past work experience can sometimes be incorrectly entered or inadequately vetted by the sending district.

    - District-specific risk (low)

      - The reliance on paper-based personnel files, as opposed to electronic records, has the potential to lead to inaccuracies.

Observations – Higher Risk Areas

- Human Resources – Risk Score: 88

  - Risk 6: Risk of being inefficient

    - Inherent risk (high)

      - The processes involved in recruiting and hiring new staff members must be efficient in order to expediently capture qualified candidates.

    - District-specific risk (very high)

      - The HR Department currently relies on a paper-based system for [127] personnel files, which may contribute to inefficiencies in data management and record-keeping.

Observations – Higher Risk Areas

- Academic Program Management – Risk Score: 85

  - Risk 2: Risk of inaccurate data and reporting

    - Inherent risk (very high)

      - Academic programs rely heavily on accurate student data, test scores, and performance metrics for planning, decision-making, and external reporting.

    - District-specific risk (high)

      - A mistake was made last year related to the reporting of economically disadvantaged students. LISD reported this to the Texas Education Agency (TEA) and developed an internal improvement plan.

      - There is a potential duplication of effort and inconsistencies in the data collected during LISD observations and walkthroughs.

Observations – Higher Risk Areas

- Academic Program Management – Risk Score: 85

  - Risk 7: Management risk

    - Inherent risk (very high)

      - Academic programs typically involve many staff members across multiple levels (e.g., teachers, instructional coaches, administrators) and multiple campuses, increasing the complexity of management and oversight.

        129

    - District-specific risk (very high)

      - High turnover rates amongst staff create challenges in sustaining consistent processes and making progress towards achieving the district's instructional goals over time.

      - The practices around knowledge transfer and succession planning for central academic leadership positions appear to be limited.

Observations – Higher Risk Areas

- Special Education – Risk Score: 83

  - Risk 3: Risk of non-compliance

    - Inherent risk (very high)

      - The Special Education program is governed by numerous complex federal regulations under the Individuals with Disabilities Education Act (IDEA) as well as state regulations.

    - District-specific risk (moderate)

      - There were moderate compliance issues arising from training gaps due to high turnover, and limited training time for new staff.

      - In 2022-23, the district was out of compliance with "SPP 11" which refers to the State Performance Plan Indicator 11 on timely initial evaluations.

130

Observations – Higher Risk Areas

- Special Education – Risk Score: 83
  - Risk 4: Failing to meet program or project goals and objectives
    - Inherent risk (high)
      - If the district fails to meet its established goals related to properly implementing students' individualized education plans (IEPs), achieving performance targets, and other key metrics, this can significantly and negatively impact the educational outcomes for special education students.

        131

    - District-specific risk (moderate)
      - High turnover rates were noted, especially in self-contained and behavior classrooms, leading to potential disruptions and knowledge gaps.
      - LISD showed Performance Level (PL)-1 or PL-2 indicators in each of the previous three years across all subject areas.

Observations – Higher Risk Areas

- Facilities Operations – Risk Score: 81

  - Risk 2: Risk of inaccurate data and reporting

    - Inherent risk (low)

      - There are few requirements for reporting data from the facilities function in school districts.

    - District-specific risk (high)

      - LISD has an inefficient and manual work order system, leading to [132] data inaccuracies as well as difficulties addressing discrepancies or errors in maintenance reporting.

      - The department is in the process of switching to a new work order system over the summer. While upgrading to this new system should help address inefficiencies, there are risks involved, including data migration risks, user adoption risks, and implementation risks.

Observations – Higher Risk Areas

- Facilities Operations – Risk Score: 81
  - Risk 4: Failing to meet program or project goals and objectives
    - Inherent risk (high)
      - There is the possibility of deferred maintenance backlog that makes it difficult to maintain facilities adequately.
      - Lack of funding and/or resources to fully meet maintenance and operational needs is an inherent risk.
    - District-specific risk (very high)
      - Formal goals for monitoring effectiveness and efficiency of maintenance and custodial functions do not exist.

133

22

Proposed Sequence of Internal Audits

Audit Area	Risk Ranking	2024-25	2025-26	2026-27	2027-28	Comments
Construction Management	1	X				
Human Resources	2	X				
Federal Programs	9	X				Included in 2025-26 due to a lower estimated level of effort for audit completion.
Academic Program Management	3		X			
Special Education	4		X			Proposed for 2025-26 due to recent consulting efforts in this area.
Facilities Management	5		X			134
Financial Management	7			X		
Safety and Security	8			X		
Transportation	6				X	Proposed for 2027-28 due to recent consulting efforts in this area.
Procurement and Contracts	10				X	

Questions?

Leander ISD Board Meeting Agenda Item Information
Meeting Date: Thursday, September 5, 2024

Agenda Item:	Consider Approval of Remote Homebound Waiver
Purpose:	☐ Discussion Item/Report Only　　☒ Action Requested
Administrator Responsible:	Paige Collier, M.Ed. Assistant Superintendent of Special Programs
Attachments:	N/A

Background Information:

To be placed in the special education or Section 504 homebound instructional setting, a student aged six years or older must meet the following criteria:

- The student is eligible for special education and related services as determined by an Admission, Review, Dismissal (ARD) committee or Section 504 accommodations as determined by the Section 504 committee.
- The student is expected to be confined at home or hospital bedside for a minimum of four weeks. The weeks need not be consecutive if the student is chronically ill and the local district policy allows for such.
- The student's medical condition is documented by a physician licensed to practice in the United States.

The district is currently seeking a homebound waiver from TEA for one student who has medical needs that impair their ability to have in-person homebound services due to their health condition. The ARD committees and/or Section 504 recommended that the student be given a remote homebound option so that they can be supported in their coursework at their appropriate level given their needs. An individual waiver will be submitted for the student.

Administrative Recommendation:

Administration recommends the board allow administration to seek a waiver from TEA to request that remote homebound instruction be provided to one student. The waiver for remote homebound will allow for a remote instructional arrangement to generate attendance (eligible days present) according to the homebound funding provisions in 4.7.2.5 Homebound Funding and Homebound Documentation Requirements.

Sample Motion:

I move to allow LISD administration to seek a waiver from TEA to request that remote homebound be provided to one student and counted for homebound funding purposes and to count the student as in attendance when remote instruction is provided.

LEANDER ✦ ISD
LEADING TO A BRIGHT FUTURE

SEPTEMBER 05, 2024

Superintendent's Report

EMPOWERED LEARNERS

138

EMPOWERED LEARNERS

EMPOWERED COMMUNITY

Listening Circles

140
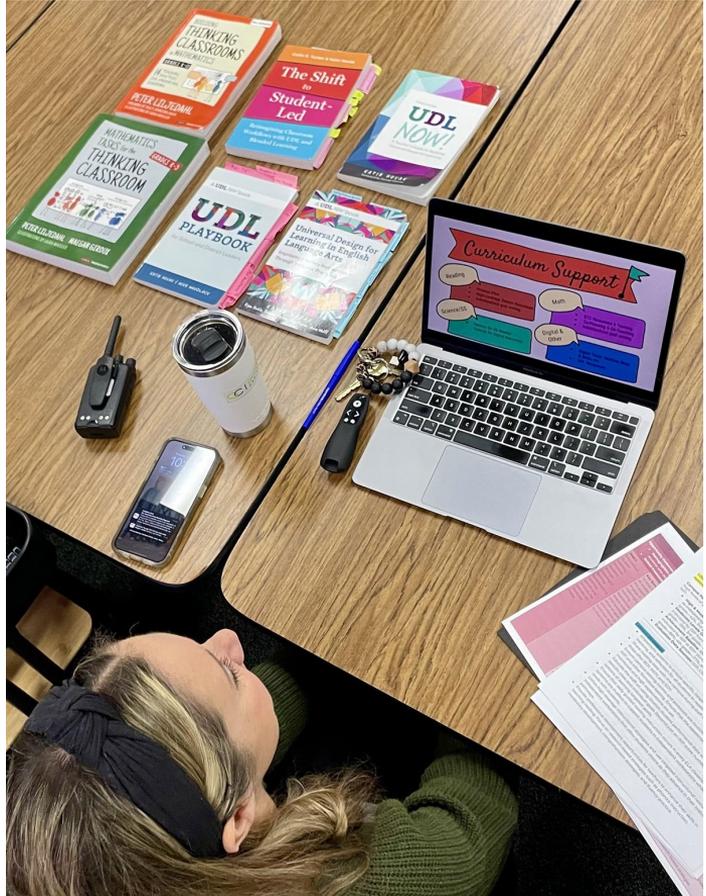
EMPOWERED COMMUNITY

Listening Circles

EMPOWERED COMMUNITY

Listening Circles

142

143

SAFE AND INNOVATIVE LEARNING ENVIRONMENTS

144

LISD'S

Leadership Academy

WHAT IS THE PURPOSE?

Are you ready to unlock your full potential and become the leader you were meant to be? Join our Leadership Academy and embark on a transformative journey toward personal and professional growth.

145

146
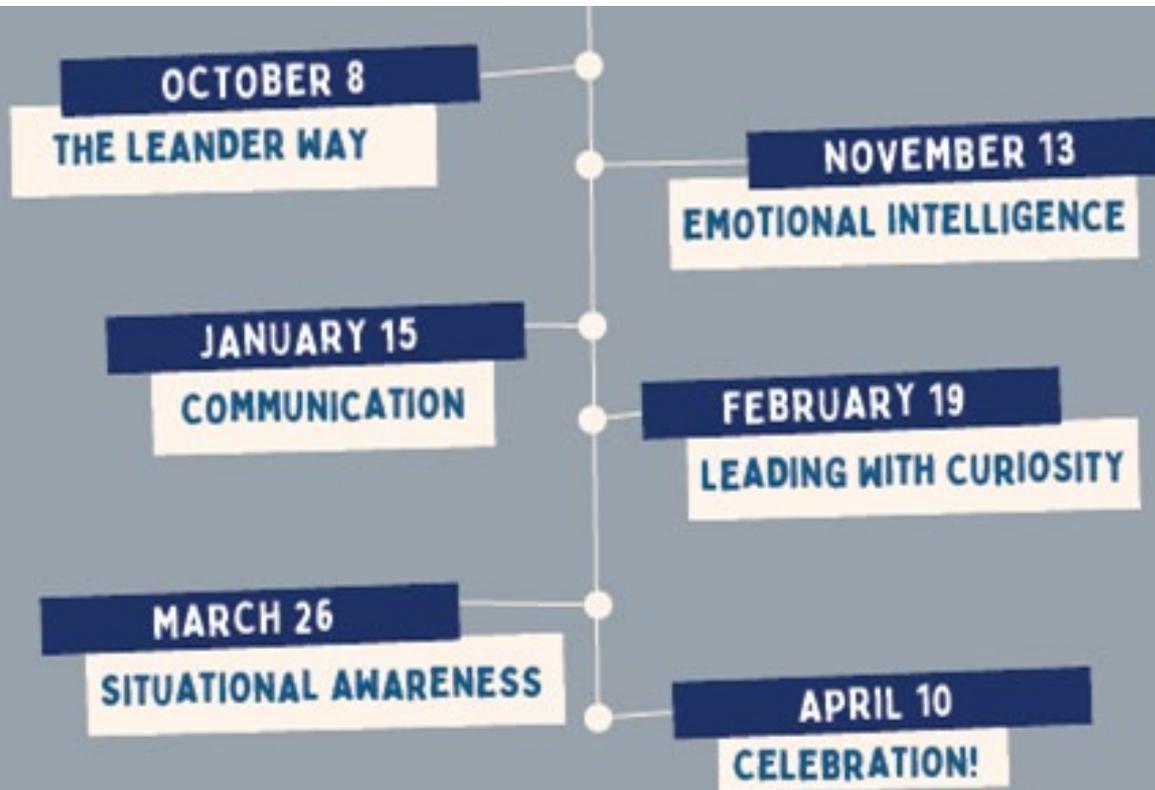
WHO IS INVITED?

Everyone: teacher, bus driver, cafeteria staff...everyone! Whether you are hoping to grow your leadership skills as a classroom teacher or grow your career into a leadership role, don't miss this opportunity to invest in yourself and take your leadership abilities to the next level. Sign up for The Leadership Academy and be the force of the future!

HOW DO I GET STARTED?

Fill out the Leadership Academy Application today!

bit.ly/LISDLeadership

147
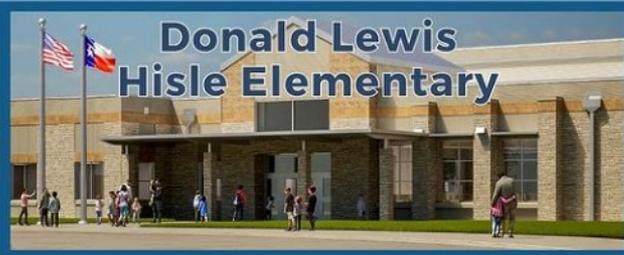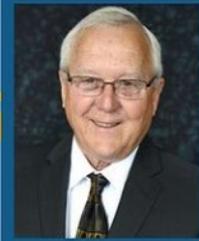
148

Hisle Elementary Dedication

DISCUSSION

Leander ISD Board Meeting Agenda Item Information

Meeting Date: Thursday, September 5, 2024

Agenda Item:	Substance Abuse Prevention Education and Support Services Update
Purpose:	☒ Discussion Item/Report Only ☐ Action Requested
Administrator Responsible:	Matthew Gutierrez, Ed.D., Deputy Superintendent, Learning and Innovation, Steve Clark, Director of Counseling Services, Cristin Wicketts, RN, Director of Health Services
Attachments:	Substance Abuse Prevention and Support Services Update Presentation *(Uploaded in BoardBook 09-03-24)*

Background Information:
Counseling Services and Health Services will provide an update on the supports available to students who are experiencing substance use concerns and the prevention efforts provided by the counseling services department.

Administrative Recommendation:
N/A

Sample Motion:
N/A

September 5, 2024

Substance Abuse Prevention Education and Support Services Update

151

Counseling Services and Health Services

Prevention Education

PURPOSE

- Update the Board on Leander ISD's substance use prevention/education efforts, and supports provided by the counseling and health services departments to students who are experiencing substance use concerns.

152

2

Prevention Education

- Substance abuse prevention instruction included in the Health Education Texas Essential Knowledge and Skills (TEKS).

- House Bill (HB) 3908

   Each school district shall annually provide research-based instruction related to fentanyl abuse prevention and drug poisoning awareness to students in grades 6 through 12.

- Counseling Services department is an added layer of support.

153

Prevention Education

- Second Step Social Emotional Learning (SEL) Curriculum (K-5)
  - Healthy coping skills

- Mental Health Minutes
  - Leander ISD created videos

- Counselor Lessons

154

4

Current Counselor Lessons Specific to Substance Prevention

- Grade 6: Vaping and Fentanyl
- Grade 7: Alcohol and Fentanyl
- Grade 8: Opioids and Fentanyl
- High School: Fentanyl

155

Prevention Education Under Review

Target Completion Date is September 13
Proposed Scope and Sequence for Review

156

"

Educating and empowering teenagers to make safe and healthy choices must be our highest priority.

- Encourage youth not to use drugs in the first place
- Encourage youth who are already using to stop or at least cut back or make alternative choices to reduce their risk
- Provide straightforward; science-based information
- Explore the real and perceived benefits
- Prioritize safety through personal responsibility and knowledge

157

"

Stanford's Safety First Mission

Parent Engagement

How do we engage parents?

- Access to lesson content
- School Health Advisory Council (SHAC) parent representation
- Distribution of informative materials during events
- Empowering Parents resource page
  - https://www.leanderisd.org/empoweringparents/

158

8

Leander Extended Opportunity Center (LEO) - Substance Use Services

- Students in grades 6-12 with a first-time substance use infraction
- Guardian consent
- CRAFFT 2.1 Questionnaire
  - Based on the results, the Student and Family Support Team (SFST) Clinician will determine the next best steps
    - Psychoeducation session(s) on substance use with the student
    - Referral to the Texas Child Health Access Through Telemedicine (TCHATT) Adolescent Substance Use Disorder Initiative, Bluebonnet Trails Recovery/OSAR (Outreach, Screening, Assessment and Referral)
    - Referral to campus-based SFST Clinician for continued support upon return to home campus
    - Referral to a community-based provider

159

Student Support

Student and Family Support Team

- Individual and Family Therapy
- Case Management
- Referrals to Community Providers
- Guardian Coaching

160

Access to an opioid Antagonist: **<u>Narcan</u>**

- Senate Bill (SB) 629
- Leander ISD Policy:
  - Board Policy FFAC (Local) updated to reflect SB 629 requirement
- Training:
  - Onboarding for all new campus employees
  - Annually
    - All campus staff are trained by the campus RN at the beginning of the school year.

161

Student Support

Access to an opioid Antagonist: **Narcan**

Automated External Defibrillator (AED)
- Two doses in every AED district wide
  - 90 AEDs total
- Two doses in each athletic trainers portable AED
  - 2 portable AEDs on each campus

Campus Nurse "Go Bag"
- Two doses in elementary
- Four doses in secondary

Thank you to:
- Wilco EMS Outreach for supplying all of our AED Narcan
- Bluebonnet Trails Community Service for supplying all of our RN "Go Bag" Narcan

162

12

DISCUSSION

163

Agenda Item:	Strategic Plan & District Improvement Plan Formative Review - Empowered Learning Part 2
Purpose:	☒ Discussion Item/Report Only ☐ Action Requested
Administrators Responsible:	Chris Clark, Ed.D, Assistant Superintendent of Curriculum and Instruction; Kristen Alex, Area Superintendent; April Chauvette, Director of Professional Learning; Brenda Cruz, Assistant Superintendent of Empowered Learning
Attachment:	Strategic Plan & District Improvement Plan Formative Review - Empowered Learning - Part 2

Background Information:

The Strategic Plan & District Improvement Plan Formative Review presentation is an opportunity to update the Board of Trustees on actions being taken to achieve outcomes articulated in Leander ISD's Strategic Plan. Tonight's Empowered Student Learning Formative Review is the second of two presentations focused on Empowered Learning (Goal 1). The purpose of presentation part 2 is to:

- Inform the Board of Trustees and our community on how we are growing capacity in our system to operate a Professional Learning Community at all levels of the organization to meet student and adult learning needs, and advance toward our overarching goals related to empowerment and ownership of learning

Administrative Recommendation:
N/A

Sample Motion:
N/A

September 5, 2024

Empowered Learning - Part 2

165

Strategic Plan & District Improvement Plan Formative - Part 2
Review - Empowered Learning

1

System Alignment

LISD 5-Year Strategic Plan

Community-Based Accountability

LISD Board Goals

Board Evaluation

Superintendent Evaluation

District & Campus Improvement Plans

166

2
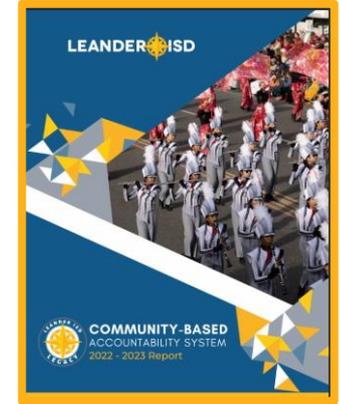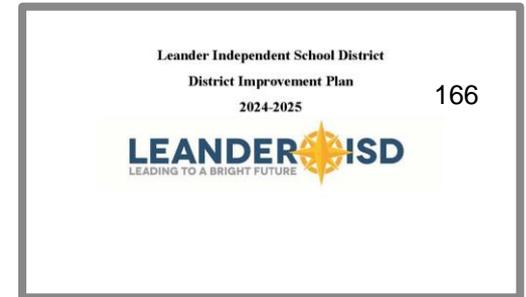
Empowered Student Learning

Goal:

Empower students through meaningful learning experiences to optimize growth and embody the Leander ISD Graduate Profile.

Impact/Student Benefit:

Students will have agency over their learning, build a growth-centered mindset, and feel empowered to pursue their dreams.

System Responses

1. **Create and support a culture of deeper learning for all staff and students, so they achieve the attributes in the LISD Graduate Profile.**
2. **Expand Student Ownership of Learning to Facilitate Acquisition of the LISD Graduate Profile**

167

3

Empowered Student Learning - Part 1

Purpose:

- Inform the Board of Trustees and our community on how we facilitate active monitoring of, response to, and communication of students' academic growth.

- Support assessment literacy around the types of assessments included in the Leander ISD Assessment Framework and how we can best utilize the data.

- Connect assessment and data literacy as tools to build and strengthen:
    - ➢ ownership of learning
    - ➢ effective collaborative teams (PLC)

168

4

Empowered Student Learning - Part 2

Purpose:

Inform the Board of Trustees and our community on how we are growing capacity in our system to operate a Professional Learning Community at all levels of the organization to meet student and adult learning needs, and advance toward our overarching goals related to empowerment and ownership of learning

169

5

Empowered Student Learning - Part 2

Collective Effervescence (Durkheim, 1912/1915)

Collective Efficacy

- Bandura (1977) Concept began emerging
- Bandura (1997) defined "Collective Efficacy"
- Hattie (2016) Meta-Analysis reveals an **Effect Size of 1.57**

Empowered Student Learning

Ownership of Learning

This is the start of the BIG work!

PLCs

171

Empowered Student Learning

PLC Belief Statement

Leander ISD believes a Professional Learning Community is the heart of high quality, job-embedded professional learning and is the most effective manner to ensure academic growth for all students.

Professional Learning Communities in Leander ISD

PLC Belief Statement
Leander ISD believes a Professional Learning Community is the heart of high quality, job-embedded professional learning and is the most effective manner to ensure academic growth for all students.

Vision of Highly Effective PLCs
Leander ISD will function as a Professional Learning Community, at all levels of the organization, through highly effective collaborative teams that center all work on improving student learning.

Operational Definition of PLCs
A Professional Learning Community is an ongoing process in which educators work collaboratively in recurring cycles of collective inquiry and action research to achieve better results for the students they serve.

Collaborative Team Commitments - The Work of our PLC

Student Learning as our Primary Purpose	Collaborative Culture as our Primary Practice	Performance Results as our Primary Measure
Our decisions focus on positively impacting student learning.	Our actions focus on building and maintaining our interdependence.	Our efforts are driven by a results-oriented mindset.
We will: Create essential outcomes based on the LISD Curriculum Documents. (What do we want students to learn?)	**We will:** Actively participate in regularly scheduled collaborative team time during the school day.	**We will:** Analyze student performance results from multiple common assessments to ensure a year (or more) of growth for every student.
Use multiple common assessments to monitor the learning of each student on all essential outcomes. (How will we know they learned it?)	Create and implement unified practices regarding scope, sequencing, pacing, grading, and assessment practices.	Purposefully identify and support students who require intervention to master essential outcomes.
Provide interventions during the regular school day. (How will we respond when students do not learn?)	Seek and share high-yield strategies to positively impact student learning.	Purposefully identify and support students who need enrichment. Reflect on results to discover strengths and weaknesses in our collective/individual teaching.
Provide enrichment and challenge opportunities during the regular school day. (How will we enrich and extend the learning for students who already know the content?)	Align our actions to collective commitments and district/campus goals.	Use our reflective practice to promote continuous improvement in every classroom and every department.

172

8

Empowered Student Learning

We, collectively, are a PLC.

LISD Vision of Highly Effective PLCs

Leander ISD will function as a Professional
Learning Community, at **all levels of the organization**,
through highly effective collaborative teams
that center all work on improving student learning.

Student & Family Learning Teams

Classroom Learning Teams

Campus Teacher Collaborative Teams

Campus Leadership Collaborative Teams

District Department Collaborative Teams

District Leadership & Board of Trustees Collaborative Teams

173

9

Empowered Student Learning

District-Wide PLC Guiding Coalition

Purpose:

...ensure high functioning professional learning communities [are] developed and supported throughout the system, through a renewed focus on the LISD PLC Commitments.

Meeting #1

Grounding Activity → Current Reality → Ideal State

175

11

Meeting #2

Confirming Ideal → Drivers/Barriers → Improvement Ideas

Themes from Ideal strongly connect to barriers:

- ✅ 30 Lack of Training and Support
- ✅ 20 Lack of Vision, Clarity, and Consistency
- ✅ 11 Lack of Time and Resources
- ✅ 15 Need for Leadership and Buy-in
- ✅ 0 Need for Data and Reflection
- ✅ 0 Need for Sustainability

Meeting #3

Shared Learning

Synthesis of Improvement Ideas

Visioning for Coalition

Small Work Groups

The Leadership Choice:
PLCs at Work or PLC Lite?
Douglas Reeves and Robert Eaker

Professional Learning Communities in Leander ISD
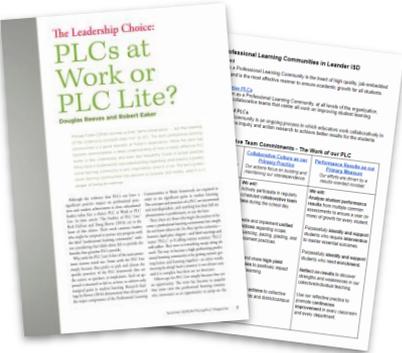
POPE Protocol *(Table 4)*

Purpose	Outcomes	Process	Evaluation
...ensure high functioning professional learning communities [are] developed and supported throughout the system, through a renewed focus on the LISD PLC Commitments.	Identify the high yield adjustments that we need to make that would be beneficial district wide. We need to gather knowledge of where we are at within the district. What is our reality? Identify timeline and participants (schools, levels, feeder patterns, content area?) Initiate conversations around what work can be done at the district level campus level.	Determine focus of process (school, level, and PLC data	Evaluating system to capture the reality of PLC data

POPE
PURPOSE
OUTCOMES
PROCESS
EVALUATION
© Langford International, Inc.
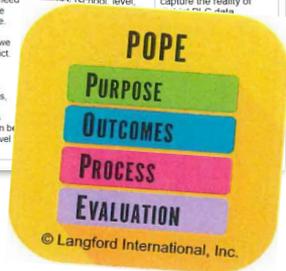
Improvement Ideas Based of Key Barriers to System-wide PLC implementation
(Organized under David Molina's "Responsibilities of Leadership" framework)

Clear Expectations & Objectives	Capacity Building	Monitor & Review
Create Clear/Common Guidance - the "why" - loose/tight - how/flow of PLC process - rubrics to support improvement - master schedule expectations (embedded, but separate from planning time) - within curriculum documents (more specifically) Connect tools/templates/docs to guiding documents Ongoing, year-long support	Tools/resources/templates that: - support the how/flow of PLC work - align with guiding documents - streamline and support efficient/effective use of curriculum docs Learning & Collaboration - campus admin and team/dept leaders, and ALL staff (including Solution Tree training, mentors/partners from other campuses, etc) - ongoing and throughout the year (not a firehose in August) - create, grow, and leverage campus-based leadership teams w/ a variety of stakeholders (based on campus level)	Reflection & Needs Assessments (individual, team, campus) Ongoing campus conversations regarding PLC expectations Pulse checks at campus and system level throughout the year (how's it going, strengths, weaknesses) Connect to SLO work

- **Loose/ Tight**
- **BoY PLC ReLaunch**

13

Meeting #4

Development of New Tools and Resources

→ Beginning of Year PLC ReLaunch Design

→ Leadership Development Topics

178

14

Empowered Student Learning

Key Barriers:

☑ 30 Lack of Training and Support

☑ 20 Lack of Vision, Clarity, and Consistency

☑ 11 Lack of Time and Resources

☑ 15 Need for Leadership and Buy-in

☑ 0 Need for Data and Reflection

☑ 0 Need for Sustainability

179

15

Empowered Student Learning

Improvement Ideas Based on Key Barriers to System-wide PLC implementation *(Organized under David Molina's "Responsibilities of Leadership" framework)*		
Clear Expectations & Objectives	**Capacity Building**	**Monitor & Review**
• **Create Clear/Common Guidance** • **Connect tools, templates, docs to guiding documents** • **Ongoing, year-long support**	• **Tools, resources, templates** • **Learning & Collaboration**	• **Reflection & Needs Assessments** • **Ongoing campus conversations regarding PLC expectations** • **Pulse checks**

180

16

Empowered Student Learning

Improvement Ideas Based on Key Barriers to System-wide PLC implementation *(Organized under David Molina's "Responsibilities of Leadership" framework)*		
Clear Expectations & Objectives	**Capacity Building**	**Monitor & Review**
• **Create Clear/Common Guidance** • **Connect tools, templates, docs to guiding documents** • **Ongoing, year-long support**	• **Tools, resources, templates** • **Learning & Collaboration**	• **Reflection & Needs Assessments** • **Ongoing campus conversations regarding PLC expectations** • **Pulse checks**

181

Empowered Student Learning

Clear Expectations & Objectives:
Professional Learning Calendar

- *Extended time in collaborative teams to engage in PLC work*

- *Embedded district content/program- based learning as a part of PLC team time for immediate application opportunities*

- *Paid, after-school capacity building sessions for collaborative team leaders to support their leadership development & prepare for PL days*

2024-2025
LEANDER ISD
LEADING TO A BRIGHT FUTURE
PROFESSIONAL LEARNING CALENDAR

Date		AM *(8:00 - 11:00 AM)*	PM *(1:00 - 4:00 PM)*
September 23 *(IAs on contract: IA Summit)*		Focused PLC Time with District-Based PL Content Embedded	Campus-Based Learning
October 14 *(IAs on contract)*	Elem	Parent Teacher Conferences	
	MS/HS	Campus-Based Learning	
November 4 & 5 *(IAs on contract)*		CIC details TBD	Focused PLC Time with District-Based PL Content Embedded
January 6 *(IAs on contract)*		Campus-Based Learning	CIC details TBD
February 17 *(IAs off contract)*		Campus-Based Learning	Focused PLC Time with District-Based PL Content Embedded
March 24 *(IAs on contract)*		Campus-Based Learning	Focused PLC Time with District-Based PL Content Embedded
April 21 *(IAs off contract)*		Focused PLC Time with District-Based PL Content Embedded	Focused PLC Time with District-Based PL Content Embedded
			Campus-Based Learning

182

18

Empowered Student Learning

Clear Expectations & Objectives:
PLC Implementation Guide

Describes Leander ISD's standard of best practice in implementing the PLC process

- *Continuum of implementation levels*

- *Key actions for each phase of the PLC cycle*

- *Used as a reflection and goal setting tool*

- *Supporting reflective/coaching questions for each phase*

183

Empowered Student Learning

Improvement Ideas Based on Key Barriers to System-wide PLC implementation
(Organized under David Molina's "Responsibilities of Leadership" framework)

Clear Expectations & Objectives	Capacity Building	Monitor & Review
• **Create Clear/Common Guidance** • **Connect tools, templates, docs to guiding documents** • **Ongoing, year-long support**	• **Tools, resources, templates** • **Learning & Collaboration**	• **Reflection & Needs Assessments** • **Ongoing campus conversations regarding PLC expectations** • **Pulse checks**

184

20

Empowered Student Learning

Capacity Building:
PLC Reflective/Coaching Questions

- *Guide teams through the key actions needed to function at high levels of PLC implementation*

- *Create clarity on the right work*

- *Inspire reflective conversations among team members*

- *Support moving teams from PLC Lite to PLC Bright*

185

Empowered Student Learning

Capacity Building:
Professional Learning

Campus & District Leaders:

- *LISD Leadership Conference*
- *SPROG Leadership Summit*
- *Amplify Your Impact: Coaching Collaborative Teams in PLCs At Work*
- *Focus strand of Leadership Meetings*

Campus teams, as available:

- *PLC At Work Live Institute*
- *PLC At Work Institute*

22

Empowered Student Learning

Capacity Building:
Professional Learning

Teacher Leaders:

- *The 15-Day Challenge: Putting All the Pieces of Daily Life in a PLC at Work Together*
- *Foundations of Teacher Leadership & Leading the Work of the PLC*
- *Paid Summer Planning Day*
- *After-school (paid) capacity building sessions*

District-Wide:

- *Beginning of Year PLC Relaunch*

23

Empowered Student Learning

Improvement Ideas Based on Key Barriers to System-wide PLC implementation *(Organized under David Molina's "Responsibilities of Leadership" framework)*		
Clear Expectations & Objectives	**Capacity Building**	**Monitor & Review**
• **Create Clear/Common Guidance** • **Connect tools, templates, docs to guiding documents** • **Ongoing, year-long support**	• **Tools, resources, templates** • **Learning & Collaboration**	• **Reflection & Needs Assessments** • **Ongoing campus conversations regarding PLC expectations** • **Pulse checks**

188

24

Empowered Student Learning

Monitor & Review:
Ongoing Data Collection & Analysis

PLC Implementation Guide as Team Reflection and Data Collection Tool

- *Initial Baseline Window in September*

- *Mid-Year/Spring Window*

- *Campus and District Access to Data*

District-Wide PLC Guiding Coalition

- *Review/planning based on data collection*

- *Anecdotal insights*

25

Empowered Student Learning

Ownership of Learning

This is the start of the BIG work!

PLCs

190

Empowered Student Learning

As PLC implementation moves from PLC Lite, to PLC Right, to PLC Bright, ownership of learning increases.

Leander ISD PLC Implementation Guide (2024-25)

Element	Key Actions	PLC Bright	PLC Right	PLC Lite
PLC Foundational Practices *Educators work in collaborative teams, rather than in isolation, and take collective responsibility for the learning of ALL students.*	• Clarify Meeting Purpose • Develop Working Agreements • Engage in Shared Learning • Utilize Processes to Foster Productivity • Commit to Collective Responsibility for All	Teachers meet in collaborative teams, efficiently using their designated, protected time within the regular school day. They utilize norms, goals, and protocols; celebrate successes; work interdependently; and leverage team member strengths to learn together and improve their practice to maximize impact on ALL students' learning.	Teachers meet in collaborative teams during designated, protected time within the regular school day. They write and use norms and goals, and ensure equitable participation of team members in learning together and planning for student learning.	Teachers inconsistently meet in collaborative teams during or only in parts of designated, protected time within the regular school day. They work together with varied levels of participation, calendar lessons and materials without discussion of instructional practice, and/or focus on operational details.
Q1: What do we want our students to know or be able to do? *Collaborative teams implement a guaranteed and viable ...*	• Prioritize Essential Standards • Identify Learning Targets • Create "I Can" Statements • Determine Proficiency Levels/Scales	Teams prioritize and unpack standards; identify progression of learning targets; write student "I can" statements; create common pacing within LISD units of study; and integrate practices that will support deeper learning, student ownership of learning, and attainment of Graduate Profile skills. Students know the unit/lesson and Graduate Profile targets and make personal connections to the targets.	Teacher teams prioritize and unpack standards, identify learning targets within LISD units of study, and discuss practices that support student ownership of learning related to the targets. Students know the unit/lesson learning targets.	Teachers deliver standards-based lessons using what they know, like the most, have materials for, or what is included/next in the textbooks.

PLC Bright ⬅ PLC Right ⬅ PLC Lite

| **Q2:** How will we know if each student has learned it?

Collaborative teams and students monitor learning and attainment of the Graduate Profile through an ongoing assessment process that includes frequent, team-developed, common formative assessments. | • Develop Common Assessments
• Align Assessment Procedures
• Collect & Organize Assessment Results
• Analyze Student Work & Data
• Reflect on Quality of Assessments & Revise
• Analyze the Impact of Instructional Practices
• Implement Processes for Student Ownership | Teacher teams collaboratively create valid and reliable common formative and summative assessments within each unit.

Teacher teams use protocols to analyze common assessment results; identify students who need intervention and extension; and determine which practices best support student learning.

Students reflect, set goals, and engage in feedback loops to track progress within and across units and on Graduate Profile skills. | Teacher teams share the responsibility for creating common formative and summative assessments within each unit.

Teacher teams analyze the results of common formative and summative assessments to identify which students need intervention and extension.

Students track progress within and across units. | Teacher teams rotate the responsibility for creating common summative assessments they administer periodically throughout the school year.

Teacher teams review summative assessment results to monitor student progress or generate grades. |

191

Empowered Student Learning

Teacher/Collaborative Team Ownership	Student Ownership	Actions and Collection of Evidence
What do we expect students to learn?	What is essential for me to know and be able to do?	• Personal Learning Plan based on standards mastery • Goal Setting • Action Plan
How do we know students are learning it?	How will I know if I am making progress toward these essential outcomes? How will I demonstrate I have learned it?	• Portfolio of Learning • Collection of Evidence (Assessment Framework) • Leading Measures • Tracking progress • Exhibition of Learning
How do we respond when they do not learn?	What steps should I take when I am struggling to make progress?	• Setting and tracking intentions based on progress • Action plan • Intervention / Extension
How do we respond when they have already learned?	How may I extend my learning when I have achieved the essential outcomes?	

192

DISCUSSION

Agenda Item:	Discussion of Elementary Tiered Math Initiative Program Evaluation
Purpose:	☒ Discussion Item/Report Only ☐ Action Required
Administrator Responsible:	Chris Clark, Ed.D, Assistant Superintendent of Curriculum and Instruction,
	Sarah Martinez, Ed.D, Director of Research Program Evaluation,
	Emily Gray, Senior Coordinator K-12 Measures,
	Jennifer Ruschhaupt, Senior Coordinator of Elementary Math and
	Alicia Westcot, Senior Director of Science & Math
Attachments:	Elementary Tiered Math Initiative Program Evaluation Presentation
	Elementary Tiered Math Initiative Program Evaluation Report

Background Information:

Dr. Sarah Martinez, Emily Gray, Alicia Westcot, and Jennifer Ruschhaupt will share the results of a comprehensive program evaluation conducted during the 2023-24 school year for the Elementary Tiered Math Initiative. Leander ISD implemented this initiative to improve student outcomes in mathematics by enhancing math instruction across elementary campuses and providing tiered support tailored to each campus's specific needs. The purpose of this presentation is to brief the Board of Trustees on the preliminary results of the initiative. The presentation will highlight key findings, successes, and challenges, and offer recommendations for enhancing the ongoing impact of this work with our elementary math teachers and students.

Administrative Recommendation:

N/A

Sample Motion:

N/A

September 5, 2024

Elementary Tiered Math Initiative Program Evaluation

195

Elementary Tiered Math Initiative Program Evaluation

Purpose of Presentation

The purpose of this presentation is to brief the Board of Trustees on the preliminary results of the Elementary Tiered Math Initiative from the 2023-24 school year. We will highlight key findings, successes, and challenges, and present recommendations for enhancing the program's impact on our elementary math teachers and students.

196

Elementary Tiered Math Program Goals

- Improve student outcomes in mathematics achievement through:
  - Systemwide professional learning to ensure LISD educators are trained and equipped to deliver effective tier-one math instruction through curriculum implementation with fidelity.

  - Tiered plan of support - differentiated to meet the needs of each campus.

- Improve teacher understanding of and comfort with the curriculum resources available for elementary math teachers.

- Provide clear expectations and direct support in utilizing the math curriculum to support high-quality instruction.

- Deepen teacher understanding of how the LISD Elementary math curriculum components work together to provide high-quality, effective math instruction.

197

3

Elementary Tiered Math Initiative

Tier 3: Embedded Support

Professional Learning + Co-Teacher for grades 4 & 5 & Campus-based Math Specialist

Tier 2: Targeted Campus Support

Professional Learning + Co-Teacher for grades 4 & 5

Tier 1: System-wide Foundational Professional Learning & Support

198

Elementary Tiered Math Initiative Theory of Change

Professional Learning

Summer/ BoY Training for teachers and campus leaders

Leadership Support

Campus leaders consistently reinforce the expectations, "look-fors", and goals in conversations with teachers

Differentiated Needs-based Support

Campuses receive needs-based support through a tiered model.

On-going Professional Learning

Teachers engage in ongoing learning throughout the year *(Prof Learning sessions, campus walks, PLCs, coaching cycles, etc)*

Improved Teacher Practice

Teachers increase confidence and competence and consistently utilize the district curriculum and 8 effective practices to plan and implement student learning experiences.

Improved Student Experience

Students engage in rich tasks that require student thinking and transfer of learning.

Improved Student Outcomes

Student outcomes in performance, math conceptual understanding & problem solving, and students' math mindset/ attitudes towards math improve.

199

Evaluation Objectives and Research Questions

Objective 1: Conduct a Comprehensive Implementation Assessment

Objective 2: Assess Program Impact on Teaching Practices

Objective 3: Gather Stakeholder Perception and Conduct a Needs Analysis

Objective 4: Data-Driven Effectiveness Evaluation

200

6

Evaluation Objectives and Research Questions

Objective 1: Conduct a Comprehensive Implementation Assessment

- How well has the Tiered Math Initiative been implemented across grades 2 through 5, and what factors contribute to variations in implementation?

- To what extent has the fidelity of implementation been maintained, and what challenges have been addressed in the process?

Objective 2: Assess Program Impact on Teaching Practices

- What observable changes have occurred in teacher mindset, instructional practices, and confidence levels due to the Tiered Math Initiative?

- Are there specific components of the initiative that have more pronounced impact on teaching practices?

Objective 3: Gather Stakeholder Perception and Conduct a Needs Analysis

- What are stakeholders' perceived strengths and benefits of the Tiered Math Initiative?

- What identified needs or challenges have stakeholders expressed, and what recommendations do they provide for program enhancement?

Objective 4: Data-Driven Effectiveness Evaluation

- What metrics are most relevant for evaluating the effectiveness of the Tiered Math Initiative?

- How will both quantitative and qualitative data be collected and analyzed to measure program effectiveness, and how can this data inform adjustments to the initiative?

- What are the initial outcomes regarding the program's impact on student math performance and growth as well as mindset about mathematics?

Methodology

Develop or Refine the Program Logic Model & KASAB	Identify Metrics & Create a Plan for Data Collection	Collect Formative & Summative Measures	Analyze Data Collected & Make Recommendations
Developed and refined the Theory of Change, Program Logic Model, and KASAB frameworks with stakeholders group	Built an evaluation framework that identified the specific metrics and indicators aligned with the program's objectives and evaluation key questions.	Measures collected: ● Student Surveys ● Teacher Surveys ● Interviews & Focus Groups ● Classroom Observations/ Walkthroughs ● MAP data ● STAAR data	Quantitative Analysis of surveys, student performance, observational data Qualitative Analysis of open ended responses on surveys, interviews and focus groups

Key Findings

Finding: Implementation Fidelity and Challenges

- Varying levels of fidelity across campuses
- Professional learning opportunities consistently provided with varying levels of ongoing campus-based support
- Adjustments from original proposal
  - Dedicated support and professional learning time with principals and instructional coaches
  - Additional math specialist for Tier 2 campus support
- Significant variation with the implementation of Co-Teaching Model
- Importance of role clarity, consistency of staff, and relationship building

204

How effectively have you been able to implement the curriculum and resources in the Essential Units of Study in your classroom this year compared with last year?
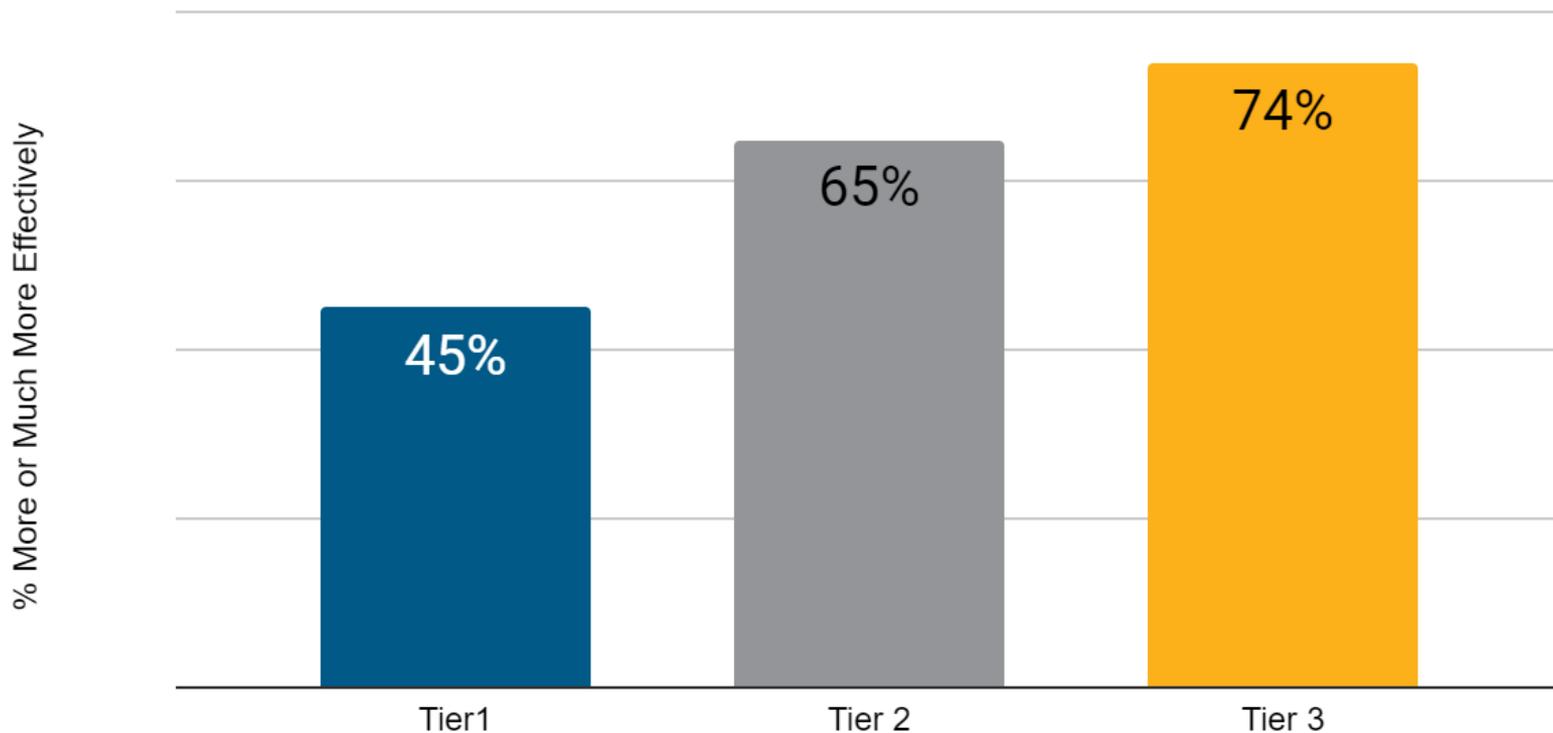
Finding: Impact on Teaching Practices
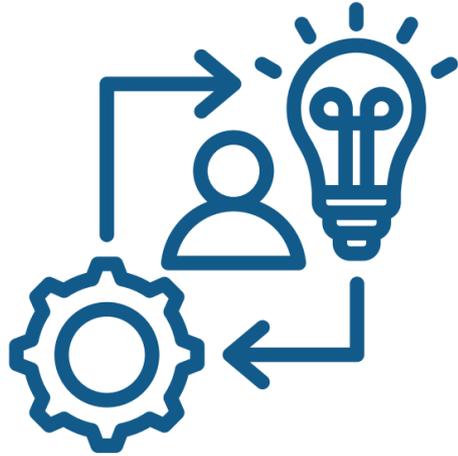
- Increased levels of confidence of teachers and utilization of curriculum resources for planning

- Increased implementation of curriculum and resources

- Increased focus on collaborative and reflective teaching practices especially at Tier 2 & 3 campuses

- Emphasis on student mathematical discourse, problem solving and conceptual understanding [206]

Key Finding #2

" It has been a Godsend to have this initiative on our campus. We have been able to move math instruction exponentially this year as compared to all my years here.

- Tier 3 Campus Instructional Coach

How effectively have you been able to implement Number Corner and Work Place games in your classroom this year compared with last year?

% More or Much More Effectively

Tier1 — 52%
Tier 2 — 55%
Tier 3 — 61%
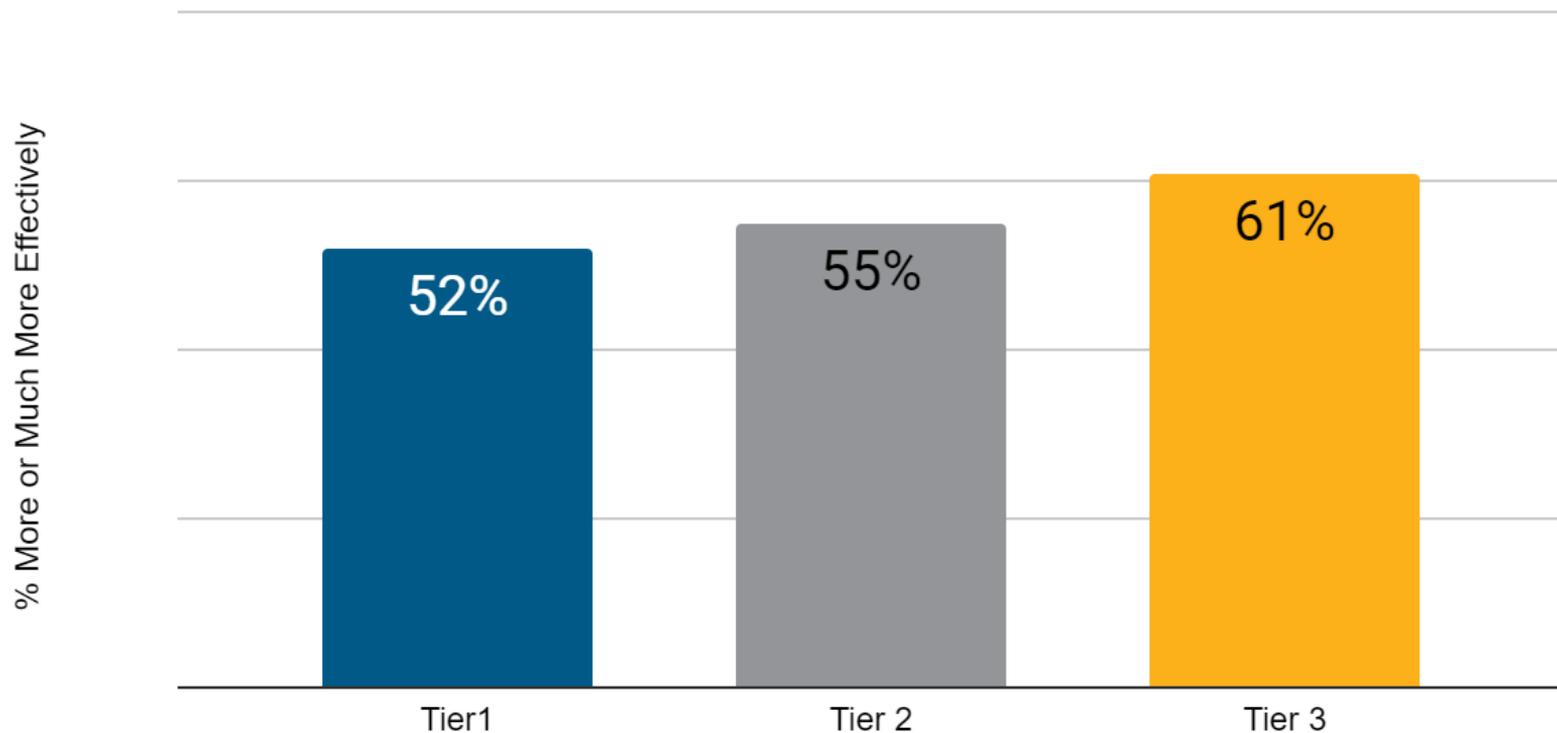
Finding: Stakeholder Perceptions

- Stakeholders identified the benefits of enhanced professional development, peer support, collaboration, and targeted support

- Desire for more targeted, collaborative, job-embedded professional learning opportunities, planning time and support, and improvements in resource usability

- Challenges include:
  - Complexity of curriculum resources
  - Time constraints
  - Differentiation for diverse needs

- Stakeholder recommendations include improving curriculum usability, providing more planning time, enhancing differentiation resources, and increasing parental engagement

209

Key Finding #3

" My favorite thing about math this year is the mindset that they teach you to have while doing math. Yes, the teaching methods are great, but the fact that you learn to try different strategies or not just give up is far more important.

"

-   5th-grade Student at Knowles Elementary

Finding: Student Outcomes

- Initial data indicates improved student engagement and confidence in math

- Evidence of improved student performance on STAAR using a "matched sample"

- Teachers report improved conceptual understanding of math among students

- Strong growth mindset evident among students

- Need a greater focus on student goal setting and ownership of learning through tracking individual growth and progress

211

Which answer below best describes your students' progress in math this year as compared to last year?
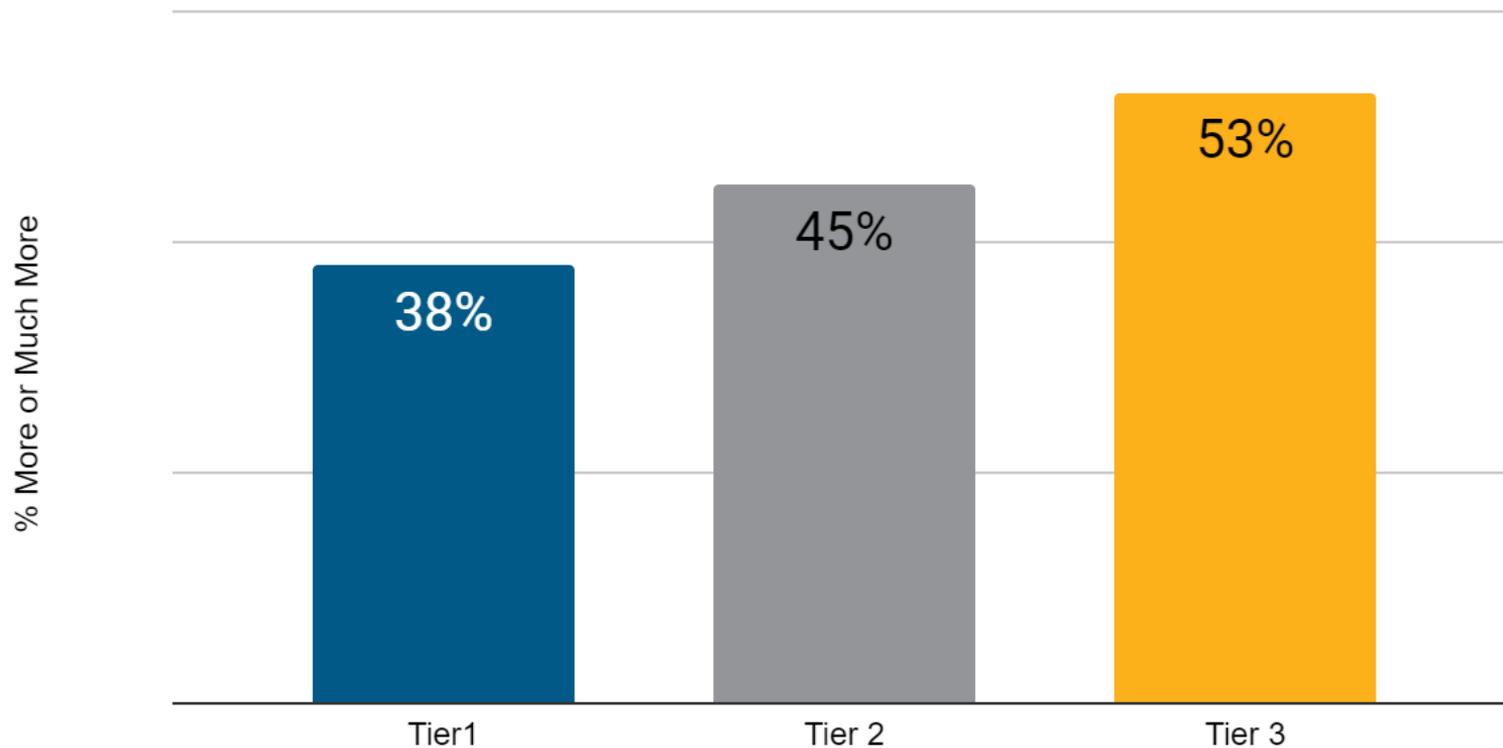
Methodology - Propensity Score Matching
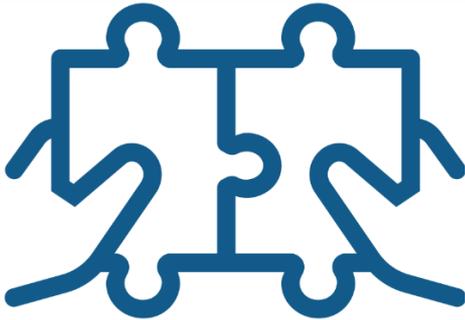
- Performance data of students at a campus with a Math Specialist (Tier 3 Campus) is compared to data of students at one of the other campuses with similar demographic characteristics

- Similar students identified based on:

  - Beginning of Year MAP Percentile

  - Economically Disadvantaged Status

  - Special Education Status

  - Hispanic Ethnicity

213

Analysis of student assessment outcomes using a matched sample:

22–23 Effect Size on STAAR Approaches – Matched Set
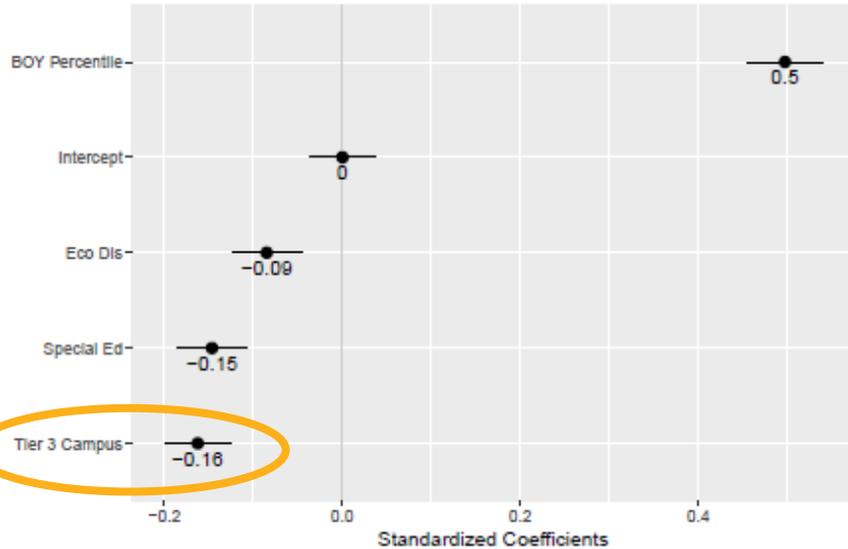
23–24 Effect Size on STAAR Approaches – Matched Set
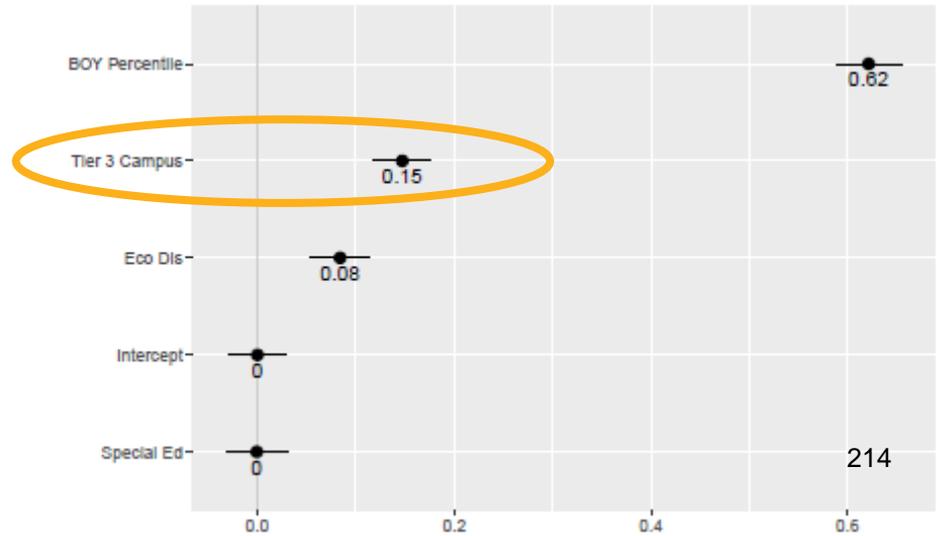
> "Students are transitioning from merely mimicking processes to developing deeper conceptual understanding. They are making connections independently and demonstrating a greater understanding of mathematical concepts"

215

- Math Co-Teacher

Key Recommendations

216

Key Recommendations

Improve "User-Friendliness" of Curriculum Resources	**Increase and Optimize Planning Time**	**Strengthen Ongoing Support and Professional Development**
Refine and Sustain the Tiered Math Support Model	**Enhance Differentiation and Intervention Strategies and Resources**	**Increase Parental Engagement in Math Learning**

217

Collaborative Development Team

- Alicia Westcot - *Co-Team Leader*
- Jennifer Ruschhaupt - *Co-Team Leader*
- Emily Gray - *Lead Data Analyst*
- April Chauvette – *Professional Learning / Process Expert*
- Jennifer Freeman- *Director of Intervention*
- Lori McKay - *Math Curriculum/ Content Expert*

- Darby Tobolka - *Math Curriculum/ Content Expert*
- Carlie Yeager- *SPROG Coordinator*
- Abigail (Abby) Elliott - *Teacher*
- Brandi Pierce- *Co-Teacher*
- Alex Smith- *Campus Math Specialist*
- Erin Uhlaender - *Campus Principal*
- Nikki Aguirre- *Instructional Coach*

218

Special Thanks!

24

Core Evaluation Team

- Dr. Sarah Martinez, LISD Director of Research and Program Evaluation
- Emily Gray, LISD Senior Coordinator for K12 Measures
- Jennifer Ruschhaupt, LISD Senior Coordinator for Elementary Mathematics
- Jennifer Freeman, LISD Director of Intervention Services
- Lori McKay, LISD Elementary Math Curriculum Specialist
- Darby Tobolka, LISD Elementary Math Curriculum Specialist
- Carlie Yeager, LISD Special Programs Coordinator

219

DISCUSSION

LEANDER ISD

Elementary Tiered Math Initiative

YEAR 1 EVALUATION

Evaluation Core Team

Dr. Sarah Martinez, LISD Director of Research and Program Evaluation

Emily Gray, LISD Senior Coordinator for K12 Measures

Jennifer Ruschhaupt, LISD Senior Coordinator for Elementary Mathematics

Jennifer Freeman, LISD Director of Intervention Services

Lori McKay, LISD Elementary Math Curriculum Specialist

Darby Tobolka, LISD Elementary Math Curriculum Specialist

Carlie Yeager, LISD Special Programs Coordinator

Spring/ Summer 2024

Introduction

In the 2023-2024 academic year, Leander ISD (LISD) implemented the Elementary Tiered Math Support Initiative. This initiative aimed to enhance math instruction across elementary campuses through a tiered support system tailored to campus-specific needs. The program aimed to improve student outcomes by providing systemwide professional development and targeted campus support.

Program Goals and Purpose

The Elementary Tiered Math Initiative had several key objectives:

1. Improve student outcomes in mathematics through effective tier-one math instruction.
2. Enhance teacher understanding and use of curriculum resources.
3. Provide clear expectations and direct support in curriculum utilization.
4. Deepen the teacher's understanding of effective math instruction.

The initiative supported 503 elementary math teachers, impacting over 12,000 students in grades 2-5.

Methodology

The evaluation focused on four primary objectives:

1. **Comprehensive Implementation Assessment:** Evaluating the fidelity and effectiveness of the initiative's implementation in year one.
2. **Impact on Teaching Practices:** Observing changes in teacher mindset, instructional practices, and confidence levels.
3. **Stakeholder Perception and Needs Analysis:** Gathering feedback from teachers, instructional coaches, specialists, principals, and other stakeholders.
4. **Effectiveness Evaluation:** Assessing relevant metrics to determine the program's impact on student outcomes and instructional practices.

Data collection included surveys, interviews, focus groups, classroom observations, and student performance metrics. The iterative evaluation process involved regular stakeholder engagement and data analysis throughout the year.

Key Findings

Implementation Fidelity and Challenges:

The program was implemented with varying levels of fidelity across campuses. While most Tier 1 campuses focused on consistent use of curriculum resources and participation in professional learning, there was variability in commitment and focus. Professional learning for leaders was also limited.

Although the co-teaching model in Tier 2 and Tier 3 campuses provided significant support, the way co-teaching was implemented across the seven campuses varied significantly due to several factors, including staffing challenges, varying levels of teacher receptiveness, and the time needed for role clarity and relationship building.

At Tier 3 campuses, the role of the math specialists consistently provides direct support to PLCs with planning, professional learning, content knowledge, and coaching to enhance math instruction and improve student outcomes.
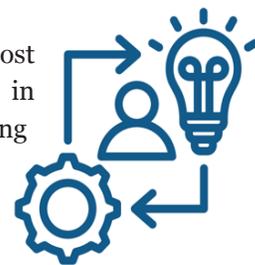
Impact on Teaching Practices:

Teachers reported increased confidence and competence in math instruction, particularly in implementing curriculum resources like Number Corner and Work Places.

There was a noticeable shift towards more collaborative and reflective teaching practices, with an emphasis on mathematical discourse and problem-solving.

Stakeholder Perception:

Stakeholders highlighted the benefits of increased professional development, peer collaboration, and the initiative's targeted support.

Challenges identified included the complexity of curriculum resources, time constraints, and the need for more differentiated instruction to meet diverse student needs.
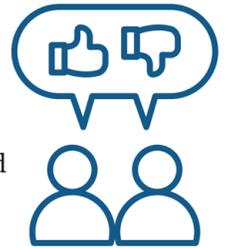
Student Outcomes:

Initial data indicated improved student engagement and confidence in math, particularly in schools with sustained co-teaching and specialist support.

Student surveys revealed a strong belief in their ability to improve in math, though there were variations in outcomes across different tiers.

Initial analysis of STAAR performance indicated that students on targeted Tier 3 campuses outperformed their matched peers from non-targeted campuses, suggesting a positive impact of the initiative on student achievement.

Recommendations

1. **Simplify and Enhance Curriculum Resources:** Streamline and organize curriculum materials to be more user-friendly and manageable for teachers, ensuring they can be easily accessed and utilized by both new and experienced teachers. Develop differentiated access points to the curriculum documents to meet varying levels of teacher expertise. Additionally, the centralized digital repositories will continue to enhance, allowing teachers to locate and navigate the necessary resources quickly.

2. **Increase and Optimize Planning Time:** Allocate more dedicated time for teachers to plan, collaborate, and implement lessons effectively. Provide time for prinicpal collaboration to identify and scale best practices in creative scheduling, such as staggered planning periods or dedicated planning days, to maximize planning time without compromising core instructional time. Consider piloting flexible scheduling models that allow teachers additional planning time within the school day.

3. **Strengthen Ongoing Support and Professional Development:** Continue providing targeted, job-embedded professional development and support through instructional coaches, math specialists, and co-teachers. Expand focused professional learning opportunities for campus leaders and instructional coaches to support and adjust professional learning opportunities to be more focused on the specific needs of individual campuses and collaborative teams. Encourage instructional coaches and specialists to offer tailored support that addresses the unique challenges of each campus and regularly assess the impact of these efforts to ensure they meet teacher needs.

4. **Refine and Sustain the Tiered Math Support Model:** Continue implementing the Tiered Math Support plan, emphasizing consistent, high-fidelity implementation. Focus on addressing the challenges identified in this report, particularly around co-teaching and role clarity. Leverage insights from successful co-teaching models in literacy and special education to refine and improve the co-teaching experience in math. Develop clear guidelines and training for co-teachers to ensure consistent application of best practices across campuses.

5. **Enhance Differentiation and Intervention Strategies and Resources:** Refine and expand resources and professional learning opportunities to better equip teachers to meet their students' diverse needs. Offer targeted training on differentiation techniques and intervention strategies that teachers can immediately apply in the classroom. Additionally, specialized resources or toolkits should be developed to help teachers support struggling students and those who need additional challenges.

6. **Increase Parental Engagement in Math Learning:** Develop and implement strategies to more effectively involve parents in supporting their children's math learning at home. This could include creating easy-to-understand guides for parents, offering workshops on how to support math learning, and providing regular updates on student progress with suggestions for at-home activities. Schools should also consider using digital platforms to engage parents, such as creating videos or webinars that explain key concepts and how parents can help their children practice these at home.

Conclusion

The first year of the Elementary Tiered Math Initiative showed promising results in enhancing teacher practices and improving student outcomes. Addressing the identified challenges and implementing the recommended improvements in the coming years will be essential to sustain and build on this progress. By simplifying resources, optimizing planning time, refining support structures, and engaging parents, the district can ensure that the initiative continues to impact both teachers and students positively.

Program Description, Goals, and Purpose

Leander ISD implemented the Elementary Tiered Math Support Initiative during the 2023-24 school year to improve student outcomes in mathematics. This program aims to enhance math instruction across elementary campuses by providing tiered support tailored to each campus's specific needs. The initiative promotes consistent math curriculum implementation and strives to ensure positive learning outcomes for all students. It follows a two-pronged approach, including systemwide, foundational professional learning and differentiated campus support through a tiered model.

The diagram below illustrates the three-tier model employed in the initiative. In Tier 1, most LISD campuses received enhanced professional development, focusing on effectively leveraging LISD curriculum resources and improving instructional practices to boost student critical thinking, problem-solving skills, and confidence. Tier 2 added a collaborative teacher (co-teacher) to seven identified campuses. In contrast, Tier 3 introduced a campus-based math specialist who provided direct support with planning, professional learning, content knowledge, and coaching.

Elementary Tiered Math Initiative

Tier 3: Embedded Support

3 — Professional Learning + Co-Teacher for grades 4 & 5 & Campus-based Math Specialist

Tier 2: Targeted Campus Support

Professional Learning + Co-Teacher for grades 4 & 5 — 2

Tier 1: System-wide Foundational Professional Learning & Support — 1

The LISD Cabinet and Board of Trustees approved the program in May of 2023. LISD implemented the program during the 2023-24 school year, including the implementation with a full day of summer/August staff development and two additional half-day professional learning opportunities in October and February provided to all elementary math teachers in grades 2 through 5. Additionally, seven campuses (all Title 1 campuses) were identified for Tier 2 and 3 support, including a co-teacher for 4th and 5th grade math instruction. Five of the seven campuses also have a full-time campus-based math specialist (Tier 3). The addition of these campus-based specialists has two potential benefits: 1) increasing the direct, ongoing support to the campuses with the greatest needs, and 2) increasing the capacity of the district-level math specialists to support the remaining campuses.
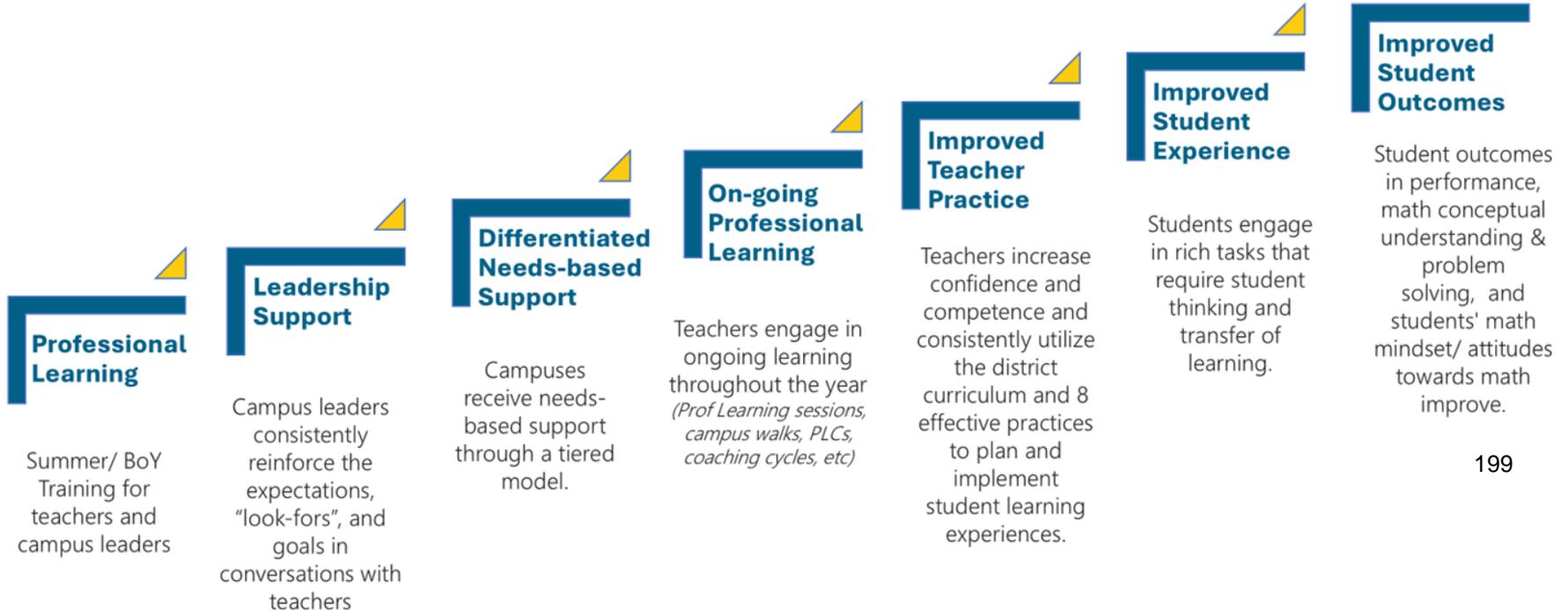
Program Goals

- Improve student outcomes in mathematics achievement through:
  - > Systemwide professional learning to ensure LISD educators are trained and equipped to deliver effective tier-one math instruction through curriculum implementation with fidelity
  - > Tiered plan of support - differentiated to meet the needs of each campus
- Improve teacher understanding of and comfort with the curriculum resources available for elementary math teachers.

227

- Provide clear expectations and direct support in utilizing the math curriculum to support high-quality instruction.
- Deepen teacher understanding of how the LISD Elementary math curriculum components work together to provide high-quality, effective math instruction.

Program Purpose

The Elementary Tiered Math Initiative supports 503 elementary math teachers (grades 2 through 5) in LISD by enhancing their content and pedagogical knowledge and skills. This enables them to deliver high-quality, research-based math instruction to over 12,000 second through fifth-grade students.

Program Theory of Action and Logic Model

LISD Tiered Math Initiative Theory of Change

The Elementary Math Initiative implemented a targeted theory of action for transformative change. The foundation included providing Professional Learning for teachers and leaders at the onset of the school year, ensuring continuous growth and skill development. The theory of change lays out a series of "If/Then" activities that should lead to the ultimate goal of improved student outcomes in mathematics.

If teachers and leaders actively engage in targeted professional learning, then leaders can effectively support teachers in their continuous growth. This leadership support, in turn, enables campus leaders to consistently reinforce expectations, fostering a culture of shared vision and accountability.

As we deliver professional learning and leadership support, we concurrently provide Differentiated Needs-Based Support, tailoring assistance based on student historical performance, teacher profiles, and readiness. This personalized approach addresses specific challenges and strengths, recognizing the distinct characteristics of each school community.

The initiative extends throughout the academic year, coupling the implementation of the differentiated, needs-based support model with ongoing professional learning. This approach expands the system's capacity to involve teachers in continuous learning through various avenues like district sessions, campus walks, Professional Learning Communities (PLCs), modeling, coaching cycles, and numerous feedback opportunities. By integrating these elements, the initiative supports teachers in adapting their pedagogical practices to promote better student learning.

In our Theory of Change, the fruition of Improved Teacher Practice becomes evident as educators gain confidence and competence, seamlessly integrating district curriculum and the eight effective mathematics teaching practices into their teaching. The NCTM's "Eight Effective Mathematics Teaching Practices" was published in 2014 in Principles to Actions: Ensuring Mathematical Success for All (NCTM, 2014). This publication aimed to provide guidance and recommendations for mathematics educators to enhance their teaching practices and promote mathematical success for all students. This evolution lays the foundation for improved student experiences and impactful learning activities (described below in Theory of Change), fostering critical thinking and learning transfer among students.

The ultimate culmination of these efforts should be apparent in Improved Student Outcomes, encompassing student growth, conceptual understanding, and positive attitudes toward math. This Theory of Change was initially formulated in the Spring of 2023 and refined collaboratively by the evaluation team in the fall of 2024. The figure below describes the Theory of Change that drove the development of the elementary-tiered math initiative in LISD.

Elementary Tiered Math Initiative Theory of Change

Professional Learning

Summer/ BoY Training for teachers and campus leaders

Leadership Support

Campus leaders consistently reinforce the expectations, "look-fors", and goals in conversations with teachers

Differentiated Needs-based Support

Campuses receive needs-based support through a tiered model.

On-going Professional Learning

Teachers engage in ongoing learning throughout the year *(Prof Learning sessions, campus walks, PLCs, coaching cycles, etc)*

Improved Teacher Practice

Teachers increase confidence and competence and consistently utilize the district curriculum and 8 effective practices to plan and implement student learning experiences.

Improved Student Experience

Students engage in rich tasks that require student thinking and transfer of learning.

Improved Student Outcomes

Student outcomes in performance, math conceptual understanding & problem solving, and students' math mindset/ attitudes towards math improve.

LISD Tiered Math Initiative Logic Model

The logic model for the Tiered Math Initiative clarifies and documents the key components of the program, linking resources, activities, and desired outcomes. By clearly outlining these elements, the logic model serves as a roadmap for the evaluation process, allowing for systematic progress tracking and identifying areas for improvement. It helps ensure that the evaluation focuses on critical aspects of the program, such as educator knowledge, teaching practices, and student achievement. Additionally, the logic model supports the development of an ongoing evaluation framework, providing a structured approach to continuous improvement and accountability, ensuring that the initiative remains aligned with its goals and responsive to the needs of students and educators.

	Inputs/Resources *Time, materials, people*	Activities/ Processes *Professional learning and other supportive activities*	Initial Outcomes/ Educator Learning Outcomes *Changes in educator knowledge, skills, and dispositions*	Intermediate Outcomes/ Educator Practice Outcomes *Changes in educator practice*	Intended Results for Students *Changes in student results*
TIER 1	Space, specialists, creation of content, multiple opportunities for attendance	Summer and Ongoing Professional Learning	Confidence in accessing and implementing EUS, 8 EPs, and all curriculum components.	Implementation of number corner and workplaces, planning with EUS & 8 EPs	• Students learning content standards and showing growth • Students improved their positive mindset about math • Improvements in math attitudes, content knowledge, and conceptual understanding leading to an increase in targeted classroom scores • Student needs are being met due to additional support, leading to growth and achievement
	Specialists/SPROG planning and implementation, ongoing	Professional learning for district and campus leaders	Understand math initiatives to support teachers Confidence in Math Initiative support systems	Evidence of implementation using Walkthroughs (aligned to the 8 EPs & "look fors"; Confidence in ability to provide high quality math instruction.	
	LISD Elementary Math Curriculum Team	District-Based Math Specialists providing campus support	Deeper content knowledge of EUS, learning from modeling, asking questions, and seeking clarification.	Implementing curriculum with integrity; Implementing the 8 EPs consistently. Confidence in implementing curriculum components and providing high-quality math instruction.	
	Schedule, Training, and time for admin, specialists, coaches, etc	Classroom walk-through data collection process	Reflecting on practices and being receptive to feedback	Implement changes based on feedback	

229

	Inputs/Resources *Time, materials, people*	Activities/ Processes *Professional learning and other supportive activities*	Initial Outcomes/ Educator Learning Outcomes *Changes in educator knowledge, skills, and dispositions*	Intermediate Outcomes/ Educator Practice Outcomes *Changes in educator practice*	Intended Results for Students *Changes in student results*
T I E R 2	Scheduling/location/time; developing training experience for teachers	Co-teaching training during the summer	Understanding of co-teach models and how and when to use them; begin to establish a team mindset	Co-Teaching models are implemented; evidence that Co-teaching is helping to grow teacher capacity in content and pedagogy	• Students learning content standards and showing growth • Students improved their positive mindset about math • Improvements in math attitudes, content knowledge, and conceptual understanding leading to an increase in targeted classroom scores • Student needs are being met due to additional support, leading to growth and achievement
	Organize schedules /location/ carve out time/ sometimes cover classes	Collaborative teachers meet bi-monthly to discuss and refine actions, progress, data, etc (twice a month) Roles and responsibilities are clarified and updated as needed.	Co-teachers are functioning as a part of a team the K-12 math team; Establish vision and look-for to get the program going; Evidence of PLCs refining practice based on data.	Coteachers operating as PLC- learning together, developing assessments, sharing ideas, using CI tools, observing each other	
	Title 1 money to fund 7 positions; application review and multi-interview process to hire, including campus leadership	Collaborative Teachers supporting 4th and 5th-grade instruction.	Targeted 4th and 5th-grade teachers have a deeper content knowledge and understanding of EUS.	Co-teaching models are implemented; there is evidence that Co-teaching is helping to grow teacher capacity in content, pedagogy, and confidence.	
		2 days/week at each campus- Math curriculum implementation specialist - unable to hire for this role - position frozen			

	Inputs/Resources *Time, materials, people*	Activities/ Processes *Professional learning and other supportive activities*	Initial Outcomes/ Educator Learning Outcomes *Changes in educator knowledge, skills, and dispositions*	Intermediate Outcomes/ Educator Practice Outcomes *Changes in educator practice*	Intended Results for Students *Changes in student results*
T I E R 3	District coordinator/ specialist secure locations, time, and resources needed and plan for learning and collaborative opportunities.	Weekly meetings of math specialist team	-Content knowledge -Curriculum development -Relationship building with campus leaders and district staff -Knowledge of the 8 EPs -Professional Learning support	PLC leadership Coaching conversation skills Implementing the 8 EPs	• Target Students learning content standards and show growth • Students improved their positive mindset about math • Improvements in math attitudes, content knowledge, and conceptual understanding leading to an increase in targeted classroom scores • Student needs are being met due to additional support, leading to growth and achievement
	Title funds to support 5 Campus-based curriculum specialists.	Math campus-based curriculum implementation specialist four days a week	-PLC planning support -Data digs -Classroom observations -Modeling for teachers - Lesson planning support -Whole campus math learning	-Feedback/coaching cycles with teachers -Regular meetings with campus leader for updates and shared leadership in math -Coaching on curriculum planning with PLCs Partnership with ICs and co-teachers	

KASAB

In addition to the Theory of Change and the Logic Model above, the collaborative evaluation team employed the KASAB tool, developed by Joellen Killion (Killion, 2017) to explore the intended outcomes for the program further. The KASAB tool is a program evaluation framework for Knowledge, Attitude, Skills, Aspiration, and Behavior. It is employed to assess the impact and effectiveness of a program by examining these key elements:

K **Knowledge:** This evaluates the participants' understanding and awareness gained from the program.

A **Attitude:** This assesses the participants' attitudes or perceptions towards the program. It aims to understand any shifts in perspectives, beliefs, or feelings resulting from program participation.

S **Skills:** The tool considers the acquisition and improvement of practical skills or competencies due to the program. It evaluates whether participants have developed the necessary skills intended by the program.

A **Aspiration:** This element gauges the participants' ambitions, goals, or future plans influenced by the program. It aims to determine if the program has inspired participants to aspire to new achievements or pursue further learning and growth.

B **Behavior:** The final component evaluates the actual behavioral changes exhibited by participants as a consequence of the program. It focuses on observable actions or practices demonstrating the program's impact on participants' conduct.

The KASAB provides a holistic framework to analyze the different dimensions of participant outcomes comprehensively, helping to understand the program's overall effectiveness and areas for improvement. For this evaluation, the team considered desired outcomes for three key players: teachers, instructional coaches and curriculum specialists, and principals. Below is the KASAB developed by the team for the Elementary Tiered Math Initiative for teachers.

Elementary Tiered Math Initiative: KASAB

Kinds of Outcomes	Definition	Key Player 1: Teachers
Knowledge	Content, concepts, principles, information, etc., are used as a basis for determining and implementing actions.	NCTM 8 Effective Practices Units of study & resources Content knowledge for grade level Understanding of theTEKS Clarity on effective strategies
Attitudes	Beliefs about the value of particular information, strategies, processes, or actions.	Willingness to extend knowledge and skills Trust in the curriculum & resources Trust in the people and support systems Open to change/mindset Willingness to ask for help
Skills	Strategies and processes to apply knowledge; capacity to act.	Putting 8 Effective Practice into practice How to question, plan for discourse How to differentiate instruction for intervention and challenge How to plan intentionally using the curriculum resources
Aspirations	Desires, or internal motivation, to engage in a particular practice.	Want more than scores. A desire to not only help students learn math concepts but also to help students develop a positive math identity Desire to allow students to grapple with, reason, and make sense of math problems and concepts. Desire to improve math confidence by helping all students feel mathematically capable. Creating a safe learning community where students and teachers can take risks and engage in shared learning.
Behaviors	Consistent application of practices within authentic settings.	Purposely plan and implement curriculum-based lessons Consistent application of 8 effective practices Provide and accept feedback and ask for help when needed.

Evaluation Objectives & Research Questions

The evaluation objectives and research questions emerged through collaborative efforts involving the larger evaluation team, the core evaluation team, and the executive governance team. Upon analyzing the Theory of Change and program logic model, it became evident that relying solely on an outcome evaluation centered on student outcomes would be inadequate for several reasons. Firstly, a one-year implementation period is unlikely to yield tangible student-level outcomes. Given that the program's primary focus is on influencing teacher and leader knowledge, skills, attitudes, and behaviors, a comprehensive evaluation must scrutinize the first-year program implementation, specifically assessing its impact on teacher and leader practices. This includes capturing stakeholders' perceptions and insights as the program is implemented.

Additionally, recognizing the necessity for an ongoing evaluation framework to drive continuous improvement efforts within the system was crucial. While this evaluation aspires to examine student-level outcomes as a preliminary indicator of program success, it underscores the imperative of sustaining program efforts and perpetuating ongoing monitoring of the metrics identified in the evaluation framework. The multifaceted nature of the program's impact necessitates a nuanced and continuous evaluation approach, emphasizing the importance of understanding, enhancing, and sustaining the program's efficacy over time. Below is a description of the four evaluation objectives and the corresponding research questions for each.

Objective 1: Conduct a Comprehensive Implementation Assessment

1. How well has the Tiered Math Initiative been implemented across grades 2 through 5, and what factors contribute to variations in implementation?

2. To what extent has the fidelity of implementation been maintained, and what challenges have been addressed in the process?

Objective 2: Assess Program Impact on Teaching Practices

3. What observable changes have occurred in teacher mindset, instructional practices, and confidence levels due to the Tiered Math Initiative?

4. Are there specific components of the initiative that have a more pronounced impact on teaching practices?

Objective 3: Gather Stakeholder Perception and Conduct a Needs Analysis

5. What are stakeholders' perceived strengths and benefits of the Tiered Math Initiative?

6. What identified needs or challenges have stakeholders expressed, and what recommendations do they provide for program enhancement?

Objective 4: Data-Driven Effectiveness Evaluation

7. What metrics are most relevant for evaluating the effectiveness of the Tiered Math Initiative?

8. How will both quantitative and qualitative data be collected and analyzed to measure program effectiveness, and how can this data inform adjustments to the initiative?

9. What are the initial outcomes regarding the program's impact on student math performance and growth as well as mindset about mathematics?

Methodology

The foundation of our evaluation process involved collaborative engagement with the program's key stakeholders, including classroom teachers, co-teachers, instructional coaches, curriculum specialists, campus and district leaders, and research and evaluation staff. We developed and refined the Theory of Change, Program Logic Model, and KASAB frameworks, establishing a shared understanding of program goals.

After establishing the foundational frameworks, we developed an evaluation framework that aligned metrics and indicators with the program objectives. We selected quantitative and qualitative data points for systematic data collection, which began in February 2024, focusing on formative measures such as mid-year surveys, interviews, and walk-throughs. Our team held regular meetings throughout the spring to analyze the collected data. By summer, this thorough analysis culminated in the findings, insights, and recommendations presented in this report. Regular communication, including quarterly updates and member checks, maintained a shared understanding and vision for the evaluation process. This iterative approach led to the comprehensive findings described here. Below is a description of the four primary phases of the evaluation process.

Develop or Refine the Program Logic Model and KASAB with the Stakeholder Group

We started the evaluation process by collaborating with the program's key stakeholders to develop and refine the Theory of Change, Program Logic Model, and KASAB (Knowledge, Attitudes, Skills, Aspirations, and Behaviors) frameworks. This collaborative team, including classroom teachers and co-teachers, instructional coaches and curriculum specialists, campus and district leaders, and research and evaluation staff, refined the evaluation questions and helped develop evaluation measures. This step was crucial for establishing a shared understanding of program goals, objectives, and desired outcomes. By involving stakeholders, we incorporated their perspectives and expectations into the evaluation process, fostering a sense of ownership and commitment.

Identify Metrics and Create a Plan for Collection

Once the Theory of Change, Logic Model, and KASAB framework were established, we built an evaluation framework that identified the specific metrics and indicators aligned with the program's objectives and evaluation key questions. Metrics included quantitative and qualitative data points that effectively measure progress and success. We then created a detailed plan for data collection, which outlined the methods, tools, and timing of data collection activities. This plan was designed to ensure systematic and consistent data gathering throughout the evaluation process.

Collect Formative and Summative Measures

Beginning in February 2024, we began executing the data collection plan to gather formative and summative measures during this phase. Formative measures allowed us to assess the program's ongoing progress, while summative measures provided an overall evaluation of its impact. Formative data included teacher and student mid-year surveys, principal interviews, focus groups/ interviews with instructional coaches, campus and district-based math specialists, co-teachers, classroom walk-throughs and observations, and ongoing participant feedback. Summative data consisted of data collected at the end of the school year, including student growth and performance data. We conducted eighteen focus groups and interview sessions during the data collection phase. Five of these sessions involved instructional coaches and math specialists from ten campuses. We also held eight focus groups and interviews with principals from thirteen elementary campuses. Additionally, all seven Tier 2 and Tier 3 campus co-teachers participated in five focus groups and interview opportunities. 3,716 students enrolled in grades 2 through 5 across all LISD campuses participated in the student survey in March, and 351 (or 70%) of 2nd through 5th-grade mathematics teachers participated in the teacher survey.

Analyze Data Collected and Make Recommendations

We began analyzing the data as it was collected. We included both quantitative analyses, including examination of classroom walk-throughs, surveys, and student performance data, and qualitative analyses, including thematic coding of open-ended responses and feedback gathered through surveys, interviews, and focus groups. The

evaluation team met regularly throughout the spring semester, analyzing the data as it became available. In the summer of 2024, after a thorough analysis of the information gathered, we developed this report that outlines the findings, insights, and recommendations. These recommendations were designed to address program strengths, identify areas for improvement, and suggest potential adaptations to enhance the program's impact. This iterative process has fostered a shared understanding and vision for this report's evaluation and findings.

In addition to using the Logic Model and KASAB to drive the selection of appropriate measures for this evaluation, the team also used the framework developed by Thomas Guskey (Guskey, 2016) to consider the levels of impact for the program's implementation. Below is a table that shows this:

Level of Impact	Process & Timeline
Level 1: Participants' Reaction *Did they like it? Was their time well spent? Was it meaningful?*	• Exit tickets/ Post-training Surveys (ongoing) • Teacher Survey (mid-year)
Level 2: Participants' Learning *Did participants acquire the intended knowledge & skills?*	• Exit tickets/ Surveys post-training • Teacher Survey (mid-year) • Co-Teacher, IC, and Specialist Interviews/Reflection
Level 3: Organizational Support & Change *Was implementation encouraged, advocated, and supported? Was the support public or overt? Were sufficient resources available, including time for sharing and reflection?*	• Principal interviews (both mid and end-of-year) • Co-Teacher, IC, and Specialist Interviews/Reflection Teacher Survey (mid-year)
Level 4: Participants' Use of New Knowledge *Did participants effectively apply the new knowledge? Degree & quality of implementation?*	• Observation/Classroom Walks (ongoing) • Teacher Survey (mid-year) • Principal/ IC/ Specialist Interviews • Student Surveys
Level 5: Student Learning Outcomes *What was the impact on students?*	• Student Growth Data (MOY and EOY) • Student Performance Data (STAAR and MAP) • Principal/ IC/ Specialist Interviews • Student Surveys

234

Evaluation Framework

This evaluation framework is designed to assess the Elementary Tiered Math Initiative's ongoing effectiveness by examining educator instructional practices and student learning outcomes. The framework provides a comprehensive approach to measuring how well educators implement curriculum components, leverage instructional practices, and engage in collaborative teaching models. It also evaluates the impact of these practices on student growth, performance, and mindset. Evidence will be collected through various methods, including surveys, observations, walkthroughs, and assessments, with data collection occurring throughout the academic year to ensure a thorough and continuous analysis of the initiative's effectiveness.

Educator Instructional Practice Outcomes

Outcome	Evidence	Timing for Collection
Planning with Essential Units of Study (EUS) & NCTM Eight Effective Practices (EPs)	• PLC Agendas & Notes • Observations/Feedback from Instructional Coaches (ICs) and Principals • Teacher Surveys	Ongoing
Confidence in Implementing Curriculum Components and Delivering High-Quality Math Instruction	• Teacher Surveys	Mid-Year
Implementing Curriculum with Integrity and Consistency with the 8 EPs	• *Walkthroughs aligned to the 8 EPs and "look-fors"*	Ongoing
Implementation of Co-Teaching Models (Tier 2 & 3)	• Teacher Surveys/Focus Groups • Walkthroughs	Mid-Year Ongoing
Co-Teachers Operating as PLCs (Tier 2 & 3)	• Co-Teacher Collaborative Team Agendas/Notes • Observations/Feedback from ICs and Principals • Teacher Surveys/Focus Groups	Ongoing
Partnerships Among Administrators, Specialists, ICs, Co-Teachers, and Teachers	• Focus Groups/Surveys	Mid-Year
Coaching and Curriculum Planning with PLCs	• PLC Agendas/Notes • Observations/Feedback from ICs and Principals • Teacher Surveys/Self-Reports	Ongoing

Student Learning Outcomes

Outcome	Evidence	Timing for Collection
Students Mastering Content Standards and Demonstrating Growth	• Collaborative Common Assessments • Student Growth Data (MOY and EOY) • Student Performance Data (STAAR & MAP) • Student Surveys • Unit Tests	MAP: 3x Year Spring STAAR
Improvement in Students' Positive Mindset Toward Math	• Student Surveys	Mid-Year
Enhancement in Math Attitudes, Content Knowledge, and Conceptual Understanding Leading to Increased Performance	• Collaborative Common Assessments • MAP • STAAR • Student/Teacher Surveys • Unit Tests	MAP: 3x Year Spring STAAR Mid-Year Surveys
Meeting Student Needs Through Tiered Support Leading to Growth and Achievement	• Improved Growth and Performance at Target Campuses • Teacher Surveys • Formative and Summative Analysis of Campus/ Classroom-Specific Performance Data	Ongoing

Objective 1:
Conduct a Comprehensive Implementation Assessment

How well has the Tiered Math Initiative been implemented across grades 2 through 5, and what factors contribute to variations in implementation?

Professional Learning for All Campuses

The Elementary Math team offered seven full-day professional learning opportunities between June 1 and August 11, 2023. Four of these sessions were tailored explicitly for 2nd-5th grade teachers, helping them reconnect with the elementary math curriculum, including the NCTM Eight Effective Practices, exploring various aspects of the Essential Units of Study, and deepening their understanding of critical resources like Bridges, Number Corner, Concept Quest, and Work Places. The other three sessions were designed for new-to-district teachers and those implementing math co-teaching with their 4th and 5th-grade teams. Nearly 500 teachers participated in the summer training and the follow-up sessions throughout the year. We conducted two additional sessions with all 2nd-5th grade math teachers in October and February, focusing on timely, relevant topics and offering choice sessions to allow teachers to customize their learning.

We had planned to pair the teacher's professional learning with similar learning for Instructional Coaches and principals. Some abbreviated professional learning with instructional coaches and principals was conducted. Still, other than one two-hour optional training with principals in July, we were not able to follow up with additional math training with our school leaders due to prioritizing other topics and needs.

Implementation of Co-Teaching Model at Tier 2 and Tier 3 Campuses

Seven co-teachers were strategically placed across selected Title 1 campuses to enhance instructional support. Their presence varied from short-term (8 weeks) to nearly full-year engagement (28 weeks). This initiative aimed to bolster student outcomes through collaborative teaching models. A total of 25 fourth and fifth-grade elementary math teachers across seven LISD Title 1 campuses participated in some form of co-teaching throughout the year as a part of this initiative. Across the seven Tier 2 and Tier 3 campuses, co-teachers provided support ranging from 8 weeks to 28 weeks, predominantly in 4th and 5th grade classrooms. The most common duration was 28 weeks, indicating a sustained co-teaching presence for most of the academic year. The consistent long-term support (28 weeks) was more prevalent in the 5th grade. The table below summarizes the engagement of co-teachers across Tier 2 and 3 campuses:

Tier	Campus	Grade Levels Supported	# of Gen Ed Teachers Paired w/ Co-Teacher	Duration of Support
Tier 2	Reed	4th and 5th	3	Supported 4th and 5th grades, with significant engagement (28 weeks) in two blocks for 4th grade and one block for 5th grade.
Tier 2	Faubion	4th and 5th	3	Engaged fully (28 weeks) with both 4th and 5th grades.
Tier 3	Knowles	4th and 5th	5	Co-teaching in 4th grade classes with varying durations (10 to 18 weeks) and extensive 28-week support in the 5th grade.
Tier 3	Grandview Hills	5th Grade	1	Exclusively supported the 5th grade for 28 weeks.
Tier 3	Camacho	4th and 5th	5	Provided 16 to 22 weeks of support across 4th and 5th grades.
Tier 3	Giddens	4th and 5th	4	Support segmented into blocks, covering both fall and spring terms, amounting to significant engagement in the 4th and 5th grades.
Tier 3	Bagdad	4th and 5th	4	Supported 4th and 5th grades, with varied durations (9 to 20 weeks).

The deployment of co-teachers in Title 1 campuses for the 2023-24 school year demonstrates a strategic effort to enhance instructional quality and student support. The varied durations and targeted grade levels reflect a flexible approach to meeting diverse educational needs. The use of co-teachers varied across the seven targeted Tier 2 and Tier 3 campuses, primarily due to each campus's unique needs. The factors contributing to these variations are discussed in more detail below.

Specialist Role:

Tier 3 campuses received additional support from full-time campus-based math specialists as part of the Elementary Tiered Math Initiative. These specialists were pivotal in enhancing math instruction across the five Tier 3 campuses, all of which are school-wide Title 1 schools, with two also operating as Dual Language campuses. Their role focused on improving teachers' content knowledge, instructional strategies, and effective use of curriculum resources like Number Corner, Work Places, and Essential Units of Study. The specialists provided hands-on support, from lesson planning to real-time coaching, particularly benefiting new and less experienced teachers.

The original proposal included six elementary and 3 secondary campus-based specialists. As we began interviewing and placing elementary specialists at campuses, the first five were placed at the Tier 3 campuses. The 6th specialist was to split time at both Tier 2 campuses. The top candidates for this specialist and the secondary positions were current high school math teachers. Due to concerns about the teacher shortage (especially in secondary mathematics) and the difficulty in finding qualified replacements, a freeze was put on these positions. These positions have remained frozen, so the supports at Tier 2 campuses were adjusted to include a co-teacher only.

Additionally, math specialists served as a critical link between instructional coaches, co-teachers, and campus administration, ensuring a cohesive approach to improving student outcomes. Their presence was especially valuable at the two Tier 3 campuses that had new principals during the 2023-24 school year, providing stability in math instruction during the leadership transition. Overall, these specialists played a key role in building teacher capacity, fostering collaboration, and driving the success of the Tiered Math Initiative at these high-need campuses.

Factors contributing to variation:

Staffing challenges at campuses, particularly related to late hires, vacancies, and skill gaps among some Spirit Exchange teachers, significantly impacted the implementation of co-teaching. Other contributing factors included the receptiveness of teams and individual teachers to co-teaching and coaching support, the time needed for new co-teachers and specialists to build positive relationships, and staff availability for training opportunities. Co-teachers who had taught on the same campus the previous year often had an advantage due to already established strong relationships. However, in other cases, teachers needed more time to adjust to their new roles.

One theme that emerged from focus groups and interviews with co-teachers, instructional coaches, specialists, and principals was the challenges associated with "building the plane while flying it." With the timing of the new program, there was some uncertainty in roles and responsibilities, and teams at all targeted campuses faced some challenges in defining roles and setting up systems and processes to support the initiative. Focus group participants expressed a desire for more clarity on roles and expectations. They wished they had more time to prepare teachers supported by co-teachers and/or specialists.

To what extent has the fidelity of implementation been maintained, and what challenges have been addressed in the process?

While key components of the Tiered Math Initiative—such as student engagement, use of curriculum resources, professional development, support with planning, and collaboration, are being implemented with fidelity, some challenges need to be addressed. The implementation of co-teaching was not consistent across the seven campuses. Additionally, challenges such as the complexity of the curriculum, time constraints, differentiation and intervention support, implementation consistency, and parental involvement still require attention. Targeted enhancements and support in these areas will help ensure more consistent and effective implementation of the initiative.

Tier 1 Campuses:

There was variability in the level of commitment and focus on using the district's curriculum and resources to promote high-quality math instruction. Most Tier 1 campus leaders who participated in focus groups and interviews reported focusing on improving PLC planning, data analysis, and the use of Number Corner (particularly in 4th grade), with noted improvements. However, the primary challenges to implementation included the complexity of the LISD curriculum and resources and the difficulty of moving students beyond rote memorization of facts and algorithms to foster deeper learning experiences.

Tier 2 Campuses:

Both campuses made changes to the originally proposed model to meet unique needs. For one Tier 2 campus, the co-teacher was needed to fill in for a vacancy in 4th grade, which was eventually filled by a Spirit Exchange teacher who needed a lot of ongoing support throughout the year. Here, the co-teacher served as the primary teacher for most of the year, gradually releasing responsibility throughout the year. The co-teacher shared planning time with both 4th and 5th graders and supported 5th graders primarily through Number Corner. The co-teacher also supported the 1st grade team, which included several NTP teachers.

The other Tier 2 campus was able to implement with fidelity and benefited from the relationships built by the co-teacher, who was formerly a member of the 4th-grade team. In this case, the co-teacher participated in shared planning and co-teaching (utilizing a variety of co-teaching structures) across 4 classrooms in grades 4 and 5 and could redistribute her time to support 3rd grade. Mid-year, she also began to support planning in 2nd grade.

Tier 3 Campuses:

There was significant variation in the implementation at the Tier 3 campuses, primarily due to unforeseen circumstances, including late hires, the need to cover multiple vacancies due to late resignations, support needed for New-to-Profession and/or Spirit Exchange teachers, and medical leave. For example, at one Tier 3 campus, the co-teacher was not able to begin actual co-teaching with 4th and 5th grade until later in the Spring. In other instances, co-teachers were needed to step into the primary teaching role, and/or classes were combined to support struggling NTP/Spirit Exchange teachers. In these cases, the campus leadership and program staff had to pivot to meet the most pressing needs of the students on their campus.

The role of the specialists on Tier 3 campuses was much more consistently implemented, with campuses reporting active involvement of specialists with PLC planning and instructional support across all grade levels. Most campuses reported that the role of the specialist was frequently expanded to primary grades and that the specialist and campus Instructional Coach often worked closely together to provide differentiated support for all teachers.

Challenges Faced and Mitigation Strategies

Key Challenges and Mitigation Strategies Identified by all campuses:

The most prevalent challenge that emerged from the interviews, focus groups, and surveys was related to the complexity of the curriculum resources. Analysis of the teacher survey open-ended responses indicated that teachers across all three tiers generally had a shared recognition of the extensive resources provided by the curriculum and showed an appreciation for the availability of resources and specific tools such as Math Resource Vocab Cards, Concept Quests, and Number Corner. This was also accompanied by consistent feelings that the complexity and amount of resources can be overwhelming. For example, a Tier 1 teacher noted that "There are so many resources, it is sometimes overwhelming," while other teachers noted that navigating the curriculum and resources was "cumbersome." The complexity and volume of curriculum resources have been overwhelming for some teachers, indicating that while fidelity is generally maintained, there is room for improvement in simplifying and managing these resources.

Mitigation strategies included participation in PLC collaborative teams, IC/Specialist targeted supports, building flexible schedules and adjusting as needed, co-planning and role clarification, providing continuous support

through coaching and data-driven monitoring, and fostering a collaborative culture among teams. Activities like monthly previews of Number Corner and learning walks have facilitated greater understanding and use of the curriculum resources. On some campuses, the co-teacher, specialist, or instructional coach supported teachers by preparing or offering make-and-take opportunities to help teachers prepare all of the materials needed to implement Number Corner for a unit. This and the preview sessions helped teachers feel more confident and prepared to implement Number Corner activities with fidelity. According to Tier 1 instructional coaches, the early grades (2nd and 3rd) are more quickly embracing the math initiative and effectively integrating components like Number Corner. The upper grades (4 and 5) have shown increasing consistency and intentionality in using Number Corner, influenced by leadership and peer observation.

Key Challenges Identified and Mitigation Strategies by Tier 1 Campuses:

The primary challenge for Tier 1 campuses was identified through focus groups and interviews as consistency and intentionality. Tier 1 district and campus administrators and coaches discussed the challenges of providing differentiated support across the twenty-one Tier 1 campuses. Within Tier 1 campuses, stakeholders also identified the need to foster collective responsibility as a key challenge. Additionally, the inconsistent use of small group instruction, resistance by some teachers, and time constraints were identified as important challenges faced in implementation. One mitigation strategy noted was the use of district-level specialists for modeling sessions, encouraging vertical team collaboration and celebrating small steps. Having specialists and co-teachers providing direct support to the campuses with the greatest needs enabled the two district specialists to provide more in-depth and targeted support for our Tier 1 Campuses.

Key Challenges Identified and Mitigation Strategies by Tier 2 & 3 Campuses:

The most common themes that emerged from the interviews and focus groups of Tier 2 and 3 stakeholders were the need to structure supports, planning, and providing differentiated professional learning opportunities to meet the diverse needs of the teachers and students. Specifically, Tier 2 and 3 campuses discussed the challenges faced in protecting instructional time, comfort with and the learning curve for new co-teachers in balancing coaching roles and building relationships, and the need for greater clarity on defining roles and responsibilities. These challenges were mitigated by providing additional training for co-teachers and ongoing dialogue to clarify roles and responsibilities.

The timing of the initiative and the flow of information was also a challenge as the campus teams were provided with some autonomy to build the model as they implemented it. Late hires also contributed to variation in the selection of co-teaching pairs and the ability to participate in professional development opportunities. A clear bright spot in mitigating these challenges is found in the opportunity for co-teachers and campus specialists to form their own collaborative team that supported their collective work. Both co-teachers and specialists described the time spent with cross-campus collaboration with their peers at the other Tier 2 and 3 campuses and with the district curriculum staff as essential to the initiative's success this year.

Tier 2 and 3 stakeholders highlighted the importance of continuous support for teachers through co-teachers and math specialists, ensuring consistency in teaching practices, and the need to foster a collaborative culture among teachers and students as crucial for effective math instruction and developing a resilient mindset. Finally, Tier 2 and 3 principals specifically noted the importance of effective monitoring involving being present in classrooms, providing real-time feedback, and using data to guide instructional decisions.

Tier 1, 2, and 3 campuses share similar challenges and successes in implementing math initiatives. Tier 1 campuses are developing consistency and intentionality, while Tier 2 and 3 campuses demonstrate structured support, planning, and differentiated professional learning. Continuous support, fostering a collaborative culture, and data-driven monitoring are crucial for achieving successful math instruction and fostering resilience among students and teachers. The importance of the role of the co-teachers and campus-based specialists was consistently brought up by all stakeholders at Tier 2 and 3 campuses as a critical component of their improvement efforts.

Objective 2:
Assess Program Impact on Teaching Practices

What observable changes have occurred in teacher mindset, instructional practices, and confidence levels due to the Tiered Math Initiative?

Insight on the observable changes in teacher mindset, instructional practices, and confidence were gathered by triangulation of data collected through classroom observations, teacher surveys, interviews, and focus groups. Although no baseline data is available to use as comparison for these findings, there appears to be ample evidence that the Elementary Math Tiered Model of supports has had a positive impact on teacher mindset, improved instructional practices, and has helped teachers feel more confident in teaching the mathematics concepts and standards to students in grades 2 through 5 in Leander ISD. The next section will discuss the findings from each data source.

Classroom Observations:

The data collected from classroom observations across all LISD elementary campuses suggests a strong implementation of engagement strategies across all tiers, particularly in fostering a positive classroom culture and intentional grouping for collaboration. High-level thinking tasks and math discourse are also emphasized, although there is some variability across tiers. Overall, most classrooms exhibit these key engagement look-fors, contributing to an effective learning environment. A look-for form was created based on the content and goals of the initiative. The form was presented to the principals at the beginning of the year, and principals were encouraged to use it throughout the year. There was significant variation in the use of this form, with some principals opting to use a campus-developed form. There were 377 total responses, with 257 tagged as taken during math instruction and recorded using the district form. It should be noted that the variation in the use of the walk-through form and the relatively small number of observations limit the interpretation of this data.

Student Engagement Look-fors:

Look for	Findings	Tier 1 (21 Campuses)	Tier 2 (2 Campuses)	Tier 3 (5 Campuses)
Positive Classroom Culture (Honoring Student Thinking/Multiple Strategies, Productive Struggle, Risk-Taking)	Observations indicate a strong presence of positive classroom culture across all tiers	79.6%	78.4%	65%
Intentional Grouping	Intentional grouping is highly prevalent, with 100% of Tier 3 campus observations	96.8%	80%	100%
Students are Engaged in a High-Level Thinking Task	Engagement in high-level thinking tasks is notably present but at lower rates than the other indicators	45.9%	50%	39.8%
Students are Engaged in Discourse Centered Around Their Math Learning	Engagement in math discourse is relatively consistent across all tiers, with percentages ranging from 64.3% to 65.9%, highlighting a focus on interactive and communicative learning.	64.3%	65%	65.9%
Lack of Engagement Indicators (None of the above were observed)	A small percentage of observations noted the absence of these engagement indicators, with Tier 3 having the highest at 18.2%, followed by Tier 1 at 13.4% and Tier 2 at 10.0%.	13.4%	10%	18.2%

20

241

The data suggests a strong implementation of engagement strategies across all tiers, particularly in fostering a positive classroom culture and intentional grouping for collaboration. High-level thinking tasks and math discourse are also emphasized, although there is some variability across tiers. Overall, most classrooms exhibit these key engagement look-fors, contributing to an effective learning environment.

Learning Environment Look-fors:

Look for	Findings	Tier 1 (21 Campuses)	Tier 2 (2 Campuses)	Tier 3 (5 Campuses)
Classroom Arrangement and Structures Allow for Student Collaboration	Classroom arrangements and structures that allow for student collaboration are highly prevalent.	86.1%	100.0%	66.7%
Evidence of Multiple Number Corner Workouts Happening Regularly	Regular Number Corner workouts were frequently observed, particularly in Tier 2 (85.7%), indicating consistent use of structured math routines.	50.0%	85.7%	58.7%
A System for Students to Engage with Work Places is Evident	The presence of a system for students to engage with Work Places is evident in a significant portion of observations. These rates are less prevalent than evidence of Number Corner.	34.7%	57.1%	42.9%
Students Have Access to Manipulatives and Other Math Tools	Over half of the classrooms observed had access to manipulatives and other math tools, with the highest access in Tier 1 (56.3%) and Tier 2 (50.0%).	56.3%	50.0%	36.5%
None of the Above were Observed	A small percentage of observations noted the absence of these engagement indicators, with Tier 3 having the highest at 12.7%, followed by Tier 1 at 5.6%. Tier 2 had no observations lacking these indicators (0.0%).	5.6%	0.0%	12.7%

The observation data for Learning Environment Look-Fors indicates a strong emphasis on collaborative learning environments and the use of structured math routines across all tiers. The emphasis on Number Corner reported during interviews and focus groups is demonstrated in this data with higher adoption levels, especially compared to evident systems for Work Places. It is notable that Tier 2 and 3 campuses have a more consistent implementation of Number Corner, which is confirmed in the interview and focus group insights. Access to manipulatives and engagement systems like workplaces is also significant; however, the finding that this occurs the least at our Tier 3 campuses is concerning and will need further investigation. While there are some instances where these indicators were not observed, the overall trend shows a positive implementation of these learning environment look-fors.

Teacher Surveys

In the absence of baseline survey data, we asked teachers who taught math last year as well as this year to compare their experiences and student progress from last year to this year. While most of the other questions included in the survey are relatively flat across the three tiers (see Appendix A for a summary of favorable responses), these questions did yield evidence about differences in teachers' perceptions. For example, we asked returning elementary math teachers how effectively they have implemented the curriculum and resources in the Essential Units of Study (EUS) in their classroom this year compared to last year. Here, we see a significant difference in the responses among tiers, with less than half of the Tier 1 teachers (45%) reporting more or much more effective integration of the curriculum resources. This compares to almost two-thirds of the Tier 2 teachers (65%) and three-fourths of the Tier 3 teachers (74%) reporting that they were more or much more effective in implementing

the curriculum resources. A chi-square analysis of these results indicated that these differences were statistically significant. (See figure below.)

How effectively have you been able to implement the curriculum and resources in the Essential Units of Study in your classroom this year compared with last year?

% More or Much More Effectively

Tier1	Tier 2	Tier 3
45%	65%	74%
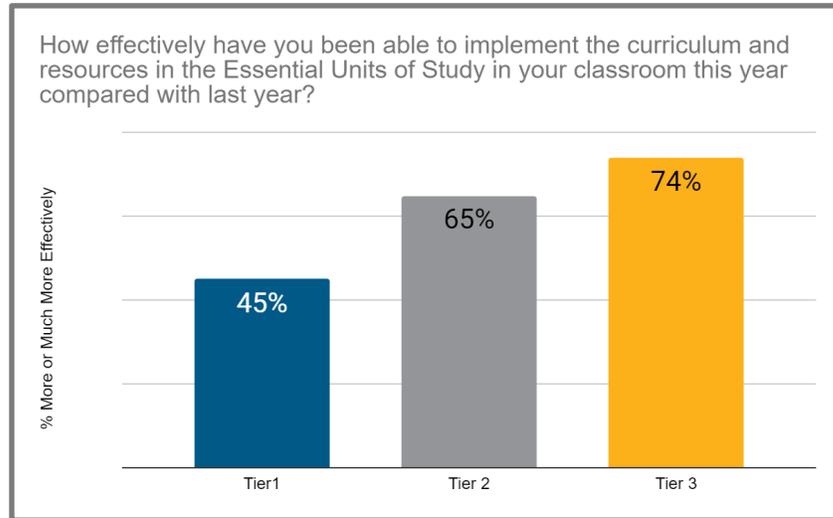
Teachers were also asked specifically to rate the effectiveness of implementing Number Corner and Work Places (key components of the LISD curriculum and Bridges resources) in their classroom this year compared with last year. While the overall data is positive, with more than half of the returning elementary math teachers indicating that the initiative has resulted in improvements in the use of these key curriculum components across all campuses (teachers reporting that they have been more or much more effective), differences are noted with higher rates of perceived effectiveness at the Tier 2 and 3 campuses. A chi-square analysis of these results indicated that these differences were statistically significant. (See figure below.)

How effectively have you been able to implement Number Corner and Work Place games in your classroom this year compared with last year?

% More or Much More Effectively

Tier1	Tier 2	Tier 3
52%	55%	61%
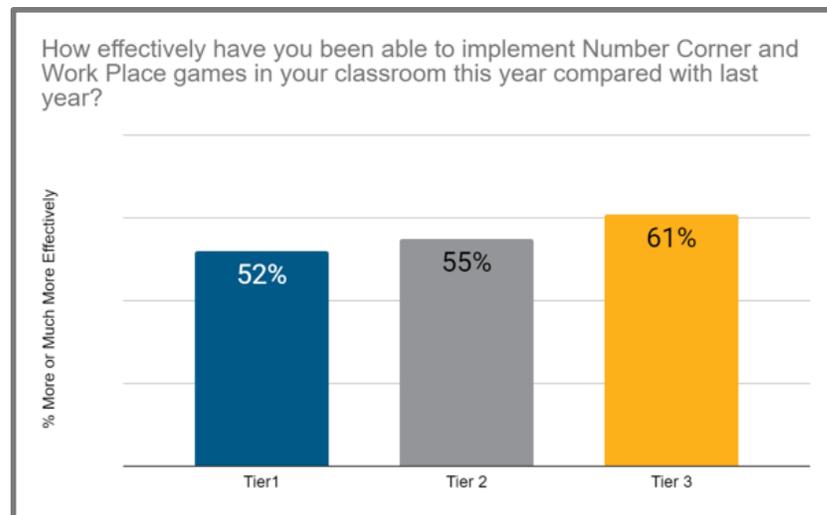
Teacher Surveys (Open-ended Responses):

The Tiered Math Initiative has led to observable changes in teacher mindset, instructional practices, and confidence levels, as evidenced by analysis of the teacher responses to the open-ended questions on the survey. Overall, there is evidence that the Tiered Math Initiative has positively influenced teacher mindsets, instructional practices, and confidence levels.

> **Teacher Mindset:** Teachers across all tiers report that students have shown increased confidence and positive attitudes toward math. This is particularly evident in Tier 2 and 3, where teachers note significant improvements in student confidence and success in math. Teachers also express increased enjoyment in teaching math, attributing it to the initiative's effective curriculum components, such as Problem-Based Learning and 3-act tasks.

243

Instructional Practices: A high percentage of teachers in all tiers report using the LISD curriculum resources to plan math instruction (Tier 1: 99%, Tier 2: 100%, Tier 3: 97%) and incorporate the NCTM 8 Effective Practices in their instruction (Tier 1: 85%, Tier 2: 88%, Tier 3: 80%). Teachers across tiers acknowledge that the training and support received have improved their instructional abilities and confidence as math teachers. For example, Tier 3 teachers particularly note the positive impact of professional development on their teaching methods.

Confidence Levels: Teachers report high levels of confidence in accessing LISD curriculum resources and implementing curriculum-based lessons, with 98-100% of teachers across all tiers expressing confidence in these areas. Teachers also expressed confidence in their ability to differentiate lessons and ask questions that deepen students' conceptual understanding, with confidence levels around 88-92% across tiers.

> *"Math Co-Teacher has had a huge impact on the positive changes to my math instruction and my confidence as I continue to learn and understand the curriculum."*
> *– Tier 3 Teacher*

Interviews and Focus Groups: There is evidence that the Tiered Math Initiative has led to significant improvements in teacher mindset, instructional practices, and confidence levels, based on principal, instructional coach, specialist, and co-teacher interviews and focus groups. Across all groups engaging in interviews/ focus groups noted that teachers have become more engaged and enthusiastic about teaching math, adopting new instructional practices focused on differentiation and intervention, and are growing more confident in their abilities. However, ongoing challenges such as the complexity of curriculum resources, resource management, and the desire for continuous professional development indicate areas for further improvement and support. Below is a summary of the key findings from these interviews and focus groups related to observable changes in teacher mindset, instructional practice, and confidence levels in teaching mathematics.

Teacher Mindset:

- **Growth Mindset and Resilience:** Teachers are increasingly adopting a mindset that values mistakes as learning opportunities and embracing the idea that everyone can be a "math person." A principal put it this way: "No one can say 'I'm not a math person' – 'we're ALL math people.'

- **Openness to Collaboration:** The stakeholders interviewed noted a noticeable shift towards valuing collaboration and reflective practices in teaching. A co-teacher described the power of collaboration as follows: "Working closely with the IC and Specialist, we experience similar situations and really figure things out together."

- **Data-Driven Instruction:** Focus groups and interviews also revealed that teachers are also more open to using data to inform their instruction, reflecting a significant change in mindset. A specialist at a Tier 3 campus noted "significant growth in teacher open-mindedness, data-driven instruction, and collaboration" during this first year of implementation.

Instructional Practices: The following includes instructional practices changes noted by instructional coaches, specialists, co-teachers, and principals.

- **Enhanced Planning and Execution:** Across all three tiers, there is evidence that teachers are using district resources like Number Corner and Bridges more effectively and consistently. A principal noted, "Number Corner is used consistently during walkthroughs, and we are starting to see the difference." Specialists, instructional coaches, and co-teachers indicated that "greater integration of Bridges resources" was observed throughout the year.

- **Focus on Mathematical Discourse:** Many stakeholders expressed improvements in teachers' ability to promote mathematical discourse among their students. There is evidence that teachers are beginning to incorporate strategies that promote deeper student thinking, such as sentence stems and question prompts across several Tier 2 and 3 campuses. One principal shared how co-teachers

were "focused on discourse, and in one case, sentence stems and question prompts for IAs doing inclusion support" were incorporated.

- **Collaborative Practices:** Many campuses described how increased peer coaching and learning walks allow teachers to see effective strategies and adapt them to their classrooms. A Tier 3 Specialist described how "Co-teacher support is critical to modeling strategies and mindset for teachers." Another specialist noted that the "best monitoring strategy is to be in classrooms and in planning time whenever possible."

- **Data-Driven and Responsive Teaching:** Principals and instructional coaches at all three tiers indicated that through PLCs, teachers set specific goals and use data from assessments to inform their instructional practices and interventions. Some also mentioned an increase in goal setting by students across many grade levels.

- **Adoption of Curriculum Components:** Teachers have integrated components like Problem-Based Learning, Number Corner, Work Places, and Concept Quests into their instruction, leading to increased student engagement. One teacher noted on the survey that they " have used the challenge menu and concept quests faithfully this year."

- **Differentiation and Intervention:** Teachers emphasize the need for differentiation and intervention, actively seeking ways to better meet their students' diverse needs. This was an identified area of continued need for improvement across many campuses, with teachers specifically asking for more resources and support to meet these needs. One teacher noted on the survey that there was a "lack of built-in interventions and extensions per lesson to meet students where they are."

Confidence Levels

- **Increased Confidence in Teaching Math:** Evidence shows that support provided by math specialists and instructional coaches has boosted teacher confidence. Principals, instructional coaches, and co-teachers all mentioned that the support from the specialist has been critical. Many Tier 1 campuses expressed a desire to have a dedicated math specialist position on campus daily to better meet the diverse needs of their teachers. There is also evidence that supports the tiered model has had a positive impact on participants. One co-teacher said, "Regular collaborative meetings, access to professional learning opportunities, and district support have been crucial in fostering confidence and proficiency in curriculum implementation."

- **Comfort with Effective Instructional Practices:** Principals, instructional coaches, and specialists noted that teachers are becoming more comfortable with implementing instructional strategies and tools, such as Number Corner, Vertical Work surfaces, Concept Quests, and collaborative learning structures. One campus principal specifically noted that "teachers like the focus on reasoning and collaboration," while another discussed the benefits of "modeling, encouraging, and highlighting risks."

- **Professional Growth and Development:** Teachers and co-teachers have expressed experiencing substantial personal and professional growth through ongoing collaboration and support from colleagues and specialists. A co-teacher noted that "as math educators, co-teachers have experienced significant personal growth." and that "collaborative efforts with specialists and leveraging expertise from colleagues have provided clarity on navigating the curriculum effectively."

- **Growing Confidence and Professional Recognition:** Overall, teachers feel more equipped to handle curriculum and instructional challenges, acknowledging their professional growth. One teacher summed it up on the teacher survey: "I feel that I have improved greatly and could teach others at this point." Another teacher noted that "the training that I have received last year has helped me a lot in my teaching styles and art of questioning."

Data from classroom observations, surveys, interviews, and focus groups indicate positive changes in teacher mindset, instructional practices, and confidence levels. Teachers have adopted more collaborative and data-

driven approaches, integrating district resources and fostering a growth mindset that promotes resilience and risk-taking. Instructional practices have shown enhancement with better planning and a focus on mathematical discourse. Confidence levels have increased due to professional development and collaborative efforts, helping teachers manage curriculum challenges more effectively.

Are there specific components of the initiative that have had a more pronounced impact on teaching practices?

The evidence from triangulating teacher surveys, stakeholder focus groups and interviews, and classroom observation that the Tiered Math Initiative has enhanced teaching practices through several key components described below. These components have collectively promoted consistency, collaboration, targeted instruction, and professional growth among teachers.

- **Collaborative Practices and Peer Coaching:** Increased peer observations and support from co-teachers foster a collaborative environment and model effective strategies. This includes at the campus collaborative team level, within the co-teaching relationships, and across district collaborative teams for co-teachers and district and campus math curriculum specialists. These practices allow teachers to observe effective strategies in action and adapt them to their own classrooms, fostering a collaborative environment. One Tier 3 Specialist noted, "Co-teacher support is critical to modeling strategies and mindset for teachers."

- **Professional Development and Specialist Support:** Regular professional development sessions and support from math specialists and instructional coaches have significantly boosted teacher confidence and instructional quality. Co-teachers and specialists at Tier 2 and 3 campuses all noted the importance of the ongoing professional learning opportunities and the benefits of the ongoing collaboration with the district specialists and each other throughout the year. A Tier 2 teacher noted, "It has been SO helpful having our ICs provide us with number corner plans and materials for each month."

- **Utilization of Curriculum Resources:** There is evidence that the implementation of Number Corner and Work Place Games components has become routine in many classrooms, with teachers noting their effectiveness in reinforcing math concepts. For instance, "Number Corner workouts are a routine practice in my classroom" illustrates these tools' consistent use and integration in daily instruction. Insight from interviews and focus groups confirmed that teachers have been using Number Corner more consistently, and this structured approach has facilitated a deeper understanding of mathematical concepts. Math Resource Vocab Cards and Concept Quests have been particularly appreciated for supporting differentiated instruction and challenging students. Teachers have noted, "I have used the challenge menu and concept quests faithfully this year," indicating their value in catering to diverse learning needs.

- **Mathematical Discourse and Reflective Practices:** Through interviews and focus groups, many campuses discussed the importance of professional learning to build student discourse and critical thinking, such as Building Thinking Classrooms, as important aspects of their teachers' growth and changes to instructional practices. Emphasis on building student discourse and critical thinking has led teachers to use sentence stems and question prompts to deepen understanding. Improvement in the amount of student-to-student discourse in math classrooms is noted, but more emphasis is needed.

- **Data-Driven Instruction:** Interviews and focus groups revealed that teachers are using assessment data from tools like MAP and Dreambox to inform their instructional practices and interventions, leading to more targeted and effective teaching.

- **Flexible Grouping and Cooperative Learning:** Although more growth is needed, the use of flexible grouping and cooperative learning structures has improved student engagement and

collaboration, evident in the comments from key stakeholders. One co-teacher specifically noted that "teachers have become more comfortable with curriculum materials and classroom systems, leading to greater teacher autonomy and willingness to try new instructional approaches." A specialist at a Tier 3 campus noted that she has seen improvement in the "use of UDL principles and flexible grouping to enhance instructional practices."

- **Problem-based Learning, the Use of Tools and Strategies like Concept Quests, Building Thinking Classrooms, and 3-Act Tasks:** In surveys, teachers have reported that these components significantly enhance student engagement and involvement in learning. One teacher mentioned, "Students are more involved in their learning," highlighting the impact of these methods on classroom dynamics. These methods have been reported to significantly increase student engagement and involvement in learning.

- **Professional Development and Instructional Coaching:** Teachers report that training and support from instructional coaches and specialists have been instrumental in improving teaching practices. Teachers have expressed that professional development has positively influenced their instructional methods and confidence. One teacher shared, "I think being given time during professional learning to apply the practices we are learning to create lesson plans or activities that will be used in the classroom. For example, I take away so many great ideas from the sessions, but by the time I am going back into plan, I have forgotten or feel distant from what I have learned" underscoring the importance of ongoing professional growth and time for reflection. Comments in focus groups also indicated that support in unit and daily planning and support for differentiated instruction and challenging students have impacted teacher practice.

Objective 3:
Gather Stakeholder Perception and Conduct a Needs Analysis

What observable changes have occurred in teacher mindset, instructional practices, and confidence levels due to the Tiered Math Initiative?

Based on the data from principal, IC, specialist, and co-teacher interviews and focus groups, as well as teacher surveys, stakeholders have identified several strengths and benefits of the Tiered Math Initiative:

1. Enhanced Teacher Collaboration and Professional Growth

- **Increased Peer Support:** The initiative has fostered a culture of collaboration among teachers, leading to more peer observations, coaching, and shared learning experiences. The initiative has fostered a more collaborative environment among co-teachers, ICs, and specialists as well. Joint planning sessions, including collaborative team meetings, have improved teamwork and shared understanding of instructional goals. A co-teacher noted, "Working closely with the IC and Specialist, we experience similar situations and really figure things out together." A specialist noted that at her Tier 3 campus, "co-teacher support is critical to modeling strategies and mindset for teachers." Finally, a principal noted that "regular collaboration and shared walkthroughs to align support strategies and ensure consistency" were key strengths of the program this year.

- **Professional Development Opportunities:** Regular professional development sessions have been highly valued, providing teachers with the tools and confidence needed to improve their

instructional practices. For example, a co-teacher noted that "regular collaborative meetings, access to professional learning opportunities, and district support have been crucial in fostering confidence and proficiency in curriculum implementation." The initiative has provided ongoing, job-embedded professional development tailored to the needs of teachers. As indicated by campus-based specialists, "near-weekly mini-PL sessions on strategies, Number Corner make-and-take sessions, and curriculum mapping have been implemented."   Additionally, "Dual Language Collaboration Days workshops on Building Thinking Classrooms and focused PD sessions on questioning strategies have been impactful."

2. Improved Instructional Practices

- **Effective Use of Curriculum Resources:** The consistent use of Number Corner and the Bridges curriculum resource has led to more structured and effective teaching practices. A campus principal noted, "Number Corner is used consistently during walkthroughs – starting to see the difference." Instructional coaches and campus-based specialists who participated in focus groups specifically noted that teachers are now utilizing resources like Number Corner and Bridges more effectively, understanding their value in the instructional process as expressed through comments like "greater integration of Bridges resources, with teachers feeling more confident and supported." and "teachers are increasingly utilizing resources like Number Corner and Work Places, showing a better understanding of their value."

- **Focus on Mathematical Discourse:** There is evidence from the focus groups and interviews that teachers adopt more cooperative learning structures, engage in academic discourse, and implement strategies learned through professional development. A Tier 3 specialist noted that there had been an "increased use of play-based learning, cooperative structures, and conscious discipline practices. Many participants also noted that "the emphasis on mathematical discourse has encouraged deeper student thinking and understanding".

- **Adoption of Flexible Grouping and Cooperative Learning Structures:** A big part of the training provided to all elementary math teachers focused on the importance of flexible grouping, student discourse, and enhancing math instructional practices through student collaboration. There is evidence that these instructional strategies have enhanced student engagement and collaboration. A specialist noted that the "use of UDL principles and flexible grouping to enhance instructional practices" has become more evident.   A co-teacher noted that she has seen that "teachers have become more comfortable with curriculum materials and classroom systems, leading to greater teacher autonomy and willingness to try new instructional approaches."

3. Increased Teacher Confidence

- **Support from Specialists and Coaches:** Regular support from math specialists and instructional coaches has significantly boosted teacher confidence. The initiative has been especially beneficial for new teachers, providing them with the necessary support and mentoring to succeed. An IC from a Tier 2 campus noted that "co-teachers have become integral, attending PLCs, supporting planning, and helping with classroom instruction, especially in grades 3-5." One teacher noted that they "feel that I have improved greatly and could teach others at this point."

- **Positive Feedback and Reinforcement:** Consistent positive feedback from principals and instructional coaches has helped build teacher confidence. ICs and math specialists noted that regular communication and support from administrators have been crucial in maintaining the momentum of the initiative. One principal described the use of "Feedback walks in Sept/Oct – gave specific positive feedback, affirming things that are going well." Tier 3 campus ICs and specialists consistently remarked that "regular meetings with campus leadership to discuss progress and strategies" were very helpful as they implemented the program throughout the year.

4. Student Engagement and Growth

- **Increased Student Confidence and Participation:** Teachers have observed higher levels of student engagement and confidence in math, leading to better academic outcomes. ICs and Specialists noted that the initiative has led to stronger student collaboration and engagement. One co-teacher specifically noted that "students are transitioning from merely mimicking processes to developing deeper conceptual understanding. They are making connections independently and demonstrating a greater understanding of mathematical concepts."

5. Reflective Practices and Data-Driven Instruction

- **Reflective Conversations and Goal Setting:** Teachers are engaging in more reflective practices and setting specific, actionable goals for their students, which has led to measurable growth. Especially on Tier 2 and 3 campuses, stakeholders noted that teachers have gained a clearer understanding of instructional goals and the rationale behind using specific resources and strategies. One instructional coach noted that "specialists' involvement has led to a better understanding of the 'why' behind lessons, improving implementation and prioritization."

- **Use of Assessment Data:** Teachers are increasingly using data from assessments to inform their instructional practices and interventions, leading to more targeted and effective teaching. ICs and Campus Specialists indicated that data-driven discussions and reflective practices have become more common, helping teachers make informed instructional decisions with a Tier 1 Instructional Coach noting that "data-driven discussions, academic discourse emphasis, and reflective conversations in PLCs have led to observable changes in teaching practices."

Overall, stakeholders have perceived the Tiered Math Initiative positively. Its notable strengths include fostering teacher collaboration and professional growth, improving instructional practices, increasing teacher confidence, enhancing student engagement and growth, and promoting reflective and data-driven instruction. These strengths and benefits highlight the initiative's success in creating a supportive, effective teaching and learning environment.

"It has been a Godsend to have this initiative on our campus." "We have been able to move math instruction exponentially this year as compared to all my years here"
– Tier 3 Campus IC

What identified needs or challenges have stakeholders expressed, and what recommendations do they provide for program enhancement?

Several themes emerged from the surveys, interviews, and focus groups related to the continued needs and challenges of the elementary math program at LISD. These include 1) the complexity of implementing the curriculum, especially the Bridges resources, 2) the need for more time for planning and lesson implementation, 3) difficulties in meeting the wide range of student needs within our classrooms, 4) the need for more on-going, differentiated, job-embedded professional learning opportunities, 5) implementation challenges related to the complexity of the resources and class sizes, and 6) the need for better family engagement to promote student mindset, confidence, and problem-solving abilities.

- **Curriculum Complexity:** Through surveys, teachers noted the overwhelming volume and complexity of resources, specifically noting that the extensive resources provided by the curriculum can be difficult to navigate and integrate effectively. The curriculum, particularly Bridges resources, is seen as difficult to use and needs to be more user-friendly. Concerns were raised about the amount of time it takes to prepare for components, like Number Corner, and support that teachers need to implement lessons to support better conceptual understandings for their students. A teacher at a Tier 3 campus summed it up this way, "I appreciate Bridges, its conceptual, and the campus math

249

support. I have often been frustrated that I don't have enough time to master the curriculum. I'm too often flying by the seat of my pants rather than being deliberate and prepared."

- **Time Constraints/ Pacing:** Teachers express the need for more dedicated time to plan, collaborate, and implement lessons. One teacher noted on the survey that we need to "give teachers time to plan. Days like today are great, but the increasing amount of frustration over expectation with no time to implement is burning teachers out." In open-ended comments on the survey, teachers also noted that the fast pace of the curriculum can make it difficult for students to master certain skills.

- **Differentiation and Intervention:** Many teachers noted a key challenge in teaching math is meeting the diverse needs of their students. This was reflected in a desire for more tailored resources with a strong demand for more differentiation and intervention resources to support diverse student needs. Teachers specifically mentioned the struggle to provide adequate support for both high achievers and students requiring additional help. Many teachers spoke of the challenges associated with differentiating learning experiences for their students. One concern raised by teachers was the difficulty of managing diverse needs, especially in large classes. They noted that larger class sizes and diverse student needs present significant challenges, especially for those new to the country. Interestingly, the problem with class size was particularly noted at Tier 3 campuses.

- **Professional Learning:** Teachers are seeking more specific and relevant professional development opportunities that address their immediate classroom needs. They also need training sessions that include time to apply new practices and create lesson plans during the sessions. Teachers consistently ask for more time to explore and implement new practices fully. There is evidence that the coaching and co-teaching models built into the Tiered Math Initiative support more targeted, ongoing, and job-embedded professional learning and support.

- **Engaging Parents in Learning:** Teachers also noted that they face challenges in engaging parents and helping them support their children's learning at home. One teacher said, "I have had some difficulty connecting parents to learning at home and how to successfully assist their children who need more support."

Recommendations for Program Enhancement from Stakeholders:

The following recommendations for program enhancement were derived from stakeholder interviews, surveys, and focus groups.

- **Improving Curriculum Usability:** Simplify, streamline, and organize curriculum resources to make them more user-friendly and easier to navigate.

- **Increasing Planning and Preparation Time:** Allocate more dedicated planning time and find creative ways to give teachers more time to plan, collaborate, and implement lessons effectively. A recommendation was also made to consider adjusting the pace of the curriculum to allow for better skill mastery.

- **Enhancing Differentiation and Intervention Support:** Offer more professional learning, resources, and strategies for differentiation and intervention support, including enhancing specific interventions and enrichment activities for both high achievers and struggling students.

- **Continue to Provide Targeted Professional Development:** Provide professional development opportunities that are directly relevant to teachers' immediate classroom needs and ensure that training sessions include time for teachers to reflect on their learning, apply new practices, and create lesson plans.

- **Improving Implementation and Support:** Stakeholders recommend that we consider a comprehensive reorganization of the curriculum to make it more user-friendly and efficient while streamlining additional resources and strategies to help manage diverse needs in large classes.

- **Engaging Parents and Community:** Create strategies to better engage parents in the learning process and provide them with resources to support their children's learning at home.

Objective 4:
Data-Driven Effectiveness Evaluation

What metrics are most relevant for evaluating the effectiveness of the Tiered Math Initiative?

The table below outlines the recommended metrics for ongoing program evaluation and continuous improvement based on the theory of action, logic model, and KASAB for this initiative. By implementing this evaluation plan, we aim to comprehensively assess the effectiveness of the Tiered Math Initiative, ensuring continuous improvement in educator practices and student outcomes.

Metric	Evaluation Tool	Purpose	Specific Tools	Recommnded Timeline
Knowledge Metrics	Teacher Survey	Conduct surveys to gauge teachers' confidence in accessing and implementing EUS, curriculum resources, and the eight effective practices.	Mid-year survey of all Elementary Math Teachers. Analyze trends over timefrom the 2024 baseline.	January
Attitude Metrics	Teacher Belief and Mindset Survey	Implement regular surveys to assess teachers' trust in the curriculum and resources, mindset toward math, and willingness to engage in professional learning.	Mid-year survey of all Elementary Math Teachers.	January
	Focus Groups	Gather qualitative data on teachers' and campus leaders' attitudes toward the Math Initiative support systems through focus groups and interviews.	Focus group/ interview protocol	Oct/ Nov January/ February
Skills Metrics	Observation	Conduct classroom observations to evaluate the effective planning and implementation of curriculum-based lessons.	LISD Instructional Practice Look Fors Consider the need for an observation protocol tied to the 8 Effective Practices.	On-going throughout the year Quarterly checks of data
	Feedback	Collect feedback from coaching sessions and professional learning activities to measure the development of effective feedback and coaching skills.	Small surveys/ reflection forms conducted after key professional learning opportunities and/or coaching opportunities.	On-going
Aspirations Metrics	Teacher Survey	Distribute surveys to understand teachers' and leaders' motivations for fostering a positive math identity among students and creating a supportive learning environment.	Mid-year survey of all Elementary Math Teachers. Analyze trends over time from the 2024 baseline.	January
	Interviews and Focus Groups	Gather qualitative data through interviews and focus groups to explore aspirations for resilience and productive struggle in the learning community.	Focus group/ interview protocol	January/ February

251

Metric	Evaluation Tool	Purpose	Specific Tools	Recommnded Timeline
Behavior Metrics	Consistency and Application Tracking	Monitor the consistent application of the 8 Effective Practices through regular classroom walkthroughs and the use of "look fors".	LISD Instructional Practice Look Fors Consider the need for an observation protocol tied to the 8 Effective Practices.	On-going throughout the year Quarterly checks of data
		Track participation in coaching cycles, feedback sessions, and PLC meetings.	Instructional Coach and Campus-Based Specialist logs and reflection	Ongoing with formal reviews at least semi-annually
		Document the implementation of co-teaching models and collaborative teaching practices.	Instructional Coach and Campus-Based Specialist logs and reflection	Ongoing with formal reviews at least semi-annually
Student Outcomes Metrics	Student Achievement and Growth Assessments	Collect and analyze student assessment data to measure conceptual understanding and content knowledge growth.	Common Collaborative Assessments NWEA- MAP STAAR	On-going throughout the learning cycle 3 x year BOY/ MOY/ EOY Spring Summative
	Student Survey	Administer surveys to assess improvements in students' math attitudes and positive mindset about math.	Elementary Student Math Survey	December/ January
	Student Performance and Growth Assessment Data	Track targeted classroom scores and overall student achievement data.	Student Assessment Dashboards	On-going

Data Collection Methods:

- **Surveys and Questionnaires:** To collect data on attitudes, aspirations, and motivations.
- **Classroom Observations:** To evaluate the application of skills and behaviors.
- **Focus Groups and Interviews:** To gather qualitative data on attitudes and aspirations.
- **Student Assessments and Surveys:** To measure student outcomes and attitudes.
- **Rubrics and Checklists:** To standardize observation and feedback processes.

How will both quantitative and qualitative data be collected and analyzed to measure program effectiveness, and how can this data inform adjustments to the initiative?

By systematically collecting and analyzing both quantitative and qualitative data, the Tiered Math Initiative can be continuously monitored and refined, ensuring it effectively supports educators and improves student outcomes. This comprehensive approach allows for data-driven adjustments that address specific challenges and leverage successful strategies, fostering a dynamic and responsive educational environment.

Recommended Quantitative Data:

- **Surveys:** Regular surveys will capture confidence levels, attitudes, and the frequency of effective practices.

- **Student Performance and Growth Data:** Collect student assessment scores to track growth in conceptual understanding, content knowledge, growth measures, and overall achievement.

- **Classroom Walkthroughs**: Use standardized rubrics to observe and document the application of the 8 Effective Practices and other teaching strategies.

- **Participation Records:** Track attendance and engagement in professional learning sessions, coaching cycles, and PLC meetings.

Recommended Qualtitative Data:

- **Open-Ended Survey Responses:** Gather detailed feedback on additional support needed, barriers faced, and suggestions for improvement.

- **Interviews and Focus Groups:** Conduct regular interviews and focus groups with teachers, specialists, and campus leaders to gather in-depth insights on attitudes, aspirations, and experiences with the initiative.

- **Observation Notes:** Collect detailed notes during classroom observations to capture contextual information and specific examples of effective practices.

Feedback Loops:

- **Regular Reporting:** Provide periodic reports summarizing key findings and progress to stakeholders. Highlight areas of success and identify challenges that need addressing.

- **Data-Driven Decision Making:** Use the collected data to inform decisions about professional development needs, resource allocation, and instructional support.

- **Responsive Adjustments:** Adjust the initiative based on feedback and data analysis. For example, if surveys indicate low confidence in certain areas, provide targeted professional learning sessions to address those gaps.

- **Continuous Improvement:** Establish ongoing feedback loops with teachers, specialists, and campus leaders to ensure the initiative remains responsive to their needs and the evolving educational environment.

What are the initial outcomes regarding the program's impact on student math performance and growth as well as mindset about mathematics?

Student Surveys:

A total of 3,716 2nd through 5th-grade students participated in the student survey during their math class in March/ April of 2024. Appendix C includes a table of the response rates for the student survey. Students were asked to rate questions related to their feelings about math on a 3-point scale (typically "Not Really", "Sometimes", or "Yes"). The overall responses indicate that a relatively low percentage of students (<10%) responded negatively to the questions, with the remaining 90%+ distributed between the two affirmative responses ("Sometimes" and "Yes"). The highest rate of "Yes" responses was found in the question designed to measure student growth mindset: "Do you believe you can get better at math with practice and effort?" Over 84% of students answered "Yes" to this question.

It is important to note that no baseline survey was conducted; therefore, it is difficult to determine the impact of the tiered supports at Tier 2 and 3 campuses. As noted above, several campus-level factors, especially as it

relates to Title 1 identified campuses, likely impact student responses for this survey. Overall, students on Tier 1 campuses tended to have more positive responses than those students on Tier 2 or 3 campuses across the survey questions. Chi-squared analyses confirm that these differences were statistically significant. The one exception was the question, "Have you set any goals for yourself in math this year?". Here about one-fourth of the students (26.8%) said "No", about one-half responded "Yes, and I'm working on them", and about 20% said, "Yes, but I forgot about them". These responses were consistent across all three tiers.

Analysis of Open-Ended Comments from Students:

Open-ended questions about what students liked and disliked most about math this year were included on the student survey for all 2nd through 5th-grade students. The analysis of student perceptions from Tier 1 and Tier 2&3 campuses reveals several similarities and differences. Both groups of students enjoyed math games, multiplication and division, and working with friends, but they also shared a common dislike for fractions, division, and challenging problems. Testing and assessments were similarly viewed negatively by students from both tiers. However, students on Tier 2&3 campuses showed a greater appreciation for challenges, diverse learning strategies, and conceptual understanding while also being more influenced by individual teachers. They expressed a stronger preference for hands-on learning and a dislike for specific math tools. In contrast, Tier 1 students were more focused on enjoying the overall math activities and were less concerned with the methods used to learn them. Additionally, Tier 1 students were more likely to dislike certain activities and were more focused on their struggles with math rather than external factors like class dynamics. The two charts that follow provide more detail on these themes:

Common Themes from Students at all 3 Campus Types

Theme	Students at Tier 2 & 3 Campuses	Students at Tier 1 Campuses
Enjoyment of Math Games:	Many students appreciated math games as a fun and engaging way to learn. Specific games mentioned include DreamBox and other interactive activities.	Similarly, Tier 1 students frequently mentioned math games as their favorite part of math class. They enjoyed activities that combined learning with play.
Multiplication and Division:	Multiplication and division were frequently cited as favorite topics. Students mentioned specific aspects like long division and learning new strategies for multiplication.	Multiplication and division were also popular among Tier 1 students. They found these topics challenging yet rewarding and enjoyed mastering new techniques.
Working with Friends:	Collaboration with peers was highlighted. Many students enjoyed working together on problems and helping each other understand math concepts.	Tier 1 students also enjoyed the social aspect of math, emphasizing group work and discussing strategies with friends.
Dislike for Fractions and Division:	Many students found fractions and division challenging and frustrating. Specific mentions include difficulties with fractions, decimals, and long division.	Similarly, Tier 1 students frequently expressed frustration with fractions and division. They found these topics hard and often confusing.
Difficulty with Challenging Problems:	Students disliked particularly challenging problems that they could not solve. They mentioned feeling frustrated with difficult questions and the complexity of certain math concepts.	Tier 1 students also noted their struggles with hard problems. They found it difficult to understand complex questions and felt overwhelmed by challenging tasks.
Testing and Assessments:	Many students disliked tests and assessments, particularly standardized tests like the STAAR test. They found these tests stressful and unhelpful.	Testing was also a common complaint among Tier 1 students. They expressed anxiety over math tests and the pressure they felt during assessments.

Specific Differences between Tier 2 & 3 and Tier 1 Campus Student Perceptions

Theme	Students at Tier 2 & 3 Campuses	Students at Tier 1 Campuses
Preference for Challenges:	These students often mentioned enjoying challenging problems and appreciating when math was tough but manageable. They liked the feeling of accomplishment that came with solving difficult problems.	While some Tier 1 students also enjoyed challenges, there was a more significant emphasis on finding math easy and enjoyable rather than explicitly seeking out difficult tasks.
Teacher Influence:	Specific teachers were frequently mentioned by name, indicating a strong influence of in-dividual teaching styles on student enjoyment of math. Students appreciated teachers who made math understandable and fun.	Although teachers were also mentioned, there was less emphasis on individual teacher influence and more on the general enjoyment of math activities.
Variety in Learning Strategies:	These students appreciated learning various strategies for solving math problems. They mentioned specific methods, like the box method for multiplication, and used different approaches to understand concepts.	There was less mention of varied strategies among Tier 1 students. They focused more on enjoying specific topics or activities rather than the methods used to learn them.
Conceptual Understanding:	There was a notable appreciation for understanding concepts deeply, such as working with fractions and decimals and understanding their practical applications.	While conceptual understanding was valued, the emphasis was more on enjoying the process and activities rather than the depth of understanding
Dislike for Specific Math Tools and Activities:	Several students mentioned disliking specific tools such as DreamBox. They felt that these tools did not help them learn effectively and preferred direct instruction from teachers.	Tier 1 students were more likely to mention disliking specific activities like "Number Corner" and "math games." They felt these activities could have been more exciting and useful.
Issues with Learning Environment and Class Dynamics:	Some students mentioned that disruptive behavior from classmates made learning math harder and less enjoyable. They felt that these disruptions negatively impacted their ability to learn.	While Tier 1 students also mentioned class dynamics, their comments focused on their struggles with math, such as feeling stressed or bored during math lessons.
Preference for Hands-On Learning:	Students at Tier 2 or 3 campuses expressed a desire for more hands-on activities and felt that too much work was done on computers rather than through interactive, practical tasks.	Tier 1 students were less likely to mention a preference for hands-on learning but did express a general dislike for "boring" or "non-interactive" math work.

My favorite thing about math this year is the mindset that they teach you to have while doing math. Yes, the teaching methods are great, but the fact that you learn to try different strategies or not just give up is far more important.
– 5th-grade student at Knowles Elementary

Analysis of Teacher Survey Related to Student Outcomes:

Without baseline data on teacher's perceptions about the progress that their students were making, we asked all returning elementary math teachers to describe the level of progress that their students were making this year as it compared to last year (note that the survey was completed in February of 2024). About one-third of Tier 1 teachers reported that their students' progress was better this year compared to last year, while almost half (45%) and more than half (53%) of Tier 2 and Tier 3 teachers, respectively, said that their students' progress was more or much more than the previous year. Although we can't draw strong conclusions from this data, it does appear to indicate that teachers who were receiving the most support through the Tiered Math Initiative believed that their students were making more progress than the students they taught before receiving these additional supports.

Which answer below best describes your students' progress in math this year as compared to last year?

- Tier 1: 38%
- Tier 2: 45%
- Tier 3: 53%

(Y-axis: % More or Much More)
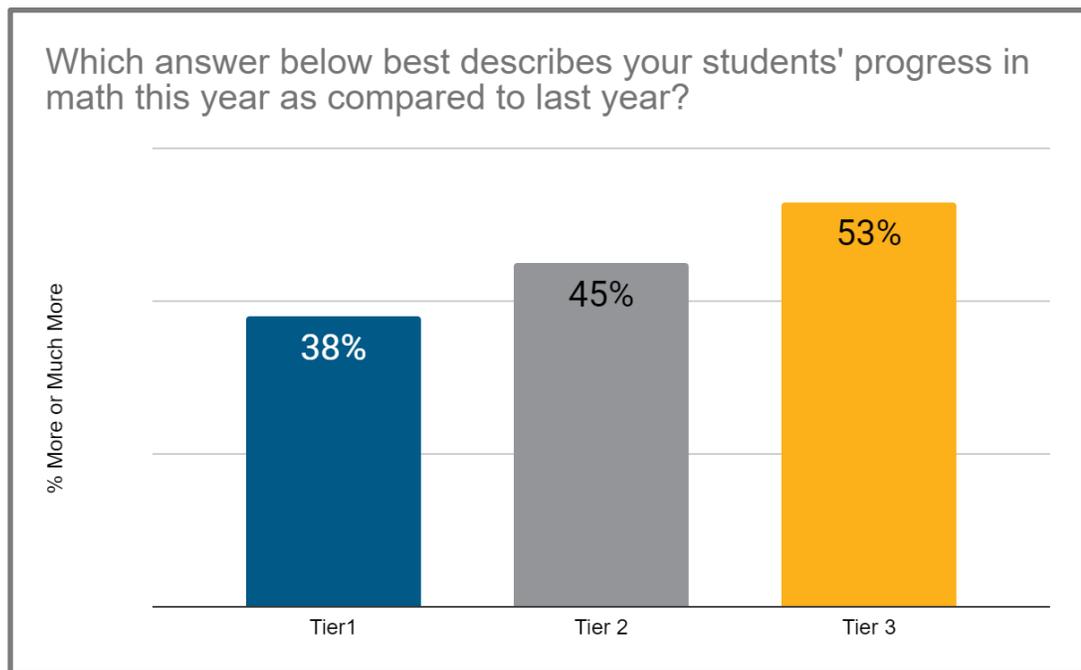
Analysis of student assessment outcomes using a matched sample:

In the first year of program implementation, the evaluation focused on the components of the Theory of Change related to program implementation, professional learning, and teacher practice. A preliminary analysis of STAAR data was conducted (as described in this section), but the expectation is that it will require a multi-year implementation of the program before clear differences in student outcomes are observed.

When analyzing STAAR performance data, it is important to acknowledge the challenges in directly comparing campuses due to significant contextual differences, particularly because the targeted campuses were all Title 1 schools. These campuses typically face more substantial challenges, such as higher poverty rates, which can impact student performance. To ensure a fair comparison, propensity score matching was used to account for contextual variables, allowing for a comparison between students on Tier 3 campuses (those with a Math Specialist and Co-Teacher) and those on Tier 1 or 2 campuses with similar characteristics. The matching was based on the following factors: Eco Dis status, Special Ed status, Hispanic ethnicity, and Beginning of Year MAP percentile. Further details are provided in Appendix E.

Before the implementation of the Tiered Math Initiative, students on the identified Tier 3 campuses (Title 1 campuses) were less likely to meet the standard on the Math STAAR test compared to similar students on Tier 1 or 2 campuses. This is evident from the negative coefficient (-0.16) in the propensity score analysis, which indicates that students on Tier 3 campuses were less likely to pass the STAAR math exam than their academically similar peers at other campuses. See the figures below for details.

However, a significant shift occurred after implementing the Tiered Math Initiative during the 2023-24 school year. The relationship between Tier 3 campus and STAAR performance flipped from negative to positive. The positive coefficient (0.15) suggests that students on the targeted Tier 3 campuses not only closed the gap but outperformed their matched peers from non-Tier 3/non-Title 1 campuses. These students were more likely to meet the STAAR standard than similar students from other campuses, indicating a positive impact of the Tiered Math Initiative on student outcomes.

256
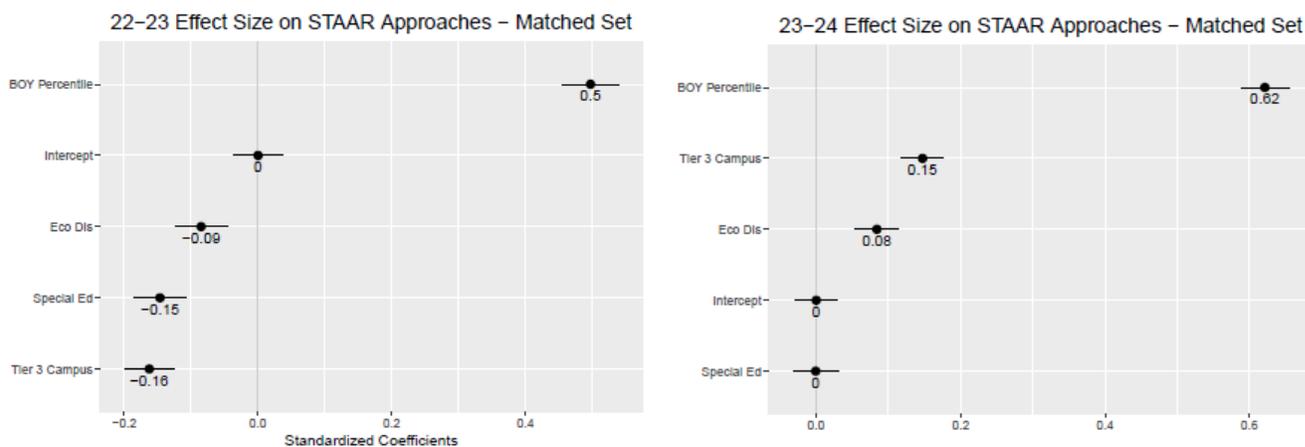
This shift highlights the effectiveness of the targeted support for Tier 3 campuses under the Tiered Math Initiative. It demonstrates that with the right resources and interventions, students at these historically underperforming schools can achieve and even exceed the performance levels of their peers at less challenged campuses.

Summary of Key Findings

Implementation Success and Challenges:

Overall, the Tiered Math Initiative was successfully implemented across grades 2 through 5, with professional learning provided to almost 500 teachers. However, maintaining fidelity was challenging due to curriculum complexity, time constraints, staffing issues, and differentiation support. A key aspect of the Theory of Change was leadership development and support. However, due to competing priorities, targeted time for leadership development and collaboration with campus principals, instructional coaches, and the elementary math curriculum team around the NCTM Eight Effective Practices was significantly limited during the 2023-24 school year.

Positive Impact on Teacher Practices:

The initiative led to improvements in teacher mindset, instructional practices, and confidence. Most teachers showed increased effectiveness in using Number Corner and Bridges resources, integrating more mathematical discourse, and engaging in reflective practices. Those who received co-teacher or specialist support demonstrated the most improvement in utilizing curriculum resources and Essential Units of Study, and they reported greater student progress compared to before the initiative's implementation.

High Levels of Teacher Confidence and Use of Curriculum Resources:

More than 90% of elementary math teachers surveyed reported that they are able to access the necessary LISD curriculum resources, use the curriculum resources to plan math instruction, purposefully plan and implement curriculum-based lessons, and unpack the TEKS for their grade level to make instructional decisions.

Enhanced Teacher Collaboration:

The program effectively fostered a culture of collaboration among teachers, instructional coaches, and specialists, leading to more peer observations, coaching, and shared learning experiences. Collaboration among co-teachers, specialists, and instructional coaches positively impacted professional growth and job satisfaction for these roles.

Improved Student Engagement and Growth:

Students at Tier 2 and Tier 3 campuses showed high levels of engagement and confidence in math, with teachers reporting better student progress this year compared to last year, particularly in challenging campuses.

Strong Growth Mindset toward Math among Students:

Over 84% of students believe they can improve in math with practice and effort, reflecting a strong growth

mindset. Students at Tier 1 campuses generally expressed more positive feelings about math. However, drawing conclusions about changes in student perceptions at targeted campuses is challenging due to the need for baseline measures and the inability to control for campus-level factors, particularly at Title 1 campuses. Additionally, the survey highlighted a need to focus on goal-setting practices, as nearly 27% of students reported not setting any math goals, while about half indicated they are actively working on their goals.

Variability in Implementation:

There was considerable variability in how co-teaching and support models were implemented across campuses, primarily due to staffing challenges, campus-specific needs, and teachers' varying receptiveness. There was much less variability in the role and implementation of campus-based math specialists across the five Tier 3 campuses.

Challenges in Curriculum Complexity and Usability:

Teachers expressed concerns about the complexity and overwhelming volume of curriculum resources, particularly the Bridges resources. There is evidence that some of the challenges are based on a need for more understanding of navigating and utilizing the Essential Units of Study (EUS) and curriculum resources for instructional planning, as well as the complexity of some of the Bridges resources included.

Need to Examine Differentiation Practices and Intervention Support:

Teachers highlighted the need to easily locate and use tailored resources to support differentiation and interventions, particularly for high achievers and struggling students. Interestingly, this request for more resources may exacerbate the above-identified problems with the complexity of the resources.

Professional Development Needs:

Eighty percent of elementary math teachers surveyed reported that the training and support they received this year improved their abilities as math teachers, and between 70% and 80% reported that the training and support received improved their confidence as math teachers. While professional development was valued, there was also a strong demand for more targeted, job-embedded learning opportunities that are directly relevant to immediate classroom needs.

Impact on Student Outcomes:

Initial analysis of STAAR performance indicated that students on targeted Tier 3 campuses outperformed their similar, matched peers from non-targeted campuses, suggesting a positive impact of the initiative on student achievement. More than 85% of the teachers surveyed believe that their students improved their conceptual understanding of math this year and have become more confident in their abilities.

Stakeholder Recommendations for Improvement:

Key recommendations include improving curriculum usability, providing more planning time, enhancing differentiation resources, and increasing parental engagement to support student learning.

Effective Professional Learning Enhances Instructional Practices:

The Tiered Math Initiative successfully enhanced teacher instructional practices, confidence, and mindset through targeted professional learning. Teachers showed improved use of curriculum resources and were more engaged in reflective and data-driven practices.

Collaborative Models Foster Teacher Growth:

The program's emphasis on collaboration, including co-teaching and peer coaching, significantly contributed to professional growth and improved instructional practices. This collaborative approach proved critical in building teacher confidence and effectiveness. This was also true for the growth of the co-teachers and specialists on targeted campuses.

Variability in Implementation Affects Program Fidelity:

While the initiative had a positive impact overall, the variability in implementation across campuses—due to staffing issues, resource availability, and campus-specific needs—resulted in inconsistencies in program fidelity.

Curriculum Complexity Remains a Significant Challenge:

The complexity and volume of the Leander ISD curriculum and Bridges resource can be overwhelming for teachers, leading to difficulties in consistent implementation.

Need for Enhanced Differentiation and Intervention Resources:

Teachers clearly desire more training on embedded resources and support to effectively differentiate instruction and meet diverse student needs, particularly for high achievers and struggling students. Additional work is needed to engage with teachers on the types of enhancements needed and the balance between reducing the complexity of resources and providing more resources.

Professional Development Needs to be More Targeted and Job-Embedded:

While professional development opportunities were appreciated, there is a need for more targeted, relevant, and job-embedded professional learning that directly addresses teachers' immediate challenges in the classroom. There is evidence that the tiered support model provided this support to teachers on targeted campuses. There is a significant concern, however, that the model as evaluated included additional required training for all elementary math teachers in 2023-24; the capacity to provide this type of professional learning is limited moving forward.

Preliminary Positive Initial Impact on Student Outcomes:

According to teachers, co-teachers, specialists, and instructional coaches, students showed increased engagement, confidence, and academic growth in math this year. Additionally, the initial analysis of student achievement data, particularly STAAR performance, indicates that the initiative had a small positive impact on the growth in math performance for students in targeted Tier 3 campuses, suggesting a promising impact of the tiered support model.

Stakeholder Engagement and Feedback Are Crucial for Continuous Improvement:

The involvement of stakeholders in providing feedback and identifying challenges and needs was critical in refining the initiative's ongoing development. Their insights highlight the importance of continuous evaluation and adjustment to meet evolving needs.

Strategic Adjustments Needed for Long-Term Success:

To sustain and build on the initiative's successes, strategic adjustments are necessary, including simplifying curriculum resources, providing more planning time, ongoing collaboration and leadership development, enhancing support for differentiated instruction, and parental engagement.

Simplify and Streamline Curriculum Resources:

Continue to simplify and enhance the usability of curriculum documents and related resources to help teachers implement the curriculum more effectively and reduce overwhelm. Continue providing direct support to teams through PLCs and IC training to implement critical components like Number Corner, Work Places, Concept Quest, and Problems and Investigations. Increase the use of unit preview videos and Number Corner Planner preview videos to further support teachers.

As the district implements significant changes in accelerated math learning for fifth-grade students, pilot a simplified and clarified version of Stage 3 curriculum documents, including a recommended day-by-day guide to support planning. Collect ongoing feedback from teachers on user-friendly aspects and make necessary adjustments. Use this pilot as a foundation for revising all elementary math curriculum documents to reflect best practices. Continue to identify bright spots, provide support, and refine the curriculum documents and resources based on teacher feedback.

Provide Additional Planning and Preparation Time:

Allocate more dedicated time for teachers to plan, collaborate, and implement lessons. Provide opportunities for principals to think creatively and collaborate on identifying the best strategies to provide this dedicated time without significantly impacting the instructional time for students. The curriculum team with teachers should consider adjusting the pacing of the curriculum to allow for better mastery of skills and reduce the pressure on teachers. Continue to provide collaborative planning opportunities for curriculum specialists, instructional coaches, and co-teachers to support implementation. Ultimately, teachers and specialists need time to engage in productive struggle to support conceptual learning and effective planning.

Enhance Differentiation and Intervention Support:

Partner with teachers, co-teachers, and specialists to review and, where appropriate, develop and provide more tailored resources and strategies for differentiation and intervention, particularly for high achievers and struggling students. Ensure these resources are easily accessible and aligned with the curriculum. Continue to support teachers through their collaborative teams on using the resources for intervention and challenge already embedded in the curriculum resources. Collect ongoing feedback on the best practices with these resources and provide opportunities for teachers to share with each other across the district.

Increase Targeted and Job-Embedded Professional Development:

Continue to offer more specific, relevant, and job-embedded professional development opportunities that address teachers' immediate classroom needs, including differentiation support. Include time for teachers to apply new practices and create lesson plans during training sessions. Continue to provide ongoing peer coaching and planning support from content specialists and instructional coaches tied to professional learning opportunities. This will need to happen within the districts' shift in the model for professional learning supported within the PLC process. This shift further reinforces the need for collaborative time with Instructional Coaches, Curriculum Specialists, and co-teachers. This includes the need to continue to build capacity with our instructional coaches and professional learning and support for principals to lead the work of their PLCs. As a part of this new focus, we will need to create systems and processes to better align PLC needs, including conceptual understanding for elementary math teachers with support from district and campus specialists.

Strengthen Implementation Support Across Campuses:

Provide additional support to ensure consistent implementation across all campuses. This may include more training for co-teachers, clearer role definitions, and ongoing support for campuses facing unique challenges, such as staffing issues or large class sizes. With the shift in focus of professional development to PLC-based, we recommend an increased focus on planning effective instructional practices. This could include expanding the support for integrating Number Corner and Work Places, as was successfully noted on some Tier 2 and 3 campuses.

0

Enhance Collaborative Practices and Peer Coaching:

Continue to foster and expand collaborative practices, including peer coaching, co-teaching, and professional learning communities (PLCs). Encourage cross-campus collaboration among co-teachers, instructional coaches, and specialists to share best practices and support each other.

Engage Parents and the Community in the Learning Process:

Develop strategies to better engage parents in their children's math education. Provide them with clear resources and guidance on how to support learning at home, particularly in fostering a positive math mindset and problem-solving skills.

Focus on Consistency in Using Effective Teaching Practices:

Continue to emphasize, monitor, and support the consistent application of the eight NCTM Effective Teaching Practices across all classrooms. Provide ongoing coaching and feedback to help teachers integrate these practices into their daily instruction. Provide opportunities for principals and other instructional leaders to collaborate on strategies to support the eight NCTM Effective Teaching Practices for all LISD elementary math teachers.

Address Implementation Challenges Related to Curriculum Complexity:

Continue to provide targeted support to teachers struggling with the complexity of the curriculum. Provide opportunities for teacher-to-teacher collaboration and modeling to support teachers struggling with the complexity of curriculum resources. Create clearer expectations around the importance of beginning with the EUS in planning and continuing to embed training on specific components of the LISD Math curriculum and resources. Continue to utilize co-teachers and math specialists to provide targeted support and modeling.

Continue Data-Driven Evaluation and Continuous Improvement:

Implement an ongoing evaluation framework that includes both quantitative and qualitative data collection. Use this data to make informed adjustments to the initiative, ensuring it continues to effectively meet the needs of teachers and students. Continue to provide opportunities for teachers to reflect on the impact of curriculum and program components and consistently provide feedback through surveys, exit tickets, reflections, and focus groups.

Adjust and Sustain the Tiered Support Model:

Given the positive impact observed in Tier 2 and 3 campuses, consider sustaining and potentially expanding the tiered support model. Ensure it is adequately resourced and continuously refined based on feedback to maximize effectiveness. Clarify the roles of co-teachers and campus-based content specialists and promote ongoing collaboration and peer support among these roles. Additionally, continue to enhance the knowledge and skills of instructional coaches to better support teachers in content knowledge and effective math instruction.

Guskey, T. (2016). Gauge impact with 5 levels of data. *Journal of Staff Development, 37(1)*.
https://www.learningforward.org

Killion, J. (2017). *Assessing impact: Evaluating professional learning*. Corwin Press.

Leinwand, S., Brahier, D. J., Huinker, D., Berry, R. Q., Dillon, F. L., Larson, M. R., ... & Smith, M. S. (2014). *Principles to actions: Ensuring mathematical success for all*. NCTM, National Council of Teachers of Mathematics.

OpenAI. (2024). *ChatGPT* (4.0) [Large language model].
https://chatgpt.com/c/6950c40b-8254-4e06-ae61-c244549bbc1d

41

Elementary Math Teacher Survey: Student Outcomes

	Tier1	Tier 2	Tier 3
My students are becoming more proficient problem-solvers in math.	89%	92%	76%
My students have improved in their conceptual understanding of math ideas this year.	91%	100%	85%
My students have positive attitudes and a growth mindset towards math this year.	86%	71%	75%
My students have become more confident in their abilities in math this year.	95%	88%	83%

Elementary Math Teacher Survey: Instructional Practices

	Tier1	Tier 2	Tier 3
I incorporate the NCTM 8 Effective Practices in planning and instruction.	85%	88%	80%
I use the LISD curriculum resources to plan math instruction.	99%	100%	97%
Number Corner workouts are a routine practice in my classroom.	73%	88%	83%
Work Place games are a routine practice in my classroom.	82%	79%	66%
The training and support that I have received this year has improved my abilities as a math teacher.	79%	79%	83%
The training and support that I have received this year has improved my confidence as a math teacher.	79%	71%	78%

Elementary Math Teacher Survey: Curriculum Planning and Implementation Confidence

	Tier1	Tier 2	Tier 3
I can access the LISD curriculum resources that I need.	98%	100%	98%
I can purposefully plan and implement curriculum-based lessons.	98%	92%	97%
I can incorporate the 8 Effective Practices into my lesson planning.	90%	88%	88%
I can unpack the math TEKS for my grade level and make instructional decisions based on my knowledge of the TEKS.	93%	96%	92%
I can ask questions that deepen students' conceptual understanding of math concepts throughout my lessons.	92%	88%	88%
I can differentiate my math lessons and activities to provide intervention for students who need it.	90%	88%	88%
I can differentiate my math lessons and activities to provide challenge for those students who need it.	86%	88%	83%

Math Enjoyment

Do you enjoy working on math activities or problems in class?

Tier 2 & 3 Campuses

Yes	Sometimes	Not really
42%	49%	9%

(N = 814)

Legend: Yes, Sometimes, Not really

Tier 1 Campuses

Yes	Sometimes	Not really
49%	44%	6%

(N = 2,664)

Legend: Yes, Sometimes, Not really

Getting Better at Math?

Do you feel like you're getting better at understanding math?

Tier 2 & 3 Campuses

Yes	Sometimes	Not really
59%	33%	8%

(N = 814)

Legend: Yes, Sometimes, Not really

Tier 1 Campuses

Yes	Sometimes	Not really
71%	25%	

(N = 2,660)

Legend: Yes, Sometimes, Not really

Setting Goals in Math?

Have you set any goals for yourself in match this year?

Tier 2 & 3 Campuses

53%	22%	25%	(N = 813)

- Yes, and I'm working on them
- Yes, but I forgot about them
- No, I haven't set any goals

Tier 1 Campuses

50%	22%	28%	(N = 2,657)

- Yes, and I'm working on them
- Yes, but I forgot about them
- No, I haven't set any goals
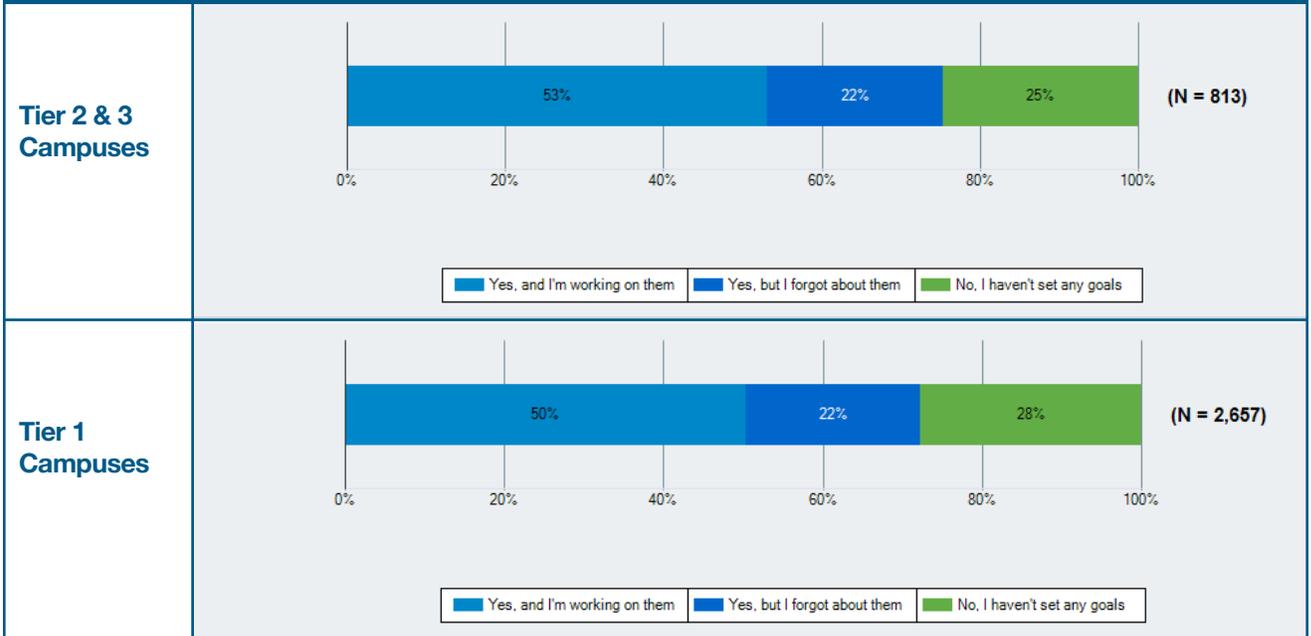
Confidence in Math?

How confident do you feel when solving math problems?

Tier 2 & 3 Campuses

38%	56%	6%	(N = 816)

- Very
- Some
- Not at all

Tier 1 Campuses

49%	47%		(N = 2,649)

- Very
- Some
- Not at all

LISD Elementary Tiered Math Initiative – Year 1 Evaluation

APPENDICES

Enjoy Solving Problems?

Do you enjoy solving math problems?

Tier 2 & 3 Campuses	Yes, a lot! 41% — Sometimes 45% — Not really 14% (N = 816)
Tier 1 Campuses	Yes, a lot! 47% — Sometimes 43% — Not really 10% (N = 2,650)

Legend: Yes, a lot! | Sometimes | Not really

Growth Mindset?

Do you think you can get better at math with practice and effort?

Tier 2 & 3 Campuses	Yes 81% — Sometimes 16% (N = 812)
Tier 1 Campuses	Yes 85% — Sometimes 12% (N = 2,661)

Legend: Yes | Sometimes | Not really

46

What do you do when you find math challenging?

What do you do when you find a math task challenging? (Select all that apply)

Tier 2 & 3 Campuses (N = 815)

Response	Percent
Keep trying	71%
Ask for help	53%
Use a different strategy	51%
Give up	8%

Tier 1 Campuses (N = 2,667)

Response	Percent
Keep trying	77%
Ask for help	57%
Use a different strategy	57%
Give up	5%
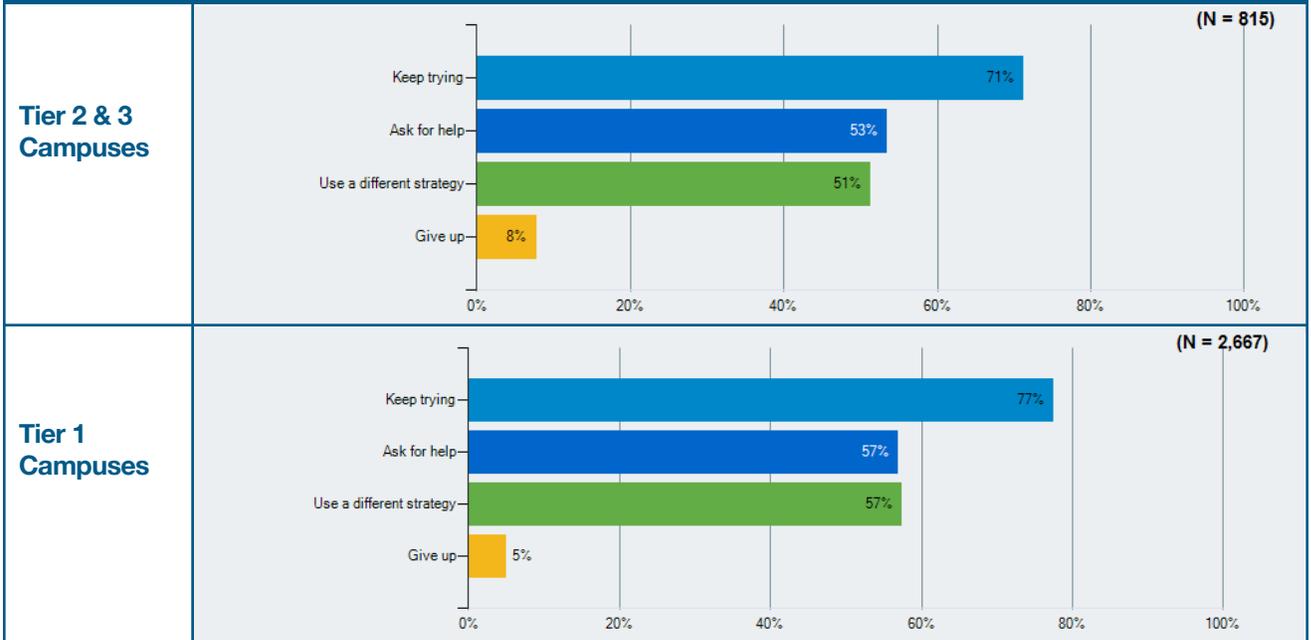
Understanding Math Better

What helps you understand math better? (Select all that apply)

Tier 2 & 3 Campuses (N = 812)

Response	Percent
Number Corner	26%
Math games	49%
Working with friends	61%
Talking about math	36%
Explaining to others	23%
Listening to others sharing their thinking	38%
Using objects (like tools, manipulatives, toys or counters)	35%
Solving math problems	46%
Other (Please specify)	11%

Tier 1 Campuses (N = 2,666)

Response	Percent
Number Corner	15%
Math games	48%
Working with friends	60%
Talking about math	37%
Explaining to others	25%
Listening to others sharing their thinking	39%
Using objects (like tools, manipulatives, toys or counters)	28%
Solving math problems	58%
Other (Please specify)	13%

268

Appendix C:
Professional Learning Plan Summary Elementary Mathematics (23-24)

Before School Starts	1st 9 weeks	2nd 9 weeks	3rd 9 weeks	4th 9 weeks
• Get ReConnected (Required 2-5: 6/1, 7/18, 7/20, 7/27, 8/11) • Collaborative Teacher Retreat (5 Tier 3 campuses 4th/5th 7/19-20) • Getting Started (new to K-5 math; 7/24, 7/26) • Bridges Intervention (7/27) • NTD K-5 (8/3 and 8/4) • 5th Grade: Intro to 5/6 Course and 2nd Grade: Intro to Concept Quests (8/8)	• Getting Started Follow-up after school Google Meets (9/19 or 9/21) • 5th Grade Advanced Math Cohort (half-day 9/27) • 2-5 Get ReConnected Follow-up (half-day 10/9)	• CIC Session for 2-5 Get ReConnected Follow-up (11/6) • Getting Started Follow-up after school Google Meet (11/28 or 11/30) • 5th Grade Advanced Math Cohort (half-day 12/6)	• Getting Started Follow-up after school Google Meet (1/30 or 2/1) • 2-5 Get ReConnected Follow-up (half-day 2/19) • 5th Grade Advanced Math Cohort (half-day 2/27)	• Getting Started Follow-up after school Google Meet (3/5 or 3/7) • 5th Grade Advanced Math (4/1)

Appendix D:
Clarification of Role for Tiered Math Initiative (23-24)

Collaborative Teacher (@ Camacho, Giddens, Reed, GVH, Faubion, Knowles, Bagdad)	Instructional Coach	Campus- and District-based Curriculum Specialist (Campus-based @ Camacho, Giddens, Bagdad, Knowles, GVH)
Implement the curriculum in order to support the growth of students and instructional staff • Directly teach students • Support inclusive practices • Collaborative teaching • Attend specific grade level PLCs and planning • Lead data discussions and develop responses to data • Support professional learning for teachers • Set/support campus-specific goals and objectives • Engage in coaching cycles in specific grades/subjects • Support implementation of written, taught, and assessed curriculum • Support/track HB 4545 within the Least Restrictive Environment model • Collaborate with service providers to support inclusion minutes as needed	**Support instructional staff in continuously improving teaching and learning** • Classroom supporter, observe, co-teach, model, and provide judgment-free feedback on instructional practices • Develop and provide professional learning for teachers • Curriculum Specialist • Instructional Specialist • Resource provider • Data Coach • School leader - collaborate with principal and school leadership improvement teams • Provide support for new and experienced teachers through coaching cycles	**Support alignment of written, taught, and assessed curriculum** • Develop and provide professional learning aligned to content and district initiatives • Compile and analyze data to coordinate plans for improvement in conjunction with ICs, co-teachers, and grade-level teams • Develop and support the implementation of LISD's guaranteed and viable curriculum • Collaborate with other teaching and learning staff to align and support resources of best practices for advancement and intervention • Collaborate with PreK-12 curriculum teams and campus staff to align district curriculum and instruction initiatives

270

Appendix E:
Propensity Score Matching Details

Demographics of students at campuses with and without a Math Specialist (Tier 1 or 2 vs Tier 3)

23–24 Race/Ethnicity Distribution
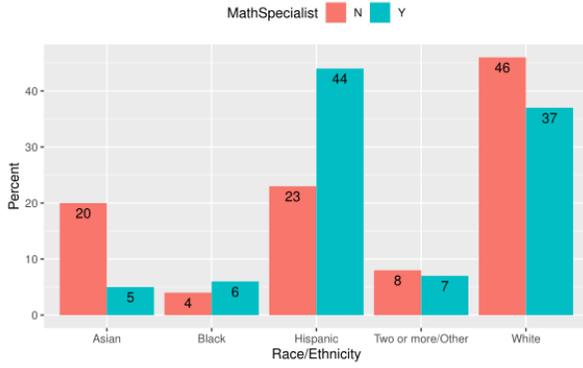
23–24 Percent Eco Dis
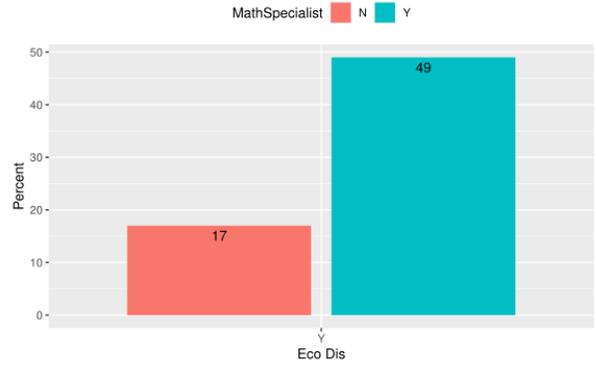
23–24 Percent Special Ed
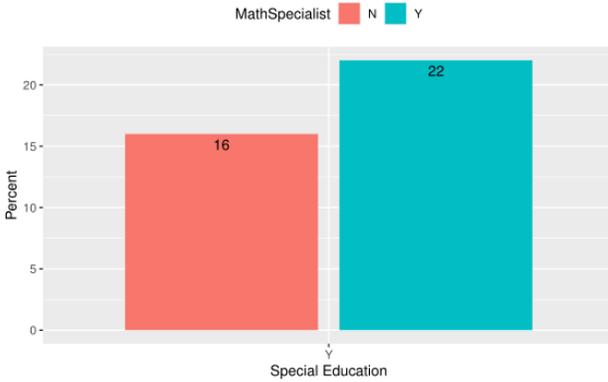
23–24 BOY MAP Percentile Distribution
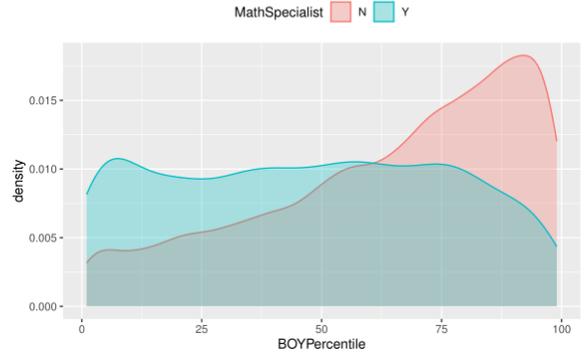
Demographics of students at campuses with and without a Math Specialist (Tier 1 or 2 vs Tier 3)

23–24 Race/Ethnicity Distribution – Matched Set
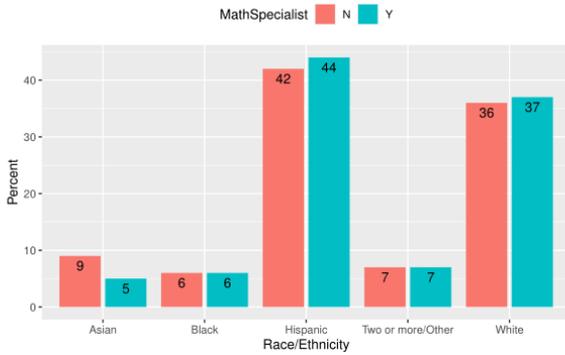
23–24 Percent Eco Dis – Matched Set
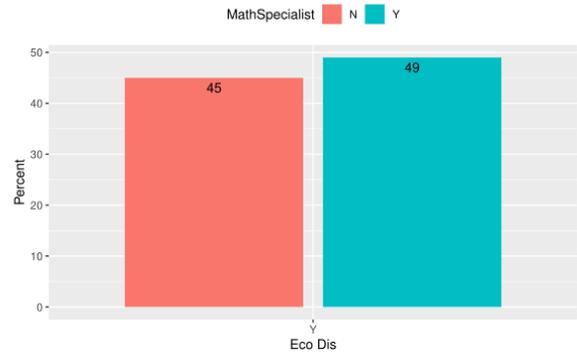
23–24 Percent Special Ed – Matched Set
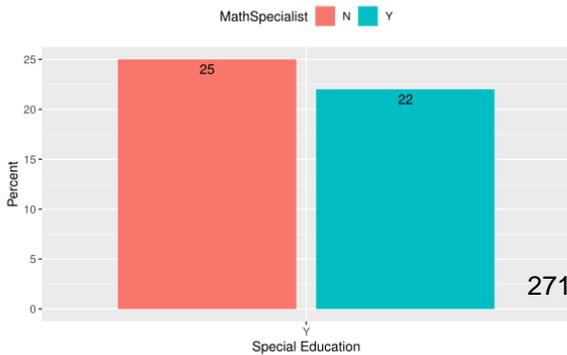
23–24 BOY MAP Percentile Distribution – Matched Set
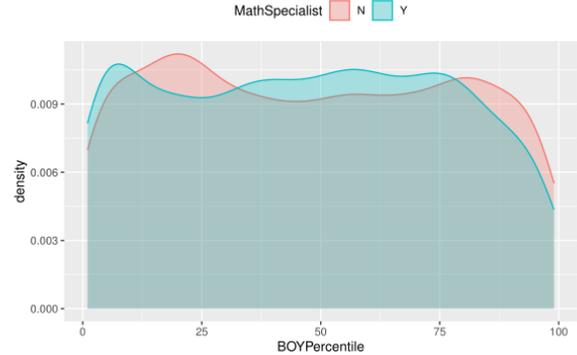
Leander ISD Board Meeting Agenda Item Information
Meeting Date: Thursday, September 5, 2024

Agenda Item:	Discussion of 2024-2025 Superintendent Evaluation Instrument
Purpose (this meeting):	☒ Discussion Item/Report Only ☐ Action Requested
Action Requested (future meeting):	Thursday, September 19, 2024
Administrator Responsible:	Sarah Grissom, Ed.D., Deputy Superintendent of Administrative Services & Strategic Planning and Sarah Martinez, Ed.D., Director of Research & Program Evaluation
Attachments:	2024-2025 Superintendent Evaluation Instrument Presentation
	2024-2025 Superintendent Evaluation Instrument Board Priorities Exercise Results *(Uploaded in BoardBook 09-18-24)*

Background Information:

In a continued effort to ensure system alignment to the LISD five-year strategic plan, administration is seeking input from the Board of Trustees on priorities for the 2024-2025 Superintendent Evaluation Instrument. Tonight, Administration will facilitate a reflective discussion on the 2023-2024 superintendent evaluation process and instrument. Administration is also seeking direction from the Board of Trustees on the priorities for the 2024-2025 Superintendent Evaluation Instrument.

Administrative Recommendation:

Administration will submit the 2024-2025 Superintendent Evaluation Instrument for Board approval at the September 19, 2024 Regular Board Meeting.

Sample Motion:

N/A

September 5, 2024

Superintendent Evaluation Instrument

274

Discussion of 2024-2025 Superintendent Evaluation Instrument

PURPOSE

- Reflect on the 2023-2024 superintendent evaluation process & instrument

- Seek Board direction on priorities for the 2024 - 2025 superintendent evaluation instrument

275

2

System Alignment

LISD 5-Year Strategic Plan

Community-Based Accountability

District & Campus Improvement Plans

LISD Board Goals

Board Evaluation

Superintendent Evaluation

276
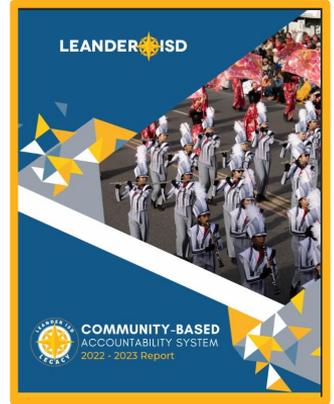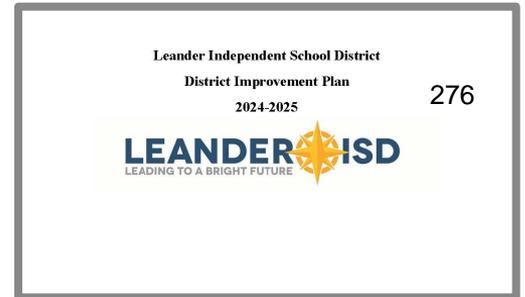
Theory Of Action

If Board of Trustees do X	→	Then Superintendent will be able to do Y	→	So that we will realize the Vision, Mission & Graduate Profile.
Board Purpose, Goals & Evaluation Board Meeting Agendas		Superintendent Evaluation		

277

REFLECTION

Discussion of 2024-2025 Superintendent Evaluation Instrument

REFLECTION

Plus/Delta

- Superintendent evaluation process
  - Quarterly Formative Review
  - Leading Measures Presentations

- Superintendent evaluation instrument

279

BOARD PRIORITIES

280

BOARD PRIORITIES

Part I - Student Performance (Required)
- Report on student performance features a worksheet prepared by the superintendent using the most recent student performance data from the Texas Academic Performance Reports (TAPR).

Part II - Key Performance Indicators
- Key performance indicators are developed in alignment with district goals. The superintendent develops superintendent performance targets, which are reviewed by the board.

Part III - Assessment of Ongoing Responsibilities
- Other management responsibilities are designed to function as an evaluation of general management performance and to assist the board and superintendent in identifying priorities for the coming year.

281

8

DISCUSSION

Part II: Superintendent Performance Goals

Goal 1: Empowered Student Learning
· Create and support a culture of deeper learning for all staff and students so they achieve the attributes in the LISD Graduate Profile.

· Promote and expand student ownership of learning.

Goal 2: Empowered Staff
· Continue to expand and enrich recruitment and retention efforts to attract and retain first-rate candidates and identify district-specific needs.

· Create a culture where staff feel valued and connected to their campus/department in order to retain a collaborative community of first-rate employees who are empowered to meet the needs of each and every student.

· Improve professional learning opportunities and ensure alignment with the district's mission, vision, core beliefs, and Graduate Profile.

Goal 3: Impactful Family Engagement

· Build systems to improve trust, mutual respect, and shared responsibility within Leander ISD.

· Improve processes for reciprocal communication at all levels and to all audiences.

Goal 4: Equitable Access
Eliminate barriers to equitable access.

Goal 5: Safe & Innovative Learning Environments
· Update the long-range facilities plan to meet the changing needs of LISD's growing populations for safe, inclusive, and innovative learning environments and implement flexible structures and strategies that focus on student engagement in meaningful learning.

Support safe, inclusive spaces for students to own their learning and pursue interests and passions through the implementation of flexible structures and strategies that focus on student engagement in deeper learning.

oing Responsibilities

Part III: Assessment of Ongoing Responsibilities

Instructional Management: The superintendent manages an assessment and improvement system for student learning in the major academic subjects that results in the ongoing improvement in student achievement.

Student Services Management: The superintendent oversees a program of students services tied to defined goals and objectives.

Staff Development and Professional Growth: The superintendent oversees a program of staff development designed to improve district performance.

Facilities and Operations Management: The superintendent maintains a management system designed to produce ongoing efficiencies in major district operations, including transportation, food services, and building maintenance and operations.

Fiscal Management: The superintendent manages a budget development, implementation, and monitoring process that reflects sound business and fiscal practices and that supports district goals.

Human Resources Management: The superintendent oversees a comprehensive human resources program (recruitment, retention, staff organization, compensation and benefits, staff recognition, etc), tied to defined goals and targets developed by administration for board review.

Board Relations: The superintendent maintains a positive and productive working relationship with the board of trustees.

Community Relations: The superintendent maintains a positive and productive working relationship with the community.

Leander ISD Board Meeting Agenda Item Information

Meeting Date: Thursday, September 5, 2024

Agenda Item:	Leander Educational Excellence Foundation (LEEF) Annual Report 2023-2024
Purpose:	☒ Discussion Item/Report Only ☐ Action Requested
Administrator Responsible:	Crestina Hardie, Chief Communications Officer, Coleen Brighton, Executive Director of LEEF and Devin Williamson, LEEF Board of Director President
Attachments:	LEEF Annual Report Presentation

Background Information:
LEEF Board of Director President Devin Williamson and Executive Director Coleen Brighton will present the Leander ISD Educational Excellence Foundation (LEEF) Annual Report for 2023-2024 Fiscal Year.

Administrative Recommendation:
N/A

Sample Motion:
N/A

ANNUAL REPORT

2023-2024

LEEF
Leander Educational
Excellence Foundation

Coleen Brighton, Executive Director
Devin Williamson, Board President

LEEF IS FOR EVERYONE

WHY THE LEANDER EDUCATIONAL EXCELLENCE FOUNDATION MATTERS

Often, there are barriers to a thriving educational experience: inequity, mental health challenges, lack of state funding and difficulty choosing a career path, to name a few. **LEEF brings together the community** – students, their families, local businesses and district staff – to close the gaps and create an experience where we can all learn from one another. **We're creating the future together.**

288

LEEF BOARD

INVESTED IN THE FUTURE OF EVERY LISD STUDENT

Bruce Gearing, Ed.D.
Leander ISD Superintendent
Ex Officio

Francesca Romans
Leander ISD Trustee
Ex Officio

Devin Williamson
LEEF Board President
Raba Kistner, Inc.

Jennifer Hayhurst
LEEF VP of Finance
Ascension Foundation

Rhonda Bly
LEEF VP of Development
Pfluger Architects

Tara LeDay
LEEF VP of Programs
Chamberlain, Hrdlicka, White,
Williams & Aughtry, P.C

Carlos Canedo
LEEF Board Secretary
Community Member

Crystal Smith
Former Board President
A+ Federal Credit Union

Denise Seiler
Community Impact

Denise Geiger
Leander ISD

Na'Cole Thompson
Leander City Council
/Leander Beauty Supply

Laura Balla
Cedar Park Regional
Medical Center

Vidya Moorthy
Founder, Clural LLC

Mike Vermeeren
Cushing Terrell

Joseph Alvarez
PBK Architect

Cara Owen
Community Member

Michael Swoda
5F Mechanical Group, Inc.

Dinesh Salem-Natarajan
Community Member

IN MARCH 2024, LEEF EMBARKED ON THE CREATION OF OUR ORGANIZATION'S FIRST-EVER STRATEGIC PLAN. THE PLANNING PROCESS IDENTIFIED GOALS, OBJECTIVES AND STRATEGIES FOR IMPLEMENTATION DURING THE 2024 YEAR AND BEYOND.

290

2023-24 PARTNERS

LEEF

A+ Federal Credit Union

pfluger

American Constructors

CEDAR PARK REGIONAL MEDICAL CENTER
A partner of the Seton Family of Hospitals

BARTLETT COCKE GENERAL CONTRACTORS

Indeco K-12 Done Right

Photo Texas PHOTOGRAPHY

RABA KISTNER

wired orthodontics powered by Smile Doctors

TOYOTA OF CEDAR PARK

McCULLOUGH Heating & Air Conditioning COOLMENOW.COM

O'CONNELL ROBERTSON

JOERIS General Contractors

H-E-B

mvba McCreary Veselka Bragg & Allen PC Attorneys at Law

WG WALSH GALLEGOS TREVIÑO RUSSO & KYLE P.C.

YMCA CENTRAL TEXAS | WIRED ORTHODONTICS | ATMOS ENERGY | BLUE CORN HARVEST BAR & GRILL
ST. DAVID'S FOUNDATION | W.D. KELLEY FOUNDATION

LEEF'S IMPACT

2023-24 AT A GLANCE

$784,832 RAISED

What began as a $17,000 foundation is now a $784,000 foundation with a vision to become a $1,000,000 foundation by 2025. This is all thanks to our generous and engaged community supporters: annual partners, monthly donors, and LISD staff and families.

42,000 STUDENTS SERVED

- **Student Initiatives** including funds for AP tests & dual credit textbooks; C.T.E. support including INCubator
- **College and Career Coaches** dedicated to helping students at every high school campus navigate the college enrollment process or life after high school
- **Literacy Initiatives** that prioritize students reading at a 3rd grade level by 3rd grade
- **Mental Health Services**, including full-time mental health specialists serving across LISD's high school campuses
- **Program Support** for special education, fine arts, entrepreneurial programs & more

69 GRANTS TOTALING $138,984 AWARDED TO STAFF

Since 2007, **LEEF has put over $1,000,000 directly back into classroom**s through teacher grants across 48 campuses & impacting over 330,000 students.

LEEF
Leander Educational Excellence Foundation

Pay to: Akin Ele

293

7
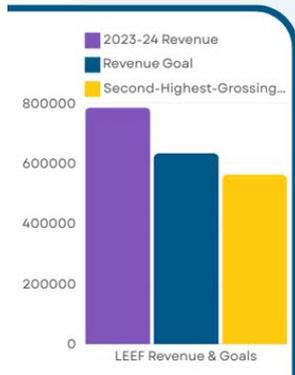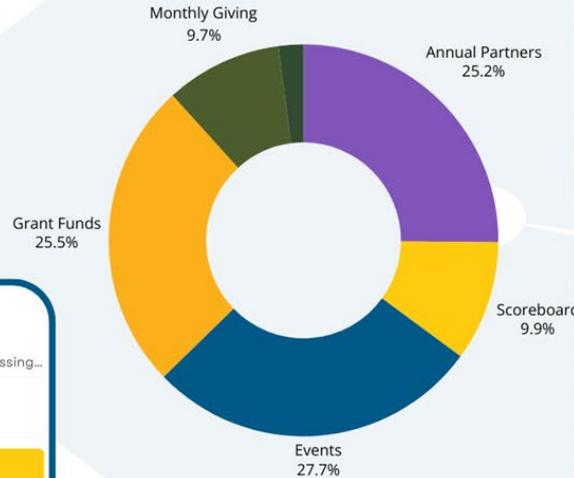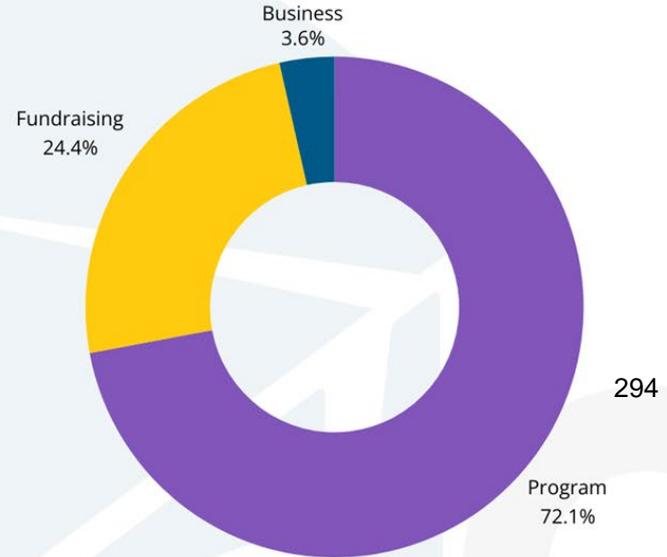
DISTRICT IMPACT

LET'S CELEBRATE 2023-24!

In November 2023, Leander ISD was Named College Board Advanced Placement District of the Year. LEEF started funding LISD AP scholarships in 2014, spurring an increase in student AP participation and raised scores. LEEF is proud to have invested $100,000 in AP tests for LISD students and aided the achievement of this award and recognition.

2023 **AP** Large District of the Year
LEANDER INDEPENDENT SCHOOL DISTRICT
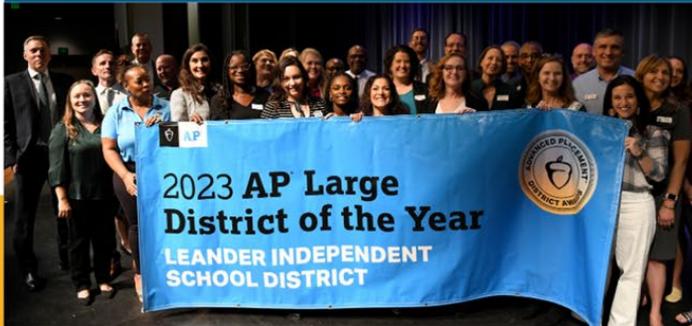
- With the help of local businesses, LEEF provided $17,500 in library book funds across all of LISD's Title I elementary schools.

- LEEF was awarded $129,000 from The Moody Foundation to continue funding two Leander ISD mental health specialists for the 2024-25 school year.

- LEEF received $50,000 from the W.D. Kelley Foundation. This grant is being used to provide funds for offsite professional development for eight Title I schools in the district.

295

TEACHER RETENTION

LEEF

ALICIA HARRIS

Principal of Knowles Elementary School

"I want to thank you again for your help in making our professional development opportunity a success. The work you do through LEEF is tremendously impactful and we are so grateful for your partnership and support. Thank you for bringing all the wonderful sponsors and donors together to make our professional development day happen on time and on budget!"

$ 2023-24: $190,000

296

10

TEACHER RETENTION

LEEF

STEPHANIE BEASLEY

Librarian | Mason Elementary

"As an LISD educator and LEEF grant recipient, the encouragement, sense of value, pride, relief and realization that you are seen and your vision for your students, campus or professional self is valued is worth as much as the monetary award itself. (Or almost as much.)"

$ **2023-24: $190,000**

297

11

STUDENT INNOVATION

NATALIE OHLSEN

Vandegrift Alumna | INCubator

"Whether it's communicating, organizing or strategizing, INCubator has helped me so much, especially with the help of mentors who are actually real entrepreneurs who helped us and guided us throughout the year. I have learned so much.

$ 2023-24: $87,956

298

LITERACY

LEEF

LAUREL DUNN

Senior Coordinator, Elementary Language Arts

"Through a partnership with LEEF, the K-12 language arts team is making fast progress in reaching our reading wellness goals, putting 1,000,000 books in students' hands in 10 years. Funds for purchasing books for summer reading and the LEEF book portable are a solid impact of 1000s of books directly into students hands."

$ **2023-24: $27,511**

299

13

MENTAL HEALTH

LEEF

ASHLEY SOUSA

LISD Parent

"My adopted son started fifth grade having never been to school before and didn't quite know how to identify and interact with his peers. Now, he feels like he's popular. He's much more confident, he's so happy, and he really feels like he knows how to set boundaries. The mental health therapist really had us all come together as a team and figure out what is truly a need and how we can coach our son and have a cohesive, happy life."

$ 2023-24: $90,000

300

COLLEGE & CAREER READINESS

LEEF

EDNA ROTICH

Rouse High School Alumna | Texas Tech University

"Both of my parents are immigrants, so it was a little difficult trying to figure out when to apply for scholarships and FAFSA and many other things. Having Mrs. Blumrich (Rouse's college coach) give us all the information that we needed was such a blessing, and I'm so grateful for that."

$ 2023-24: $111,000

301

LEEF GRANTS

EMPOWERING LISD EDUCATORS

October 18, 2023

$500.00

2023-24 Innovative Grants

Innovative grants are designed to enable staff to bring their vision to the classroom. Whether they have a new tool they'd like to try, a book collection they'd like to add to their classroom, a conference they want to attend or a learning resource they want to use with their students, these grants provide funding for new ideas. **This year, LEEF awarded 36 Innovative Grants totaling $16,756.**

2023-24 Collaborative Grants

Collaborative grants are designed to provide resources for programs and projects that make a district or campus-wide impact. **This past year, LEEF gave out 33 Collaborative Grants totaling $118,498.85.**

Professional Development Grants

Teachers interested in attending a conference or other professional development opportunity can now apply for a professional development grant during any time of the year! These grants will be awarded on a rolling basis.

Coming Soon: Empowerment Grants

Thank you to our #1LISD staff for making up the largest percentage of our monthly donors. Over 1,800 Leander ISD staff members gave over $54,000 to LEEF this past year! These dollars go directly back into our classrooms through teacher grants.

303

LEEF EVENTS

CELEBRATING STUDENTS & TEACHERS

LEEF

The Emerald City Gala

This year's LEEF Gala—with an Emerald City theme to correspond with the district's "No Place Like LISD" theme—raised a record-setting $220,000.

STAR Awards Banquet

Tears were shed and hearts were warmed as Leander ISD students from every district campus expressed their appreciation for specific teachers who made an impact on their education.

Amplify Austin

In April, LEEF partnered with district Parent-Teacher Associations to raise money during Amplify Austin's "I Live Here I Give Here" event.

304

LISD EVENTS

EMPOWERING STUDENTS & TEACHERS

Backpack Attack

LEEF handed out over 1,000 books at the 2023 Backpack Attack event hosted by Leander ISD and Hill Country Bible Church Ministries, putting English and Spanish books in the hands of hundreds of students.

Convocation

At the 2023 Back-to-School Convocation event for Leander ISD staff, Collaborative Grant winners were surprised and awarded over $118,000 in grants onstage throughout the celebration.

Lit Love

Leander ISD's 2024 Lit Love Conference, hosted incredible speakers and rich resources for teachers and staff looking to improve their strategies for literacy in their classrooms.

305

LIFETIME IMPACT

2007-2024

LEEF

$1,006,151
TEACHING GRANTS

$340,000
MENTAL HEALTH

$170,000
EARLY LITERACY

$100,000
AP TESTS

$500,000
COLLEGE & CAREER
READINESS

$286,685
STUDENT INITIATIVES

$140,000
UNCHARTED LEARNING

December 2023

$2,500.00

ndred and 00/100 Dollars ---

306

Thank you LISD Board of Trustees!

307

Leander ISD Board Meeting Agenda Item Information
Meeting Date: Thursday, September 5, 2024

Agenda Item:	Monthly Bond Status Report
Purpose:	☒ Discussion Item/Report Only ☐ Action Requested
Administrator Responsible:	Pete Pape, Ed.D, CPA, Chief Financial Officer
Attachments:	Bond Project Status Report

Background Information:
The monthly report for July is included which reflects bond funds remaining from authorizations prior to 2017 and the full list of projects ongoing under the 2017 authorization. The report also includes a column reflecting funding sources from other areas (2007 bond funds, major maintenance, etc.) used to support bond projects. This report should reflect ALL sources of funds available, budgeted, and remaining related to construction/bond projects.

There is an additional page that now details 2021 bond funds.

The 2023 bond authorization is now a separate one-page report.

The report shows the original and current budgets for all projects and costs to date by fiscal year. The last column of the report shows the budget remaining for the specific project. As projects are finalized, the Board will be asked to reallocate any remaining balances to project savings and/or other projects allowable within the confines on the bond orders.

Administrative Recommendation:
N/A

Sample Motion:
N/A

LEANDER ✦ ISD
LEADING TO A BRIGHT FUTURE

2017 BOND PROJECT STATUS REPORT

LEANDER ISD

CAMPUS	PROJECT DESCRIPTION	2007 BOND AUTHORIZATION BUDGET	2017 BOND AUTHORIZATION BUDGET	BUDGET TRANSFERS	OTHER REVENUE SOURCES	TOTAL PROJECT BUDGET	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	TOTAL EXPENDITURES TO DATE	PROJECT ENCUMBRANCE	REMAINING BUDGET
HS CAMPUS IMPROVEMENTS																	
Leander HS	CTE Classrooms and Black Box Renovations, Additions and Renovations to Existing Ag Barn, Softball Complex Improvements	-	4,947,836	(105,871)	-	4,841,965	1,590	3,756,402	972,608	37,647	73,719	-	-	-	4,841,965	0	(0)
Cedar Park HS	Additions and Renovation, Softball Complex Improvements	-	11,150,507	(289,182)	-	10,861,325	505,712	6,109,691	3,161,020	383,351	725,406	(23,856)	-	-	10,861,325	0	0
Cedar Park HS	Board Approved: Major Maintenance: CPHS Renovations	-	-	-	9,855,820	9,855,820		7,279,652	2,576,168						9,855,820		-
Cedar Park HS	Flex Lab	3,100,000	-	(3,100,000)	-	-									-		-
Vista Ridge HS	JROTC Building Additions and Renovations, Incubator Renovations	-	2,665,503	(289,133)	-	2,376,370	-	1,677,160	426,247	1,692	255,004	16,267	(7,084)	-	2,369,286	0	7,084
Vandegrift HS	Ag Facility	-	3,768,160	(350,839)	-	3,417,321	-	294,468	1,735,381	1,387,472	-	-	-	-	3,417,321	0	0
Vandegrift HS	Classroom Additions, Incubator Renovation	-	31,245,385	(10,719,785)	-	20,525,600	-	4,618,833	11,021,375	4,564,706	123,386	-	16,959	-	20,345,259	178,065	2,276
Vandegrift HS	Secondary Access Road	-	3,000,000	-	-	3,000,000	26,883	39,722	45,474	6,252	128,850	119,107	2,122	-	368,409	156,591	2,475,000
Glenn HS	Remaining Construction Contract (Under 2007 Auth)	408,677	-	(381,253)	-	27,424				27,424					27,424		-
Glenn HS	Remaining GHS Template (Under 2007 Auth)	763,642	-	-	-	763,642	-	-	-	621	48,141	-	-	-	48,762	0	714,880
Glenn HS	Ag Facility	-	3,163,960	(492,005)	-	2,671,955	148,457	2,297,596	211,760	14,142	-	-	-	-	2,671,955	-	(0)
Various HS	Campus Security Upgrades (High School Sites)	-	3,625,020	188,469	-	3,813,489	-	-	1,136,909	2,673,060	3,520	-	-	-	3,813,489	0	(0)
Monroe/CPHS	Monroe Stadium Expansion and Cedar Park HS Grandstand Replacement	-	1,758,284	(99,822)	-	1,658,462	1,054,496	591,541	12,000	425	-	-	-	-	1,658,462		-
HS 7	New Construction (Design Only)	-	10,073,645	-	-	10,073,645									-		10,073,645
HS Land	Future HS #8	-	21,411,300	(21,411,300)	-	-									-		-
Leander HS	LHS Master Plan	-	-	100,000	-	100,000	-	-	-	-	-	97,000	-	-	97,000		3,000
	Total HS Campus Improvements	4,272,319	96,809,600	(36,950,721)	9,855,820	73,987,018	1,737,136	26,665,065	21,298,943	9,096,792	1,358,026	208,518	11,997	-	60,376,477	334,656	13,275,885
MS CAMPUS IMPROVEMENTS																	
Leander MS	HVAC Update, Classroom Addition	-	21,516,101	(3,908,424)	-	17,607,677	3,594,061	11,265,274	902,173	1,426,631	280,767	138,770	-	-	17,607,677	0	(0)
Leander MS	HVAC Update: Under 2007 Auth	692	-	(606)	882,988	883,074	-	188,707	694,281	86	-	-	-	-	883,074		-
Cedar Park MS	HVAC Update	-	15,240,743	(2,073,215)	-	13,167,528	-	6,936,074	1,940,710	2,112,431	1,612,696	252,627	-	-	12,854,539	302,604	10,384
Danielson MS	MS New Construction	-	63,410,011	(3,731,073)	-	59,678,938	761,745	20,857,501	30,847,648	6,626,911	253,957	277,095	(39,942)	-	59,584,915		94,023
Danielson MS	MS Template (From 2007 Auth)	62,738	-	(6,952)	-	55,786	-	-	-	55,786	-	-	-	-	55,786		-
Various MS	Campus Security Upgrades (Middle School Sites)	-	7,250,040	(455,910)	-	6,794,130	-	-	1,406,210	5,029,283	358,638	-	-	-	6,794,130		(0)
MS Land	Future MS #11	-	10,018,850	-	-	10,018,850	-	-	-	-	-	-	10,018,850	-	10,018,850		-
	Total MS Campus Improvements	63,430	117,435,745	(10,176,180)	882,988	108,205,983	4,355,807	39,247,557	35,791,022	15,251,128	2,506,059	668,492	9,978,908	-	107,798,972	302,604	104,406
ES CAMPUS IMPROVEMENTS																	
Mason ES	Play Area Renovation and District Standard Traffic Gates	-	603,560	(163,243)	-	440,317	391,220	49,098	-	-	-	-	-	-	440,317	-	(0)
Giddens ES	HVAC Update and District Standard Traffic Gates	-	9,005,975	(1,696,318)	-	7,309,657	2,433,399	4,321,512	428,859	14,010	64,156	47,722	-	-	7,309,657	0	(0)
Steiner ES	HVAC Update	-	8,857,136	(246,468)	-	8,610,668	-	-	2,783,462	4,132,589	1,534,031	160,587	-	-	8,610,668	(0)	(0)
Akin ES	Remaining Construction Contract (Under 2007 Auth)	607,348	-	(562,024)	-	45,324	-	-	-	45,324	-	-	-	-	45,324		-
Larkspur ES 27	New construction	-	37,779,628	(24,805,180)	-	12,974,448	2,965,860	8,982,507	874,374	151,706	-	-	-	-	12,974,448	(0)	-
Larkspur ES 27	Board Approved: 2007 Funds: EL 27 Construction	-	-	-	18,639,920	18,639,920	-	18,168,836	471,084	-	-	-	-	-	18,639,920		(0)
Tarvin ES 28	ES New Construction	-	40,862,445	(3,415,928)	-	37,446,517	-	-	4,472,697	28,057,563	3,937,877	347,446	33,091	13,775	36,862,449	36,811	547,257
North ES 29	ES New Construction	-	42,496,943	-	-	42,496,943	-	-	-	1,256,605	31,019,546	6,352,020	613,565	66,697	39,308,434	802,588	2,385,921
Hisle ES 30	ES New Construction (Design Only)	-	2,181,032	61,120,968	-	63,302,000	-	-	-	-	-	5,919,208	43,806,361	297,410	50,022,979	9,898,276	3,380,745
Hisle ES 30	ES Template												397,662	498,738	896,400	356,787	(1,253,187)
Various ES	District Standard Traffic Gates - Bagdad ES, Block House ES, Cox ES, Cypress ES, Faubion ES, Knowles ES, Naumann ES and Whitestone ES	-	245,700	(554)	-	245,146	-	245,146	-	-	-	-	-	-	245,146		(0)
ES Land	Future Elementary Sites	6,238,719	-	-	-	6,238,719	-	-	-	33,193	4,126,708	92,569	1,902,911	-	6,155,382	83,337	(0)
ES Land	Future ES (34, 35, 36, 37, 38, 39, 40)	-	30,504,236	-	-	30,504,236	-	-	-	-	-	-	11,003,567	-	11,003,567		19,500,669
Various ES	ES Prototype																
	Total ES Campus Improvements	6,846,067	172,536,655	30,231,253	18,639,920	228,253,895	5,790,479	31,767,099	9,030,475	33,690,990	40,682,318	12,919,553	57,757,157	876,620	192,514,691	11,177,799	24,561,405
TECHNOLOGY PROJECTS																	
Technology	Device, Hardware, Infrastructure Replacement, Disaster Recovery Hot Site	-	38,730,000	71,328	-	38,801,328	3,391,432	10,679,797	4,391,158	7,780,357	2,464,107	2,906,148	3,490,294	2,057,495	37,160,787	996,057	644,484
Technology	IT Assessment	-	-	199,035	-	199,035	-	-	-	173,556	25,479	-	-	-	199,035		-
Vista Ridge HS	Disaster Recovery Site Improvements	465,062	-	(428,139)	-	36,923	-	-	-	-	-	36,923	-	-	36,923		-
	Total Technology Projects	465,062	38,730,000	(157,776)	-	39,037,286	3,391,432	10,679,797	4,391,158	7,953,913	2,489,586	2,943,070	3,490,294	2,057,495	37,396,745	996,057	644,484
SUPPORT SERVICES PROJECTS																	
Plant Services	Replacement Maintenance/Grounds Vans and Trucks	-	893,000	-	-	893,000	-	100,136	148,630	-	146,975	111,660	385,599	-	893,000		0
Plant Services	Water Bottle Refilling Stations	314,087	-	13,798	-	327,885	-	-	-	242,949	84,935	-	-	-	327,885	0	0.18
Transportation	88 Replacement Buses; A/C Retrofit	-	10,200,000	-	-	10,200,000	-	8,688,117	-	818,918	-	692,965	-	-	10,200,000		-
Transportation	Bus A/C Upgrades: 2007 Funded Portion	-	-	-	35,080	35,080	-	35,080	-	-	-	-	-	-	35,080		-
Transportation	North Satellite Transportation Center	-	17,800,000	(2,245,948)	-	15,554,052	773,943	14,232,376	436,119	111,614	-	-	-	-	15,554,052		(0.43)
Transportation	South Satellite Transportation Center	3,100,000	-	(3,100,000)	-	-	-	-	-	-	-	-	-	-	-		-
Land	Initial Land Costs: Warehouse/Science Material Center	100,000	-	1,973,668	-	2,073,668	-	-	-	2,072,178	1,489	-	-	-	2,073,668		0.23
Plant Services	Major Maintenance Funding	-	-	12,500,000	-	12,500,000	-	-	-	-	-	1,704,007	1,567,762	-	3,271,768	591,752	8,636,479.52
Plant Services	Portables	-	-	2,500,000	-	2,500,000	-	-	-	-	179,817	2,271,230	-	-	2,451,047	24,683	24,269.98
District Wide	HVAC Design	-	-	2,200,000	-	2,200,000	-	-	-	-	-	2,182,000	-	-	2,182,000	-	18,000.00
District Wide	Traffic Signal	-	-	500,000	-	500,000	-	-	-	-	-	-	500,000	-	500,000	-	-
District Wide	Williamson County Road 175 Updates	-	-	2,000,000	-	2,000,000	-	-	-	-	-	-	-	-	-	-	2,000,000.00
	Total Support Service Projects	3,514,087	28,893,000	16,341,518	35,080	48,783,685	773,943	23,055,709	584,749	3,245,660	413,217	6,961,862	2,453,360	-	37,488,500	616,436	10,678,749
PROJECT MANAGEMENT																	
2007 Funds	Bond Interest/Other Rev/Project Management	1,339,002	-	-	18,318	1,357,320	-	-	-	613,920	575,077	168,323	-	-	1,357,320	-	(0)
2007 Funds	Project Management Costs (Reserve)	500,000	-	-	-	500,000	-	-	-	-	-	274,534	214,566	339,248	828,348	0	(328,348)
2007 Funds	Project Savings	1,558,683	-	(1,338,674)	-	220,009	-	-	-	-	-	-	-	-	-	-	220,009
2017 Funds	Bond Interest/Other Rev/Project Management	-	-	-	11,971,951	11,971,951	-	-	-	-	-	-	144,000	-	144,000	-	11,827,951
2017 Funds	Project Savings	-	-	-	2,050,580	2,050,580	-	-	-	-	-	-	-	-	-	-	2,050,580
	Total Project Management	3,397,685	-	711,906	11,990,269	16,099,860	-	-	-	613,920	575,077	442,857	358,566	339,248	2,329,668	0	13,770,192
	TOTALS	18,558,650	454,405,000	-	41,404,077	514,367,727	16,048,798	131,415,227	71,096,347	69,852,403	48,024,281	24,144,352	74,050,282	3,273,363	437,905,053	13,427,552	63,035,122

LEANDER ISD
LEADING TO A BRIGHT FUTURE

CAMPUS	PROJECT DESCRIPTION	PROJECT SOURCES :					PROJECT EXPENDITURES :					PROJECT ENCUMBRANCE	REMAINING BUDGET
		2021 BOND AUTHORIZATION BUDGET	BUDGET TRANSFERS	OTHER REVENUE SOURCES	TOTAL PROJECT BUDGET		2021-2022	2022-2023	2023-2024	2024-2025	TOTAL EXPENDITURES TO DATE		
TECHNOLOGY													
Technology	MS CTE Program Startup	$ 102,000	$ -	$ -	$ 102,000		$ -	$ -	$ -	$ -	$ -	$ -	$ 102,000
Technology	Document Camera Replacement	412,500	-	-	412,500		-	-	30,417	-	30,417	-	382,084
Technology	Elementary Device Replacement	6,703,057	-	-	6,703,057		144,359	448,968	2,556,835	159,579	3,309,741	852,371	2,540,945
Technology	Elementary Teacher Devices	460,000	-	-	460,000		-	407,866	7,546	-	415,412	-	44,588
Technology	Library Makerspaces	253,000	-	-	253,000		-	78,000	97,524	-	175,524	-	77,476
Technology	Non-Instructional Device Replacement	887,778	-	-	887,778		11,773	247,618	332,017	53,535	644,942	20,654	222,181
Technology	Interactive Panels	10,440,000	-	-	10,440,000			200,000	521,742	-	721,742	8,360,626	1,357,632
Technology	Printers	450,000	-	-	450,000		333	5,139	11,091	-	16,563	-	433,437
Technology	Secondary Device Replacement	13,589,742	-	-	13,589,742		460,510	2,000,641	4,635,965	558,479	7,655,595	55,341	5,878,807
PROJECT MANAGEMENT													
2021 Funds	Bond Interest/Other Rev/Project Management	-	-	196,956	196,956								$ 196,956
	TOTALS	$ 33,298,077	$ -	$ 196,956	$ 33,495,033		$ 616,975	$ 3,388,232	$ 8,193,136	$ 771,593	$ 12,969,935	$ 9,288,992	$ 11,039,150

2023 Bond Project Status Report

Campus	Project Description	2023 Bond Authorization Amount	Budget Transfers/Revenue Sources	Total Project Budget		2022-2023	2023-2024	2024-2025	Total Expenditures to Date	Project Encumbrance	Remaining Budget
			Project Sources:			Project Expenditures:					
HS Campus Improvements											
Vista Ridge HS	Modernization	69,635,000	-	69,635,000		540,500	8,440,441	198,927	9,179,868	43,651,191	16,803,941
Cedar Park HS	Modernization, Roof Repairs, & South PAC Modernization	51,571,651	-	51,571,651		-	2,815,311	2,677,488	5,492,799	33,377,263	12,701,589
ECHS & Transition	Early College HS and Transition Facilities for Growth - Design	6,991,130	4,151,508	11,142,638		-	2,777,324	67,088	2,844,412	2,648,870	5,649,356
HS 7	Design Only	2,134,344	-	2,134,344		-	-			-	2,134,344
Leander HS	Phase 1 and Design of Master Plan, Roof Repirs, Band Practice Field Fence/Bollards, & Don Tew Pac Modernization	37,460,920	32,300,000*	37,460,920		-	3,772,151	662,823	4,434,974	21,167,394	11,858,552
Multi HS	Baseball & Softball Turf - Cedar Park, Leander, Rouse, Vandegrift, and Vista Ridre	27,601,380	-	27,601,380		-	2,047,719		2,047,719	8,138,765	17,414,896
Multi HS	Musical Instrument Replacement	3,762,500	-	3,762,500		-	1,622,504	210,970	1,833,475	247,016	1,682,009
Multi HS/MS	Remote Mgmt and Monitoring of Field Lights - Ftball fields at Canyon Ridge MS, Running Brushy MS; Baseball and Softball fields at Cedar Park HS and Vista Ridee HS	82,700	-	82,700		-	-			-	82,700
Sci Matl & 18+	Science Materials Center & Special Ed 18+ Transition Services Bldg	42,154,555	-	42,154,555		-	1,787,310	17,330	1,804,640	1,340,541	39,009,374
	Total HS Campus Improvements	241,394,180	4,151,508	245,545,688		540,500	23,262,760	3,834,626	27,637,886	110,571,041	107,336,761
MS Campus Improvements											
Canyon Ridge MS	Heat Recovery Unit	3,000,000	-	3,000,000		-	2,970,000		2,970,000	30,000	-
Henry MS	Modernization - Design Only	3,499,584	-	3,499,584		-	-		-	-	3,499,584
MS10	Design Only	6,500,000	-	6,500,000		-	-		-	-	6,500,000
Multi MS	Musical Instrument Replacement	2,508,200	-	2,508,200		-	1,750,052	134,102	1,884,154	350,121	273,925
Running Brushy MS	Modernization	31,898,758	-	31,898,758		280,000	6,919,658	3,942,453	11,142,112	10,846,101	9,910,545
Running Brushy MS	Turf Field	1,186,500	-	1,186,500		-	6,100		6,100	-	1,180,400
	Total MS Campus Improvements	48,593,042	-	48,593,042		280,000	11,645,811	4,076,555	16,002,366	11,226,222	21,364,455
ES Campus Improvements											
Bagdad EL	Modernization	21,259,009	-	21,259,009		-	3,627,136	129,583	3,756,719	12,978,055	4,524,235
EL 30	Roads	14,000,000	-	14,000,000		-	-		-	-	14,000,000
EL 31	New Construction	71,432,375	-	71,432,375		-	2,229,709	6,540	2,236,249	800,368	68,395,758
EL 32	New Construction	79,944,260	-	79,944,260		-	-		-	-	79,944,260
Multi EL	Student Sinks - Bathrooms and in Cafeteria: Block House ES, Cypress ES, Faubion ES, Mason ES, Whitestone ES	1,356,360	-	1,356,360		-	881,946		881,946	-	474,414
Multi EL	Shade Structures	3,100,000	-	3,100,000		-	1,254,039		1,254,039	185,000	1,660,961
	Total ES Campus Improvements	191,092,004	-	191,092,004		-	7,992,830	136,123	8,128,953	13,963,422	168,999,629
Support Services Projects											
Plant Services	Trucks	700,000	-	700,000		-	700,852	113,056	813,908	-	(113,908)
Plant Services	Utility Vehicles, Tractors, Mowers	410,000	-	410,000		-	399,330		399,330	(0)	10,670
Plant Services	Vans	818,840	-	818,840		-	461,992		461,992	(0)	356,848
Plant Services	Mechanic Shop Update	10,842,838	-	10,842,838		-	445,520	9,800	455,320	298,695	10,088,823
Plant Services	Grandview Hills EL Building to Transportation Facility Renovation, Grandview Hills EL Ancillary Renovation, & Second Broadband Network Node	30,182,092	-	30,182,092		-	995,500		995,500	740,752	28,445,840
Transportation	Bus Replacement (134 Buses: 80 General Education and 45 Special Education Replacements, 9 Growth)	18,300,000	-	18,300,000		-	9,059,902	172,796	9,232,698	8,264,635	802,667
Transportation	Bus Cameras - Entire Transportation Fleet	1,200,000	-	1,200,000		-	1,070,443		1,070,443	(0)	129,557
	Total Support Services Projects	62,453,770	-	62,453,770		-	13,133,540	295,652	13,429,192	9,304,081	39,720,497
Technology Projects											
Technology	Partial Fiber Replacement	4,286,610	-	4,286,610		-	-		-	-	4,286,610
Technology	WAN Refresh	3,086,390	-	3,086,390		-	-	1,058,438	1,058,438	1,587,355	440,596
Technology	Campus, District LAN Refresh - MDF/IDF Closet Improvements	1,452,000	-	1,452,000		-	865,607	221,917	1,087,524	357,824	6,651
Technology	ES Cabling Replacement	2,880,000	-	2,880,000		-	-		-	-	2,880,000
Technology	MS Cabling Replacement	680,000	-	680,000		-	-		-	-	680,000
Technology	Wireless Connectivity Improvements	1,250,000	-	1,250,000		-	26,099	1,105,941	1,132,040	117,960	-
Technology	Storage/Server - Tech	1,200,000	-	1,200,000		-	-		-	-	1,200,000
Technology	Interactive Panel Installation	18,000,000	-	18,000,000		-	-		-	3,342,476	14,657,524
Technology	Interactive Panel and A/V for non classrooms	2,200,000	-	2,200,000		-	-	81,180	81,180	-	2,118,820
Technology	Student and Staff Device Refresh	7,864,000	-	7,864,000		-	-		-	-	7,864,000
Technology	2nd Grade Chromebooks	800,000	-	800,000		-	-		-	-	800,000
Technology	CTE Mobile Maker Labs	121,000	-	121,000		-	60,419		60,419	-	60,581
Technology	Firewall (Prop A)	2,000,000	-	2,000,000		-	-		-	1,952,387	47,613
Technology	Recovery Applicance (Prop A)	540,000	-	540,000		-	-		-	-	540,000
Technology	Content Filters (Prop A)	500,000	-	500,000		-	388,103		388,103	(0)	111,897
Technology	Second Broadband Network Node	See Plant Services GVH	-	-		-	-		-	-	-
	Total Technology Projects	46,860,000	-	46,860,000		-	1,340,229	2,467,476	3,807,705	7,358,003	35,694,292
Campus Security Projects											
Technology	Firewall (Prop A)	See Technology	-	-		-	-		-	-	-
Technology	Recovery Applicance (Prop A)	See Technology	-	-		-	-		-	-	-
Technology	Content Filters (Prop A)	See Technology	-	-		-	-		-	-	-
District Wide Security	Exterior TEA Requirement - Exterior Door Numbering	152,000	-	152,000		-	0		0	(0)	152,000
District Wide Security	Exterior TEA Requirement - Fencing	160,000	-	160,000		-	-		-	-	160,000
District Wide Security	Exterior TEA Requirement - Forced Entry-Resistant Film	1,192,400	-	1,192,400		-	-		-	-	1,192,400
District Wide Security	Exterior TEA Requirement - Portable/Exterior Door Handle	200,000	-	200,000		-	-		-	-	200,000
District Wide Security	Exterior TEA Requirement - Exterior Lockboxes	150,000	-	150,000		-	-		-	-	150,000
District Wide Security	Interior TEA Requirement - Panic Alert System - Lockdown	87,000	-	87,000		-	-		-	-	87,000
District Wide Security	Interior TEA Requirement - Digital Mapping System	144,000	-	144,000		-	-		-	-	144,000
District Wide Security	Interior TEA Requirement - Alert Notification System	100,000	-	100,000		-	-		-	-	100,000
District Wide Security	Security Cameras - Replace Existing and Adding Cameras - Replace Camera Servers	5,235,000	-	5,235,000		-	430,606		430,606	3,915,000	889,394
District Wide Security	Interior Key Switching and Auto-Locking Hardware	200,000	-	200,000		-	-		-	-	200,000
District Wide Security	Interior Classroom Door Handles	2,700,000	-	2,700,000		-	-		-	-	2,700,000
District Wide Security	Energy Management - Outside Wall Packs and Canopy LED Lighting. Parking Lot Lights at SS, Central Trans, and indoor LED lighting at Central Trans	1,106,604	-	1,106,604		-	-		-	-	1,106,604
	Total Campus Security Projects	11,427,004	-	11,427,004		-	430,606	-	430,606	3,915,000	7,081,398
Campus Repurposing Projects											
Repurpose	Repurpose LEO	37,000,000	-	37,000,000		-	-		-	-	37,000,000
Repurpose	Repurpose Elementary	37,000,000	(37,000,000)	-		-	-		-	-	-
Repurpose	Repurpose Elementary	37,000,000	(23,000,000)	14,000,000		-	-		-	552,594	13,447,406
Repurpose	Repurpose Elementary	50,000,000	-	50,000,000		-	-		-	-	50,000,000
Repurpose	Early Childhood Center		60,000,000	60,000,000		-	19,350	12,900	32,250	32,250	59,935,500
	Total Campus Repurposing Projects	161,000,000	-	161,000,000		-	19,350	12,900	32,250	584,844	160,382,906
Project Management											
2023 Funds	Bond Interest/Other Rev/Project Management	-	10,359,470	10,359,470		-	453,302	110,506	563,808	-	9,795,662
2023 Funds	Project Savings									-	-
	Total Project Management	-	10,359,470	10,359,470		-	453,302	110,506	563,808	-	9,795,662
	TOTALS	762,820,000	14,510,978	766,971,508		820,500	58,278,427	10,933,837	70,032,765	156,922,613	550,375,600

*Per Board Approval on February 1, 2024. An additional $32,300,000 will be funded towards the LHS Master Plan with current and future Bond Interest Earnings

Leander ISD Board Meeting Agenda Item Information
Meeting Date: Thursday, September 5, 2024

Agenda Item:	Monthly Financial Report
Purpose:	☒ Discussion Item/Report Only ☐ Action Requested
Administrator Responsible:	Pete Pape Ed.D, CPA, Chief Financial Officer
Attachments:	Monthly Financial Report – July 2024

Background Information:
The monthly financial reports provide a revenue and expenditure summary and compare current budget performance to the prior year through the same time period. This month, the reports reflect activity through the month of July 2024, the first month of the 2025 fiscal year.

These are <u>unaudited</u> figures, as the annual independent audit will be done following the closing of the books at the end of the fiscal year. All supporting documentation relative to the receipt and expenditure of funds is available in the Financial Services Office for inspection and review.

A supplemental report is also included detailing Technology and Instructional Materials Allotment (TIMA) disbursement and requisition requests.

Administrative Recommendation:
N/A

Sample Motion:
N/A

Leander Independent School District
GENERAL FUND 181, 196-199
STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCE
FOR THE ONE MONTH ENDING JULY 31, 2024

	CURRENT YEAR 2024-2025					PRIOR YEAR 2023-2024			
	Original Budget	Amended Budget	Actual Year to Date	Actual to Budget		Original Budget	Amended Budget	Actual Year to Date	Actual to Budget
REVENUES:									
Local and Intermediate Sources	346,031,030	346,031,030	1,236,907	0.36%		426,747,513	426,926,833	1,961,999	0.46%
State Program Revenues	96,578,545	96,578,545	2,606,232	2.70%		56,983,976	56,983,976	1,770,037	3.11%
Federal Program Revenues	5,890,000	5,890,000	59,865	1.02%		7,162,000	7,162,000	56,444	0.79%
Other Financing Sources	270,000	270,000	24,011	8.89%		270,000	270,000	9	0.00%
Total Revenues	448,769,575	448,769,575	3,927,015	0.88%		491,163,489	491,342,809	3,788,489	0.77%
EXPENDITURE SUMMARY BY FUNCTION:									
11 - Instructional	272,220,415	273,464,009	2,595,683	0.95%		265,876,732	266,187,993	2,125,628	0.80%
12 - Instructional Resources and Media Services	4,892,740	4,923,115	39,740	0.81%		5,093,573	5,105,907	41,655	0.82%
13 - Curriculum and Instructional Staff Development	11,031,670	11,166,459	443,645	3.97%		10,468,918	10,550,373	422,363	4.00%
21 - Instructional Leadership	5,057,353	5,057,353	359,306	7.10%		5,226,065	5,241,065	308,497	5.89%
23 - School Leadership	25,423,912	25,443,554	577,597	2.27%		25,724,098	25,726,473	591,079	2.30%
31 - Guidance, Counseling and Evaluation	22,435,390	22,438,203	300,277	1.34%		22,067,309	22,156,660	280,674	1.27%
32 - Social Work Services	1,678,114	1,678,873	34,619	2.06%		1,430,967	1,430,967	40,119	2.80%
33 - Health Services	4,363,260	4,363,945	116,866	2.68%		4,133,802	4,181,652	35,111	0.84%
34 - Student (Pupil) Transportation	14,176,050	14,176,050	274,133	1.93%		14,413,284	14,487,394	245,562	1.70%
35 - Food Services	11,800	60,745	11,449	18.85%		71,074	71,074	9,082	12.78%
36 - Cocurricular/Extra Curricular Activities	14,168,459	14,221,367	396,046	2.78%		13,378,951	13,499,198	330,565	2.45%
41 - General Administration	11,209,284	11,543,676	842,123	7.30%		11,547,244	12,001,903	774,322	6.45%
51 - Plant Maintenance and Facility Services	42,659,929	43,590,324	940,298	2.16%		39,243,925	40,335,880	1,421,187	3.52%
52 - Security and Monitoring Services	4,303,903	4,355,853	86,345	1.98%		3,056,021	3,085,421	26,078	0.85%
53 - Data Processing Services	9,549,638	9,855,495	549,564	5.58%		9,350,999	9,540,176	529,352	5.55%
61 - Community Services	2,214,218	2,214,218	161,353	7.29%		2,127,153	2,133,853	72,030	3.38%
71 - Debt Administration - Principal	537,869	537,869	42,675	7.93%		525,415	525,415	31,413	5.98%
81 - Facilities and Acquisition & Construction	-	8,400	3,263	38.84%		-	-	-	-
91- Recapture Payments	11,484,229	11,484,229	-	-		57,867,040	57,867,040	-	-
95 - Payments to Juvenile Justice Alternative Program	230,000	230,000	-	-		245,000	245,000	-	-
99 - Other intergovernmental Charges	2,713,944	2,713,944	-	-		2,789,900	2,789,900	-	-
Other Financing Uses	1,500,000	1,500,000	-	-		3,050,000	3,050,000	3,050,000	100.00%
Total Expenditures	461,862,177	465,027,680	7,774,981	1.67%		497,687,470	500,213,343	10,334,719	2.07%
EXPENDITURE SUMMARY BY OBJECT:									
61XX - Payroll Costs	393,084,037	393,022,099	6,028,093	1.53%		382,651,587	382,551,480	5,494,535	1.44%
62XX - Professional and Contracted Services	38,823,793	40,030,131	588,977	1.47%		82,745,788	84,205,199	823,074	0.98%
63XX - Supplies and Materials	20,568,749	22,149,408	861,004	3.89%		20,991,885	21,874,909	702,812	3.21%
64XX - Other Operating Expenses	7,215,413	7,176,578	179,577	2.50%		6,496,863	6,726,438	222,338	3.31%
65XX - Debt Administration	537,869	537,869	42,675	7.93%		525,415	525,415	31,413	0.00%
66XX - Capital Outlay Expenses	132,316	611,594	74,654	12.21%		1,225,932	1,279,902	10,547	0.82%
89XX - Other Uses	1,500,000	1,500,000	-	-		3,050,000	3,050,000	3,050,000	100.00%
Total Expenditures	461,862,177	465,027,680	7,774,981	1.67%		497,687,470	500,213,343	10,334,719	2.07%
Excess (Deficiency) of Revenues Over Expenditures	(13,092,602)	(16,258,105)	(3,847,966)			(6,523,981)	(8,870,534)	(6,546,230)	

Fund Balance, July 1, beginning	185,218,952
Estimated Fund Balance, July 31, ending	181,370,986

Leander Independent School District
CHILD NUTRITION FUNDS 240 and 242
STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCE
FOR THE ONE MONTH ENDING JULY 31, 2024

	CURRENT YEAR 2024-2025					PRIOR YEAR 2023-2024			
	Original Budget	Amended Budget	Actual Year to Date	Actual to Budget		Original Budget	Amended Budget	Actual Year to Date	Actual to Budget
REVENUES:									
Local and Intermediate Sources	8,038,396	8,038,396	86,962	1.08%		8,515,353	8,515,353	68,283	0.80%
State Program Revenues	75,000	75,000	1,248	1.66%		75,000	75,000	-	-
Federal Program Revenues	6,341,726	6,341,726	-	-		7,598,682	7,598,682	-	-
Other Financing Sources	-	-	-	-		-	-	-	-
Total Revenues	14,455,122	14,455,122	88,210	0.61%		16,189,035	16,189,035	68,283	0.42%
EXPENDITURE SUMMARY BY FUNCTION:									
11 - Instructional				-					-
12 - Instructional Resources and Media Services				-					-
13 - Curriculum and Instructional Staff Development				-					-
21 - Instructional Leadership				-					-
23 - School Leadership				-					-
31 - Guidance, Counseling and Evaluation				-					-
32 - Social Work Services				-					-
33 - Health Services				-					-
34 - Student (Pupil) Transportation				-					-
35 - Food Services	15,772,327	16,755,406	28,556	0.17%		15,689,035	15,689,035	26,203	0.17%
36 - Cocurricular/Extra Curricular Activities				-					-
41 - General Administration				-					-
51 - Plant Maintenance and Facility Services				-					-
52 - Security and Monitoring Services				-					-
53 - Data Processing Services				-					-
61 - Community Services				-					-
71 - Debt Administration - Principal				-					-
81 - Facilities and Acquisition & Construction				-					-
91- Recapture Payments				-					-
95 - Payments to Juvenile Justice Alternative Program				-					-
99 - Other intergovernmental Charges				-					-
Other Financing Uses				-					-
Total Expenditures	15,772,327	16,755,406	28,556	0.17%		14,293,811	14,293,811	22,710	0.16%
EXPENDITURE SUMMARY BY OBJECT:									
61XX - Payroll Costs	5,481,106	5,481,106	27,820	0.51%		7,048,215	7,048,215	15,533	-
62XX - Professional and Contracted Services	6,276,708	6,298,627	-	-		6,267,440	6,267,440	-	-
63XX - Supplies and Materials	1,552,393	1,611,779	737	0.05%		1,507,380	1,507,380	10,566	0.70%
64XX - Other Operating Expenses	29,150	29,150	-	-		36,000	36,000	104	0.29%
65XX - Debt Administration	-	-	-	-		-	-	-	-
66XX - Capital Outlay Expenses	2,432,970	3,334,744	-	-		830,000	830,000	-	-
89XX - Other Uses	-	-	-	-		-	-	-	-
Total Expenditures	15,772,327	16,755,406	28,556	0.17%		15,689,035	15,689,035	26,203	0.17%
Excess (Deficiency) of Revenues Over Expenditures	(1,317,205)	(2,300,284)	59,654			1,895,224	1,895,224	45,572	

Fund Balance, July 1, beginning	16,162,698	
Estimated Fund Balance, July 31, ending	16,222,352	

Leander Independent School District
DEBT SERVICE FUND 599
STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCE
FOR THE ONE MONTH ENDING JULY 31, 2024

	CURRENT YEAR 2024-2025					PRIOR YEAR 2023-2024			
	Original Budget	Amended Budget	Actual Year to Date	Actual to Budget		Original Budget	Amended Budget	Actual Year to Date	Actual to Budget
REVENUES:									
Local and Intermediate Sources	147,222,823	147,222,823	670,827	0.46%		149,878,792	149,878,792	764,152	0.51%
State Program Revenues	14,241,719	14,241,719	23,757	0.17%		2,988,508	2,988,508	-	-
Federal Program Revenues	-	-	-	0.00%		-	-	-	-
Other Financing Sources	-	-	-	0.00%		-	-	-	-
Total Revenues	161,464,542	161,464,542	694,584	0.43%		152,867,300	152,867,300	764,152	0.50%
EXPENDITURE SUMMARY BY FUNCTION:									
11 - Instructional	-	-	-	-					-
12 - Instructional Resources and Media Services	-	-	-	-					-
13 - Curriculum and Instructional Staff Development	-	-	-	-					-
21 - Instructional Leadership	-	-	-	-					-
23 - School Leadership	-	-	-	-					-
31 - Guidance, Counseling and Evaluation	-	-	-	-					-
32 - Social Work Services	-	-	-	-					-
33 - Health Services	-	-	-	-					-
34 - Student (Pupil) Transportation	-	-	-	-					-
35 - Food Services	-	-	-	-					-
36 - Cocurricular/Extra Curricular Activities	-	-	-	-					-
41 - General Administration	-	-	-	-					-
51 - Plant Maintenance and Facility Services	-	-	-	-					-
52 - Security and Monitoring Services	-	-	-	-					-
53 - Data Processing Services	-	-	-	-					-
61 - Community Services	-	-	-	-					-
71 - Debt Administration - Principal	161,464,542	161,464,542	400	0.00%		152,867,300	152,868,100	1,200	0.00%
81 - Facilities and Acquisition & Construction	-	-	-	-					-
91- Recapture Payments	-	-	-	-					-
95 - Payments to Juvenile Justice Alternative Program	-	-	-	-					-
99 - Other intergovernmental Charges	-	-	-	-					-
Other Financing Uses	-	-	-	-					-
Total Expenditures	161,464,542	161,464,542	400	0.00%		136,338,776	136,338,776	31,744	0.02%
EXPENDITURE SUMMARY BY OBJECT:									
61XX - Payroll Costs	-	-	-	-		-	-	-	-
62XX - Professional and Contracted Services	-	-	-	-		-	-	-	-
63XX - Supplies and Materials	-	-	-	-		-	-	-	-
64XX - Other Operating Expenses	-	-	-	-		-	-	-	-
65XX - Debt Administration	161,464,542	161,464,542	400	0.00%		152,867,300	152,868,100	1,200	0.00%
66XX - Capital Outlay Expenses	-	-	-	-		-	-	-	-
89XX - Other Uses	-	-	-	-		-	-	-	-
Total Expenditures	161,464,542	161,464,542	400	0.00%		152,867,300	152,868,100	1,200	0.00%
Excess (Deficiency) of Revenues Over Expenditures	-	-	694,184			16,528,524	16,528,524	732,408	

Fund Balance, July 1, beginning	135,556,442
Estimated Fund Balance, July 31, ending	136,250,626

TEXAS EDUCATION AGENCY

Allotment Report
LEANDER ISD

Current Biennium includes SY 2023-2024 & SY 2024-2025

District / Charter: 246913
School Year   : 2024-2025

Transaction Type	Date	Transaction ID	Description	Amount
Adjustment	05/09/2024	0000252987	2022-23 High Enrollment Growth	$18,005.60
Allotment	05/09/2024	0000252988	Current Biennial Allotment	$7,364,859.23
Carryover Funds	05/09/2024	0000252989	Prior Biennial Carryover	$877.59
Prior Expenditure	05/09/2024	0000252990	School Year 2023-2024 Expenditure	($1,302,123.46)
Total Allotment				**$6,081,618.96**
Allotment Disbursement	07/18/2024	D000258049	Technology Services	($125,000.00) 316
Total Allotment Disbursements				**($125,000.00)**

Remaining Allotment   **$5,956,618.96**

Leander ISD Board Meeting Agenda Item Information
Meeting Date: Thursday, September 5, 2024

Agenda Item:	Monthly Investment Report
Purpose:	☒ Discussion Item/Report Only ☐ Action Requested
Administrator Responsible:	Pete Pape, Ed.D., CPA, Chief Financial Officer
Attachments:	Monthly Investment Report

Background Information:

The monthly investment report reflects the District's investment activities and balances for all fund types. The report presents a picture of cash and investments by grouping into the categories of individually acquired securities and pooled investments. A comparison to market value is also presented in each report. Reports for the District's investments as of July 2024 is presented.

Administrative Recommendation:

N/A

Sample Motion:

N/A

Investment Portfolio Summary

For the Month Ended

July 31, 2024

For the Month Ended
July 31, 2024

This report is prepared for Leander ISD (the "Entity") in accordance with Chapter 2256 of the Texas Public Funds Investment Act ("PFIA"). Section 2256.023(a) of the PFIA states that: "Not less than quarterly, the investment officer shall prepare and submit to the governing body of the entity a written report of the investment transactions for all funds covered by this chapter for the preceding reporting period." This report is signed by the Entity's investment officers and includes the disclosures required in the PFIA. To the extent possible, market prices have been obtained from independent pricing sources.

The investment portfolio compiled with the PFIA and the Entity's approved Investment Policy and Strategy throughout the period. All investment transactions made in the portfolio during this period were made on behalf of the Entity and were made in full compliance with the PFIA and the approved Investment Policy.

Officer Names and Titles:

Name: Pete Pape   Title: Chief Financial Officer

Name: Dana Paulson   Title: Sr. Director, Financial Services

Name: Connie Wheeler   Title: Controller

Name: Becky Garcia   Title: Director, Treasury & Debt Management

Name: Cassandra Hartmann Title: Treasury Specialist

319

Account Summary

	Beginning Value as of 07/01/2024	Ending Value as of 07/31/2024
Par Value	673,974,393.70	637,278,760.73
Book Value	672,985,536.37	636,603,485.23
Market Value	672,882,793.70	636,538,320.73
Market Value %	**99.985%**	**99.990%**
Weighted Avg. DTM	27	22
Weighted Avg. YTM	5.413%	5.416%
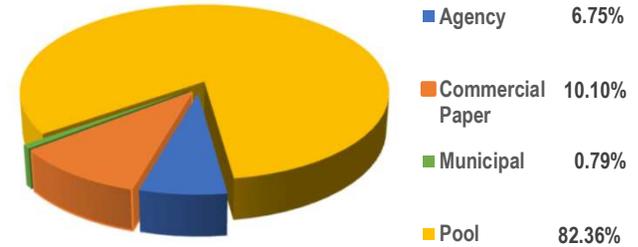
Allocation by Security Type

- Agency 6.75%
- Commercial Paper 10.10%
- Municipal 0.79%
- Pool 82.36%

Allocation by Issuer

- Logic 27.11%
- Texas Class 15.42%
- Texas Range 15.98%
- LoneStar 8.95%
- Texas FIT 32.54%

Maturity Distribution %

- Overnight 69.01%
- 2-90 Days 16.12%
- 91-180 Days 11.73%
- 180+ Days 3.14%

Allocation by Broker

- Wells Fargo 29.21%
- Raymond James 26.51%
- Hilltop Securities 44.28%

320

3
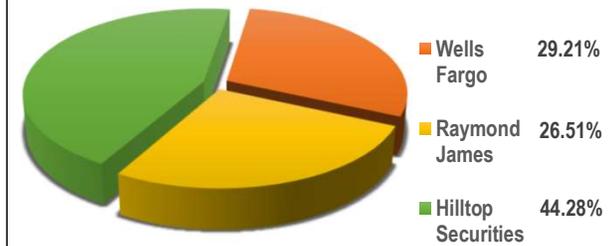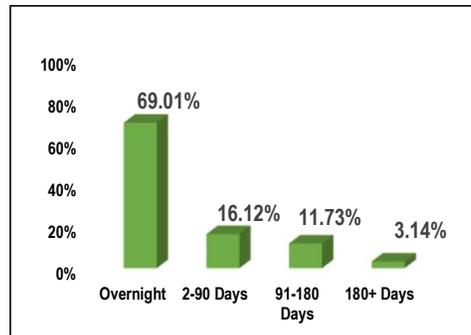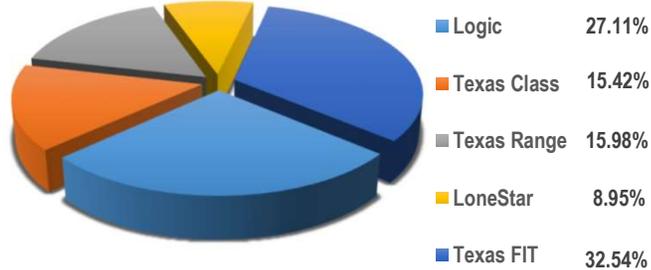
Benchmark Comparsion
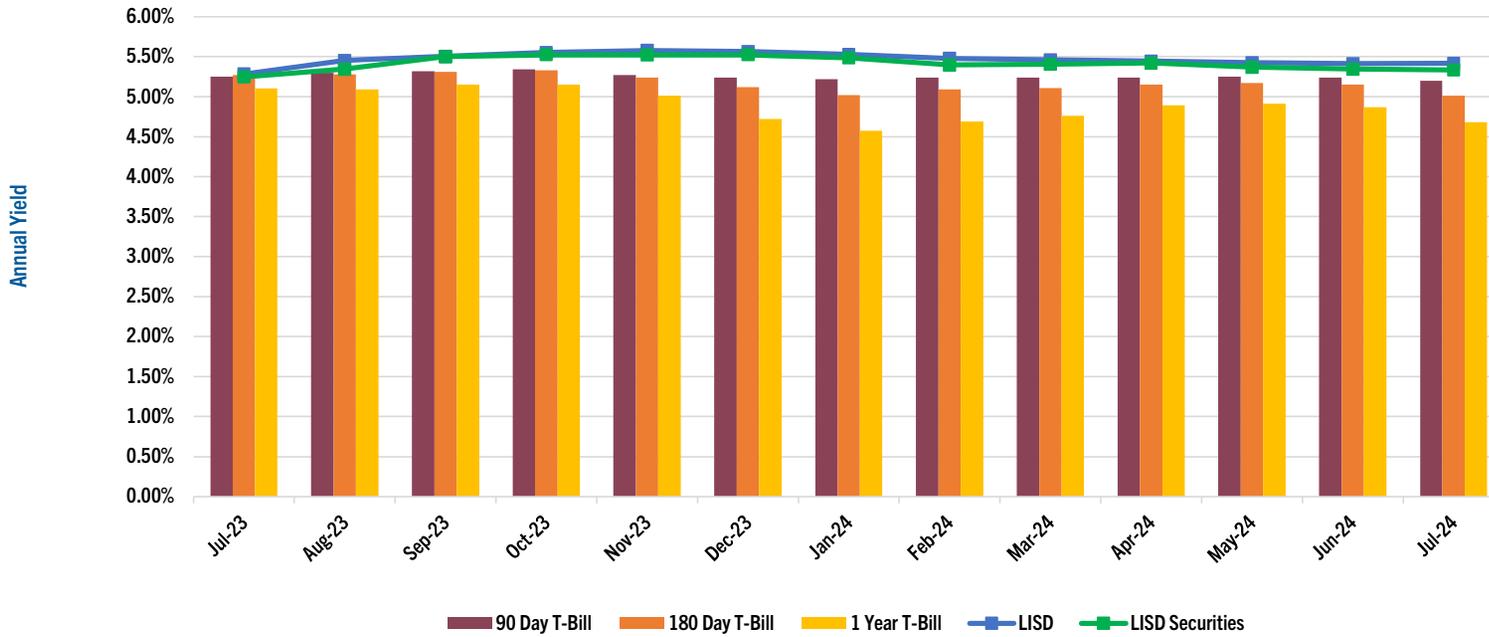
321

Acquisition Date	Security Type	Broker	CUSIP	Security Description	Rating Agency	Security Rating	Coupon	Callable	Par Value	Annualized Yield	Maturity Date	Days to Maturity	Beginning Book	Ending Book	Beginning Market	Ending Market	Additions & Changes in Market Value
General Operating - 199																	
3/27/2024	CP	HS	62479LG82	MUFG Bank Ltd NY	S&P	A-1	-			5.371%	7/8/2024		9,989,714	-	9,991,000	-	(9,991,000)
5/31/2024	MUNI-CP	WF	54270GFZ2	Long Island Power Auth	S&P	A-1+	5.430%			5.423%	7/18/2024		10,000,000	-	10,000,100	-	(10,000,100)
3/1/2024	AGNC	WF	3135GA4R9	Fannie Mae	S&P	AA+	0.420%		3,000,000	5.319%	8/23/2024	22	2,979,257	2,991,390	2,977,200	2,989,260	12,060
2/27/2024	CP	WF	55609EJ33	Macquarie International	S&P	A-1	-		5,000,000	5.357%	9/3/2024	33	4,953,689	4,976,121	4,949,250	4,974,600	25,350
2/12/2024	CP	RJ	89233GJ64	Toyota Motor Credit Corp	S&P	A-1+	-		10,000,000	5.275%	9/6/2024	36	9,904,711	9,948,800	9,897,100	9,944,290	47,190
3/20/2024	CP	RJ	22533TJW7	Credit Agricole CIB NY	S&P	A-1	-		10,000,000	5.413%	9/30/2024	60	9,867,039	9,912,333	9,863,300	9,909,350	46,050
3/8/2024	CP	RJ	5148X0K46	Landesbk Baden-Wurtt NY	Fitch	F1	-		10,000,000	5.341%	10/4/2024	64	9,863,306	9,907,911	9,855,500	9,901,960	46,460
4/23/2024	CP	HS	8923A0KJ1	Toyota Credit Puerto Rico	S&P	A-1+	-		10,000,000	5.559%	10/18/2024	78	9,836,197	9,882,783	9,836,500	9,882,500	46,000
4/4/2024	CP	HS	80285PL42	Santander UK PLC	S&P	A-1	-		10,000,000	5.281%	11/4/2024	95	9,820,800	9,864,889	9,812,000	9,858,800	46,800
2/27/2024	CP	WF	4497W0LM8	ING Funding LLC	S&P	A-1	-		10,000,000	5.280%	11/21/2024	112	9,798,211	9,841,956	9,783,200	9,834,500	51,300
4/23/2024	MUNI	WF	59261CAD5	MET Transportation Auth NY	S&P	SP1+	5.250%		5,000,000	5.303%	12/19/2024	140	4,998,219	4,998,542	4,991,250	4,997,500	6,250
1/22/2024	AGNC	HS	3135GAMA6	Fannie Mae	S&P	AA+	5.295%	Y	10,000,000	5.295%	1/17/2025	169	10,000,000	10,000,000	9,988,300	9,995,700	7,400
2/14/2024	AGNC	WF	3130AYYL4	Federal Home Loan Bank	S&P	AA+	5.210%	Y	10,000,000	5.210%	2/14/2025	197	10,000,000	10,000,000	9,987,900	9,991,600	3,700
	POOL	LOGIC		Logic					24,291,707	5.403%	8/1/2024	1	28,118,782	24,291,707	28,118,782	24,291,707	(3,827,075)
	POOL	LONESTAR		Lonestar					8,303,233	5.439%	8/1/2024	1	8,265,156	8,303,233	8,265,156	8,303,233	38,078
	POOL	TXCLASS		Texas Class					8,052,516	5.448%	8/1/2024	1	8,015,451	8,052,516	8,015,451	8,052,516	37,065
	POOL	TXRANGE		Texas Daily Select					4,043,967	5.440%	8/1/2024	1	4,025,434	4,043,967	4,025,434	4,043,967	18,533
2/7/2024	POOL	TXFIT		TX Choice - Fixed Term						5.325%	7/8/2024		10,000,000	-	10,000,000	-	(10,000,000)
2/7/2024	POOL	TXFIT		TX Choice - Fixed Term					10,000,000	5.317%	8/12/2024	11	10,000,000	10,000,000	10,000,000	10,000,000	-
5/17/2024	POOL	TXFIT		TX Choice - Fixed Term					10,000,000	5.410%	9/12/2024	42	10,000,000	10,000,000	10,000,000	10,000,000	-
5/20/2024	POOL	TXFIT		TX Choice - Fixed Term					10,000,000	5.410%	10/15/2024	75	10,000,000	10,000,000	10,000,000	10,000,000	-
	POOL	TXFIT		Texas FIT					20,626,131	5.430%	8/1/2024	1	10,320,864	20,626,131	10,320,864	20,626,131	10,305,267
									188,317,554				**210,756,829**	**187,642,279**	**210,678,287**	**187,597,614**	**(23,080,673)**
Debt Service - 599																	
	POOL	LOGIC		Logic					37,153,362	5.403%	8/1/2024	1	36,846,417	37,153,362	36,846,417	37,153,362	306,945
	POOL	LONESTAR		Lonestar					12,044,703	5.439%	8/1/2024	1	11,989,468	12,044,703	11,989,468	12,044,703	55,236
	POOL	TXCLASS		Texas Class					20,375,539	5.448%	8/1/2024	1	20,281,753	20,375,539	20,281,753	20,375,539	93,787
	POOL	TXRANGE		Texas Daily Select					20,226,605	5.440%	8/1/2024	1	20,133,911	20,226,605	20,133,911	20,226,605	92,695
11/14/2023	POOL	TXFIT		TX Choice - Fixed Term					25,000,000	5.767%	8/12/2024	11	25,000,000	25,000,000	25,000,000	25,000,000	-
3/26/2024	POOL	TXFIT		TX Choice - Fixed Term					20,000,000	5.236%	1/21/2025	173	20,000,000	20,000,000	20,000,000	20,000,000	-
	POOL	TXFIT		Texas FIT					6,979	5.430%	8/1/2024	1	6,947	6,979	6,947	6,979	32
									134,807,189				**134,258,495**	**134,807,189**	**134,258,495**	**134,807,189**	**548,694**
Child Nutrition - 240																	
	POOL	LOGIC		Logic					**16,277,146**	5.403%	8/1/2024	1	**16,825,491**	**16,277,146**	**16,825,491**	**16,277,146**	**(548,345)**
Capital Project - 640																	
	POOL	LOGIC		Logic					7,607,060	5.403%	8/1/2024	1	14,053,178	7,607,060	14,053,178	7,607,060	(6,446,118)
	POOL	LONESTAR		LoneStar					26,589,405	5.439%	8/1/2024	1	26,467,469	26,589,405	26,467,469	26,589,405	121,936
	POOL	TXRANGE		Texas Daily Select					7,065,704	5.440%	8/1/2024	1	7,033,323	7,065,704	7,033,323	7,065,704	32,381
4/9/2024	POOL	TXFIT		TX Choice - Fixed Term					10,000,000	5.410%	12/9/2024	130	10,000,000	10,000,000	10,000,000	10,000,000	-
	POOL	TXFIT		Texas FIT					22,625,273	5.430%	8/1/2024	1	22,521,363	22,625,273	22,521,363	22,625,273	103,910
									73,887,442				**80,075,334**	**73,887,442**	**80,075,334**	**73,887,442**	**(6,187,892)**
Capital Project - 642																	
	POOL	LOGIC		Logic					**20,156,124**	5.403%	8/1/2024	1	**20,802,199**	**20,156,124**	**20,802,199**	**20,156,124**	**(646,074)**
Capital Project - 643																	
1/22/2024	AGNC	HS	3135GAMA6	Fannie Mae	S&P	AA+	5.295%	Y	10,000,000	5.295%	1/17/2025	169	10,000,000	10,000,000	9,988,300	9,995,700	7,400
6/3/2024	AGNC	HS	3130B1MQ7	Federal Home Loan	S&P	AA+	5.400%	Y	10,000,000	5.400%	5/28/2025	300	10,000,000	10,000,000	9,987,500	9,983,800	(3,700)
	POOL	LOGIC		Logic					18,252,636	5.403%	8/1/2024	1	25,984,724	18,252,636	25,984,724	18,252,636	(7,732,089)
	POOL	TXCLASS		Texas Class					52,431,413	5.448%	8/1/2024	1	52,190,075	52,431,413	52,190,075	52,431,413	241,338
	POOL	TXRANGE		Texas Daily Select					52,426,765	5.440%	8/1/2024	1	52,186,503	52,426,765	52,186,503	52,426,765	240,262
	POOL	TXFIT		Texas FIT					42,344,510	5.430%	8/1/2024	1	42,150,037	42,344,510	42,150,037	42,344,510	194,473
									185,455,323				**192,511,340**	**185,455,323**	**192,487,140**	**185,434,823**	**(7,052,317)**
Workers Comp - 753																	
	POOL	LOGIC		Logic					**5,030,475**	5.403%	8/1/2024	1	**3,596,752**	**5,030,475**	**3,596,752**	**5,030,475**	**1,433,723**
Health Insurance - 771																	
	POOL	LOGIC		Logic					**13,347,506**	5.403%	8/1/2024	1	**14,159,097**	**13,347,506**	**14,159,097**	**13,347,506**	**(811,591)**
			GRAND TOTALS						**637,278,761**				**672,985,536**	**636,603,485**	**672,882,794**	**636,538,321**	**(36,344,473)**
			WEIGHTED AVERAGE YIELD & MATURITY							**5.416%**		**22**					

322

CUSIP	Security Type	Security Description	Maturity / Coupon Date	Interest	Principal	Total Amount
General Operating - 199						
	POOL	TX CHOICE - Fixed Term	8/12/2024	271,640	10,000,000	10,271,640
3130AYYL4	AGNC	Federal Home Loan Bank	8/14/2024	260,500		260,500
3135GA4R9	AGNC	Fannie Mae	8/23/2024	6,300	3,000,000	3,006,300
55609EJ33	CP	Macquarie International	9/3/2024		5,000,000	5,000,000
89233GJ64	CP	Toyota Motor Credit Corp	9/6/2024		10,000,000	10,000,000
	POOL	TX CHOICE - Fixed Term	9/12/2024		10,000,000	10,000,000
22533TJW7	CP	Credit Agricole CIP NY	9/30/2024		10,000,000	10,000,000
5148X0K46	CP	Landesbk Baden-Wurtt NY	10/4/2024		10,000,000	10,000,000
	POOL	TX CHOICE - Fixed Term	10/15/2024		10,000,000	10,000,000
8923A0KJ1	CP	Toyota Credit Puerto Rico	10/18/2024		10,000,000	10,000,000
80285PL42	CP	Santander UK PLC	11/4/2024		10,000,000	10,000,000
4497W0LM8	CP	ING Funding LLC	11/21/2024		10,000,000	10,000,000
59261CAD5	MUNI	MET Transportation Auth NY	12/19/2024	196,146	5,000,000	5,196,146
3135GAMA6	AGNC	Fannie Mae	1/17/2025	264,750	10,000,000	10,264,750
3130AYYL4	AGNC	Federal Home Loan Bank	2/14/2025	260,500	10,000,000	10,260,500
				1,259,836	**123,000,000**	**124,259,836**
Debt Service - 599						
	POOL	TX CHOICE - Fixed Term	8/12/2024	1,071,372	25,000,000	26,071,372
	POOL	TX CHOICE - Fixed Term	1/21/2025	863,614	20,000,000	20,863,614
				1,934,986	**45,000,000**	**46,934,986**
Capital Project - 640						
	POOL	TX CHOICE - Fixed Term	12/9/2024	361,655	10,000,000	10,361,655
				361,655	**10,000,000**	**10,361,655**
Capital Project - 643						
3130B1MQ7	AGNC	Federal Home Loan Bank	11/28/2024	262,500		262,500
3135GAMA6	AGNC	Fannie Mae	1/17/2025	264,750	10,000,000	10,264,750
3130B1MQ7	AGNC	Federal Home Loan Bank	5/28/2025	270,000	10,000,000	10,270,000
				797,250	**20,000,000**	**20,797,250**

Total for all Portfolios			
	Interest	Principal	Total
August 2024	1,609,812	38,000,000	39,609,812
September 2024	-	35,000,000	35,000,000
October 2024	-	30,000,000	30,000,000
November 2024	262,500	20,000,000	20,262,500
December 2024	557,801	15,000,000	15,557,801
January 2025	1,393,114	40,000,000	41,393,114
February 2025	260,500	10,000,000	10,260,500
March 2025	-	-	-
April 2025	-	-	-
May 2025	270,000	10,000,000	10,270,000
June 2025	-	-	-
July 2025	-	-	-
Total Projected Cash Flow from Investments	**4,353,727**	**198,000,000**	**202,353,727**
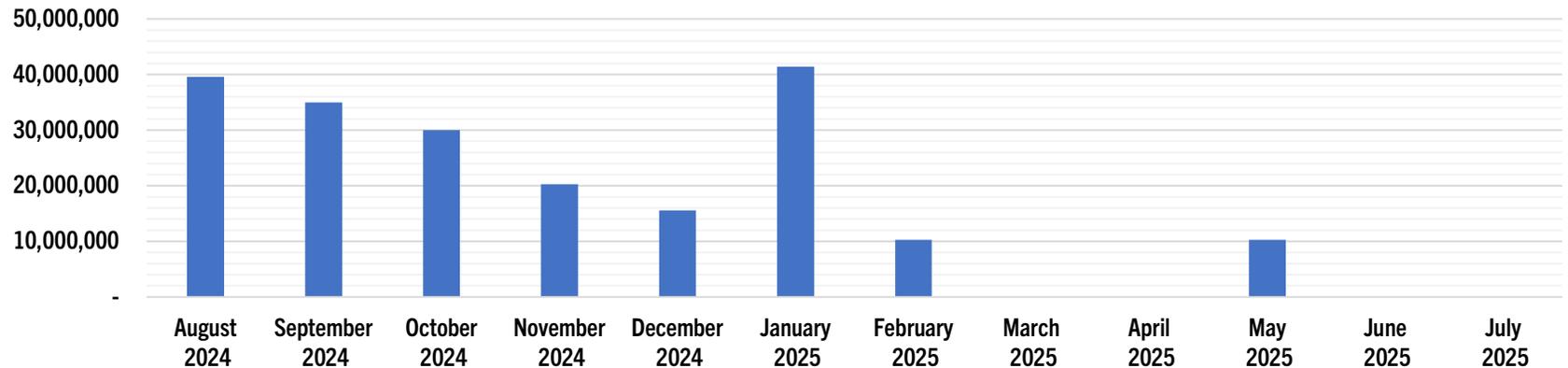
Cash Account	Cash Balance 07/01/2024	Deposits & Credits	Withdrawals & Debits	Cash Balance 07/31/2024
(199) General Operating	8,324,985	64,335,070	67,384,429	5,275,626
(240) Child Nutrition	656,647	627,970	1,280,000	4,617
(599) Debt Service	6,181	23,757	1,200	28,738
(640) Capital Project 640	2,225	6,495,000	6,496,287	937
(642) Capital Project 642	44	740,000	739,269	775
(643) Capital Project 643	921,254	8,088,396	9,009,469	181
(753) Workers Compensation	25,257	25,000	49,687	570
(771) Health Insurance	1,538,273	3,428,656	3,169,338	1,797,591
Total Cash for Leander ISD	**11,474,866**	**83,763,848**	**88,129,680**	**7,109,035**

325

Leander ISD Board Meeting Agenda Item Information
Meeting Date: Thursday, September 5, 2024

Agenda Item:	Monthly Tax Collection Report
Purpose:	☒ Discussion Item/Report Only ☐ Action Requested
Administrator Responsible:	Pete Pape, Ed.D., CPA, Chief Financial Officer
Attachments:	Monthly Tax Collection Report

Background Information:
The tax collection report for July shows the actual collection of current and delinquent taxes at 99.09% which is 0.49% below the rate achieved at the same time last year. At the end of July, the District had realized 99.14% of the supplemented current levy compared to 99.48% in the previous year.

The delinquent tax collections for July were negative due to the settlement of lawsuits and refunds for retroactive homestead exemptions. Refunds processed for prior tax years often fully offset any delinquent collections for the month.

Administrative Recommendation:
N/A

Sample Motion:
N/A

LEANDER ISD
LEADING TO A BRIGHT FUTURE

Leander Independent School District
Tax Collections Report
2023 Tax Year

As of July 31, 2024

		Collections		Current		Total
M & O Collections		**to Date**		**Month**		**Collections**
Current Year Collections	$	254,242,162.84	$	256,941.83	$	254,499,104.67
Delinquent Collections		(165,954.70)		(199,628.08)		(365,582.78)
Rollbacks		401,257.41		8,368.49		409,625.90
Penalty & Interest		887,294.39		80,543.99		967,838.38
	$	**255,364,759.94**	$	**146,226.23**	$	**255,510,986.17**
I & S Collections						
Current Year Collections	$	192,246,604.90	$	108,967.81	$	192,355,572.71
Delinquent Collections		(69,995.77)		(67,702.68)		(137,698.45)
Rollbacks		87,692.42		3,575.58		91,268.00
Penalty & Interest		367,413.19		33,425.66		400,838.85
	$	**192,631,714.74**	$	**78,266.37**	$	**192,709,981.11**
Total Collections						
Current Year Collections	$	446,488,767.74	$	365,909.64	$	446,854,677.38
Delinquent Collections		(235,950.47)		(267,330.76)		(503,281.23)
Rollbacks		488,949.83		11,944.07		500,893.90
Penalty & Interest		1,254,707.58		113,969.65		1,368,677.23
	$	**447,996,474.68**	$	**224,492.60**	$	**448,220,967.28**

2023 Original Tax Levy	$	**454,583,073.34**
Adjustments to Date		**(3,858,570.27)**
2023 Adjusted Tax Levy	$	**450,724,503.07**

Current Rate		**99.14%**

Taxes Outstanding		
Current Year Uncollected	$	3,943,786.20
Delinquent Taxes		3,564,561.15
Rollbacks		989,936.89
	$	**8,498,284.24**

2023 Tax Year

12 Month Collection Comparison

Monthly Collections	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
CURRENT:						
October	4,889,207	4,996,661	7,645,966	6,828,098	2,023,418	1,962,507
November	15,949,954	15,365,390	16,131,367	23,233,518	14,907,988	15,245,349
December	191,714,942	208,405,529	204,795,089	223,308,803	280,700,737	220,840,322
January	123,950,495	118,038,446	124,213,650	132,069,128	143,676,816	164,068,894
February	25,739,331	26,750,027	36,968,124	36,891,384	64,040,389	38,112,026
March	2,613,424	3,031,131	4,050,915	4,810,773	3,968,053	3,811,398
April	1,094,725	928,488	1,264,134	978,072	1,279,570	1,241,374
May	1,188,957	1,575,273	874,578	1,137,872	999,547	834,120
June	487,888	708,691	920,000	474,660	523,795	372,778
July	755,556	645,083	788,999	409,717	570,001	365,910
August	351,891	285,364	442,470	387,067	609,998	-
September	136,834	116,523	149,360	52,068	(143,267)	-
TOTAL	368,873,204	380,846,606	398,244,652	430,581,160	513,157,045	446,854,677
Current Levy YTD -July	99.47%	99.39%	99.49%	99.65%	99.48%	99.14%
Current & Delinquent YTD-July	99.80%	99.39%	99.83%	99.88%	99.58%	99.09%
Current Levy - Full Tax Year	99.60%	99.50%	99.64%	99.75%	99.57%	*in process*
Current & Delinquent - Full Tax Year	99.96%	99.66%	100.01%	100.03%	99.68%	*in process*
Final Adjusted Tax Roll	370,356,031	382,765,184	399,679,970	431,647,750	515,395,952	450,724,503 *in process*

Historical Collection Comparison

328
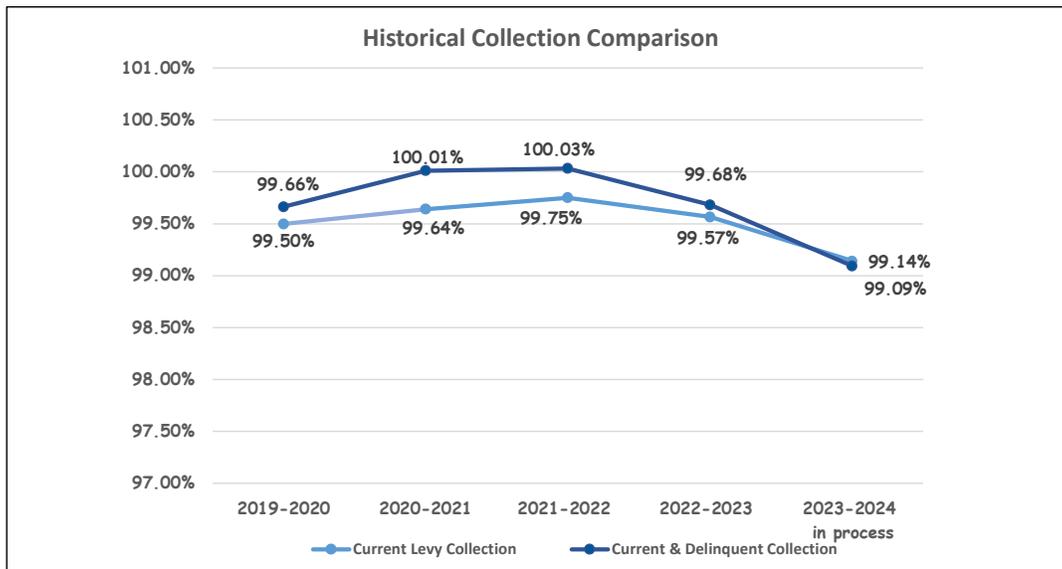
```
                              TRAVIS COUNTY TAX OFFICE
TXDIST1A                      OVERALL COLL/DIST REPORT                DATE 08/01/2024   PAGE   49
     RECEIVABLE BALANCE 'R' REPORT      FROM 07/01/2024 TO 07/31/2024    YEAR FROM 0000 TO 2023
                                        ALL OTHERS
```

```
   ILE       -- LEANDER ISD         ------------------------------------------------------------------------------
        BEGINNING      TAX    BASE TAX           NET BASE TAX  PERCENT      ENDING    P & I      P & I      LRP  OTHER PENALTY      TOTAL
   YEAR TAX BALANCE     ADJ    COLLECTED  REVERSALS  COLLECTED COLLECTED  TAX BALANCE COLLECTED REVERSALS COLLECTED  COLLECTED   DISTRIBUTED
   ------------------------------------------------------------------------------------------------------------------------------------

   1982        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1983        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1984        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1985        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1986        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1987        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1988        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1989        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1990        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1991        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1992        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1993        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1994        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1995        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1996        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1997        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1998        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   1999        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   2000        .00      .00       .00        .00        .00     .00 %         .00       .00      .00        .00        .00         .00
   2001       3.30      .00       .00        .00        .00     .00 %        3.30       .00      .00        .00        .00         .00
   2002     944.87      .00       .00        .00        .00     .00 %      944.87       .00      .00        .00        .00         .00
   2003    3563.52   156.76-      .00        .00        .00     .00 %     3406.76       .00      .00        .00        .00         .00
   2004    2747.07      .00       .00        .00        .00     .00 %     2747.07       .00      .00        .00        .00         .00
   2005    3249.53      .00       .00        .00        .00     .00 %     3249.53       .00      .00        .00        .00         .00
   2006    8574.53      .00       .00        .00        .00     .00 %     8574.53       .00      .00        .00        .00         .00
   2007    8131.75   548.92-      .00        .00        .00     .00 %     7582.83       .00      .00        .00        .00         .00
   2008   11694.85      .00       .00        .00        .00     .00 %    11694.85       .00      .00        .00        .00         .00
   2009   13471.49      .00       .00        .00        .00     .00 %    13471.49       .00      .00        .00        .00         .00
   2010   22687.61      .00       .00        .00        .00     .00 %    22687.61       .00      .00        .00        .00         .00
   2011   33623.75   935.24-      .00        .00        .00     .00 %    32688.51       .00      .00        .00        .00         .00
   2012   45845.20   191.43-      .00        .00        .00     .00 %    45653.77       .00      .00        .00        .00         .00
   2013   47258.26  5576.74-      .00        .00        .00     .00 %    41681.52       .00      .00        .00        .00         .00
   2014   49059.97      .00       .00        .00        .00     .00 %    49059.97       .00      .00        .00        .00         .00
   2015   56710.56      .00    388.01        .00     388.01     .68 %    56322.55    442.33      .00      24.69        .00      855.03
   2016   70937.91      .00    254.14        .00     254.14     .36 %    70683.77    259.21      .00      23.31        .00      536.66
   2017   90442.84      .00    447.75        .00     447.75     .50 %    89995.09    400.98      .00      21.93        .00      870.66
   2018  143563.67      .00    221.12        .00     221.12     .15 %   143342.55    172.47      .00      21.23        .00      414.82
   2019  178976.08    35.03-   180.42        .00     180.42     .10 %   178760.63    119.08      .00      28.45        .00      327.95
   2020  228016.88   374.55    324.05        .00     324.05     .14 %   228067.38    174.99      .00      26.04        .00      525.08
   2021  330304.86   576.32  11742.03      71.54   11670.49    3.53 %   319210.69   4763.14      .00      15.84        .00    16449.47
   2022  687944.21 236974.38- 36009.54  256762.40  220752.86- 48.95-%  671722.69   7637.93      .00      46.62        .00   213068.31-
   ------------------------------------------------------------------------------------------------------------------------------------
   TOTL 2037752.71 243467.63- 49567.06  256833.94  207266.88- 11.55-%  2001551.96  13970.13     .00     208.11        .00   193088.64-

   2023 2179176.34 212492.83- 383606.07 235838.36  147767.71   7.51 %  1818915.80  47528.00     .00      30.71     1203.75   196530.17
```

3

ENTITY
TOTL   4216929.05   455960.46-   433173.13   492672.30   59499.17- 1.58-%   3820467.76   61498.13   .00   238.82   1203.75   3441.53

Recap & Standings Report

WTAXSaaS

Cycles: **All**   Taxing Units: **Leander ISD...**   Deposit Date Range: **07/01/2024 to 07/31/2024**   Sorted By: **By Year, Descending**   Options: **Separate Rollbacks, Include**

Property Tax

SLE (Leander ISD)   **2023 Fiscal Year: 10/01/2023 - 09/30/2024**

IS

	Original Roll	Beg. Uncollected	Adjustments	Adjusted Uncollected	Collections	P&I Collected	Credits / Discounts Allowed	Atty. Fee Collected	Variance	Uncollected Balance	YTD Collections
2025	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2024	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2023	86,636,108.37	797,297.56	-105,052.30	692,245.26	64,985.36	13,900.69	-687.31	10,991.46	0.75	627,947.96	85,425,884.53
2022	86,353,297.56	142,843.31	-19,814.83	123,028.48	-17,162.08	495.32	0.00	285.48	0.02	140,190.58	-120,254.29
2021	94,332,048.48	63,262.97	-1,542.35	61,720.62	-172.35	161.86	0.00	0.30	0.00	61,892.97	-39,194.76
2020	80,626,149.65	48,902.37	-334.36	48,568.01	951.86	250.33	0.00	16.14	0.00	47,616.15	-1,748.36
2019	75,775,669.00	41,989.98	-57.20	41,932.78	1,149.20	271.44	0.00	0.00	0.00	40,783.58	6,051.40
2018	68,954,540.92	29,228.82	0.00	29,228.82	0.00	0.00	0.00	0.00	0.00	29,228.82	2,437.01
2017	62,290,320.36	27,958.98	0.00	27,958.98	0.00	0.00	0.00	0.00	0.00	27,958.98	2,662.12
2016	55,603,656.23	22,110.95	0.00	22,110.95	0.00	0.00	0.00	0.00	0.00	22,110.95	1,705.08
2015	49,093,370.76	19,299.28	0.00	19,299.28	0.00	0.00	0.00	0.00	0.00	19,299.28	1,403.02
2014	44,412,322.78	16,635.08	0.00	16,635.08	0.00	0.00	0.00	0.00	0.00	16,635.08	1,263.31
2013	38,869,330.27	18,069.23	0.00	18,069.23	51.83	71.53	1,063.46	18.50	0.00	16,953.94	2,455.41
2012	36,200,605.63	9,556.09	0.00	9,556.09	0.00	0.00	0.00	0.00	0.00	9,556.09	1,280.61
2011	34,042,595.83	6,616.83	0.00	6,616.83	0.00	0.00	0.00	0.00	0.00	6,616.83	610.38
2010	30,041,634.03	4,708.69	0.00	4,708.69	0.00	0.00	0.00	0.00	0.00	4,708.69	0.00
2009	27,944,427.52	3,802.41	0.00	3,802.41	0.00	0.00	0.00	0.00	0.00	3,802.41	0.00
2008	24,003,652.64	3,495.97	0.00	3,495.97	0.00	0.00	0.00	0.00	0.00	3,495.97	0.00
2007	0.00	2,495.88	0.00	2,495.88	0.00	0.00	0.00	0.00	0.00	2,495.88	0.00
2006	0.00	1,920.45	0.00	1,920.45	0.00	0.00	0.00	0.00	0.00	1,920.45	0.00
2005 & prior	0.00	3,656.02	0.00	3,656.02	0.00	0.00	0.00	0.00	0.00	3,656.02	0.00
Summary											
Total Current	86,636,108.37	797,297.56	-105,052.30	692,245.26	64,985.36	13,900.69	-687.31	10,991.46	0.75	627,947.96	85,425,884.53
Total Delinquent	808,543,621.66	466,553.31	-21,748.74	444,804.57	-15,181.54	1,250.48	1,063.46	320.42	0.02	458,922.67	-141,331.07
Rollbacks		263,937.45	43,873.12	307,810.57	3,575.58	0.00	0.00	0.00	0.00	304,234.99	91,268.00
Fee Type Total	895,179,730.03	1,527,788.32	-82,927.92	1,444,860.40	53,379.40	15,151.17	376.15	11,311.88	0.77	1,391,105.62	85,375,821.46

Combined Collections (Collections + P&I Collected) -- 68,530.57

Recap & Standings Report

WTAXSaaS

Cycles: **All**   Taxing Units: **Leander ISD...**   Deposit Date Range: **07/01/2024 to 07/31/2024**   Sorted By: **By Year, Descending**   Options: **Separate Rollbacks, Include**

Property Tax

SLE (Leander ISD)   **2023 Fiscal Year: 10/01/2023 - 09/30/2024**

MO

	Original Roll	Beg. Uncollected	Adjustments	Adjusted Uncollected	Collections	P&I Collected	Credits / Discounts Allowed	Atty. Fee Collected	Variance	Uncollected Balance	YTD Collections
2025	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2024	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2023	204,434,958.83	1,881,379.58	-247,891.48	1,633,488.10	153,345.29	32,801.24	-1,621.84	25,936.50	2.00	1,481,766.65	201,579,342.01
2022	247,179,750.43	408,877.69	-56,718.51	352,159.18	-49,125.30	1,417.82	0.00	817.08	0.06	401,284.54	-344,218.92
2021	176,897,933.42	118,634.80	-2,892.33	115,742.47	-323.22	303.52	0.00	0.56	0.00	116,065.69	-73,500.75
2020	165,309,606.89	100,265.45	-685.51	99,579.94	1,951.67	513.27	0.00	33.10	0.00	97,628.27	-3,584.66
2019	157,224,379.73	87,123.59	-118.68	87,004.91	2,384.44	563.20	0.00	0.00	0.00	84,620.47	12,555.84
2018	152,580,256.06	64,676.53	0.00	64,676.53	0.00	0.00	0.00	0.00	0.00	64,676.53	5,392.52
2017	137,287,673.22	61,621.29	0.00	61,621.29	0.00	0.00	0.00	0.00	0.00	61,621.29	5,867.31
2016	122,550,282.37	48,732.13	0.00	48,732.13	0.00	0.00	0.00	0.00	0.00	48,732.13	3,758.01
2015	108,201,646.02	42,535.38	0.00	42,535.38	0.00	0.00	0.00	0.00	0.00	42,535.38	3,092.26
2014	97,884,620.94	36,663.54	0.00	36,663.54	0.00	0.00	0.00	0.00	0.00	36,663.54	2,792.22
2013	85,667,878.57	39,824.43	0.00	39,824.43	114.23	157.64	2,343.87	40.78	0.00	37,366.33	5,411.72
2012	79,786,018.87	21,061.50	0.00	21,061.50	0.00	0.00	0.00	0.00	0.00	21,061.50	2,822.46
2011	77,006,044.05	14,967.57	0.00	14,967.57	0.00	0.00	0.00	0.00	0.00	14,967.57	1,380.69
2010	75,321,364.08	11,805.88	0.00	11,805.88	0.00	0.00	0.00	0.00	0.00	11,805.88	0.00
2009	76,011,409.77	10,342.88	0.00	10,342.88	0.00	0.00	0.00	0.00	0.00	10,342.88	0.00
2008	73,587,435.47	10,717.38	0.00	10,717.38	0.00	0.00	0.00	0.00	0.00	10,717.38	0.00
2007	0.00	7,662.99	0.00	7,662.99	0.00	0.00	0.00	0.00	0.00	7,662.99	0.00
2006	0.00	7,975.49	0.00	7,975.49	0.00	0.00	0.00	0.00	0.00	7,975.49	0.00
2005 & prior	0.00	17,007.34	0.00	17,007.34	0.00	0.00	0.00	0.00	0.00	17,007.34	0.00
Summary											
Total Current	204,434,958.83	1,881,379.58	-247,891.48	1,633,488.10	153,345.29	32,801.24	-1,621.84	25,936.50	2.00	1,481,766.65	201,579,342.01
Total Delinquent	1,832,496,299.89	1,110,495.86	-60,415.03	1,050,080.83	-44,998.18	2,955.45	2,343.87	891.52	0.06	1,092,735.20	-378,243.60
Rollbacks		593,935.23	100,135.16	694,070.39	8,368.49	0.00	0.00	0.00	0.00	685,701.90	199,908.97
Fee Type Total	2,036,931,258.72	3,585,810.67	-208,171.35	3,377,639.32	116,715.60	35,756.69	722.03	26,828.02	2.06	3,260,203.75	201,401,007.38

Cycles: **All**   Taxing Units: **Leander ISD...**   Deposit Date Range: **07/01/2024 to 07/31/2024**   Sorted By: **By Year, Descending**   Options: **Separate Rollbacks, Include**

Property Tax

Combined Collections (Collections + P&I Collected) -- 152,472.29

333

Cycles: **All**   Taxing Units: **Leander ISD...**   Deposit Date Range: **07/01/2024 to 07/31/2024**   Sorted By: **By Year, Descending**   Options: **Separate Rollbacks, Include**

Property Tax

SLE (Leander ISD)   **2023 Fiscal Year: 10/01/2023 - 09/30/2024**

SA

	Original Roll	Beg. Uncollected	Adjustments	Adjusted Uncollected	Collections	P&I Collected	Credits / Discounts Allowed	Atty. Fee Collected	Variance	Uncollected Balance	YTD Collections
2025	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2024	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2023	151,638.85	17,067.42	-2,100.35	14,967.07	-188.72	69.36	0.00	-18.63	0.00	15,155.79	121,080.46
2022	114,067.61	2,500.17	-14.46	2,485.71	100.06	29.96	0.00	19.51	0.00	2,385.65	1,872.80
2021	88,927.72	1,339.00	0.00	1,339.00	0.00	0.00	0.00	0.00	0.00	1,339.00	159.32
2020	64,284.07	755.04	0.00	755.04	0.00	0.00	0.00	0.00	0.00	755.04	64.99
2019	69,012.56	1,187.71	0.00	1,187.71	0.00	0.00	0.00	0.00	0.00	1,187.71	-8.35
2018	83,414.82	1,051.46	0.00	1,051.46	0.00	0.00	0.00	0.00	0.00	1,051.46	0.00
2017	56,346.24	501.23	0.00	501.23	0.00	0.00	0.00	0.00	0.00	501.23	0.00
2016	55,049.70	914.93	0.00	914.93	0.00	0.00	0.00	0.00	0.00	914.93	0.00
2015	48,897.66	855.77	0.00	855.77	0.00	0.00	0.00	0.00	0.00	855.77	0.00
2014	50,500.66	552.19	0.00	552.19	0.00	0.00	0.00	0.00	0.00	552.19	384.40
2013	48,069.44	2,147.81	0.00	2,147.81	15.78	21.77	323.69	5.63	0.00	1,808.34	355.58
2012	44,655.51	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2011	31,924.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2010	36,721.71	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2009	36,058.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2008	31,809.91	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2007	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2006	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2005 & prior	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Summary											
Total Current	151,638.85	17,067.42	-2,100.35	14,967.07	-188.72	69.36	0.00	-18.63	0.00	15,155.79	121,080.46
Total Delinquent	859,740.12	11,805.31	-14.46	11,790.85	115.84	51.73	323.69	25.14	0.00	11,351.32	2,444.34
Rollbacks		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Fee Type Total	1,011,378.97	28,872.73	-2,114.81	26,757.92	-72.88	121.09	323.69	6.51	0.00	26,507.11	123,524.80

Combined Collections (Collections + P&I Collected) -- 48.21

Recap & Standings Report

WTAXSaaS

Cycles: **All**   Taxing Units: **Leander ISD...**   Deposit Date Range: **07/01/2024 to 07/31/2024**   Sorted By: **By Year, Descending**   Options: **Separate Rollbacks, Include**

Property Tax

SLE (Leander ISD)   **2023 Fiscal Year: 10/01/2023 - 09/30/2024**

Taxing Unit Totals (IS,MO,SA)

	Original Roll	Beg. Uncollected	Adjustments	Adjusted Uncollected	Collections	P&I Collected	Credits / Discounts Allowed	Atty. Fee Collected	Variance	Uncollected Balance	YTD Collections
2025	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2024	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2023	291,222,706.05	2,695,744.56	-355,044.13	2,340,700.43	218,141.93	46,771.29	-2,309.15	36,909.33	2.75	2,124,870.40	287,126,307.00
2022	333,647,115.60	554,221.17	-76,547.80	477,673.37	-66,187.32	1,943.10	0.00	1,122.07	0.08	543,860.77	-462,600.41
2021	271,318,909.62	183,236.77	-4,434.68	178,802.09	-495.57	465.38	0.00	0.86	0.00	179,297.66	-112,536.19
2020	246,000,040.61	149,922.86	-1,019.87	148,902.99	2,903.53	763.60	0.00	49.24	0.00	145,999.46	-5,268.03
2019	233,069,061.29	130,301.28	-175.88	130,125.40	3,533.64	834.64	0.00	0.00	0.00	126,591.76	18,598.89
2018	221,618,211.80	94,956.81	0.00	94,956.81	0.00	0.00	0.00	0.00	0.00	94,956.81	7,829.53
2017	199,634,339.82	90,081.50	0.00	90,081.50	0.00	0.00	0.00	0.00	0.00	90,081.50	8,529.43
2016	178,208,988.30	71,758.01	0.00	71,758.01	0.00	0.00	0.00	0.00	0.00	71,758.01	5,463.09
2015	157,343,914.44	62,690.43	0.00	62,690.43	0.00	0.00	0.00	0.00	0.00	62,690.43	4,495.28
2014	142,347,444.38	53,850.81	0.00	53,850.81	0.00	0.00	0.00	0.00	0.00	53,850.81	4,035.53
2013	124,585,278.28	60,041.47	0.00	60,041.47	181.84	250.94	3,731.02	64.91	0.00	56,128.61	8,222.71
2012	116,031,280.01	30,617.59	0.00	30,617.59	0.00	0.00	0.00	0.00	0.00	30,617.59	4,103.07
2011	111,080,564.02	21,584.40	0.00	21,584.40	0.00	0.00	0.00	0.00	0.00	21,584.40	1,991.07
2010	105,399,719.82	16,514.57	0.00	16,514.57	0.00	0.00	0.00	0.00	0.00	16,514.57	0.00
2009	103,991,895.66	14,145.29	0.00	14,145.29	0.00	0.00	0.00	0.00	0.00	14,145.29	0.00
2008	97,622,898.02	14,213.35	0.00	14,213.35	0.00	0.00	0.00	0.00	0.00	14,213.35	0.00
2007	0.00	10,158.87	0.00	10,158.87	0.00	0.00	0.00	0.00	0.00	10,158.87	0.00
2006	0.00	9,895.94	0.00	9,895.94	0.00	0.00	0.00	0.00	0.00	9,895.94	0.00
2005 & prior	0.00	20,663.36	0.00	20,663.36	0.00	0.00	0.00	0.00	0.00	20,663.36	0.00
Summary											
Total Current	291,222,706.05	2,695,744.56	-355,044.13	2,340,700.43	218,141.93	46,771.29	-2,309.15	36,909.33	2.75	2,124,870.40	287,126,307.00
Total Delinquent	2,641,899,661.67	1,588,854.48	-82,178.23	1,506,676.25	-60,063.88	4,257.66	3,731.02	1,237.08	0.08	1,563,009.19	-517,130.33
Rollbacks		857,872.68	144,008.28	1,001,880.96	11,944.07	0.00	0.00	0.00	0.00	989,936.89	291,176.97
Taxing Unit Total	2,933,122,367.72	5,142,471.72	-293,214.08	4,849,257.64	170,022.12	51,028.95	1,421.87	38,146.41	2.83	4,677,816.48	286,900,353.64
Percentages											

% of Roll Collected - 2023 - 99.27%	Adjusted Original Roll -- $289,251,177.40	Current YTD Collected -- $287,126,307.00

Tax Collections Compared to Current Taxes Billed 8.09% Collected

All Collections Compared to Current Taxes Billed 9.83% Collected

Combined Collections (Collections + P&I Collected) -- 221,051.07

Cycles: **All**   Taxing Units: **Leander ISD...**   Deposit Date Range: **07/01/2024 to 07/31/2024**   Sorted By: **By Year, Descending**   Options: **Separate Rollbacks, Include**

Property Tax

336