

**WACO INDEPENDENT SCHOOL DISTRICT
REGULAR MEETING
WISD Conference Center
115 S 5th Street
Waco, Texas 76701**

Thursday, November 17, 2022 - 6:00 PM

A Regular Meeting of the Board of Trustees of Waco Independent School District will be held November 17, 2022, beginning at 6:00 PM in the WISD Conference Center, 115 S 5th Street, Waco, Texas.

The subjects to be discussed or considered or upon which any formal action may be taken are listed below. Items do not have to be taken in the same order as shown on this meeting notice/agenda.

Unless removed from the consent agenda, items identified within the consent agenda will be acted on at one time.

AGENDA

1. **Call to Order**
2. **Public Comments on Agenda Items**
3. **Moment of Silence and Pledge of Allegiance**
4. **Special Recognitions**
 - 4.A. Pledge Leaders
 - 4.B. Principal Leadership Institute
 - 4.C. Community Partner Award
5. **Superintendent's Report**
 - 5.A. G.W. Carver Student Ambassadors
 - 5.B. Elementary Design Student Engagement Sessions
 - 5.C. PEIMS Snapshot Data
6. **Information Items/Reports**
 - 6.A. Monthly Financial Reports for the Period Ended September 30, 2022
 - 6.B. Monthly Financial Reports for the Period Ended October 31, 2022
7. **Consent Agenda: Consider and Take Appropriate Action**
 - 7.A. Amendments to the 2022-2023 Budget
 - 7.B. Bid Award for Educational Consulting, Professional Development, and Other Student-Based Contracted Services
 - 7.C. Bid Award for Maintenance Supplies, Equipment, and Services
 - 7.D. Bid Award for Temporary Labor Services
 - 7.E. Bid Renewal for Fire Alarm Repairs and Security & Fire Alarm Monitoring Services
 - 7.F. Purchases over \$50,000 under Pre-Existing Bid, Purchasing Cooperative, or Allowed Professional Services

- 7.G. Allowance Expenditure Authorization to Address Equipment Costs Related to the Construction of G.W. Carver Middle School
- 7.H. Campus Targeted Improvement Plans
- 7.I. Second Reading and Adoption of Board Policy DEC(LOCAL)
- 7.J. Board of Trustee Meeting Minutes
 - 7.J.1. Regular Meeting - October 27, 2022
- 8. **Consider, Discuss and Take Appropriate Action Regarding the Award of Contract to CORE Construction, Inc. for Tennyson Middle School**
Presenter: Gloria Barrera
- 9. **Review and Discuss the Opportunity Culture Program**
Presenter: Dr. Josie Gutierrez
- 10. **Announcements**
- 11. **Consideration of Personnel**
 - 11.A. Deliberate the Appointment, Employment, Evaluation, Reassignment, Duties, Discipline, or Dismissal of a Public Officer or Employee
 - 11.B. Hear a Complaint or Charge Against an Officer or Employee
- 12. **Adjournment**

Waco Independent School District
Board of Trustees Meeting Agenda Item

Date: November 17, 2022

Contact Person: Alice Jauregui

RE: Special Recognitions

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Background Information:

Pledge Leaders

Each month, one campus selects two students to lead the Pledge of Allegiance at the regular business meeting of the Waco ISD Board of Trustees. For the month of November, Elise Rangel and Chris Sanchez from Hillcrest PDS Elementary were selected for this honor.

Principal Leadership Institute

Region 12 has created a Principal Leadership Institute to enable campus principals, assistant principals, and district leaders to increase alignment, focus, commitment to excellence, and continuous improvement while building network opportunities with other leaders throughout the region. The program was created to strengthen leadership capacity in:

Connecting theory to practice

Discovering new methods for improving individual, group, and school performance

Strategies for fostering a positive school culture, valuing diversity, and communicating effectively with stakeholders

Proven techniques for increasing personal growth and improving relationships with colleagues and staff

Organizational processes that improve the learning and life of your students

Principals who attended the Region 12 Leadership Series that began in June 2022 were eligible to apply for the institute, and district administration qualified for the institute with a participating principal.

As part of the institute, participants will travel to Dallas and Boston to engage in classroom observations, leadership learning experiences, and conversations to explore a campus-based problem of practice. All expenses, including hotel, meals, and domestic travel during the ESC selected travel events are provided by the service center at no cost to attendees. Both the Dallas and the Boston learning experiences will include campus visits and observations, including time to converse and ask questions of campus leaders.

The following Waco ISD leaders were chosen by Region 12 to participate in the Principal Leadership Institute:

Krystal Collier
Cari Detlefsen
Lauren Fraser
Pedro Hernandez
Sharina Hubbard

Becky Kersh
Karmen Logan
Erin Lange
Dr. Keonna White

Community Partner Award

Each month, Waco ISD recognizes a community partner making a difference for students with the Waco ISD Award for Outstanding Community Partners. The recognition celebrates the theme for the 2022-2023 school year “Lead from the Heart” and acknowledges the impact that our community partners make in the lives of our students and staff.

In November, the district is recognizing the Waco Rotary for the great contributions they bestow on Waco ISD. Here to accept the award is Waco Rotary Executive Director Katherine Logue.

The Waco Rotary works with Waco ISD in various ways including recognizing one senior from each high school for the Youth Citizenship Award that focuses on community service. They select one female and one male high school student from the district for the Rotary Youth Leadership Award (RYLA). These students attend a one-week camp with other RYLA winners from various high schools that focuses on developing leadership skills, and connecting with each other.

The Waco Rotary recently partnered with GWAHCA on a literacy project by donating \$2700 to purchase 160 books focused on various healthcare topics for the GWAHCA library. Rotarians with a background in the healthcare field also plan to speak with GWAHCA students to discuss the importance of literacy in the workplace.

Fiscal Implications:

None

Administration Recommendations:

For discussion only

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: November 17, 2022

Contact Person: Sheryl Davis

RE: Monthly Financial Reports for the Period Ended September 30, 2022

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Background Information:

Attached are the compiled September monthly financial reports for the following:

- General Fund
- Food Service Fund
- Debt Service Fund
- Internal Services Fund

These interim financial statements have been prepared utilizing data generated from the automated financial system and do not include any information related to other special revenue funds, capital projects funds, or trust and agency funds. Balances included in the report are unaudited and may change as a result of final year end closing entries and audit activities.

Fiscal Implications:

None.

Administrative Recommendations:

The Administration recommends that the Board of Trustees accept the monthly financial reports for the period ended September 30, 2022, as presented.



**Waco Independent School
District
Business & Support Services**

Sheryl Davis
Chief Finance Officer

P.O. Box 27, Waco, Texas 76703
Phone: 254-755-9440

November 10, 2022

Board of Trustees
Waco Independent School District
Waco, Texas

The accompanying balance sheets, statements of revenues, expenditures and changes in fund balance, and encumbrances and expenditures by fund, function and object for the month ending September 30, 2022 have been compiled for the General Fund, Food Service Fund, Debt Service Fund, and Internal Services Fund. Final cash reconciliation procedures and financial audit activities may result in additional adjustments to the September financial statements. These preliminary financial reports are prepared utilizing the following assumptions:

- Revenue: Recorded on a cash basis with adjustments to accrual basis made at August 31, 2023.
- Expenditure: Totals on the "Statement of Revenues, Expenditures and Changes in Fund Balance" include expenditures occurring during the interim period reported. Balances will be adjusted to accrual basis at August 31, 2023. Outstanding encumbrances are included on the "Encumbrances and Expenditures by Fund, Function, and Object" schedule, only.
- Beginning Fund Balance: Represents August 31, 2022 unaudited ending fund balance.

I have not performed an audit or review of these financial statements. Please do not hesitate to call if you have any questions or need further assistance.

Sheryl Davis
Chief Finance Officer

Waco Independent School District
BALANCE SHEET
GENERAL FUND
As of September 30, 2022

ASSETS

| | | |
|--|----|------------|
| Cash and Temporary Investments | \$ | 68,060,116 |
| Property Taxes Receivable, Net of Allowance of \$2,167,519 | | 655,211 |
| Due from Other Governments | | 76,897 |
| Accrued Interest | | 141,698 |
| Due from Other Funds | | 28,770,762 |
| Other Receivables | | 84,033 |
| Inventories | | 354,340 |
| Deferred Expenditures | | 10,921 |
| | | 10,921 |
| Total Assets | \$ | 98,153,978 |

LIABILITIES

| | | |
|--|----|------------|
| Accounts Payable | \$ | 2,652,023 |
| Other Current Liabilities | | 29,191 |
| Payroll Withholdings and Contributions Payable | | 1,332,456 |
| Accrued Wages Payable | | 7,425,208 |
| Due to Other Funds | | 25,909,985 |
| Due to Other Governments | | (174) |
| Unearned Revenue | | 4,740,809 |
| | | 4,740,809 |
| Total Liabilities | \$ | 42,089,498 |

DEFERRED INFLOWS OF RESOURCES

| | | |
|---------------------------------------|----|---------|
| Unavailable Revenues - Property Taxes | \$ | 655,211 |
| | | 655,211 |
| Total Deferred Inflows of Resources | \$ | 655,211 |

FUND BALANCES

| | | |
|-------------------------------------|----|------------|
| Nonspendable Fund Balance | \$ | 354,340 |
| Restricted Fund Balance | | 2,386,835 |
| Committed Fund Balance | | 3,953,492 |
| Unassigned Fund Balance | | 48,714,602 |
| | | 48,714,602 |
| Total Fund Balances | \$ | 55,409,269 |
| Total Liabilities and Fund Balances | \$ | 98,153,978 |

Waco Independent School District
STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET AND ACTUAL
For the Period Ended September 30, 2022

| GENERAL FUND | | | | | | | | | |
|--|-------------------|-------------------|-------------------|------------|------------------------|------------|---|--------------------------------|--------------------------------|
| | Adopted Budget | Amended Budget | (Memo) Monthly | | (Memo) Year-to-Date | | Difference- Amended Budget to YTD Actual | CY YTD As % of Budget | PY YTD As % of Budget |
| | | | Current | Prior Year | Current | Prior Year | | | |
| | | | 9/30/2022 | 9/30/2021 | 9/30/2022 | 9/30/2021 | | | |
| REVENUES | | | | | | | | | |
| LOCAL SOURCES | | | | | | | | | |
| 5710 Local Property Taxes | \$ 81,805,900 | 81,805,900 | 199,642 | (121,631) | 199,642 | (121,631) | (81,606,258) | 0.24% | -18.00% |
| 5720 Services to Other Districts | 74,000 | 74,000 | 8,397 | 7,781 | 8,397 | 7,781 | (65,603) | 11.35% | 8.63% |
| 5730 Tuition & Fees | 193,000 | 193,000 | 32,136 | 5,720 | 32,136 | 5,720 | (160,864) | 16.65% | 6.73% |
| 5740 Other Local Revenue | 468,300 | 468,300 | 44,085 | 13,302 | 44,085 | 13,302 | (424,215) | 9.41% | 25.00% |
| 5750 Extracurricular Activities | 390,400 | 390,400 | 68,583 | 81,220 | 68,583 | 81,220 | (321,817) | 17.57% | 36.75% |
| 5760 Intermediate Source (C.E.D.) | 1,000,000 | 1,000,000 | - | - | - | - | (1,000,000) | 0.00% | 0.00% |
| Total Local Sources | \$ 83,931,600 | 83,931,600 | 352,843 | (13,608) | 352,843 | (13,608) | (83,578,757) | 0.42% | -2.00% |
| STATE SOURCES | | | | | | | | | |
| 5810 Per Capita & FSP Act | \$ 58,788,960 | 58,788,960 | 15,619,975 | 16,893,582 | 15,619,975 | 16,893,582 | (43,168,985) | 26.57% | 21.57% |
| 5830 Other State Program | 7,165,711 | 7,165,711 | 536,024 | 546,774 | 536,024 | 546,774 | (6,629,687) | 7.48% | 7.53% |
| Total State Sources | \$ 65,954,671 | 65,954,671 | 16,155,999 | 17,440,356 | 16,155,999 | 17,440,356 | (49,798,672) | 24.50% | 20.38% |
| FEDERAL SOURCES | | | | | | | | | |
| 5900 Federal Sources Revenue | 8,090,727 | 8,090,727 | 76,673 | 110,167 | 76,673 | 110,167 | (8,014,054) | 0.95% | 2.82% |
| Total Revenues | \$ 157,976,998 | 157,976,998 | 16,585,515 | 17,536,915 | 16,585,515 | 17,536,915 | (141,391,483) | 10.50% | 10.64% |
| EXPENDITURES | | | | | | | | | |
| 11 Instruction | \$ 88,908,434 | 88,890,807 | 8,566,963 | 10,445,121 | 8,566,963 | 10,445,121 | 80,323,844 | 9.64% | 11.60% |
| 12 Instructional Resources & Media | 558,313 | 558,313 | 45,008 | 215,042 | 45,008 | 215,042 | 513,305 | 8.06% | 20.34% |
| 13 Curriculum & Staff Development | 4,368,265 | 4,243,559 | 292,355 | 397,963 | 292,355 | 397,963 | 3,951,204 | 6.89% | 8.79% |
| 21 Instructional Leadership | 4,131,369 | 4,015,540 | 355,351 | 343,690 | 355,351 | 343,690 | 3,660,189 | 8.85% | 9.03% |
| 23 School Leadership | 10,144,781 | 10,184,202 | 977,871 | 943,003 | 977,871 | 943,003 | 9,206,331 | 9.60% | 9.24% |
| 31 Guidance, Counseling & Evaluation | 5,785,954 | 5,787,954 | 542,712 | 556,037 | 542,712 | 556,037 | 5,245,242 | 9.38% | 10.19% |
| 32 Social Work Services | 806,369 | 806,369 | 66,576 | 73,316 | 66,576 | 73,316 | 739,793 | 8.26% | 8.17% |
| 33 Health Services | 1,501,102 | 1,501,102 | 151,781 | 148,459 | 151,781 | 148,459 | 1,349,321 | 10.11% | 9.50% |
| 34 Student Transportation | 3,761,600 | 5,281,802 | 326,153 | 289,253 | 326,153 | 289,253 | 4,955,649 | 6.18% | 6.45% |
| 35 Food Services | - | - | - | - | - | - | - | 0.00% | 0.00% |
| 36 Extracurricular Activities | 5,686,449 | 5,764,230 | 682,434 | 579,397 | 682,434 | 579,397 | 5,081,796 | 11.84% | 10.41% |
| 41 General Administration | 7,323,927 | 7,427,983 | 746,808 | 605,596 | 746,808 | 605,596 | 6,681,175 | 10.05% | 8.83% |
| 51 Plant Maintenance & Operations | 17,617,917 | 19,853,811 | 2,212,253 | 2,034,895 | 2,212,253 | 2,034,895 | 17,641,558 | 11.14% | 10.13% |
| 52 Security & Monitoring Services | 2,765,386 | 2,844,852 | 279,009 | 227,280 | 279,009 | 227,280 | 2,565,843 | 9.81% | 7.94% |
| 53 Data Processing Services | 4,289,383 | 4,324,854 | 971,664 | 946,573 | 971,664 | 946,573 | 3,353,190 | 22.47% | 24.27% |
| 61 Community Services | 487,519 | 639,019 | 53,210 | 24,329 | 53,210 | 24,329 | 585,809 | 8.33% | 4.14% |
| 71 Debt Service | 345,000 | 345,000 | - | - | - | - | 345,000 | 0.00% | 0.00% |
| 81 Facilities Acquisition & Construction | - | 601,957 | - | 25,516 | - | 25,516 | 601,957 | 0.00% | 0.00% |
| 93 Shared Services Arrangements | 345,000 | 345,000 | - | - | - | - | 345,000 | 0.00% | 0.00% |
| 95 Juvenile Justice Program | 650,000 | 650,000 | 1,500 | 50,611 | 1,500 | 50,611 | 648,500 | 0.23% | 7.23% |
| 97 Payments to Tax Increment Fund | 25,000 | 25,000 | (28,434) | (66,362) | (28,434) | (66,362) | 53,434 | -113.74% | -1.02% |
| 99 Other Intergovernmental Charges | 808,424 | 808,424 | 194,376 | 138,698 | 194,376 | 138,698 | 614,048 | 24.04% | 16.91% |
| Total Expenditures | \$ 160,310,192 | 164,899,778 | 16,437,590 | 17,978,417 | 16,437,590 | 17,978,417 | 148,462,188 | 9.97% | 9.93% |
| Excess (Deficiency) of Revenues Over (Under) Expenditures | \$ (2,333,194) | (6,922,780) | 147,925 | (441,502) | 147,925 | (441,502) | 7,070,705 | | |
| OTHER FINANCING SOURCES (USES) | | | | | | | | | |
| 7900 Other Sources | - | - | - | - | - | - | - | | |
| 8900 Other Uses | (1,030,292) | (1,030,292) | - | - | - | - | (1,030,292) | | |
| Total Other Financing Source (Uses) | \$ (1,030,292) | (1,030,292) | - | - | - | - | (1,030,292) | | |
| Total Changes in Fund Balances | \$ (3,363,486) | (7,953,072) | 147,925 | (441,502) | 147,925 | (441,502) | 8,100,997 | | |
| Fund Balances, Beginning | 41,078,214 | 53,543,236 | | | 55,261,344 | 52,213,207 | 1,718,108 | | |
| Fund Balances, Ending | \$ 37,714,728 | 45,590,164 | | | 55,409,269 | 51,771,705 | 9,819,105 | | |

Waco Independent School District
EXPENDITURES AND ENCUMBERED FUNDS BY FUNCTION AND MAJOR OBJECT
GENERAL FUND
For the Period Ended September 30, 2022

| | | Payroll Costs <u>6100</u> | Purchased & Contracted Services <u>6200</u> | Supplies & Materials <u>6300</u> | Other Operating Costs <u>6400</u> | Debt Services <u>6500</u> | Capital Outlay <u>6600</u> | Total | (Memo) Total |
|---------------------------------------|---------------------------------------|---------------------------------|--|--|--|---------------------------------|----------------------------------|-------------------|-------------------|
| | | | | | | | | Year-to-Date | Year-to-Date |
| | | | | | | | | 9/30/2022 | 9/30/2021 |
| | | <u>6000</u> | <u>6000</u> | <u>6000</u> | <u>6000</u> | <u>6000</u> | <u>6000</u> | <u>6000</u> | <u>6000</u> |
| 11 | Instruction | \$ 8,102,275 | 228,556 | 599,434 | 133,653 | - | 5,465 | 9,069,383 | 11,325,831 |
| 12 | Instructional Resources & Media | 44,844 | 35,000 | 1,306 | 100 | - | - | 81,250 | 217,730 |
| 13 | Curriculum & Staff Development | 256,753 | 118,513 | 29,166 | 47,740 | - | - | 452,172 | 457,122 |
| 21 | Instructional Leadership | 301,366 | 113,137 | 22,403 | 92,770 | - | - | 529,676 | 429,189 |
| 23 | School Leadership | 933,810 | 18,548 | 50,316 | 17,697 | - | - | 1,020,371 | 979,889 |
| 31 | Guidance, Counseling & Evaluation | 518,256 | 82,350 | 8,823 | 3,443 | - | - | 612,872 | 590,695 |
| 32 | Social Work Services | 65,419 | 1,809 | 3,562 | 3,194 | - | - | 73,984 | 75,542 |
| 33 | Health Services | 150,986 | 20 | 11,613 | 20 | - | - | 162,639 | 156,857 |
| 34 | Student Transportation | - | 2,789,301 | 59,142 | 2,020 | - | 89,950 | 2,940,413 | 2,376,237 |
| 35 | Food Services | - | - | - | - | - | - | - | 38,290 |
| 36 | Co/Extracurricular Activities | 295,562 | 231,070 | 243,366 | 319,991 | - | 65,845 | 1,155,834 | 1,189,189 |
| 41 | General Administration | 445,025 | 338,044 | 107,271 | 207,783 | - | - | 1,098,123 | 957,945 |
| 51 | Plant Maintenance & Operations | 682,311 | 2,593,446 | 547,451 | 1,013,149 | - | 81,682 | 4,918,039 | 3,941,634 |
| 52 | Security & Monitoring Services | 150,361 | 287,468 | 97,061 | 1,825 | - | 74,338 | 611,053 | 751,279 |
| 53 | Data Processing Services | 161,019 | 213,892 | 909,033 | 7,613 | - | 79,764 | 1,371,321 | 1,087,325 |
| 61 | Community Services | 27,558 | 229,629 | 1,590 | 3,618 | - | - | 262,395 | 102,074 |
| 71 | Debt Service | - | - | - | - | - | - | - | - |
| 81 | Facilities Acquisition & Construction | - | - | - | - | - | 497,239 | 497,239 | 11,664,195 |
| 93 | Shared Services Arrangements | - | - | - | - | - | - | - | - |
| 95 | Juvenile Justice Program | - | - | - | 74,634 | - | - | 74,634 | 102,845 |
| 97 | Payments to Tax Increment Fund | - | - | - | (28,434) | - | - | (28,434) | (66,362) |
| 99 | Other Intergovernmental Charges | - | 194,376 | - | - | - | - | 194,376 | 138,698 |
| Total Expenditures & Encumbered Funds | | <u>\$ 12,135,545</u> | <u>7,475,159</u> | <u>2,691,537</u> | <u>1,900,816</u> | <u>-</u> | <u>894,283</u> | <u>25,097,340</u> | <u>36,516,204</u> |

Waco Independent School District
BALANCE SHEET
CHILD NUTRITION FUND
As of September 30, 2022

ASSETS

| | |
|--------------------------------|----------------------------|
| Cash and Temporary Investments | \$ 4,677,264 |
| Due from Other Governments | 2,127,320 |
| Accrued Interest | 4,139 |
| Due from Other Funds | <u>1,568,647</u> |
| Total Assets | <u><u>\$ 8,377,370</u></u> |

LIABILITIES

| | |
|-----------------------|----------------------------|
| Accounts Payable | \$ 481,154 |
| Accrued Wages Payable | 139,072 |
| Due to Other Funds | <u>1,752,363</u> |
| Total Liabilities | <u><u>\$ 2,372,589</u></u> |

FUND BALANCES

| | |
|-------------------------------------|----------------------------|
| Restricted Fund Balance | <u>\$ 6,004,781</u> |
| Total Fund Balances | <u><u>\$ 6,004,781</u></u> |
| Total Liabilities and Fund Balances | <u><u>\$ 8,377,370</u></u> |

Waco Independent School District
STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET AND ACTUAL
For the Period Ended September 30, 2022

CHILD NUTRITION FUND

| | Adopted Budget | Amended Budget | (Memo) | | (Memo) | | Difference- Amended Budget to YTD Actual | CY YTD As % of Budget | PY YTD As % of Budget |
|--|-------------------|-------------------|----------------------|-------------------------|----------------------|-------------------------|---|--------------------------------|--------------------------------|
| | | | Monthly | | Year-to-Date | | | | |
| | | | Current 9/30/2022 | Prior Year 9/30/2021 | Current 9/30/2022 | Prior Year 9/30/2021 | | | |
| REVENUES | | | | | | | | | |
| LOCAL SOURCES | | | | | | | | | |
| 5740 Other Local Revenue | \$ 32,000 | 32,000 | (9,767) | 239 | (9,767) | 239 | (41,767) | -30.52% | 0.96% |
| 5750 Extracurricular Activities | 403,000 | 403,000 | 58,945 | 59,355 | 58,945 | 59,355 | (344,055) | 14.63% | 14.73% |
| Total Local Sources | \$ 435,000 | 435,000 | 49,178 | 59,594 | 49,178 | 59,594 | (385,822) | 11.31% | 13.93% |
| STATE SOURCES | | | | | | | | | |
| 5820 Other State Program (TEA) | \$ - | - | - | - | - | - | - | 0.00% | 0.00% |
| Total State Sources | \$ - | - | - | - | - | - | - | 0.00% | 0.00% |
| FEDERAL SOURCES | | | | | | | | | |
| 5900 Federal Sources Revenue | \$ 9,485,099 | 9,573,543 | 1,172,378 | 1,165,217 | 1,172,378 | 1,165,217 | (8,401,165) | 12.25% | 12.75% |
| Total Revenues | \$ 9,920,099 | 10,008,543 | 1,221,556 | 1,224,811 | 1,221,556 | 1,224,811 | (8,786,987) | 12.21% | 12.80% |
| EXPENDITURES | | | | | | | | | |
| 35 Food Services | \$ 10,978,538 | 12,686,159 | 893,061 | 1,042,215 | 893,061 | 1,042,215 | 11,793,098 | 7.04% | 9.50% |
| Total Expenditures | \$ 10,978,538 | 12,686,159 | 893,061 | 1,042,215 | 893,061 | 1,042,215 | 11,793,098 | 7.04% | 9.50% |
| Excess (Deficiency) of Revenues Over (Under) Expenditures | \$ (1,058,439) | (2,677,616) | 328,495 | 182,596 | 328,495 | 182,596 | 3,006,111 | | |
| OTHER FINANCING SOURCES (USES) | | | | | | | | | |
| 7900 Other Sources | - | - | - | - | - | - | - | | |
| 8900 Other Uses | - | - | - | - | - | - | - | | |
| Total Other Financing Sources (Uses) | \$ - | - | - | - | - | - | - | | |
| Total Changes in Fund Balances | \$ (1,058,439) | (2,677,616) | 328,495 | 182,596 | 328,495 | 182,596 | 3,006,111 | | |
| Fund Balances, Beginning | 2,758,147 | 4,689,546 | | | 5,676,286 | 4,689,546 | 986,740 | | |
| Fund Balances, Ending | \$ 1,699,708 | 2,011,930 | | | 6,004,781 | 4,872,142 | 3,992,851 | | |

Waco Independent School District
EXPENDITURES AND ENCUMBERED FUNDS BY FUNCTION AND MAJOR OBJECT
CHILD NUTRITION FUND
For the Period Ended September 30, 2022

| | | | | | | | <i>(Memo)</i> |
|---------------------------------------|-------------------|---------------------------------------|-------------------------|-----------------------------|-------------------|------------------------------------|------------------------------------|
| | Payroll Costs | Purchased & Contracted Services | Supplies & Materials | Other Operating Costs | Capital Outlay | Total Year-to-Date 9/30/2022 | Total Year-to-Date 9/30/2021 |
| | <u>6100</u> | <u>6200</u> | <u>6300</u> | <u>6400</u> | <u>6600</u> | <u>6000</u> | <u>6000</u> |
| 35 Food Services | \$ 300,089 | 738,755 | 396,521 | 1,650 | 1,592,730 | 3,029,745 | 2,573,135 |
| Total Expenditures & Encumbered Funds | <u>\$ 300,089</u> | <u>738,755</u> | <u>396,521</u> | <u>1,650</u> | <u>1,592,730</u> | <u>3,029,745</u> | <u>2,573,135</u> |

Waco Independent School District
BALANCE SHEET
DEBT SERVICE FUND
As of September 30, 2022

ASSETS

| | |
|--|----------------------------|
| Cash and Temporary Investments | \$ 4,103,987 |
| Property Taxes Receivable, Net of Allowance of \$480,335 | 143,226 |
| Due from Other Governments | <u>2,178</u> |
| Total Assets | <u><u>\$ 4,249,391</u></u> |

LIABILITIES

| | |
|--------------------------|-------------------------|
| Accounts Payable | \$ (258) |
| Due to Other Funds | 41,738 |
| Due to Other Governments | <u>(37)</u> |
| Total Liabilities | <u><u>\$ 41,443</u></u> |

DEFERRED INFLOWS OF RESOURCES

| | |
|---------------------------------------|--------------------------|
| Unavailable Revenues - Property Taxes | <u>\$ 143,226</u> |
| Total Deferred Inflows of Resources | <u><u>\$ 143,226</u></u> |

FUND BALANCES

| | |
|-------------------------------------|----------------------------|
| Restricted Fund Balance | <u>\$ 4,064,722</u> |
| Total Fund Balances | <u><u>\$ 4,064,722</u></u> |
| Total Liabilities and Fund Balances | <u><u>\$ 4,249,391</u></u> |

Waco Independent School District
STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET AND ACTUAL
For the Period Ended September 30, 2022

DEBT SERVICE FUND

| | Adopted Budget | Amended Budget | (Memo) Monthly | | (Memo) Year-to-Date | | Difference- Amended Budget to YTD Actual | CY YTD As % of Budget | PY YTD As % of Budget |
|--|-------------------|-------------------|-------------------|------------|------------------------|------------|---|--------------------------------|--------------------------------|
| | | | Current | Prior Year | Current | Prior Year | | | |
| | | | 9/30/2022 | 9/30/2021 | 9/30/2022 | 9/30/2021 | | | |
| REVENUES | | | | | | | | | |
| LOCAL SOURCES | | | | | | | | | |
| 5710 Local Property Taxes | \$ 24,654,348 | 24,654,348 | 42,852 | (25,497) | 42,852 | (25,497) | (24,611,496) | 0.17% | -0.17% |
| 5740 Other Local Revenue | 25,000 | 25,000 | 995 | 292 | 995 | 292 | (24,005) | 3.98% | 3.00% |
| Total Local Sources | \$ 24,679,348 | 24,679,348 | 43,847 | (25,205) | 43,847 | (25,205) | (24,635,501) | 0.18% | -0.16% |
| STATE SOURCES | | | | | | | | | |
| 5820 Other State Program (TEA) | \$ 221,700 | 221,700 | - | - | - | - | (221,700) | 0.00% | 0.00% |
| Total State Sources | \$ 221,700 | 221,700 | - | - | - | - | (221,700) | 0.00% | 0.00% |
| Total Revenues | \$ 24,901,048 | 24,901,048 | 43,847 | (25,205) | 43,847 | (25,205) | (24,857,201) | 0.18% | -0.16% |
| EXPENDITURES | | | | | | | | | |
| 71 Debt Service | \$ 16,206,517 | 16,206,517 | 750 | 1,050 | 750 | 1,050 | 16,205,767 | 0.00% | 0.01% |
| 97 Payments to Tax Increment Fund | 1,070,729 | 1,470,729 | (5,891) | (400) | (5,891) | (400) | 1,476,620 | -0.40% | -0.04% |
| Total Expenditures | \$ 17,277,246 | 17,677,246 | (5,141) | 650 | (5,141) | 650 | 17,682,387 | -0.03% | 0.00% |
| Excess (Deficiency) of Revenues Over (Under) Expenditures | \$ 7,623,802 | 7,223,802 | 48,988 | (25,855) | 48,988 | (25,855) | (7,174,814) | | |
| OTHER FINANCING SOURCES (USES) | | | | | | | | | |
| 7900 Other Sources | - | - | - | - | - | - | - | | |
| 8900 Other Uses | - | - | - | - | - | - | - | | |
| Total Other Financing Source (Uses) | \$ - | - | - | - | - | - | - | | |
| Total Changes in Fund Balances | \$ 7,623,802 | 7,223,802 | 48,988 | (25,855) | 48,988 | (25,855) | (7,174,814) | | |
| Fund Balances, Beginning | 4,816,349 | 4,866,235 | | | 4,015,734 | 4,866,235 | (850,501) | | |
| Fund Balances, Ending | \$ 12,440,151 | 12,090,037 | | | 4,064,722 | 4,840,380 | (8,025,315) | | |

Waco Independent School District
Statement of Net Position
Proprietary Fund
As of September 30, 2022

| | Governmental Activities ----- Internal Service Fund |
|---------------------------|---|
| Assets | |
| Current assets: | |
| Due from other funds | \$ 4,140,630 |
| Other receivables | 250,170 |
| Total Assets | \$ 4,390,800 |
| Liabilities | |
| Current liabilities: | |
| Accounts payable | \$ 161,031 |
| Other current liabilities | 946,477 |
| Health claims payable | 0 |
| Due to other funds | 139,533 |
| Total current liabilities | \$ 1,247,041 |
| Total liabilities | \$ 1,247,041 |
| Net position | |
| Unrestricted net position | \$ 3,143,759 |
| Total net position | \$ 4,390,800 |

Waco Independent School District
Statement of Revenues, Expenses, and Changes in Net Position
Budget and Actual
For the Period Ended September 30, 2022

Proprietary Fund
Governmental Activities - Internal Service Fund

| | Budget | (Memo) | | (Memo) | | Difference Budget to Current Year-to-Date | CY YTD As % of Budget | PY YTD As % of Budget |
|-----------------------------|----------------------|----------------------|-------------------------|----------------------|-------------------------|--|--------------------------------|--------------------------------|
| | | Monthly | | Year-to-Date | | | | |
| | | Current 9/30/2022 | Prior Year 9/30/2021 | Current 9/30/2022 | Prior Year 9/30/2021 | | | |
| Operating revenues: | | | | | | | | |
| Employee contributions: | | | | | | | | |
| Group health | \$ 3,034,000 | 278,404 | 253,358 | 278,404 | 253,358 | (2,755,596) | 9.18% | 8.35% |
| Assessments to other funds: | | | | | | | | |
| Group health | 9,800,000 | 760,556 | 756,370 | 760,556 | 756,370 | (9,039,444) | 7.76% | 7.72% |
| Unemployment | 155,000 | 9,456 | 19,707 | 9,456 | 19,707 | (145,544) | 6.10% | 12.71% |
| Workers compensation | 230,000 | 29,427 | 20,407 | 29,427 | 20,407 | (200,573) | 12.79% | 8.87% |
| Prescription drug rebates | 860,000 | - | - | - | - | (860,000) | 0.00% | 0.00% |
| Insurance recovery | - | - | - | - | - | - | 0.00% | 0.00% |
| Total operating revenues | <u>\$ 14,079,000</u> | <u>1,077,843</u> | <u>1,049,842</u> | <u>1,077,843</u> | <u>1,049,842</u> | <u>(13,001,157)</u> | <u>7.66%</u> | <u>7.46%</u> |
| Operating expenses: | | | | | | | | |
| Administrative fees | \$ 1,539,900 | 191,699 | 214,054 | 191,699 | 214,054 | 1,348,201 | 12.45% | 13.90% |
| Claims expense: | | | | | | | | |
| Medical claims | 7,153,600 | 395,598 | 512,740 | 395,598 | 512,740 | 6,758,002 | 5.53% | 7.17% |
| Prescription drug claims | 3,926,200 | 224,278 | 227,519 | 224,278 | 227,519 | 3,701,922 | 5.71% | 5.79% |
| Unemployment | 185,000 | - | - | - | - | 185,000 | 0.00% | 0.00% |
| Workers compensation | 265,000 | 620 | 10,688 | 620 | 10,688 | 264,380 | 0.23% | 4.03% |
| Stop-loss insurance | 1,625,000 | 108,417 | 132,714 | 108,417 | 132,714 | 1,516,583 | 6.67% | 8.17% |
| Wellness Program | 54,000 | 5,705 | - | 5,705 | - | 48,295 | 10.56% | 0.00% |
| Total operating expenses | <u>\$ 14,748,700</u> | <u>926,317</u> | <u>1,097,715</u> | <u>926,317</u> | <u>1,097,715</u> | <u>13,822,383</u> | <u>6.28%</u> | <u>7.44%</u> |
| Change in net position | \$ (669,700) | <u>151,526</u> | <u>(47,873)</u> | <u>151,526</u> | <u>(47,873)</u> | <u>821,226</u> | | |
| Net position: | | | | | | | | |
| Net position, beginning | \$ 3,564,375 | | | 2,992,233 | 3,564,375 | (572,142) | | |
| Net position, ending | <u>\$ 2,894,675</u> | | | <u>3,143,759</u> | <u>3,516,502</u> | <u>249,084</u> | | |

Waco Independent School District
Statement of Cash Flows
For the Period Ended September 30, 2022

Proprietary Fund

| | Governmental Activities Internal Service Fund |
|---|--|
| Cash flows from operating activities: | |
| Cash received from employee contributions | \$ 278,404 |
| Cash received from assessments to other funds | 647,913 |
| Cash received from prescription drug rebates | - |
| Cash received from insurance recoveries | - |
| Cash payments for claims | (620,496) |
| Cash payments for stop loss premiums | (108,417) |
| Cash payments for professional and contracted services | (191,699) |
| Cash payments for wellness program | (5,705) |
| Net cash provided by operating activities | \$ - |
| Net increase in cash and cash equivalents | \$ - |
| Cash and cash equivalents at beginning of year | - |
| Cash and cash equivalents at end of year | \$ - |
| Reconciliation of operating income to net cash provided by operating activities: | |
| Operating gain | \$ 151,526 |
| Effects of increases and decreases in current assets and liabilities: | |
| Decrease in receivables | (220,018) |
| Increase in accounts payable | 74,699 |
| Increase in current liabilities | 52,741 |
| Increase in liabilities | 186,962 |
| Decrease in claims liability | (245,910) |
| Net cash provided by operating activities | \$ - |

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: November 17, 2022

Contact Person: Sheryl Davis

RE: Monthly Financial Reports for the Period Ended October 31, 2022

=====

Background Information:

Attached are the compiled October monthly financial reports for the following:

- General Fund
- Food Service Fund
- Debt Service Fund
- Internal Services Fund

These interim financial statements have been prepared utilizing data generated from the automated financial system and do not include any information related to other special revenue funds, capital projects funds, or trust and agency funds. Balances included in the report are unaudited and may change as a result of final year end closing entries and audit activities.

Fiscal Implications:

None.

Administrative Recommendations:

The Administration recommends that the Board of Trustees accept the monthly financial reports for the period ended October 31, 2022, as presented.



**Waco Independent School
District
Business & Support Services**

Sheryl Davis
Chief Finance Officer

P.O. Box 27, Waco, Texas 76703
Phone: 254-755-9440

November 10, 2022

Board of Trustees
Waco Independent School District
Waco, Texas

The accompanying balance sheets, statements of revenues, expenditures and changes in fund balance, and encumbrances and expenditures by fund, function and object for the month ending October 31, 2022 have been compiled for the General Fund, Food Service Fund, Debt Service Fund, and Internal Services Fund. Final cash reconciliation procedures and financial audit activities may result in additional adjustments to the October financial statements. These preliminary financial reports are prepared utilizing the following assumptions:

- Revenue: Recorded on a cash basis with adjustments to accrual basis made at August 31, 2023.
- Expenditure: Totals on the "Statement of Revenues, Expenditures and Changes in Fund Balance" include expenditures occurring during the interim period reported. Balances will be adjusted to accrual basis at August 31, 2023. Outstanding encumbrances are included on the "Encumbrances and Expenditures by Fund, Function, and Object" schedule, only.
- Beginning Fund Balance: Represents August 31, 2022 unaudited ending fund balance.

I have not performed an audit or review of these financial statements. Please do not hesitate to call if you have any questions or need further assistance.

Sheryl Davis
Chief Finance Officer

Comparison of Fiscal Year 2022-2023 Revenues and Expenditures to Previous Fiscal Year as of October 31, 2022

Variations in revenues and expenditures as compared to the previous year are primarily due to the cyclical nature of budgetary receipts and expenditures. The larger variances are explained in this summary.

General Fund

Revenues:

5710 Local Property Taxes – Collections as of the end of October have decreased \$271,913 from last year. The decrease is due, in part, to the compression of the Maintenance and Operations tax rate from \$1.0244 to \$0.9429 per \$100 of assessed value. Although the District collected \$2.4 million of the newly levied 2022 taxes, adjustments to prior years' taxes due totaled \$198,136 on settlements of outstanding value appeals.

5730 Tuition and Fees – Current year revenue reflects an increase of \$31,266 over last year.

5740 Other Local Revenue – Revenues have increased \$150,321 over last year. This is primarily attributable to an increase in earnings on investments of \$184,206 offset by a reduction in pass-through collections for properties in the Tax Increment Reinvestment Zones of \$52,013.

5810 Per Capita and Foundation School Program Revenue – Revenue has decreased \$2.8 million from last year. Revenue reflects near final settlement payments due to the Texas Education Agency for the 2021-2022 fiscal year.

Functional Expenditures:

Expenditures in the functional categories appear to be consistent with last year's spending pattern with the exceptions shown below.

11 Instruction – The decrease of \$2.1 million is primarily due to the reduction in staff due to enrollment losses as well as the elimination of instructional aides to accommodate salary increases. Additionally, approximately \$860,000 in salaries and benefits for dyslexia specialists have been picked up by ESSER funds. While this change in funding sources was implemented during 2021-2022, it had not yet occurred for October 2021 reporting. It is planned that ESSER funds will continue to pay for those salaries for the next two fiscal years.

12 Instructional Resources & Media – Expenditures have decreased \$212,014. This is a result of professional librarian and instruction media staff being funded through federal stimulus grants with an accompanying reduction of library aides in the general fund.

34 Student Transportation – The increase in expenditures of \$69,124 is due to a slight increase in the number of extracurricular trips as well as fewer disruptions of regular home-to-school routes due to bus driver vacancies.

52 Security and Monitoring Services – The \$51,180 increase in expenditures is due to the receipt of one of the remaining two vehicles ordered in the summer of 2021.

61 Community Services – The 76.9% increase in expenditures results from timing differences in the payment Communities in Schools' invoices. At this time last year no payments had been made.

81 Facilities Acquisition and Construction – Expenditures have decreased \$2.4 million due to the completion of the Paul Tyson Stadium project in 2021-2022.

95 Juvenile Justice Program – The decrease in expenditures of \$49,111 is due to a timing difference in the payments to the McLennan County Challenge Academy. Staff is investigating why no payments have been made at this time.

99 Other Intergovernmental Charges – Payments to the McLennan County Appraisal District have increased \$55,678 over last year. This increase is due to a refund in 2022 to all taxing entities for overpayments in that year. The District's share of the Appraisal District's budget for 2022-2023 will result in an increase in cost of 3%.

Food Service Fund

Revenues:

5740 Other Local Revenues – The reduction in other local revenues in the current year is due to the recording of a loss in net asset value (NAV) for a prior year investment. With the increase in interest rates, a number of investments have decreased in market value. Most of these have matured or will mature shortly and are being reinvested at higher rates.

5750 Extracurricular Activities – Revenues generated through adult meals and catering have increased \$51,534 over last year.

5900 Federal Sources Revenue – Federal reimbursements for meals have decreased \$152,176 from last year. While the percentage of students participating has increased slightly over last year's slow start, enrollments are down. Additionally, as a participant in the Community Eligibility Program, where all of our students are eligible for free meals, the District's percentage of reimbursement is based on direct certification from enrollment in other need-based programs for low-income students, such as SNAP, TANF, Medicaid, children in foster care or identified as homeless, migrant, or eligible for state-sponsored pre-kindergarten programs, as of April 1st. The District will only be reimbursed at 95% for the 2022-2023 school year.

Functional Expenditures:

Expenditures in the functional categories appear to be consistent with last year's spending pattern with the exceptions shown below.

35 Food Services – Expenditures have decreased \$195,268 from last year. Most of the underexpenditure is due to timing of food and non-food orders. Staffing vacancies are still significant, running at almost 30%.

Debt Service Fund

Revenues:

5710 Local Property Taxes – Property tax collections at the end of October have increased \$128,750 in comparison to last year. The additional collections are due to valuation increases as well as an increase in the Interest and Sinking tax rate from \$0.22024 to \$0.298969 per \$100 of valuation.

Functional Expenditures:

Expenditures in the functional categories appear to be consistent with last year’s spending pattern with the exceptions shown below.

97 Payments to Tax Increment Fund – Expenditures have decreased \$11,902 from last year. This is due to refunds of taxes for properties located in the Tax Increment Reinvestment Zones.

Proprietary Fund – Governmental Activities – Internal Service Fund

The District utilizes an Internal Services Fund to account for its fully-insured group health insurance plan as well as its partially self-insured workers’ compensation and unemployment coverages. Internal service funds are utilized to account for the financing of goods or services provided by one organizational unit of the school district to other organizational units. It essentially facilitates the allocation of costs to all funding sources.

Operating revenues and operating expenses have been included in a detail designed to provide relevant information. Revenues from District contributions (assessments to other funds) are distinguished from revenues from employee contributions to health insurance. Expenses detail claims payments, administrative fees, and stop-loss or excess insurance costs.

As of October 31, 2022, revenues exceeded expenditures by \$15,823, an improvement of \$392,254 over last year. The improvement is due to the increase in contribution rates for health insurance that was effective January 1, 2022. The following chart reflects net operations for the various programs accounted for in the fund:

| Program | Revenues | Expenditures | Net |
|---------------------------|-----------------|---------------------|------------|
| Group Health Insurance | \$ 2,374,047 | \$ 2,315,550 | \$ 58,497 |
| Unemployment Compensation | 18,860 | 3,052 | 15,808 |
| Workers’ Compensation | 58,925 | 103,894 | (44,969) |
| Wellness Programs* | 0 | 13,513 | (13,513) |
| Total | \$ 2,451,832 | \$ 2,436,009 | \$ 15,823 |

*Under the terms of the agreement with Blue Cross-Blue Shield, the District receives an annual claims credit of \$150,000 to use for wellness programs.

Unemployment shows an expenditure of \$3,052 for the year. This amount is net of credits of \$2,174 due to claims audits on individuals.

While workers’ compensation claims expenditures have decreased \$10,067 over last year.

Reserves for estimated incurred-but-not-reported (IBNR) claims for the fully self-funded health insurance plan totaled \$675,169 for medical claims and \$46,395 for prescription drugs, at August 31, 2022. Additionally, reserves for the estimated allocated loss adjustment expense (ALAE) for the partially self-funded workers’ compensation plan totaled \$300,617. The unaudited beginning net position at September 1, 2022 was \$2,992,233.

Waco Independent School District
BALANCE SHEET
GENERAL FUND
As of October 31, 2022

ASSETS

| | | |
|--|----|-------------------|
| Cash and Temporary Investments | \$ | 69,202,525 |
| Property Taxes Receivable, Net of Allowance of \$2,167,519 | | 655,211 |
| Due from Other Governments | | 76,898 |
| Accrued Interest | | 177,654 |
| Due from Other Funds | | 10,399,058 |
| Other Receivables | | 30,598 |
| Inventories | | 311,217 |
| Deferred Expenditures | | 5,421 |
| Total Assets | \$ | <u>80,858,582</u> |

LIABILITIES

| | | |
|--|----|-------------------|
| Accounts Payable | \$ | 1,247,747 |
| Other Current Liabilities | | 29,191 |
| Payroll Withholdings and Contributions Payable | | 2,573,061 |
| Accrued Wages Payable | | 9,123,687 |
| Due to Other Funds | | 4,878,715 |
| Due to Other Governments | | (174) |
| Unearned Revenue | | 4,740,809 |
| Total Liabilities | \$ | <u>22,593,036</u> |

DEFERRED INFLOWS OF RESOURCES

| | | |
|---------------------------------------|----|----------------|
| Unavailable Revenues - Property Taxes | \$ | <u>655,211</u> |
| Total Deferred Inflows of Resources | \$ | <u>655,211</u> |

FUND BALANCES

| | | |
|-------------------------------------|----|-------------------|
| Nonspendable Fund Balance | \$ | 311,217 |
| Restricted Fund Balance | | 2,011,708 |
| Committed Fund Balance | | 3,842,678 |
| Unassigned Fund Balance | | 51,444,732 |
| Total Fund Balances | \$ | <u>57,610,335</u> |
| Total Liabilities and Fund Balances | \$ | <u>80,858,582</u> |

Waco Independent School District
STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET AND ACTUAL
For the Period Ended October 31, 2022

| | GENERAL FUND | | | | | | Difference- Amended Budget to YTD Actual | CY YTD As % of Budget | PY YTD As % of Budget |
|--|-------------------|-------------------|-----------------------|--------------------------|------------------------|--------------------------|---|--------------------------------|--------------------------------|
| | Adopted Budget | Amended Budget | (Memo) Monthly | | (Memo) Year-to-Date | | | | |
| | | | Current 10/31/2022 | Prior Year 10/31/2021 | Current 10/31/2022 | Prior Year 10/31/2021 | | | |
| REVENUES | | | | | | | | | |
| LOCAL SOURCES | | | | | | | | | |
| 5710 Local Property Taxes | \$ 81,805,900 | 81,805,900 | 1,893,546 | 2,486,733 | 2,093,188 | 2,365,101 | (79,712,712) | 2.56% | 3.40% |
| 5720 Services to Other Districts | 74,000 | 74,000 | 8,058 | 7,489 | 16,455 | 15,270 | (57,545) | 22.24% | 16.93% |
| 5730 Tuition & Fees | 193,000 | 193,000 | 4,851 | - | 36,986 | 5,720 | (156,014) | 19.16% | 6.73% |
| 5740 Other Local Revenue | 468,300 | 468,300 | 144,676 | 25,137 | 188,761 | 38,440 | (279,539) | 40.31% | 0.72% |
| 5750 Extracurricular Activities | 390,400 | 390,400 | 38,792 | - | 107,376 | 81,220 | (283,024) | 27.50% | 36.75% |
| 5760 Intermediate Source (C.E.D.) | 1,000,000 | 1,000,000 | - | - | - | - | (1,000,000) | 0.00% | 0.00% |
| Total Local Sources | \$ 83,931,600 | 83,931,600 | 2,089,923 | 2,519,359 | 2,442,766 | 2,505,751 | (81,488,834) | 2.91% | 3.33% |
| STATE SOURCES | | | | | | | | | |
| 5810 Per Capita & FSP Act | \$ 58,788,960 | 58,788,960 | 12,813,673 | 14,355,629 | 28,433,648 | 31,249,211 | (30,355,312) | 48.37% | 39.90% |
| 5830 Other State Program | 7,165,711 | 7,165,711 | 530,779 | 586,205 | 1,066,803 | 1,132,979 | (6,098,908) | 14.89% | 15.60% |
| Total State Sources | \$ 65,954,671 | 65,954,671 | 13,344,452 | 14,941,834 | 29,500,451 | 32,382,190 | (36,454,220) | 44.73% | 37.84% |
| FEDERAL SOURCES | | | | | | | | | |
| 5900 Federal Sources Revenue | 8,090,727 | 8,090,727 | 73,930 | 44,732 | 150,603 | 154,900 | (7,940,124) | 1.86% | 3.96% |
| Total Revenues | \$ 157,976,998 | 157,976,998 | 15,508,305 | 17,505,925 | 32,093,820 | 35,042,841 | (125,883,178) | 20.32% | 21.27% |
| EXPENDITURES | | | | | | | | | |
| 11 Instruction | \$ 88,908,434 | 89,080,807 | 7,951,086 | 8,206,493 | 16,518,049 | 18,651,614 | 72,562,758 | 18.54% | 20.71% |
| 12 Instructional Resources & Media | 558,313 | 558,313 | 40,574 | 82,554 | 85,582 | 297,596 | 472,731 | 15.33% | 28.15% |
| 13 Curriculum & Staff Development | 4,368,265 | 4,273,559 | 341,935 | 321,427 | 634,290 | 719,389 | 3,639,269 | 14.84% | 15.88% |
| 21 Instructional Leadership | 4,131,369 | 4,028,540 | 315,246 | 299,913 | 670,597 | 643,603 | 3,357,943 | 16.65% | 17.52% |
| 23 School Leadership | 10,144,781 | 10,326,329 | 938,692 | 919,458 | 1,916,563 | 1,862,461 | 8,409,766 | 18.56% | 18.25% |
| 31 Guidance, Counseling & Evaluation | 5,785,954 | 5,787,954 | 507,897 | 504,852 | 1,050,608 | 1,060,888 | 4,737,346 | 18.15% | 19.45% |
| 32 Social Work Services | 806,369 | 806,369 | 63,927 | 69,706 | 130,503 | 143,022 | 675,866 | 16.18% | 15.93% |
| 33 Health Services | 1,501,102 | 1,501,102 | 143,270 | 141,577 | 295,051 | 290,036 | 1,206,051 | 19.66% | 18.56% |
| 34 Student Transportation | 3,761,600 | 5,281,802 | 293,238 | 261,014 | 619,391 | 550,267 | 4,662,411 | 11.73% | 12.26% |
| 35 Food Services | - | - | - | - | - | - | - | 0.00% | 0.00% |
| 36 Extracurricular Activities | 5,686,449 | 5,764,230 | 439,972 | 487,570 | 1,122,406 | 1,066,967 | 4,641,824 | 19.47% | 19.17% |
| 41 General Administration | 7,323,927 | 7,427,983 | 491,953 | 544,352 | 1,238,761 | 1,149,948 | 6,189,222 | 16.68% | 16.48% |
| 51 Plant Maintenance & Operations | 17,617,917 | 19,853,811 | 1,087,307 | 1,346,490 | 3,299,560 | 3,381,385 | 16,554,251 | 16.62% | 16.83% |
| 52 Security & Monitoring Services | 2,765,386 | 2,844,852 | 211,620 | 212,169 | 490,629 | 439,449 | 2,354,223 | 17.25% | 15.36% |
| 53 Data Processing Services | 4,289,383 | 4,324,854 | 442,700 | 374,812 | 1,414,364 | 1,321,385 | 2,910,490 | 32.70% | 33.88% |
| 61 Community Services | 487,519 | 639,019 | 50,732 | 34,428 | 103,943 | 58,757 | 535,076 | 16.27% | 9.79% |
| 71 Debt Service | 345,000 | 345,000 | - | - | - | - | 345,000 | 0.00% | 0.00% |
| 81 Facilities Acquisition & Construction | - | 601,957 | - | 2,395,577 | - | 2,421,094 | 601,957 | 0.00% | 0.00% |
| 93 Shared Services Arrangements | 345,000 | 345,000 | - | - | - | - | 345,000 | 0.00% | 0.00% |
| 95 Juvenile Justice Program | 650,000 | 650,000 | - | - | 1,500 | 50,611 | 648,500 | 0.23% | 7.23% |
| 97 Payments to Tax Increment Fund | 25,000 | 25,000 | (12,910) | 12,742 | (41,344) | (53,619) | 66,344 | -165.38% | -0.82% |
| 99 Other Intergovernmental Charges | 808,424 | 808,424 | - | - | 194,376 | 138,698 | 614,048 | 24.04% | 16.91% |
| Total Expenditures | \$ 160,310,192 | 165,274,905 | 13,307,239 | 16,215,134 | 29,744,829 | 34,193,551 | 135,530,076 | 18.00% | 18.46% |
| Excess (Deficiency) of Revenues Over (Under) Expenditures | \$ (2,333,194) | (7,297,907) | 2,201,066 | 1,290,791 | 2,348,991 | 849,290 | 9,646,898 | | |
| OTHER FINANCING SOURCES (USES) | | | | | | | | | |
| 7900 Other Sources | - | - | - | - | - | - | - | | |
| 8900 Other Uses | (1,030,292) | (1,030,292) | - | - | - | - | (1,030,292) | | |
| Total Other Financing Source (Uses) | \$ (1,030,292) | (1,030,292) | - | - | - | - | (1,030,292) | | |
| Total Changes in Fund Balances | \$ (3,363,486) | (8,328,199) | 2,201,066 | 1,290,791 | 2,348,991 | 849,290 | 10,677,190 | | |
| Fund Balances, Beginning | 41,078,214 | 53,543,236 | | | 55,261,344 | 52,213,207 | 1,718,108 | | |
| Fund Balances, Ending | \$ 37,714,728 | 45,215,037 | | | 57,610,335 | 53,062,497 | 12,395,298 | | |

Waco Independent School District
EXPENDITURES AND ENCUMBERED FUNDS BY FUNCTION AND MAJOR OBJECT
GENERAL FUND
For the Period Ended October 31, 2022

| | | | | | | | | <i>(Memo)</i> | |
|---------------------------------------|---------------------------------------|---------------|-------------|------------|-----------|----------|---------|---------------|--------------|
| | | Payroll | Purchased & | Supplies & | Other | Debt | Capital | Total | Total |
| | | Costs | Contracted | Materials | Operating | Services | Outlay | Year-to-Date | Year-to-Date |
| | | 6100 | 6200 | 6300 | 6400 | 6500 | 6600 | 10/31/2022 | 10/31/2021 |
| | | 6000 | 6000 | 6000 | 6000 | 6000 | 6000 | 6000 | 6000 |
| 11 | Instruction | \$ 15,834,723 | 266,454 | 763,961 | 153,404 | - | 5,465 | 17,024,007 | 19,532,324 |
| 12 | Instructional Resources & Media | 84,616 | 35,145 | 2,518 | 100 | - | - | 122,379 | 300,284 |
| 13 | Curriculum & Staff Development | 500,986 | 201,231 | 37,902 | 54,016 | - | - | 794,135 | 786,135 |
| 21 | Instructional Leadership | 585,662 | 124,759 | 29,805 | 102,921 | - | - | 843,147 | 729,167 |
| 23 | School Leadership | 1,842,930 | 25,382 | 65,898 | 25,552 | - | - | 1,959,762 | 1,899,346 |
| 31 | Guidance, Counseling & Evaluation | 1,008,848 | 96,615 | 9,276 | 6,283 | - | - | 1,121,022 | 1,095,546 |
| 32 | Social Work Services | 128,790 | 1,809 | 3,737 | 3,200 | - | - | 137,536 | 145,248 |
| 33 | Health Services | 292,292 | 20 | 13,213 | 384 | - | - | 305,909 | 298,434 |
| 34 | Student Transportation | - | 3,037,244 | 104,437 | 2,020 | - | 89,950 | 3,233,651 | 2,637,251 |
| 35 | Food Services | - | - | - | - | - | - | - | 38,290 |
| 36 | Co/Extracurricular Activities | 591,131 | 264,477 | 309,405 | 364,216 | - | 71,335 | 1,600,564 | 1,676,760 |
| 41 | General Administration | 875,784 | 376,493 | 112,811 | 225,174 | - | - | 1,590,262 | 1,502,297 |
| 51 | Plant Maintenance & Operations | 1,314,025 | 2,952,016 | 688,206 | 1,018,725 | - | 81,682 | 6,054,654 | 5,287,744 |
| 52 | Security & Monitoring Services | 309,623 | 322,815 | 113,960 | 2,021 | - | 74,338 | 822,757 | 963,448 |
| 53 | Data Processing Services | 304,961 | 241,574 | 1,178,388 | 9,334 | - | 79,764 | 1,814,021 | 1,462,136 |
| 61 | Community Services | 54,307 | 253,486 | 1,716 | 3,618 | - | - | 313,127 | 136,502 |
| 71 | Debt Service | - | - | - | - | - | - | - | - |
| 81 | Facilities Acquisition & Construction | - | - | - | - | - | 497,239 | 497,239 | 14,059,772 |
| 93 | Shared Services Arrangements | - | - | - | - | - | - | - | - |
| 95 | Juvenile Justice Program | - | - | - | 74,634 | - | - | 74,634 | 102,845 |
| 97 | Payments to Tax Increment Fund | - | - | - | (41,344) | - | - | (41,344) | (53,619) |
| 99 | Other Intergovernmental Charges | - | 194,376 | - | - | - | - | 194,376 | 138,698 |
| Total Expenditures & Encumbered Funds | | \$ 23,728,678 | 8,393,896 | 3,435,233 | 2,004,258 | - | 899,773 | 38,461,838 | 52,738,608 |

Waco Independent School District
BALANCE SHEET
CHILD NUTRITION FUND
As of October 31, 2022

ASSETS

| | |
|--------------------------------|---------------------|
| Cash and Temporary Investments | \$ 4,817,548 |
| Due from Other Governments | 2,279,457 |
| Accrued Interest | 7,120 |
| Due from Other Funds | - |
| Total Assets | <u>\$ 7,104,125</u> |

LIABILITIES

| | |
|-----------------------|-------------------|
| Accounts Payable | \$ 468,549 |
| Accrued Wages Payable | 180,007 |
| Due to Other Funds | 143,996 |
| Total Liabilities | <u>\$ 792,552</u> |

FUND BALANCES

| | |
|-------------------------------------|---------------------|
| Restricted Fund Balance | <u>\$ 6,311,573</u> |
| Total Fund Balances | <u>\$ 6,311,573</u> |
| Total Liabilities and Fund Balances | <u>\$ 7,104,125</u> |

Waco Independent School District
STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET AND ACTUAL
For the Period Ended October 31, 2022

CHILD NUTRITION FUND

| | Adopted Budget | Amended Budget | (Memo) | | (Memo) | | Difference- Amended Budget to YTD Actual | CY YTD As % of Budget | PY YTD As % of Budget |
|--|-------------------|-------------------|-----------------------|--------------------------|-----------------------|--------------------------|---|--------------------------------|--------------------------------|
| | | | Monthly | | Year-to-Date | | | | |
| | | | Current 10/31/2022 | Prior Year 10/31/2021 | Current 10/31/2022 | Prior Year 10/31/2021 | | | |
| REVENUES | | | | | | | | | |
| LOCAL SOURCES | | | | | | | | | |
| 5740 Other Local Revenue | \$ 32,000 | 32,000 | 4,646 | 247 | (5,121) | 486 | (37,121) | -16.00% | 1.94% |
| 5750 Extracurricular Activities | 403,000 | 403,000 | 51,944 | - | 110,889 | 59,355 | (292,111) | 27.52% | 14.73% |
| Total Local Sources | \$ 435,000 | 435,000 | 56,590 | 247 | 105,768 | 59,841 | (329,232) | 24.31% | 13.98% |
| STATE SOURCES | | | | | | | | | |
| 5820 Other State Program (TEA) | \$ - | - | - | - | - | - | - | 0.00% | 0.00% |
| Total State Sources | \$ - | - | - | - | - | - | - | 0.00% | 0.00% |
| FEDERAL SOURCES | | | | | | | | | |
| 5900 Federal Sources Revenue | \$ 9,485,099 | 9,573,543 | 1,058,172 | 1,217,509 | 2,230,550 | 2,382,726 | (7,342,993) | 23.30% | 26.07% |
| Total Revenues | \$ 9,920,099 | 10,008,543 | 1,114,762 | 1,217,756 | 2,336,318 | 2,442,567 | (7,672,225) | 23.34% | 25.53% |
| EXPENDITURES | | | | | | | | | |
| 35 Food Services | \$ 10,978,538 | 12,686,159 | 807,971 | 854,084 | 1,701,031 | 1,896,299 | 10,985,128 | 13.41% | 17.29% |
| Total Expenditures | \$ 10,978,538 | 12,686,159 | 807,971 | 854,084 | 1,701,031 | 1,896,299 | 10,985,128 | 13.41% | 17.29% |
| Excess (Deficiency) of Revenues Over (Under) Expenditures | \$ (1,058,439) | (2,677,616) | 306,791 | 363,672 | 635,287 | 546,268 | 3,312,903 | | |
| OTHER FINANCING SOURCES (USES) | | | | | | | | | |
| 7900 Other Sources | - | - | - | - | - | - | - | | |
| 8900 Other Uses | - | - | - | - | - | - | - | | |
| Total Other Financing Sources (Uses) | \$ - | - | - | - | - | - | - | | |
| Total Changes in Fund Balances | \$ (1,058,439) | (2,677,616) | 306,791 | 363,672 | 635,287 | 546,268 | 3,312,903 | | |
| Fund Balances, Beginning | 2,758,147 | 4,689,546 | | | 5,676,286 | 4,689,546 | 986,740 | | |
| Fund Balances, Ending | \$ 1,699,708 | 2,011,930 | | | 6,311,573 | 5,235,814 | 4,299,643 | | |

Waco Independent School District
EXPENDITURES AND ENCUMBERED FUNDS BY FUNCTION AND MAJOR OBJECT
CHILD NUTRITION FUND
For the Period Ended October 31, 2022

| | | | | | | | <i>(Memo)</i> |
|--|-------------------|---------------------------------------|-------------------------|-----------------------------|-------------------|-------------------------------------|-------------------------------------|
| | Payroll Costs | Purchased & Contracted Services | Supplies & Materials | Other Operating Costs | Capital Outlay | Total Year-to-Date 10/31/2022 | Total Year-to-Date 10/31/2021 |
| | <u>6100</u> | <u>6200</u> | <u>6300</u> | <u>6400</u> | <u>6600</u> | <u>6000</u> | <u>6000</u> |
| 35 Food Services | \$ 591,142 | 1,126,674 | 432,078 | 1,829 | 1,686,043 | 3,837,766 | 3,427,219 |
| Total Expenditures & Encumbered Funds | <u>\$ 591,142</u> | <u>1,126,674</u> | <u>432,078</u> | <u>1,829</u> | <u>1,686,043</u> | <u>3,837,766</u> | <u>3,427,219</u> |

Waco Independent School District
BALANCE SHEET
DEBT SERVICE FUND
As of October 31, 2022

ASSETS

| | |
|--|---------------------|
| Cash and Temporary Investments | \$ 4,707,881 |
| Property Taxes Receivable, Net of Allowance of \$480,335 | 143,226 |
| Due from Other Governments | 2,178 |
| Due from Other Funds | <u>-</u> |
| Total Assets | <u>\$ 4,853,285</u> |

LIABILITIES

| | |
|--------------------------|------------------|
| Accounts Payable | \$ (400) |
| Due to Other Funds | 41,880 |
| Due to Other Governments | <u>(37)</u> |
| Total Liabilities | <u>\$ 41,443</u> |

DEFERRED INFLOWS OF RESOURCES

| | |
|---------------------------------------|-------------------|
| Unavailable Revenues - Property Taxes | <u>\$ 143,226</u> |
| Total Deferred Inflows of Resources | <u>\$ 143,226</u> |

FUND BALANCES

| | |
|-------------------------------------|---------------------|
| Restricted Fund Balance | <u>\$ 4,668,616</u> |
| Total Fund Balances | <u>\$ 4,668,616</u> |
| Total Liabilities and Fund Balances | <u>\$ 4,853,285</u> |

Waco Independent School District
STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET AND ACTUAL
For the Period Ended October 31, 2022

| DEBT SERVICE FUND | | | | | | | | | | |
|---------------------------------------|--|-----------------------|--------------------------|-----------------------|--------------------------|------------------|------------------|---|--------------------------------|--------------------------------|
| | | (Memo) | | | | (Memo) | | Difference- Amended Budget to YTD Actual | CY YTD As % of Budget | PY YTD As % of Budget |
| | | Monthly | | Year-to-Date | | | | | | |
| Adopted Budget | Amended Budget | Current 10/31/2022 | Prior Year 10/31/2021 | Current 10/31/2022 | Prior Year 10/31/2021 | | | | | |
| REVENUES | | | | | | | | | | |
| LOCAL SOURCES | | | | | | | | | | |
| 5710 | Local Property Taxes | \$ 24,654,348 | 24,654,348 | 594,534 | 534,133 | 637,385 | 508,635 | (24,016,963) | 2.59% | 3.42% |
| 5740 | Other Local Revenue | 25,000 | 25,000 | 6,583 | 4,362 | 7,579 | 4,654 | (17,421) | 30.32% | 0.44% |
| | Total Local Sources | <u>\$ 24,679,348</u> | <u>24,679,348</u> | <u>601,117</u> | <u>538,495</u> | <u>644,964</u> | <u>513,289</u> | <u>(24,034,384)</u> | <u>2.61%</u> | <u>3.22%</u> |
| STATE SOURCES | | | | | | | | | | |
| 5820 | Other State Program (TEA) | \$ 221,700 | 221,700 | - | - | - | - | (221,700) | 0.00% | 0.00% |
| | Total State Sources | <u>\$ 221,700</u> | <u>221,700</u> | <u>-</u> | <u>-</u> | <u>-</u> | <u>-</u> | <u>(221,700)</u> | <u>0.00%</u> | <u>0.00%</u> |
| | Total Revenues | <u>\$ 24,901,048</u> | <u>24,901,048</u> | <u>601,117</u> | <u>538,495</u> | <u>644,964</u> | <u>513,289</u> | <u>(24,256,084)</u> | <u>2.59%</u> | <u>3.16%</u> |
| EXPENDITURES | | | | | | | | | | |
| 71 | Debt Service | \$ 16,206,517 | 16,206,517 | - | - | 750 | 1,050 | 16,205,767 | 0.00% | 0.01% |
| 97 | Payments to Tax Increment Fund | 1,070,729 | 1,470,729 | (2,777) | 3,633 | (8,668) | 3,234 | 1,479,397 | -0.59% | 0.30% |
| | Total Expenditures | <u>\$ 17,277,246</u> | <u>17,677,246</u> | <u>(2,777)</u> | <u>3,633</u> | <u>(7,918)</u> | <u>4,284</u> | <u>17,685,164</u> | <u>-0.04%</u> | <u>0.02%</u> |
| | Excess (Deficiency) of Revenues Over (Under) Expenditures | <u>\$ 7,623,802</u> | <u>7,223,802</u> | <u>603,894</u> | <u>534,862</u> | <u>652,882</u> | <u>509,005</u> | <u>(6,570,920)</u> | | |
| OTHER FINANCING SOURCES (USES) | | | | | | | | | | |
| 7900 | Other Sources | - | - | - | - | - | - | - | | |
| 8900 | Other Uses | - | - | - | - | - | - | - | | |
| | Total Other Financing Source (Uses) | <u>\$ -</u> | <u>-</u> | <u>-</u> | <u>-</u> | <u>-</u> | <u>-</u> | <u>-</u> | | |
| | Total Changes in Fund Balances | <u>\$ 7,623,802</u> | <u>7,223,802</u> | <u>603,894</u> | <u>534,862</u> | <u>652,882</u> | <u>509,005</u> | <u>(6,570,920)</u> | | |
| | Fund Balances, Beginning | <u>4,816,349</u> | <u>4,866,235</u> | | | <u>4,015,734</u> | <u>4,866,235</u> | <u>(850,501)</u> | | |
| | Fund Balances, Ending | <u>\$ 12,440,151</u> | <u>12,090,037</u> | | | <u>4,668,616</u> | <u>5,375,240</u> | <u>(7,421,421)</u> | | |

Waco Independent School District
Statement of Net Position
Proprietary Fund
As of October 31, 2022

| | Governmental Activities ----- Internal Service Fund |
|--------------------------------|---|
| Assets | |
| Current assets: | |
| Due from other funds | \$ 3,967,792 |
| Other receivables | 157,468 |
| Prepaid items-health insurance | - |
| Total Assets | \$ 4,125,260 |
| Liabilities | |
| Current liabilities: | |
| Accounts payable | \$ 94,558 |
| Other current liabilities | 1,022,646 |
| Health claims payable | 0 |
| Due to other funds | 0 |
| Total current liabilities | \$ 1,117,204 |
| Total liabilities | \$ 1,117,204 |
| Net position | |
| Unrestricted net position | \$ 3,008,056 |
| Total net position | \$ 4,125,260 |

Waco Independent School District
Statement of Revenues, Expenses, and Changes in Net Position
Budget and Actual
For the Period Ended October 31, 2022

Proprietary Fund
Governmental Activities - Internal Service Fund

| | Budget | (Memo) | | (Memo) | | Difference Budget to Current Year-to-Date | CY YTD As % of Budget | PY YTD As % of Budget |
|-----------------------------|----------------------|-----------------------|--------------------------|-----------------------|--------------------------|--|--------------------------------|--------------------------------|
| | | Monthly | | Year-to-Date | | | | |
| | | Current 10/31/2022 | Prior Year 10/31/2021 | Current 10/31/2022 | Prior Year 10/31/2021 | | | |
| Operating revenues: | | | | | | | | |
| Employee contributions: | | | | | | | | |
| Group health | \$ 3,631,100 | 283,883 | 257,159 | 562,287 | 510,518 | (3,068,813) | 15.49% | 16.83% |
| Assessments to other funds: | | | | | | | | |
| Group health | 10,236,500 | 1,051,204 | 753,945 | 1,811,760 | 1,510,315 | (8,424,740) | 17.70% | 15.41% |
| Unemployment | 112,000 | 9,404 | 19,408 | 18,860 | 39,115 | (93,140) | 16.84% | 25.24% |
| Workers compensation | 358,000 | 29,498 | 20,078 | 58,925 | 40,485 | (299,075) | 16.46% | 17.60% |
| Prescription drug rebates | 1,187,000 | - | - | - | - | (1,187,000) | 0.00% | 0.00% |
| Insurance recovery | - | - | - | - | - | - | 0.00% | 0.00% |
| Total operating revenues | <u>\$ 15,524,600</u> | <u>1,373,989</u> | <u>1,050,590</u> | <u>2,451,832</u> | <u>2,100,433</u> | <u>(13,072,768)</u> | <u>15.79%</u> | <u>14.92%</u> |
| Operating expenses: | | | | | | | | |
| Administrative fees | \$ 1,344,000 | 93,396 | 98,068 | 285,095 | 312,122 | 1,058,905 | 21.21% | 20.27% |
| Claims expense: | | | | | | | | |
| Medical claims | 9,431,000 | 892,273 | 929,104 | 1,287,872 | 1,441,844 | 8,143,128 | 13.66% | 20.16% |
| Prescription drug claims | 3,928,000 | 398,045 | 348,177 | 622,322 | 575,696 | 3,305,678 | 15.84% | 14.66% |
| Unemployment | 102,000 | 3,052 | - | 3,052 | - | 98,948 | 2.99% | 0.00% |
| Workers compensation | 260,000 | - | - | 621 | 10,688 | 259,379 | 0.24% | 4.03% |
| Stop-loss insurance | 1,739,000 | 115,117 | - | 223,534 | 132,714 | 1,515,466 | 12.85% | 8.17% |
| Wellness Program | 67,000 | 7,808 | 3,800 | 13,513 | 3,800 | 53,487 | 20.17% | 7.04% |
| Total operating expenses | <u>\$ 16,871,000</u> | <u>1,509,691</u> | <u>1,379,149</u> | <u>2,436,009</u> | <u>2,476,864</u> | <u>14,434,991</u> | <u>14.44%</u> | <u>16.79%</u> |
| Change in net position | \$ (1,346,400) | <u>(135,702)</u> | <u>(328,559)</u> | 15,823 | (376,431) | 1,362,223 | | |
| Net position: | | | | | | | | |
| Net position, beginning | \$ 3,187,944 | | | 2,992,233 | 3,564,375 | (195,711) | | |
| Net position, ending | <u>\$ 1,841,544</u> | | | <u>3,008,056</u> | <u>3,187,944</u> | <u>1,166,512</u> | | |

Waco Independent School District
Statement of Cash Flows
For the Period Ended October 31, 2022

Proprietary Fund

| | Governmental Activities Internal Service Fund |
|---|--|
| Cash flows from operating activities: | |
| Cash received from employee contributions | \$ 283,883 |
| Cash received from assessments to other funds | 1,225,808 |
| Cash payments for claims | (1,293,370) |
| Cash payments for stop loss premiums | (115,117) |
| Cash payments for professional and contracted services | (93,396) |
| Cash payments for wellness program | (7,808) |
| Net cash provided by operating activities | \$ - |
| Net increase in cash and cash equivalents | \$ - |
| Cash and cash equivalents at beginning of year | - |
| Cash and cash equivalents at end of year | \$ - |
| Reconciliation of operating income to net cash provided by operating activities: | |
| Operating loss | \$ (135,702) |
| Effects of increases and decreases in current assets and liabilities: | |
| Decrease in receivables | 126,006 |
| Decrease in accounts payable | (66,473) |
| Increase in current liabilities | 76,169 |
| Net cash provided by operating activities | \$ - |

Waco Independent School District
Board of Trustee Meeting Agenda Item

Date: November 17, 2022

Contact Person: Sheryl Davis

RE: Amendments to the 2022-2023 Budget

=====

Background Information:

The Texas Education Agency has established additional requirements for school district budget preparation. As part of these requirements, a school district must amend the official budget before exceeding a functional expenditure category, i.e., instruction, administration, etc., in the total district budget. Attached are copies of the proposed amendments to the Official Budget identifying details of the requests. The following summarizes the effect of these amendments by functional category.

Summary:

Amendment #011: University High School (Fund 199)

This amendment will realign funds from instruction contracted services and curriculum and instructional staff development for employee travel to community services contracted services and instructional materials and fees to correctly account for the Community in Schools contract and provide instruction materials and membership fees for the AVID program. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

| | | <u>TEA Revenue/Function Description</u> | |
|---------------------|-----------|---|---|
| Source of Funds: | \$ 30,774 | | Instruction, Curriculum & Instructional Staff Development |
| Use of Funds: | \$ 30,774 | | Instruction, Community Services |
| Fund Balance Effect | | None | |

Amendment #012: Waco High School (Fund 199)

This amendment will realign funds from instruction contracted services to community services contracted services to correctly account for the Community in Schools contract. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

| | | <u>TEA Revenue/Function Description</u> | |
|---------------------|-----------|---|--------------------|
| Source of Funds: | \$ 30,000 | | Instruction |
| Use of Funds: | \$ 30,000 | | Community Services |
| Fund Balance Effect | | None | |

Amendment #013: Districtwide (Fund 199)

This amendment will realign funds budgeted for instructional substitutes to cover substitutes for health services. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

| | | <u>TEA Revenue/Function Description</u> |
|---------------------|-------------|---|
| Source of Funds: | \$ 27,000 | Instruction |
| Use of Funds: | \$ 27,000 | Health Services |
| Fund Balance Effect | None | |

Amendment #014: Tennyson Middle School (Fund 199)

This amendment will realign funds budgeted for instructional contingencies to cover additional part-time assistance for school leadership and instructional staff development and teacher support contracted services at Tennyson Middle School. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

| | | <u>TEA Revenue/Function Description</u> |
|---------------------|-------------|--|
| Source of Funds: | \$ 44,598 | Instruction |
| Use of Funds: | \$ 44,598 | Curriculum & Instructional Staff Development, School Leadership |
| Fund Balance Effect | None | |

Amendment #015: Districtwide (Fund 199)

This amendment will place budget for payments to principals at campuses with returning teachers designated under the Teacher Incentive Allotment Program. Expenditures will be covered by the 10% of the funds generated under the Foundation School Program Teacher Incentive Allotment not required to be spent on teacher compensation. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

| | | <u>TEA Revenue/Function Description</u> |
|---------------------|-------------|---|
| Source of Funds: | \$ 9,570 | State Program Revenue |
| Use of Funds: | \$ 9,570 | School Leadership |
| Fund Balance Effect | None | |

Amendment #016: Waco ISD Police Department (Fund 199)

This amendment will realign funds budgeted for plant maintenance and operations contracted maintenance contingency to security and monitoring services contracted services to cover the increase in contracted security patrol services. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

| | | <u>TEA Revenue/Function Description</u> |
|---------------------|-------------|---|
| Source of Funds: | \$ 60,000 | Plant Maintenance & Operations |
| Use of Funds: | \$ 60,000 | Security & Monitoring Services |
| Fund Balance Effect | None | |

A copy of the amendments are attached for your review detailing line items to be adjusted.

Fiscal Implications:

The budget amendments have no impact on fund balance.

Administrative Recommendation(s):

The administration recommends that the Board of Trustees approve the budget amendments, as presented.

**WACO INDEPENDENT SCHOOL DISTRICT
AMENDMENT BUDGET FORM**

AMENDMENT # 013

CAMPUS OR DEPARTMENT: Districtwide

DATE: 11/17/2022

| BUDGET CODE | | | | | | | DESCRIPTION | A | B | C | D |
|-------------|-----|------|----|-----|-----|------|---|-----------------------|-------------------------|-------------------------------|-----------------------|
| FUND | FNC | OBJ | SO | ORG | PRG | LOPT | | CURRENT APPROPRIATION | CURRENT ACCOUNT BALANCE | REQUESTED INCREASE (DECREASE) | AMENDED APPROPRIATION |
| 199 | 33 | 6112 | 98 | 999 | 99 | 000 | Wages-Subs-Teachers/Other Professionals | - | - | 27,000 | 27,000 |
| 199 | 11 | 6112 | 98 | 999 | 99 | 000 | Wages-Subs-Teachers/Other Professionals | 100,000 | 100,000.00 | (27,000) | 73,000 |
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REASON FOR REQUEST: This amendment will realign funds budgeted for instructional substitutes to cover substitutes for health services.

BUDGET ADMINISTRATOR / _____


Chief Financial Officer

**WACO INDEPENDENT SCHOOL DISTRICT
AMENDMENT BUDGET FORM**

AMENDMENT # 014

CAMPUS OR DEPARTMENT: Tennyson Middle School

DATE: 11/17/2022

| BUDGET CODE | | | | | | | | A | B | C | D |
|-------------|-----|------|----|-----|-----|------|---|-----------------------|-------------------------|-------------------------------|-----------------------|
| FUND | FNC | OBJ | SO | ORG | PRG | LOPT | DESCRIPTION | CURRENT APPROPRIATION | CURRENT ACCOUNT BALANCE | REQUESTED INCREASE (DECREASE) | AMENDED APPROPRIATION |
| 199 | 23 | 6117 | 00 | 044 | 99 | 000 | Wages - Part-time Teachers/Other Prof | - | - | 32,000 | 32,000 |
| 199 | 23 | 6141 | 00 | 044 | 99 | 000 | Social Security/Medicare | 6,017 | 4,848.96 | 464 | 6,481 |
| 199 | 23 | 6143 | 00 | 044 | 99 | 000 | Workers' Compensation | 1,119 | 224.42 | 102 | 1,221 |
| 199 | 23 | 6145 | 00 | 044 | 99 | 000 | Unemployment Compensation | 232 | 81.93 | 32 | 264 |
| 199 | 13 | 6299 | 00 | 044 | 99 | 000 | Miscellaneous Contracted Services | 255 | 255.00 | 12,000 | 12,255 |
| 199 | 11 | 6499 | 98 | 999 | 99 | 000 | Miscellaneous Operating Costs-Contingency | 145,350 | 145,350.00 | (44,598) | 100,752 |
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REASON FOR REQUEST: Amend funds from instructional contingency to cover cost of additional school leadership and teacher support at Tennyson Middle School.

BUDGET ADMINISTRATOR / _____


_____ Chief Financial Officer

**WACO INDEPENDENT SCHOOL DISTRICT
AMENDMENT BUDGET FORM**

AMENDMENT # 015

CAMPUS OR DEPARTMENT: Districtwide

DATE: 11/17/2022

| BUDGET CODE | | | | | | | DESCRIPTION | A | B | C | D |
|-------------|-----|------|----|-----|-----|------|-------------------------------------|-----------------------|-------------------------|-------------------------------|-----------------------|
| FUND | FNC | OBJ | SO | ORG | PRG | LOPT | | CURRENT APPROPRIATION | CURRENT ACCOUNT BALANCE | REQUESTED INCREASE (DECREASE) | AMENDED APPROPRIATION |
| 199 | 23 | 6116 | 98 | 999 | 99 | 292 | Supplemental Stipend-Other Prof-TIA | - | - | 8,500 | 8,500 |
| 199 | 23 | 6141 | 98 | 999 | 99 | 292 | Social Security/Medicare-TIA | - | - | 130 | 130 |
| 199 | 23 | 6143 | 98 | 999 | 99 | 292 | Workers' Compensation-TIA | - | - | 30 | 30 |
| 199 | 23 | 6145 | 98 | 999 | 99 | 292 | Unemployment Compensation-TIA | - | - | 10 | 10 |
| 199 | 23 | 6146 | 98 | 999 | 99 | 292 | Teacher Retirement/TRS Care-TIA | - | - | 900 | 900 |
| 199 | 00 | 5812 | 00 | 000 | 00 | 292 | State Foundation School Pgm-TIA | - | - | (9,570) | (9,570) |
| | | | | | | | | | | | |
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REASON FOR REQUEST: To place budget for payments to principals at campuses with returning teachers designated under the Teacher Incentive Allotment Program.
Payments will be covered by the 10% of the funds generated under the Foundation School Program Teacher Incentive Allotment not required
to be spent on teacher compensation.

BUDGET ADMINISTRATOR /

Sheyl Davis
Chief Financial Officer

Waco Independent School District
Board of Trustee Meeting Agenda Item

Date: November 17, 2022

Contact Person: C. Eppel

RE: Bid Award for Educational Consulting, Professional Development, and Other Student-Based Contracted Services

=====

Background Information:

Request for Proposal, RFP # 21-1182, Educational Consulting, Professional Development, and Other Student-Based Contracted Services have been received for the purpose of creating a list of vendors which can service the District. We received five (3) responses during the past month. The recommended vendors will be added to our previously approved list of one hundred and seventy-one (186) responses.

Examples of the types of services covered under this RFP are:

- Academic Educational Consultant
- Professional/Staff Development Training
- Motivational or Professional Speaker
- Program Review/Recommendation Services
- Data/Statistical Analysis
- Curriculum Design
- Evaluator Services
- Judging Services
- Technology Analysis/Consultant
- Operations Analysis/Consultant
- Grant Evaluation Services
- Presentations/Programs for staff and students (e.g. authors)
- Marching Band/Drill/Cheer Design and Choreography (includes camps)
- Theatre Coaching Services
- Instructors for outside of the school day classes (art, photography, gardening, tennis, Zumba, etc.)
- Speaker(s) for Assembly Programs
- Other services deemed appropriate for this request

In an effort to create inclusivity with our consulting, professional development, and student-based contracted services vendors and in light of changes made in 2019 by the Texas Education Agency's, Financial Accountability Systems Resource Guide (FASRG) Module 5 – Purchasing, the Business Services Department has elected to utilize the Extended Period for Multiple Award Contracts as shown in the FASRG excerpt shows.

3.16.6 Limited Response Period versus Extended Period for Multiple Award Contracts

Normal procurement practices will allow solicitation responses to be submitted to the district within a limited, specific time period, usually two to three weeks. The district may want to review past policies to determine if a limited response time is in the best interest of the district and the needs of its end users.

Consideration may need to be given to have an extended opening for receiving responses.

- Limited Response Period. This choice is considered a normal, formal RFP. Examples include newspaper advertisements and awards made and limited to only the responders that submitted and awarded for the solicitation.
- Extended Response Period. This choice is more informal than a limited response period. The major difference is the date the responses are due. This method allows for responses to be accepted throughout an extended period such as the date of the contract award expiration and awards made periodically. Periodic board approval may also be required. For newspaper advertisements, our District will continue to publicize periodic republication through our website and continue to enlist the assistance of the three (3) Chamber of Commerce's, as received on this first solicitation. The advertisement will address concerns about transparency by announcing the solicitation to new readers even though the statutory requirements were met by the initial publication.

The intent for awarding additional vendors to this bid will be done on an as needed basis. Vendors submitting a response by the end of each month will be submitted for consideration at the next board meeting.

Fiscal Implications:

The cost of these items will be charged to the appropriate campus/department budget.

Administrative Recommendation(s):

The Administration recommends that the Board of Trustees approve the additional five (5) vendors for the Educational Consulting, Professional Development, and Other Student-Based Contracted Services bid, as presented.

RFP #21-1182 Educational Consulting, Professional Development, and Other Student-Based Contracted Services

Alicia Brummeler

Company Name: Alicia Brummeler
Street Address: 22 Quaker Path
City, State, Zip: Stony Brook, NY 11790
Contact Name: Alicia Brummeler
Contact Phone Number: 254-424-6735
Contact Email Address: aliciabrummeler@gmail.com
Category of Service Provided: Professional/Staff Development Training
Target Audience: K-12 Teachers
Description of Services: Provides two different workshops. The embodied classroom provides teachers classroom practices and rhythms that recognize students and teachers as whole persons. Soul-care for educators focuses on practices and habits that renew and recharge weary teachers.
Pricing: \$1,000 for two workshops, includes two presentations and one-on-one coaching with teachers. \$600 for half-day workshops. In addition, all travel-related expenses.

Capstone College and Career Advising LLC.

Company Name: Capstone College and Career Advising LLC.
Street Address: 3800 Paluxy Dr. Suite 200
City, State, Zip: Tyler, TX 75703
Contact Name: Jim Bell
Contact Phone Number: 903-747-3424 Ext. 1
Contact Email Address: jbell@capstoneadvising.com
Category of Service Provided: Curriculum Design
Target Audience: High School Students
Description of Services: College and career planning for High School students.
Pricing: One year subscription fee of \$1,500 with unlimited access from students for online resources.

GPR Ventures, LLC

Company Name: GPR Ventures, LLC.
Street Address: 27 Camden Oaks LN
City, State, Zip: Montgomery, TX 77356
Contact Name: Deborah D. Graham Contact
Phone Number: 281-705-3887
Contact Email Address: debdgraham@gmail.com
Category of Service Provided: Professional/Staff Development Training

Target Audience: Administrators, Teachers, Staff, and Students

Description of Services: Customized educational leadership training, staff development, PLC's, and workshops for teachers and staff; Coaching and mentoring for teachers and administrators; Student workshops and camps; Instructional modeling.

Pricing: Normal daily rate for one presenter: \$1,000-1500 with \$750 additional per presenter, if needed. Half day sessions: \$500-750 with 90 minute sessions: \$350-500. Fees are based on specific services provided which include materials, travel costs, reports, etc. (negotiable).

IDEA Reimagined Coaching and Consulting LLC

Company Name: IDEA Reimagined Coaching and Consulting LLC

Street Address: 11110 Boardwalk Drive, #10

City, State, Zip: Baton Rouge, LA 70816

Contact Name: Valentina White-Rideaux

Contact Phone Number: 225-910-3781

Contact Email Address: valentina@idea-reimagined.com

Category of Service Provided: Professional/Staff Development Training

Target Audience: K-12 Special Education Teachers

Description of Services: Provides professional development that addresses inclusion practices; logistically combining the expert content knowledge of general education teachers with the skills in implementing research based instructional adaptations that special education teachers possess. Provides professional learning experiences that include facilitated professional interactions, collaborative problem-solving, and community building to guide educators in increasing professional competence, confidence, and capacity in supporting the diverse learning needs of students in an inclusive setting. Package accommodates 20 teachers and consist of the following: 12 days of service include 4 days of coaching and performance feedback, 3 180-minute professional development sessions, 4 day 180-minute micro-teaching workshop series sessions, 1 Day in the Fall, 1 Day in the Spring, Wrap Up Meeting/Next Steps. Access to App IDEA: instructional resources and ongoing dissemination of relevant information.

Pricing: Onsite: 11 Days at \$2,147.00 per day= \$23,617.00. Virtual: \$18,893.00. App IDEA access: (Annual Membership) 20 at \$57.00= \$1,140.00. Digital Workbook/Manual: 20 at \$85.00= \$1,700.00

Virtac Learning Lab

Company Name: Virtac Learning Lab, LLC

Street Address: 319 Bald Eagle Way

City, State, Zip: Belcamp, MD 21017

Contact Name: Vanessa Brookins

Contact Phone Number: 512-914-1911

Contact Email Address: vbrookins16@gmail.com

Category of Service Provided: Professional/Staff Development Training

Target Audience: Teachers who work with Individual Education Plan (IEP) students

Description of Services: Lead consultant has 20 years of experience in public school education and has worked with Pre-K through 12 grade students, with and without an Individual Education Plan (IEP). Familiarity with student's IEP process and the services teachers are expected to provide in the classroom.

Pricing: All packages include travel, lodging, supplies, and materials. Package 1 (25 participants) \$11,000: 180 hours of training on SPED Rx process, and tracking and monitoring student's IEP goals toward progress. Package 2 (20 participants) \$18,000: 180 hours of training on SPED Rx process, record Keeping Electronic documents, analyze data and monitor student's progress toward IEP goals, 3 small group Check-ins (Zoom meet Q&A), 30 minutes Case Study Review, 3 Webinars (pre- recorded). Package 3 (15 participants) \$22,000: 180 hours of training on SPED Approach, record keeping electronic documents, analyze data and monitor student's progress toward IEP goals, and 3 small group Check-ins (zoom meet Q&A).

Waco Independent School District
Board of Trustee Meeting Agenda Item

Date: November 17, 2022

Contact Person: C. Eppel/G. Barrera

RE: Bid Award for Maintenance Supplies, Equipment, and Services

=====

Background Information:

Request for Proposal, RFP # 22-1229, Maintenance Supplies, Equipment, and Services have been received for the purpose of creating a list of vendors which can provide supplies, equipment, and services for the Facilities and Maintenance and Custodial Departments. We have received ninety (90) responses for this initial bid. We received two (2) additional vendors this past month and are attached for your consideration.

In an effort to allow for maximum participation with our Maintenance and Custodial vendors and in light of changes made in 2019 by the Texas Education Agency's, Financial Accountability Systems Resource Guide (FASRG) Module 5 Purchasing, the Business Services Department has elected to utilize the Extended Period for Multiple Award Contracts as shown in the FASRG excerpt shows.

3.16.6 Limited Response Period versus Extended Period for Multiple Award Contracts

Normal procurement practices will allow solicitation responses to be submitted to the district within a limited, specific time period, usually two to three weeks. The district may want to review past policies to determine if a limited response time is in the best interest of the district and the needs of its end users.

Consideration may need to be given to have an extended opening for receiving responses.

- Limited Response Period. This choice is considered a normal, formal RFP. Examples include newspaper advertisements and awards made and limited to only the responders that submitted and awarded for the solicitation.

- Extended Response Period. This choice is more informal than a limited response period. The major difference is the date the responses are due. This method allows for responses to be accepted throughout an extended period such as the date of the contract award expiration and awards made periodically. Periodic board approval may also be required. For newspaper advertisements, our District will continue to publicize periodic republication through our website and continue to enlist the assistance of the three (3) Chamber of Commerce's, as received on this first solicitation. The advertisement will address concerns about transparency by announcing the

solicitation to new readers even though the statutory requirements were met by the initial publication.

The intent for awarding additional vendors to this bid will be done on an as needed basis. Vendors submitting a response by the end of each month will be submitted for consideration at the next board meeting.

Fiscal Implications:

The cost of these items will be charged to the appropriate campus/department budget.

Administrative Recommendation(s):

The Administration recommends that the Board of Trustees approve the two (2) additional new vendors for the Maintenance Supplies, Equipment, and Services bid, as presented.

RFP # 22-1229
Maintenance Supplies, Equipment and Services
Vendor List for October

| Responding Supplier | City | State |
|--|-----------------|--------------|
| Grones Environmental Services | Waco | TX |
| Loop 340 Overhead Door (Sideline Enterprises, Inc.) | Waco | TX |
| Previously Awarded Vendors | City | State |
| A&H Refrigeration Co. Inc. | Waco | TX |
| A-1 Banner & Sign Co. Inc. | Waco | TX |
| A-1 Vacuum Center, Inc. | Conroe | TX |
| AAA Elevator Inspections | Austin | TX |
| Access Lift & Service Company, Inc. | Peaster | TX |
| Acme Architectural Hardware | College Station | TX |
| Air Flow Filter Service, Ltd | Waco | TX |
| Allen Glass Company | Hewitt | TX |
| ARC Abatement 1, Ltd. | Waco | TX |
| B F Hurley Mat Co, Inc. | LaGrange | GA |
| B&B Repair Shop | West | TX |
| Bain Paper Company | Waco | TX |
| Barnett Contracting, Inc. | Waco | TX |
| Batteries Plus Waco/Temple/Harker Heights (Glacierbeach) | Waco | TX |
| Belfor (Belfor USA Group, Inc.) | Waco | TX |
| Benchmark Signs | Weatherford | TX |
| Bill's Discount Tire Service (Maria G. Castanon-Vega) | Waco | TX |
| Bleacher Service Company (Gilbert D. Trevino) | Moody | TX |
| Brandt (The Brandt Companies, LLC.) | Waco | TX |
| Brem's Fencing LLC | Valley Mills | TX |
| Brewer Lock and Safe | Waco | TX |
| BUGSDOTCOM Termite and Pest | Waco | TX |
| Bullseye Glass (Bullseye Glass LLC,) | Waco | TX |
| Centex Carpet & Interiors | Waco | TX |
| CF Supply Inc | Waco | TX |
| Clarks Small Engine Repair | Lacy Lakeview | TX |
| Climatec, LLC | Austin | TX |
| Code-3 Fire & Safety Products | Waco | TX |
| Communication Concepts | Fort Worth | TX |
| Competitive Choice Inc. | Houston | TX |
| Complete Supply, Inc. | Dallas | TX |
| Core Controls | Dallas | TX |
| Dealers Electrical Supply | Waco | TX |
| DenaliCS (Denali Construction Services, LP) | Carrollton | TX |
| Dent Enterprises LLC | Desoto | TX |
| Diesel Power Supply Co. | Waco | TX |
| Encore Fence | Temple | TX |
| Environmental Concerns, Inc. | Waco | TX |
| EPIC Solar Control, LLC | McKinney | TX |
| Fairway Supply | Irving | TX |
| Firetrol Protection Systems (Heather Foster) | Austin | TX |

RFP # 22-1229
Maintenance Supplies, Equipment and Services
Vendor List for October

| Previously Awarded Vendors | City | State |
|---|----------------|-------|
| Fissco Supply (Frigelar North America DBA Fissco Supply) | Dallas | TX |
| Fitzgerald Lawnscafer Ltd. | Woodway | TX |
| Fort Worth Window Cleaning, Inc. | Haltom City | TX |
| Fred's Power Wash (Washer Power) | Waco | TX |
| Gene Ives Acoustic & Tile Co. | Waco | TX |
| Global Industrial (Global Equipment Co., Inc.) | Buford | GA |
| H. B. Blake Company | Hewitt | TX |
| HCS Inc. (MB Home Construction) | Waco | TX |
| Image Maker 4U, Inc. | Hughes Springs | TX |
| Independent Hardware Inc. | Philadelphia | PA |
| Interboro Packaging Corporation | Montgomery | NY |
| Intercon Environmental, Inc. | Mansfield | TX |
| Intermountain Lock & Security Supply | Salt Lake City | UT |
| J.K. Brown | Moody | TX |
| Justin Seed Company | Justin | TX |
| Landscape Supply (Waco Landscape Supply, LP) | Waco | TX |
| Lennox Industries (Lennox Industries Inc.) | Richardson | TX |
| Liftcrete Solutions (Green Foam Solutions, Inc.) | Waco | TX |
| Lonestar Chiller Systems (Lonestar Chiller Systems LLC) | Crawford | TX |
| Ludwig Saw and Tool Sharpening | Waco | TX |
| M.A.N.S Distributors Inc. | Carrollton | TX |
| Marks Plumbing Parts (John W Gasparini Inc.) | Fort Worth | TX |
| Morrison Supply Co. | Waco | TX |
| National Wholesale Supply Co. | Woodway | TX |
| P&E Mechanical Contractors, LLC | Waco | TX |
| Patriot Supply Company | Brady | TX |
| Perry Office Plus (Perry Office Products) | Temple | TX |
| Pye Barker Fire | Waco | TX |
| Richards Equipment Company | Waco | TX |
| Share Corporation | Milwaukee | WI |
| Sherwin Williams (The Sherwin Williams Company) | Waco | TX |
| Shiffler Equipment Sales, Inc. | Chardon | OH |
| Sims Plastics of Waco | Waco | TX |
| Smoot-Anderson Co., Inc. | Waco | TX |
| Solar Supply | Waco | TX |
| Southern Clean Pressure Washing (Michael Jackson) | Ferris | TX |
| Southwest Maintenance, LTD | Waco | TX |
| Starks Janitorial Services | Mesquite | TX |
| Sunrise Environmental LLC (Jessica L Marquesen) | Bridgeport | TX |
| SWS Concrete Contractor (Scott W Schreiber) | Waco | TX |
| T&G Chemical and Supply | Waco | TX |
| T.E.A.M. Solutions, Inc. (Texas Energy & Automation Management Solutions, Inc.) | Waco | TX |
| TJ's Professional Painting and Construction, LLC | Red Oak | TX |
| Trane | Fort Worth | TX |

RFP # 22-1229
Maintenance Supplies, Equipment and Services
Vendor List for October

| Previously Awarded Vendors | City | State |
|-----------------------------------|-------------|--------------|
| UniFirst Corporation | Hewitt | TX |
| United Refrigeration Inc. | Waco | TX |
| Virkim Inc. | Hewitt | TX |
| Winston Watercooler of Waco LTD | Waco | TX |
| Woodard Builders Supply Company | Fort Worth | TX |

Waco Independent School District
Board of Trustee Meeting Agenda Item

Date: November 17, 2022

Contact Person: C. Eppel/C. Reece

RE: Bid Award for Temporary Labor Services

=====

Background Information:

Request for Proposals, RFP # 22-1230, have been opened and evaluated for the purpose of awarding multiple vendors to provide temporary labor services in the areas of cafeteria, kitchen, custodial, and warehouse workers on an as needed basis. We received nine (9) responses for this service. After evaluating each response and understanding the number of temporary labor personnel needed to maintain our facilities with kitchen, custodial and warehouse workers, it was determined that a minimum of four (4) vendors could meet the District's needs and carry out the daily work schedule necessary for both the Child Nutrition Department and the Custodial Department.

The following vendors are being recommended for this bid award:

- Link Staffing
- Jack of All Trades
- Laine Federal Solutions, and
- LaneStaffing.

A bid tabulation along with a scoring worksheet is attached for your review.

This bid will expire November 30, 2023 with three (3) additional one (1) year renewal option.

Fiscal Implications:

The cost of this service will be charged to the appropriate departmental contracted services budget.

Administrative Recommendation(s):

The Administration recommends that the Board of Trustees approve the bid award for Temporary Labor Services to Link Staffing, Jack of All Trades, Laine Federal Solutions, and LaneStaffing, as presented.

RFP # 22-1230
Temporary Labor Services
Bid Tabulation

| 1 Kitchen Workers | |
|--|---------|
| Laine Federal Solutions | \$15.94 |
| Jack of All Trades (Jack of All Trades Personnel Services, Inc.) | \$16.24 |
| Link Staffing (Stafflink INC) | \$17.40 |
| RedCap Staffing (EP Employment Services LLC DBA) | \$18.76 |
| LaneStaffing, Inc. | \$19.80 |
| 22nd Century Technologies, Inc. | \$20.25 |
| Allcor Staffing Services | \$24.00 |
| StaffEZ of Texas | \$24.30 |
| Diskriter, Inc. | \$33.29 |
| | |
| 2 Cafeteria Workers | |
| LaneStaffing, Inc. | \$13.86 |
| Laine Federal Solutions | \$15.94 |
| Jack of All Trades (Jack of All Trades Personnel Services, Inc.) | \$16.24 |
| Link Staffing (Stafflink INC) | \$17.40 |
| RedCap Staffing (EP Employment Services LLC DBA) | \$18.76 |
| 22nd Century Technologies, Inc. | \$20.25 |
| Allcor Staffing Services | \$24.00 |
| StaffEZ of Texas | \$24.30 |
| Diskriter, Inc. | \$28.44 |
| | |
| 3 Custodial Workers | |
| LaneStaffing, Inc. | \$14.52 |
| Laine Federal Solutions | \$16.58 |
| Link Staffing (Stafflink INC) | \$17.40 |
| Jack of All Trades (Jack of All Trades Personnel Services, Inc.) | \$17.97 |
| RedCap Staffing (EP Employment Services LLC DBA) | \$18.96 |
| 22nd Century Technologies, Inc. | \$19.58 |
| StaffEZ of Texas | \$27.00 |
| Allcor Staffing Services | \$29.00 |
| Diskriter, Inc. | \$29.56 |
| | |
| 4 Warehouse Workers | |
| Laine Federal Solutions | \$17.21 |
| Jack of All Trades (Jack of All Trades Personnel Services, Inc.) | \$17.97 |
| LaneStaffing, Inc. | \$18.48 |
| RedCap Staffing (EP Employment Services LLC DBA) | \$18.97 |
| 22nd Century Technologies, Inc. | \$20.25 |
| Link Staffing (Stafflink INC) | \$20.30 |
| Allcor Staffing Services | \$24.00 |
| StaffEZ of Texas | \$27.00 |
| Diskriter, Inc. | \$34.78 |

Supplier Scoring Summary 22-1230 - Temporary Labor Services - Scoring Round

| Supplier | Rank | Score | Cost | Past Experience with the District | Past Experience with Waco ISD | Experience doing this type of Business | Experience doing this type of Business | Meets the District's staffing Needs | References | Based on External References |
|---------------------------------|------|--------------|--------------|-----------------------------------|-------------------------------|--|--|-------------------------------------|-------------|------------------------------|
| 54 | 100 | 40 | 5 | 20 | 20 | 15 | 15 | 15 | 15 | 15 |
| Link Staffing | 1 | 84.00 | 34 | 5 | 20 | 18 | 7 | 7 | 7 | 7 |
| Jack of All Trades | 2 | 81.00 | 36 | 5 | 20 | 12 | 8 | 8 | 8 | 8 |
| Laine Federal Solutions | 3 | 75.33 | 37 | 0 | 17 | 17 | 5 | 5 | 5 | 5 |
| LaneStaffing, Inc. | 4 | 75.33 | 37 | 0 | 17 | 17 | 5 | 5 | 5 | 5 |
| 22nd Century Technologies, Inc. | 5 | 71.00 | 31 | 0 | 20 | 13 | 7 | 7 | 7 | 7 |
| StaffEZ of Texas | 6 | 70.67 | 24 | 0 | 20 | 13 | 13 | 13 | 13 | 13 |
| RedCap Staffing | 7 | 63.00 | 33 | 0 | 13 | 12 | 5 | 5 | 5 | 5 |
| Diskriter, Inc. | 8 | 60.00 | 20 | 0 | 20 | 15 | 5 | 5 | 5 | 5 |
| Allcor Staffing Services | 9 | 56.67 | 25 | 0 | 13 | 13 | 5 | 5 | 5 | 5 |
| | | 70.78 | 30.78 | 1.11 | 17.78 | 14.44 | 6.67 | 6.67 | 6.67 | 6.67 |

Evaluation Criteria - Scoring Round

| Cost | |
|--|--|
| Buyer Entered? | Yes |
| Note Required? | None |
| Allowed Decimals: | 0 |
| Criteria Type | Entered Value |
| Max Score | 40 |
| Past Experience with the District | |
| Instructions | Any past experience = 5 points No past business - 0 points |
| Buyer Entered? | No |
| Note Required? | Optional |
| Allowed Decimals: | 0 |
| Score Choices | 0 - No Past Experience 5 - Past Experience |
| Experience doing this type of Business | |
| Instructions | 1-5 years in business = Fair 5 points 5-10 years in business = Good 10 points 10 or more years in business = Excellent 20 points |
| Buyer Entered? | No |
| Note Required? | Optional |
| Allowed Decimals: | 0 |
| Score Choices | 5 - Fair 10 - Good 20 - Excellent |
| Meets the District's Staffing Needs | |
| Description | Active and Available Applicants |
| Instructions | More than 30 applicants = Excellent 20 points 20 - 30 applicants = Good 15 points 10-20 applicants = Fair 10 points Less than 10 applicants = Poor 5 points |
| Buyer Entered? | No |
| Note Required? | Optional |
| Allowed Decimals: | 0 |
| Score Choices | 5 - Poor 10 - Fair 15 - Good 20 - Excellent |
| References | |
| Based on External References | |
| Instructions | 3-4 Positive References = Excellent 15 points 2-3 Positive Reference = Good 10 points 0-1 Positive References = Fair 5 points |
| Buyer Entered? | No |
| Note Required? | Optional |
| Allowed Decimals: | 0 |
| Score Choices | 5 - Fair 10 - Good 15 - Excellent |

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: November 17, 2022

Contact Person: C. Eppel/D. Williams

RE: Bid Renewal for Fire Alarm Repairs and Security & Fire Alarm Monitoring Services

=====

Background Information:

Request for Proposal, RFP # 21-1202, Fire Alarm Repairs, and Security & Fire Alarm Monitoring Services, has been previously opened for the purpose of awarding a contract to provide the Fire Alarm Repairs, as well as provide the Security & Fire Alarm Monitoring Services on a 24-hour, 7 day a week basis. We received two (2) proposals for this solicitation, Firetrol Protection Systems and Therrell Alarm Protection Service. After the proposals were evaluated by the Police Department, it was determined that Firetrol Protection System offered the best value to the District and therefore recommends Firetrol Protection System's contract be renewed. A bid tabulation is attached for your review.

The Police Department has been pleased with the services which they have received from Firetrol Protection Systems and therefore recommends exercising their option to renew this contract for an additional year.

This bid will expire November 30, 2023 with two (2) additional one (1) year renewal options.

Fiscal Implications:

The cost of this service will be charged to the appropriate contracted services budget.

Administrative Recommendation(s):

The Administration recommends that the Board of Trustees approve the bid renewal for Fire Alarm Repairs and Security & Fire Alarm Monitoring Services to Firetrol Protection System, as presented.

RFP # 21-1202
 Fire Alarm Repairs Security and Fire Alarm Monitoring
 Bid Tabulaton

| Pricing Description: | Firetrol | Therrell |
|--|-----------------|-----------------|
| Pricing - Security and Fire Monitoring | | |
| Price per Panel per month - Security | \$ 15.00 | \$ 22.50 |
| Price per Panel per month - Fire | \$ 40.00 | \$ 29.50 |
| | | |
| Pricing - Fire Alarm Repairs & Installation | | |
| Maximum Hourly Rate for Licensed Fire Alarm Technician | \$ 90.00 | \$ 75.00 |
| Maximum Hourly Rate for Fire Alarm Laborer | \$ 65.00 | \$ 60.00 |
| Materials Mark-up | 25.00% | 35.00% |
| | | |
| Annual Inspection | | |
| Annual Price to inspect all panels | \$ 17,650.00 | \$ 45,225.00 |
| Annual Monitoring Cost | \$ 21,180.00 | \$ 20,424.00 |
| | | |
| Estimated Annual Cost | \$ 38,830.00 | \$ 65,649.00 |

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: November 17, 2022

Contact Person: C. Eppel

RE: Purchases over \$50,000 Under Pre-Existing Bid, Purchasing Cooperative, or Allowed Professional Service

=====

Background Information:

In April 2020, the Board approved a change in Board Policy CH (Local) that requires all purchase requests over \$50,000 to be approved by the Board of Trustees prior to being made. These purchases will be made under a pre-existing bid or purchasing cooperative. The following purchase requests have been made as of November 17, 2022:

Pre-Existing Bid:

- Maps101 - \$53,550 – Three year subscription access to digital maps for Social Studies – WISD Bid #21-1200 Instructional Materials
- Brem’s Fencing LLC - \$97,804 - Safety and security replacement of 4’ fence with 6’ fence - WISD Bid #22-1229 Maintenance

Purchasing Cooperative:

- Raptor Technologies - \$134,167 - Annual subscription for Visitor Management, Emergency Management, and StudentSafe. TIPS Cooperative Bid # 200105 Visitor Management, Threat Assessment, Emergency Management Software and Equipment
- Enterprise Security Solutions of Texas Inc. - \$76,070.17 - Security Card Access for Lake Air Montessori – TIPS Cooperative Bid # 21020401 Fire, Firearm, and Active Shooter Safety and Security Solutions
- BearCom Operating LLC - \$121,497.58 - Unified Communications/Walkie Talkie System Repeater - BuyBoard Cooperative # 604-20 Radio Communications and Video Recording Products and Services

Fiscal Implications:

The cost of these goods and services will be charged to the appropriate departmental budget.

Administrative Recommendation(s):

The Administration recommends that the Board of Trustees approve the purchase requests over \$50,000, as presented.

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: November 17, 2022

Contact Person: Gloria Barrera

RE: Allowance Expenditure Authorization to Address Equipment Escalation Costs Related to the Construction of G.W. Carver Middle School

=====

Background Information:

As CORE Construction has progressed through the procurement process for G.W. Carver MS, an equipment delivery issue has arisen. Supply chain issues are causing selected HVAC equipment delays, resulting in lead times that will not meet the project’s construction schedule. Switching to a new manufacturer will maintain the project schedule.

The Guaranteed Maximum Price approved by the Board on June 23, 2022, included a contingency allowance to address unforeseen expenses of this type. In this case, added costs to switch to a new manufacturer brings added value with superior construction, better customization and performance, and longer equipment life.

O’Connell Robertson’s engineer, Bath & Associates (Commissioning agent), and Waco ISD have reviewed the proposed cost and find it to be acceptable.

Fiscal Implications

Funding for the additional \$478,994 in costs associated with this change will come from the Escalation Allowance included in the project contract. This does not increase the Guaranteed Maximum Price for the project or change the project schedule.

Administrative Recommendation(s):

Approve the Allowance Expenditure Authorization (AEA) for costs associated with changing an HVAC equipment manufacturer to achieve the desired completion date for the G.W. Carver Middle School, and authorize the Superintendent to execute the AEA.



ALLOWANCE EXPENDITURE AUTHORIZATION (AEA)

WACO ISD

ALLOWANCE FUND: Escalation Contingency

Facilities and Construction Department

Project: Replacement Carver MS

Authorization Number: 016

From: Waco ISD

To: Core Construction

Date: 11/11/2022

Re: COR-016

You are authorized to perform the following item(s) of work and to adjust the Allowance Sum accordingly:

PCO 016 - Air Hanlder Units Substitution

THIS IS NOT A CHANGE ORDER AND DOES NOT INCREASE OR DECREASE THE CONTRACT AMOUNT OR CONTRACT TIME

| | |
|---|--------------|
| Allowance Balance | \$478,994.00 |
| Allowance Expenditures prior to this Authorization..... | |
| Allowance Balance after to this Authorization..... | \$478,994.00 |
| Allowance will be decreased by this Authorization..... | \$478,994.00 |
| New Allowance Balance..... | \$0.00 |

O'Connell Robertson
ARCHITECT (Firm name)

Core Construction
CONTRACTOR

OWNER (Firm name)

Juan E. ...
SIGNATURE

David Gonzalez
SIGNATURE

SIGNATURE

Jaiy Braulick, CA
PRINTED NAME AND TITLE

David Gonzalez, Project Manager
PRINTED NAME AND TITLE

PRINTED NAME AND TITLE

DATE 11/12/22

11/11/2022
DATE

DATE

Attachments

Copies: Owner Contractor Consultants _____ _____ _____ File



PCO 016 Air Handler Units Substitution

To: Gloria Barrera
 Waco ISD
 501 Franklin Avenue
 Waco, TX 76701
PH: 254-755-9473 Fax:

From: David Gonzalez
Date:
Project: 21-01-012 Waco ISD - Replacement Carver MS

Below is the detail for our proposal to complete the following changes in contract work

Air Handler Units Substitution

Proposed Scope of Work: Air Handler Units substitution due to procurement issues from Trane (Original manufacturer)

Prices are valid until:

| Vendor Name | Description | Amount |
|------------------------|------------------------|----------------|
| | Escalation Contingency | \$(478,994.00) |
| Rabroker AC & Plumbing | HVAC Systems | \$478,994.00 |
| | Subtotal | 0.00 |
| | Fee | 0.00 |
| | Total | \$0.00 |

Due to the nature of this change and its impact on the current schedule, we would request that an additional 0 day(s) be added to the project's final completion date. Contractor reserves the right to request additional time and extended job cost beyond requested amounts when actual schedule impact has been determined.

Approved By:

 Gloria Barrera
 Waco ISD

Date

Rabroker HVAC and Plumbing

REV 1

PROPOSAL REQUEST FORM

Project: Carver MS

Location: Waco, Texas

GC: Core Construction

PR # Expidite AHUs

Date: 11/11/2022

| | |
|-----------------------------|-------------------|
| A. <u>Materials</u> | \$ <u>435,449</u> |
| B. <u>Equipment</u> | \$ <u>-</u> |
| C. <u>Labor</u> | \$ <u>-</u> |
| D. <u>Sub-Contract Work</u> | \$ <u>-</u> |
| E. <u>Misc</u> | \$ <u>-</u> |
| F. <u>Material Tax</u> | \$ <u>-</u> |
| G. <u>Labor Tax</u> | \$ <u>-</u> |
| H. <u>Fee</u> | \$ <u>43,545</u> |
| I. <u>P&P Bond</u> | \$ <u>-</u> |
| | |
| <u>TOTAL</u> | \$ <u>478,994</u> |

-

| | |
|------------------------|----------|
| Time Requested: | 0 |
|------------------------|----------|

-

-

Rabroker HVAC and Plumbing

| HVAC & PLUMBING SHORT RECAP | | | | PRINT TIME: 11/11/2022 7:52 | | | |
|--|--------------------------------|----------------------------|----------------|-----------------------------|------------------------|-----------------|---------------|
| JOB NAME: Carver MS | | Job Number 391-22C | | BID DATE: 11/11/2022 | | | |
| LOCATION: | | REV 1 | | EST. NO.: | | | |
| LABOR RATE: \$ 55.39 | | MAN HRS | | EQUIP \$ | | | |
| MCA %: 100% | | UNIT HRS | | MAT'L \$ | | | |
| | | EXT HRS | | LABOR \$ | | | |
| | | | | SUB-MISC | | | |
| P L U M B I N G | QUAN | DESCRIPTION | | | | | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | - TAG & ID | | - | 0 | \$ - | \$ - | |
| | - TESTING | 10.0% | - | 0 | \$ - | \$ - | |
| | - SUPERVISION | 10.0% | - | 0 | \$ - | \$ - | |
| PLUMBING TOTALS | | | 0 | 0 | \$ - | \$ - | |
| P I P I N G | QUAN | DESCRIPTION | | | | | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | 1 | | 0 | 0 | \$ - | \$ - | |
| | - TAG & ID | | - | 0 | \$ - | \$ - | |
| | - SUPERVISION | 10.0% | - | 0 | \$ - | \$ - | |
| PIPING TOTALS | | | 0 | 0 | \$ - | \$ - | |
| S H E E T M E T A L | #S OF DUCT: | 0 | | | \$ - | \$ - | |
| | LABOR RATES | | | | \$ - | \$ - | |
| | \$ 35.21 | SHOP | - | 0 | \$ - | \$ - | |
| | \$ 21.48 | HANDLING | - | 0 | \$ - | \$ - | |
| \$ 53.24 | FIELD | - | 0 | \$ - | \$ - | | |
| QUAN | DESCRIPTION | | | | | | |
| | Sheetmetal Shop Expense | | | | \$ - | \$ - | |
| 1 | Original Trane AHUs | 0 | 0 | \$ - | \$ (820,346) | \$ - | |
| 1 | Temptrol AHUs | 0 | 0 | \$ - | \$ 1,255,795 | \$ - | |
| 1 | | 0 | 0 | \$ - | \$ - | \$ - | |
| 1 | | 0 | 0 | \$ - | \$ - | \$ - | |
| 1 | | 0 | 0 | \$ - | \$ - | \$ - | |
| 1 | | 0 | 0 | \$ - | \$ - | \$ - | |
| 1 | | 0 | 0 | \$ - | \$ - | \$ - | |
| | - SUPERVISION | 10.0% | - | 0 | \$ - | \$ - | |
| SHEETMETAL TOTALS | | | 0 | 0 | \$ 435,449 | \$ - | |
| HVAC TOTALS | | | 0 | 0 | \$ 435,449 | \$ - | |
| S U B & M I S C | LINE | DESCRIPTION | VENDOR | | | SUBCONTRACTORS | |
| | 1 | INSULATION | | | \$ - | \$ - | |
| | 2 | TEMP CONTROLS | | | \$ - | \$ - | |
| | 3 | | | | \$ - | \$ - | |
| | 4 | | | | \$ - | \$ - | |
| | 5 | | | | \$ - | \$ - | |
| | 6 | | | | \$ - | \$ - | |
| | 7 | CLEAN UP CREW | 2.0% | | \$ - | \$ - | |
| | 8 | EQUIPMENT RENTAL | | | \$ - | \$ - | |
| | 9 | RABROKER - START -UP T & B | | | \$ - | \$ - | |
| | - SMALL TOOL/MISC MTL/WARRANTY | | | \$ - | \$ - | | |
| SUB & MISC. TOTALS | | | | | \$ - | \$ - | |
| M I S C | STARTUP LABOR RATE: | \$ 60.00 | SUMMARY | | | | |
| | EQUIPMENT ADJUSTMENT: | 0% | | HVAC | SUB & MISC. | PLUMBING | TOTALS |
| | WARRANTY %: | 0% | | EQUIP | \$ - | \$ - | \$ - |
| | MISC. MATERIAL %: | 0% | | MATL | \$ 435,449 | \$ - | \$ 435,449 |
| | | | | LABOR | \$ - | \$ - | \$ - |
| | | | | Sub/Misc | \$ - | \$ - | \$ - |
| | | | | NEW Const Tax | \$ - | \$ - | \$ - |
| | | | | Remodel Tax | \$ - | \$ - | \$ - |
| | | | | COST | \$ 435,449 | \$ - | \$ 435,449 |
| | | | | GEN. COND. | \$ - | \$ - | \$ - |
| | | | SUBTOTAL | \$ 435,449 | \$ - | \$ 435,449 | |
| | | | FEE | \$ 43,545 | \$ - | \$ 43,545 | |
| | | | BID W/O BOND | \$ 478,994 | \$ - | \$ 478,994 | |
| | | | P&P BOND | | | \$ - | |
| | | | JOB TOTAL BID | | | \$ 478,994 | |
| | | | % M/U v LABOR | 04 | 0.0% | 0.0% | 0.0% |

Waco Independent School District
Board of Trustee Meeting Agenda Item

Date: November 17, 2022

Contact Person: Dr. Deena Cornblum

RE: Campus Targeted Improvement Plans

=====

Background Information:

Per guidance issued by the Texas Education Agency (TEA) on August 18, 2022, all districts and campuses that received an overall D or F rating in 2019 are expected to update and continue to maintain a Targeted Improvement Plan (TIP). Brazos High School, Cesar Chavez Middle School, Dean Highland Elementary, and South Waco Elementary were all required to submit TIPs to TEA in 2019 and will continue to update and maintain the plans for the 2022-2023 school year.

Districts must submit the first progress update and Board approval of the TIPs to the Intervention, Stage, and Activity Manager (ISAM) system by December 16, 2022. The plans are attached for the Board's review.

Fiscal Implications:

Not Applicable

Administrative Recommendation(s):

Approve the Targeted Improvement Plans as submitted.

Waco Independent School District
Brazos High School - TIP
2022-2023 Targeted Improvement Plan



Campus Number: 161914007

Board Approval Date:

Superintendent:
DCSI/Grant Coordinator:

Susan Kincannon, EdD
Karmen Logan

Principal: Daphanie Latchison
ESC Case Manager: Jessica Torres
ESC Region: 12

Assurances

DCSI/Grant Coordinator

I, the District Coordinator of School Improvement/Grant Coordinator, attest that I will provide or facilitate the provision of all the necessary district-level commitments and support mechanisms to ensure the successful implementation of the Targeted Improvement Plan for this campus. I understand I am responsible for the implementation of all intervention requirements. If I am the principal supervisor, I understand I am responsible for ensuring the principal carries out the plan elements as indicated herein.

Signature: Karmen Logan

Principal Supervisor

I, as supervisor of the principal for this campus, attest that I will coordinate with the DCSI/Grant Coordinator to provide or facilitate the provision of all the necessary district-level commitments and support mechanisms to ensure the principal I supervise can achieve successful implementation of the Targeted Improvement Plan for this campus. I understand I am responsible for ensuring the principal carries out the plan elements as indicated herein.

Signature: David Hamilton

Principal

I, as principal for this campus, attest that I will coordinate with the DCSI/Grant Coordinator (and my supervisor, if they are not the same person) to use the district-provided commitments and support mechanisms to ensure the successful implementation of the Targeted Improvement Plan for this campus. I agree to carry out the plan elements as indicated herein.

Signature: Daphanie Latchison

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Data Analysis

Student Achievement

What accountability goal has your campus set for this year?

With the new AEA accountability and considering unique student needs, at least 40 students should receive CCMR points when obtaining credit for College Prep English and College Prep Math courses. In each of the EOC content areas, we have set a goal for at least a 10% increase initially in the Approaches category and a 5-10% increase in the Meets and Masters category.

School Progress

What accountability goal has your campus set for this year?

Our 2021-2022 student performance is as follows:

ELAR- 32% Approaches, 11% Meets, and 0% Masters, Our summative goal is 43% Approaches, 18% Meets, and 10% Masters.

Algebra 1- 40% Approaches, 0% Meets, and 0% Masters. Our summative goal is 50% Approaches, 12% Meets, and 8% Masters.

Biology- 44% Approaches, 0% Meets, and 0% Masters. Our summative goal is 53% Approaches, 10% Meets, and 5% Masters.

US History- 59% Approaches, 11% Meets, and 7% Masters. Our summative goal is 67% Approaches, 17% Meets, and 7% Masters.

If students meet the goals set forth for each of the EOC content areas aforementioned, we will earn numerous points per student in each of the 3 categories- STAAR Component, School Progress Domain Part 2: Retest Growth, and Closing the Gaps.

Closing the Gaps

What accountability goal has your campus set for this year?

For English 1 and 2 end of course assessments, African American students scored 30% Approaches (20 tests), Hispanic students scored 31% (26 tests), and White students scored 100% (1 test). With Hispanic students being our majority and secondly, African Americans, their results were almost equal. So the goal for both subgroups would be to increase by 10% since ELAR is an annual focus and our biggest deficit academically.

For Algebra 1 end of course assessment, African American students scored 50% Approaches (2 tests), Hispanic students scored 33% (3 tests), and there wasn't any White students that tested. The discrepancy between both subgroups is 17%. So the goal for our Hispanic students is to increase by 10% in order to lessen the margin of performance.

For the annual graduation rate for 2022 was 58.5% and our goal this year is 67%. And we did not measure at all for 2022 for CCMR, so our goal this year would be that 20% of our graduates will receive CCMR credit. Leadership team will actively monitor student data on multiple data trackers to ensure that we stay ahead of individual student plans. With these goals, our campus rating should be at least a C.

Subject Areas and Student Groups

Which subjects are a focus this year when thinking about student performance? Why have you identified these specific subject areas? What is the intended impact on your accountability domain scores?

Our 2021-2022 student performance is as follows:

ELAR- 32% Approaches, 11% Meets, and 0% Masters, Our summative goal is 43% Approaches, 18% Meets, and 10% Masters.

Algebra 1- 40% Approaches, 0% Meets, and 0% Masters. Our summative goal is 50% Approaches, 12% Meets, and 8% Masters.

Biology- 44% Approaches, 0% Meets, and 0% Masters. Our summative goal is 53% Approaches, 10% Meets, and 5% Masters.

US History- 59% Approaches, 11% Meets, and 7% Masters. Our summative goal is 67% Approaches, 17% Meets, and 7% Masters.

If students meet the goals set forth for each of the EOC content areas aforementioned, we will earn numerous points per student in each of the 3 categories- STAAR Component, School Progress Domain Part 2: Retest Growth, and Closing the Gaps.

Our campus focus this year is ELAR and Algebra 1 being that we have new, onboarding teachers that are veterans, but not new to the profession. Formative assessments in EOC small group sessions will be conducted bi-weekly to track progress of student performance.

Which student group outcomes are you targeting in these goals? What is the intended impact on your accountability domain scores?

Since ELAR is our greatest deficit as a campus, it is the content area that we focus on accountability the most. However, we work with all content areas to improve graduation rates for all students. Most of our students are economically disadvantaged and our student groups are African American and Hispanic. Both of these student groups are the focus for accountability.

CCMR

What goals has your campus set for CCMR?

With the new AEA accountability and considering unique student needs, at least 40 students should receive CCMR points when obtaining credit for College Prep English and College Prep Math courses.

Federal Graduation Rate

What goals has your campus set for Federal Graduation Rate?

Our Federal Graduation Rate for 4-year (cohort 2021) students was 58.5%; 5-year (cohort 2020) students was 37.5%; and 6-year (2019) students was 37.1%. We have set a goal for our 4-year, 5-year- and 6-year to increase by at least 5% across all cohorts.

Essential Actions

Cycles 1-3

Essential Action 1.1: Develop campus instructional leaders with clear roles and responsibilities.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders have clear, written, and transparent roles and responsibilities, and core leadership tasks (including observations, debriefs, and leadership team meetings) are scheduled on weekly calendars. • Performance expectations are clear, written, and measurable and they match job responsibilities. • Campus instructional leaders use consistent written protocols and processes to lead their department or grade-level teams. • Campus instructional leaders meet weekly to focus on student progress and formative data. • Principal improves campus leaders through regularly scheduled job-embedded professional development and development opportunities are consistent with best practices for adult learning, deliberate modeling, and observation and feedback cycles.

Essential Action 2.1: Recruit, select, assign, induct and retain a full staff of highly qualified educators.

Implementation Level: Fully Implemented

Key Practices:

Essential Action 3.1: Compelling and aligned vision, mission, goals, values focused on a safe environment and high expectations.

Implementation Level: Fully Implemented

Key Practices:

Essential Action 4.1: Daily use of high-quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

Implementation Level: Partial Implementation

Key Practices: Daily lesson-level, unit, and interim assessments are administered to determine if students learned what was taught. Assessments are at the appropriate level of rigor and aligned to TEKS and instructional materials. Time for reteach is built into the scope and sequence. • High-quality instructional materials are consistently used across classrooms, including resources intentionally designed to meet the needs of students with disabilities and English learners, along with other student groups with diverse needs. • Campus instructional leaders frequently review how teachers internalize, modify and use lesson plans, providing feedback and lesson planning support regarding alignment to the scope and sequence, the standards and the expected level of rigor.

Essential Action 5.1: Effective classroom routines and instructional strategies.

Implementation Level: Fully Implemented

Key Practices:

Essential Action 5.3: Data-driven instruction.

Implementation Level: Partial Implementation

Key Practices:

Cycle 4

Essential Action 1.1: Develop campus instructional leaders with clear roles and responsibilities.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 2.1: Recruit, select, assign, induct and retain a full staff of highly qualified educators.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 3.1: Compelling and aligned vision, mission, goals, values focused on a safe environment and high expectations.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 4.1: Daily use of high-quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 5.1: Effective classroom routines and instructional strategies.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 5.3: Data-driven instruction.

Implementation Level: Not Yet Started

Key Practices:

Cycles

Cycle 1 - (Sept – Nov)

Did you achieve your student performance data goals? Why or why not?:

1. Essential Action 1.1: Develop campus instructional leaders with clear roles and responsibilities.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders have clear, written, and transparent roles and responsibilities, and core leadership tasks (including observations, debriefs, and leadership team meetings) are scheduled on weekly calendars. • Performance expectations are clear, written, and measurable and they match job responsibilities. • Campus instructional leaders use consistent written protocols and processes to lead their department or grade-level teams. • Campus instructional leaders meet weekly to focus on student progress and formative data. • Principal improves campus leaders through regularly scheduled job-embedded professional development and development opportunities are consistent with best practices for adult learning, deliberate modeling, and observation and feedback cycles.

Rationale: Understanding the substance of effective leadership roles and responsibilities and utilizing changes to TEA changes to accountability for our campus are needed in order to move teacher and student performance through innovative measures.

Who will you partner with?: Other

How will you build capacity in this Essential Action? We will build capacity by partnering with TNTP and our district principal coach to ensure we have clearly defined roles and responsibilities along with a system for tracking our leadership action steps. Leadership calendars allow equitable time for teacher observation/feedback and establish PLC processes in order to maximize admin. roles and improve leader and teacher capacities.

How will you communicate these priorities to your stakeholders? How will you create buy-in?:

Principal will meet with campus leaders to collaboratively reconstruct and/or refine roles and responsibilities for the new school year. Campus leadership will create monthly newsletters to communicate information with staff, students, and families about academic expectations and processes in order to establish a cohesive culture.

Desired Annual Outcome: By May 2023, the campus instructional leadership team will be able to provide 90% of the suggested evidence of key practices aligned to strong school leadership and planning, increasing campus implementation levels from partial to full implementation.

District Commitment Theory of Action: If the district provides coaching support for campus leadership and provides exemplars for observation feedback, PLCs and ILT meetings, then the campus will meet its goal and achieve full implementation for Lever 1.1.

Desired 90-day Outcome: By November 2022, the campus instructional leadership team will streamline effective ways to incorporate data into 75% of bi-weekly agendas that target the new AEA accountability.

District Actions: The district will provide a principal coach and will partner with TNTP to provide coaching and support in developing strong leadership practices on campus.

Did you achieve your 90 day outcome?:

Why or why not?:

| What challenges do you think you'll encounter in achieving desired campus or student outcomes for this cycle? | What specific action steps address these challenges? | How does this action step address this challenge? |
|---|--|---|
| Acclimating new admin members into established protocols along with time management in addressing the needs of campus as foreseen through data tracking | None | Creating a system of monitoring campus data through pre-scheduled leadership meetings along with documenting action steps accordingly |

| Step 1 Details | Formative Reviews |
|--|---|
| <p>Action Step 1: Principal will meet with leadership team members and collaboratively refine their roles and responsibilities. Professional development opportunities will be sought out for each team member in order to maximize their potential according to their job description.</p> <p>Evidence Used to Determine Progress: Leadership Team Checkpoint trackers</p> <p>Person(s) Responsible: Principal, AP, Counselor, Dropout Prevention Specialist, and Restorative Discipline Facilitator</p> <p>Resources Needed: Google Drive</p> <p>Addresses an Identified Challenge: No</p> <p>Start Date: September 1, 2022 - Frequency: Ongoing - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 2 Details | Formative Reviews |
| <p>Action Step 2: Create a monthly newsletter to distribute to parents, students, and staff about campus expectations, students expectations, and school news.</p> <p>Evidence Used to Determine Progress: Facebook post and school website</p> <p>Person(s) Responsible: Principal</p> <p>Resources Needed: Google Drive</p> <p>Addresses an Identified Challenge: No</p> <p>Start Date: September 1, 2022 - Frequency: Ongoing - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 3 Details | Formative Reviews |
| <p>Action Step 3: Pre-schedule and document leadership meetings bi- weekly and create data tracking forms aligned to streamline the content and cater to teacher and student progress and performance.</p> <p>Evidence Used to Determine Progress: ARC Communication Log, 2022-2023 Brazos Cohort Tracker, truancy reports</p> <p>Person(s) Responsible: Principal, Asst. Principal, Counselor, Dropout Prevention Specialist, PEIMS Specialist, and Restorative Discipline Facilitator</p> <p>Resources Needed: Google Drive</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: Ongoing - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |

| Step 4 Details | Formative Reviews |
|---|---|
| <p>Action Step 4: Create equitable data tracking tools that are designed to target student growth aligned to new AEA accountability.</p> <p>Evidence Used to Determine Progress: Inclusive Cohort Tracker; ARC communication log</p> <p>Person(s) Responsible: Principal, Assistant Principal, Counselor, Restorative Discipline Facilitator, Dropout Prevention Specialist, PEIMS Specialist</p> <p>Resources Needed: Google drive</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 2, 2022 - Frequency: Ongoing - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |

Cycle 1 - (Sept – Nov)

2. Essential Action 4.1: Daily use of high-quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

Implementation Level: Partial Implementation

Key Practices: Daily lesson-level, unit, and interim assessments are administered to determine if students learned what was taught. Assessments are at the appropriate level of rigor and aligned to TEKS and instructional materials. Time for reteach is built into the scope and sequence. • High-quality instructional materials are consistently used across classrooms, including resources intentionally designed to meet the needs of students with disabilities and English learners, along with other student groups with diverse needs. • Campus instructional leaders frequently review how teachers internalize, modify and use lesson plans, providing feedback and lesson planning support regarding alignment to the scope and sequence, the standards and the expected level of rigor.

Rationale: To ensure equitable instruction for all students, the campus leadership will coach EOC content area teachers to build capacity of the lesson cycle components particularly focusing on ELAR and Algebra 1 teachers.

Who will you partner with?: Other

How will you build capacity in this Essential Action? The campus will partner with TNTP and the district curriculum department on alignments of the lesson cycle with STAAR EOC standards.

Leadership team agendas along with data tracking forms will be aligned to each meeting objective to streamline the content and cater to teacher and student progress and performance.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: We will begin by reviewing campus data to show gaps in student achievement. We will review lesson plans and perform classroom observations in order to provide feedback regarding alignment of lesson cycle- objectives, activities and exit tickets. We will include job embedded professional development to staff through PLCs. We prioritize communicating with our families about student graduation plans and other requirements in obtaining their high school diploma.

Desired Annual Outcome: By May 2023, our campus will ensure that 100% of daily lesson plans include aligned objectives, activities, and exit tickets.

District Commitment Theory of Action: If the district provides curriculum support and ongoing feedback and coaching for the campus principal, then the campus will be able to ensure that there is alignment of objectives, activities, and exit tickets in all content areas.

Desired 90-day Outcome: By November 30 2022, leadership team will provide training and campus expectations on aligned objectives in the lesson cycle. Our campus will ensure that at least 80% of daily lesson plans include aligned objectives, activities, and exit tickets.

District Actions: The district will provide training and support around expectations for lesson plan objectives.

Did you achieve your 90 day outcome?:

Why or why not?:

| What challenges do you think you'll encounter in achieving desired campus or student outcomes for this cycle? | What specific action steps address these challenges? | How does this action step address this challenge? |
|--|--|--|
| Onboarding teachers understanding their content standards to be able to determine objectives that are aligned. | None | Lesson plan feedback will include feedback in regard to alignment of objectives. |

| Step 1 Details | Formative Reviews |
|---|---|
| <p>Action Step 1: PLCs to provide job embedded training are pre-scheduled and conducted weekly by teachers with administrators in attendance.</p> <p>Evidence Used to Determine Progress: PLC meeting agendas and notes</p> <p>Person(s) Responsible: Principal, Asst. Principal, and EOC content area teachers</p> <p>Resources Needed: Google Drive</p> <p>Addresses an Identified Challenge: No</p> <p>Start Date: September 1, 2022 - Frequency: Weekly - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 2 Details | Formative Reviews |
| <p>Action Step 2: Campus administrators will monitor lesson plans and teachers will receive feedback on their SGI lesson plans as it aligns to STAAR EOC standards.</p> <p>Evidence Used to Determine Progress: Annotated lesson plans</p> <p>Person(s) Responsible: Principal and Asst. Principal</p> <p>Resources Needed: Eduphoria, Gmail, Google Drive</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: Weekly - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 3 Details | Formative Reviews |
| <p>Action Step 3: Campus administrators will communicate with all teachers on the and provide training on the new AEA accountability system to establish a renewed focus of the significance of student success in every category.</p> <p>Evidence Used to Determine Progress: Training PPT material</p> <p>Person(s) Responsible: Principal and Asst. Principal</p> <p>Resources Needed: Google Drive</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: One Time - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |

Cycle 2 - (Dec – Feb)

Did you achieve your student performance data goals? Why or why not?:

1. Essential Action 1.1: Develop campus instructional leaders with clear roles and responsibilities.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders have clear, written, and transparent roles and responsibilities, and core leadership tasks (including observations, debriefs, and leadership team meetings) are scheduled on weekly calendars. • Performance expectations are clear, written, and measurable and they match job responsibilities. • Campus instructional leaders use consistent written protocols and processes to lead their department or grade-level teams. • Campus instructional leaders meet weekly to focus on student progress and formative data. • Principal improves campus leaders through regularly scheduled job-embedded professional development and development opportunities are consistent with best practices for adult learning, deliberate modeling, and observation and feedback cycles.

Rationale: Understanding the substance of effective leadership roles and responsibilities and utilizing changes to TEA changes to accountability for our campus are needed in order to move teacher and student performance through innovative measures.

Who will you partner with?: Other

How will you build capacity in this Essential Action? We will build capacity by partnering with TNTP and our district principal coach to ensure we have clearly defined roles and responsibilities along with a system for tracking our leadership action steps. Leadership calendars allow equitable time for teacher observation/feedback and establish PLC processes in order to maximize admin. roles and improve leader and teacher capacities.

How will you communicate these priorities to your stakeholders? How will you create buy-in?:

Principal will meet with campus leaders to collaboratively reconstruct and/or refine roles and responsibilities for the new school year. Campus leadership will create monthly newsletters to communicate information with staff, students, and families about academic expectations and processes in order to establish a cohesive culture.

Desired Annual Outcome: By May 2023, the campus instructional leadership team will be able to provide 90% of the suggested evidence of key practices aligned to strong school leadership and planning, increasing campus implementation levels from partial to full implementation.

District Commitment Theory of Action: If the district provides coaching support for campus leadership and provides exemplars for observation feedback, PLCs and ILT meetings, then the campus will meet its goal and achieve full implementation for Lever 1.1.

Desired 90-day Outcome: By February 2023, the campus instructional leadership team will be able to provide at least 80% of the suggested evidence of key practices aligned to strong school leadership and planning.

District Actions:

Did you achieve your 90 day outcome?:

Why or why not?:

Cycle 2 - (Dec – Feb)

2. Essential Action 4.1: Daily use of high-quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

Implementation Level: Partial Implementation

Key Practices: Daily lesson-level, unit, and interim assessments are administered to determine if students learned what was taught. Assessments are at the appropriate level of rigor and aligned to TEKS and instructional materials. Time for reteach is built into the scope and sequence. • High-quality instructional materials are consistently used across classrooms, including resources intentionally designed to meet the needs of students with disabilities and English learners, along with other student groups with diverse needs. • Campus instructional leaders frequently review how teachers internalize, modify and use lesson plans, providing feedback and lesson planning support regarding alignment to the scope and sequence, the standards and the expected level of rigor.

Rationale: To ensure equitable instruction for all students, the campus leadership will coach EOC content area teachers to build capacity of the lesson cycle components particularly focusing on ELAR and Algebra 1 teachers.

Who will you partner with?: Other

How will you build capacity in this Essential Action? The campus will partner with TNTP and the district curriculum department on alignments of the lesson cycle with STAAR EOC standards.

Leadership team agendas along with data tracking forms will be aligned to each meeting objective to streamline the content and cater to teacher and student progress and performance.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: We will begin by reviewing campus data to show gaps in student achievement. We will review lesson plans and perform classroom observations in order to provide feedback regarding alignment of lesson cycle- objectives, activities and exit tickets. We will include job embedded professional development to staff through PLCs. We prioritize communicating with our families about student graduation plans and other requirements in obtaining their high school diploma.

Desired Annual Outcome: By May 2023, our campus will ensure that 100% of daily lesson plans include aligned objectives, activities, and exit tickets.

District Commitment Theory of Action: If the district provides curriculum support and ongoing feedback and coaching for the campus principal, then the campus will be able to ensure that there is alignment of objectives, activities, and exit tickets in all content areas.

Desired 90-day Outcome: By February 2023, our campus will ensure that at least 90% of daily lesson plans include aligned objectives, activities, and exit tickets.

District Actions:

Did you achieve your 90 day outcome?:

Why or why not?:

Cycle 3 - (Mar – May)

Did you achieve your student performance data goals? Why or why not?:

1. Essential Action 1.1: Develop campus instructional leaders with clear roles and responsibilities.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders have clear, written, and transparent roles and responsibilities, and core leadership tasks (including observations, debriefs, and leadership team meetings) are scheduled on weekly calendars. • Performance expectations are clear, written, and measurable and they match job responsibilities. • Campus instructional leaders use consistent written protocols and processes to lead their department or grade-level teams. • Campus instructional leaders meet weekly to focus on student progress and formative data. • Principal improves campus leaders through regularly scheduled job-embedded professional development and development opportunities are consistent with best practices for adult learning, deliberate modeling, and observation and feedback cycles.

Rationale: Understanding the substance of effective leadership roles and responsibilities and utilizing changes to TEA changes to accountability for our campus are needed in order to move teacher and student performance through innovative measures.

Who will you partner with?: Other

How will you build capacity in this Essential Action? We will build capacity by partnering with TNTP and our district principal coach to ensure we have clearly defined roles and responsibilities along with a system for tracking our leadership action steps. Leadership calendars allow equitable time for teacher observation/feedback and establish PLC processes in order to maximize admin. roles and improve leader and teacher capacities.

How will you communicate these priorities to your stakeholders? How will you create buy-in?:

Principal will meet with campus leaders to collaboratively reconstruct and/or refine roles and responsibilities for the new school year. Campus leadership will create monthly newsletters to communicate information with staff, students, and families about academic expectations and processes in order to establish a cohesive culture.

Desired Annual Outcome: By May 2023, the campus instructional leadership team will be able to provide 90% of the suggested evidence of key practices aligned to strong school leadership and planning, increasing campus implementation levels from partial to full implementation.

District Commitment Theory of Action: If the district provides coaching support for campus leadership and provides exemplars for observation feedback, PLCs and ILT meetings, then the campus will meet its goal and achieve full implementation for Lever 1.1.

Desired 90-day Outcome: By November 2022, the campus instructional leadership team will be able to provide 80% of the suggested evidence of key practices aligned to strong school leadership and planning.

District Actions:

Did you achieve your 90 day outcome?:

Why or why not?:

Did you achieve your annual outcome?:

Cycle 3 - (Mar – May)

2. Essential Action 4.1: Daily use of high-quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

Implementation Level: Partial Implementation

Key Practices: Daily lesson-level, unit, and interim assessments are administered to determine if students learned what was taught. Assessments are at the appropriate level of rigor and aligned to TEKS and instructional materials. Time for reteach is built into the scope and sequence. • High-quality instructional materials are consistently used across classrooms, including resources intentionally designed to meet the needs of students with disabilities and English learners, along with other student groups with diverse needs. • Campus instructional leaders frequently review how teachers internalize, modify and use lesson plans, providing feedback and lesson planning support regarding alignment to the scope and sequence, the standards and the expected level of rigor.

Rationale: To ensure equitable instruction for all students, the campus leadership will coach EOC content area teachers to build capacity of the lesson cycle components particularly focusing on ELAR and Algebra 1 teachers.

Who will you partner with?: Other

How will you build capacity in this Essential Action? The campus will partner with TNTP and the district curriculum department on alignments of the lesson cycle with STAAR EOC standards.

Leadership team agendas along with data tracking forms will be aligned to each meeting objective to streamline the content and cater to teacher and student progress and performance.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: We will begin by reviewing campus data to show gaps in student achievement. We will review lesson plans and perform classroom observations in order to provide feedback regarding alignment of lesson cycle- objectives, activities and exit tickets. We will include job embedded professional development to staff through PLCs. We prioritize communicating with our families about student graduation plans and other requirements in obtaining their high school diploma.

Desired Annual Outcome: By May 2023, our campus will ensure that 100% of daily lesson plans include aligned objectives, activities, and exit tickets.

District Commitment Theory of Action: If the district provides curriculum support and ongoing feedback and coaching for the campus principal, then the campus will be able to ensure that there is alignment of objectives, activities, and exit tickets in all content areas.

Desired 90-day Outcome: By May 2023, our campus will ensure that 100% of daily lesson plans include aligned objectives, activities, and exit tickets

District Actions:

Did you achieve your 90 day outcome?:

Why or why not?:

Did you achieve your annual outcome?:

Cycle 4 - (Jun – Aug)

Student Data

| Student Achievement and Closing the Gaps | | | | | | | | | | | | | | | | | | | |
|--|---|---|-------|---------------|-----------------|-------------------|----------------------|--------------------|------------------|--------------|--------------------------|-----------------|----------------|----------------|-----------------|----------------|----------------|--------------------------|----------------|
| Core Metrics | Sub Metrics | | Grade | Student Group | Subject Tested | Performance Level | Summative Assessment | 2023 Student Count | % of Assessments | | | | | | | | | | |
| | | | | | | | | | 2021 Results | 2022 Results | 2022 Participation Rates | Cycle 1 | | | Cycle 2 | | | 2023 Accountability Goal | |
| | | | | | | | | | | | | Assessment Type | Formative Goal | Actual Results | Assessment Type | Formative Goal | Actual Results | Summative Goal | Actual Results |
| Student Achievement | # of Students at Approaches, Meets, and Masters | | All | All | Reading | Approaches | STAAR | 46 | 42 | 32 | N/A | CBM | 35 | | CBM | 40 | | 43 | |
| | | | All | All | Reading | Meets | STAAR | 46 | 10 | 11 | N/A | CBM | 12 | | CBM | 15 | | 18 | |
| | | | All | All | Reading | Masters | STAAR | 46 | 2 | 0 | N/A | CBM | 5 | | CBM | 8 | | 10 | |
| | | | All | All | Mathematics | Approaches | STAAR | 12 | 14 | 40 | N/A | CBM | 42 | | CBM | 45 | | 50 | |
| | | | All | All | Mathematics | Meets | STAAR | 12 | 0 | 0 | N/A | CBM | 5 | | CBM | 10 | | 12 | |
| | | | All | All | Mathematics | Masters | STAAR | 12 | 0 | 0 | N/A | CBM | 5 | | CBM | 8 | | 8 | |
| | | | All | All | Science | Approaches | STAAR | 17 | 30 | 44 | N/A | CBM | 48 | | CBM | 50 | | 53 | |
| | | | All | All | Science | Meets | STAAR | 17 | 0 | 0 | N/A | CBM | 5 | | CBM | 8 | | 10 | |
| | | | All | All | Science | Masters | STAAR | 17 | 0 | 0 | N/A | CBM | 2 | | CBM | 4 | | 5 | |
| | | | All | All | Social Studies | Approaches | STAAR | 24 | 63 | 59 | N/A | CBM | 62 | | CBM | 65 | | 67 | |
| Closing the Gaps | Focus 1 | Graduation Rate Status | All | All Students | Graduation Rate | N/A | Graduation Rate | N/A | 16 | 21 | 100 | Other | 50 | | Other | 60 | | 67 | |
| | Focus 2 | School Quality/College & Career Readiness | All | All Students | CCMR | N/A | CCMR | N/A | 1 | 0 | 100 | Other | 10 | | Other | 15 | | 20 | |

| Academic Growth | | | | | | | | | | | | | | |
|-----------------|-------------|-------|----------------------|------------------------------------|------------------------|--------------|------------------------|------------------------|------------------------|------------------------|----------------|--------------------------|--|--|
| Core Metrics | Sub Metrics | Grade | Summative Assessment | 2023 Total # of Evaluated Students | Percentage of Students | 2022 Results | Cycle 1 Formative Goal | Cycle 1 Actual Results | Cycle 2 Formative Goal | Cycle 2 Actual Results | Summative Goal | Summative Actual Results | | |
| Academic Growth | ELAR | All | STAAR | | Did Not Meet | | | | | | | | | |
| | | | | | Approaches | | | | | | | | | |
| | | | | | Meets | | | | | | | | | |
| | Masters | | | | | | | | | | | | | |
| | Math | All | STAAR | | Did Not Meet | | | | | | | | | |
| | | | | | Approaches | | | | | | | | | |
| Meets | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |

**Waco Independent School District
Cesar Chavez Middle School - TIP
2022-2023 Targeted Improvement Plan**



Campus Number: 161914043

Board Approval Date:

Superintendent:
DCSI/Grant Coordinator:

Susan Kincannon, EdD
Karmen Logan

Principal: Pedro Hernandez
ESC Case Manager: Jessica Torres
ESC Region: 12

Assurances

DCSI/Grant Coordinator

I, the District Coordinator of School Improvement/Grant Coordinator, attest that I will provide or facilitate the provision of all the necessary district-level commitments and support mechanisms to ensure the successful implementation of the Targeted Improvement Plan for this campus. I understand I am responsible for the implementation of all intervention requirements. If I am the principal supervisor, I understand I am responsible for ensuring the principal carries out the plan elements as indicated herein.

Signature: Karmen Logan

Principal Supervisor

I, as supervisor of the principal for this campus, attest that I will coordinate with the DCSI/Grant Coordinator to provide or facilitate the provision of all the necessary district-level commitments and support mechanisms to ensure the principal I supervise can achieve successful implementation of the Targeted Improvement Plan for this campus. I understand I am responsible for ensuring the principal carries out the plan elements as indicated herein.

Signature: David Hamilton

Principal

I, as principal for this campus, attest that I will coordinate with the DCSI/Grant Coordinator (and my supervisor, if they are not the same person) to use the district-provided commitments and support mechanisms to ensure the successful implementation of the Targeted Improvement Plan for this campus. I agree to carry out the plan elements as indicated herein.

Signature: Pedro Hernandez

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Data Analysis

Student Achievement

What accountability goal has your campus set for this year?

Our goal is to make a 5-13% jump in our student achievement in reading and math. Students struggled overall to meet grade level standard. We will focus on creating and implementing rigorous Tier 1 instruction for all students and intervening with struggling students through intervention and tutoring. Student performance in math was lower than reading and therefore additional focus will be placed on monitoring growth of students in math utilizing our student data tracker.

Our reading goals are to have 71% at Approaches, 37% at Meets, 21 at Masters.

Our math goals are to have 61% at Approaches, 23% at Meets, 10% at Masters.

School Progress

What accountability goal has your campus set for this year?

We are focusing on Domain 2A. We will make growth in RLA 73% (2021-68%) and Math 68% (2021-58%). Students made significant growth in reading this past year and our goal is to maintain it. Due to lower math scores, the campus leadership is putting greater focus on planning, coaching tier 1 instruction, intervention and DDI meetings for math. The campus will monitor growth with a campus growth tracker with rigorous and attainable goals for each student.

Closing the Gaps

What accountability goal has your campus set for this year?

Growth

Math

African American- 68%

Hispanic-70%

Eco. Dis- 68%

The campus has chosen to put more focus on math due to the lack of growth and not meeting targets in achievement or growth for math. Due to current scores, the primary focus will be on growth of our two largest sub-pops of Hispanic and African American. Since our campus has a high economically disadvantaged population, we believe focusing on the other two groups and ensuring growth will also effect growth for eco-disadvantaged sub-pop.

Subject Areas and Student Groups

Which subjects are a focus this year when thinking about student performance? Why have you identified these specific subject areas? What is the intended impact on your accountability domain scores?

The areas of focus is Math growth due to the campus missing targets in this area for Closing the Gaps. Math scores have tremendously decreased and it impacts our accountability.

Growth Goals

Math

African American- 68%

Hispanic-70%

Eco. Dis- 68%

The campus has chosen to put more focus on math due to the lack of growth and not meeting targets in achievement or growth for math. Due to current scores, the primary focus will be on growth of our two largest sub-pops of Hispanic and African American. since our campus has a high economically disadvantaged population, we believe focusing on the other two groups and ensuring growth will also effect growth for eco-disadvantaged sub-pop.

Which student group outcomes are you targeting in these goals? What is the intended impact on your accountability domain scores?

The areas of focus is Math growth due to the campus missing targets in this area for Closing the Gaps. Math scores have tremendously decreased and it impacts our accountability.

Growth Goals

Math

African American- 68%

Hispanic-70%

Eco. Dis- 68%

The campus has chosen to put more focus on math due to the lack of growth and not meeting targets in achievement or growth for math. Due to current scores, the primary focus will be on growth of our two largest sub-pops of Hispanic and African American. since our campus has a high economically disadvantaged population, we believe focusing on the other two groups and ensuring growth will also effect growth for eco-disadvantaged sub-pop.

Essential Actions

Cycles 1-3

Essential Action 1.1: Develop campus instructional leaders with clear roles and responsibilities.

Implementation Level: Partial Implementation

Key Practices:

Essential Action 2.1: Recruit, select, assign, induct and retain a full staff of highly qualified educators.

Implementation Level: Partial Implementation

Key Practices: Campus leaders implement targeted and personalized strategies to retain staff, particularly high-performing staff. • Teacher placements are strategic based on student need and teacher strengths.

Essential Action 3.1: Compelling and aligned vision, mission, goals, values focused on a safe environment and high expectations.

Implementation Level: Beginning Implementation

Key Practices:

Essential Action 4.1: Daily use of high-quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

Implementation Level: Beginning Implementation

Key Practices:

Essential Action 5.1: Effective classroom routines and instructional strategies.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders provide training and ongoing support so that teachers implement best practices for establishing and maintaining a strong classroom culture, including setting behavioral expectations, establishing routines and procedures that maximize instructional time, and building strong relationships.

Essential Action 5.3: Data-driven instruction.

Implementation Level: Partial Implementation

Key Practices:

Cycle 4

Essential Action 1.1: Develop campus instructional leaders with clear roles and responsibilities.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 2.1: Recruit, select, assign, induct and retain a full staff of highly qualified educators.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 3.1: Compelling and aligned vision, mission, goals, values focused on a safe environment and high expectations.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 4.1: Daily use of high-quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 5.1: Effective classroom routines and instructional strategies.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 5.3: Data-driven instruction.

Implementation Level: Not Yet Started

Key Practices:

Cycles

Cycle 1 - (Sept – Nov)

Did you achieve your student performance data goals? Why or why not?:

1. Essential Action 2.1: Recruit, select, assign, induct and retain a full staff of highly qualified educators.

Implementation Level: Partial Implementation

Key Practices: Campus leaders implement targeted and personalized strategies to retain staff, particularly high-performing staff. • Teacher placements are strategic based on student need and teacher strengths.

Rationale: Cesar Chavez experienced a 50% turnover rate with teachers during past school years and we do not want this to become the norm. The campus principal is new to the position and the campus no longer has the position of the Dean of Instruction due to district budget cuts.

Who will you partner with?: Other

How will you build capacity in this Essential Action? Cesar Chavez's leadership will collaborate with Human Resources and district coaches and our VIP, TNTP, to recruit highly qualified teachers. We will collect survey data from various teacher groups to make decisions about school culture and teacher practices. Teacher leaders will also be utilized to guide the campus decision making process through the overseeing of committees and clubs that teachers manage.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: Create opportunities for teachers to lead district and campus initiatives. Develop incentives that motivate and encourage effective teaching practices across campus. The instructional leadership team will establish a plan to strengthen recruitment and hiring practices that enable educators to be a part of CCMS. Encourage parent and student involvement through the creation of extended instructional activities that are intended to raise awareness of the school's rating along with instructional strategies to improve the academic success of their child. We will work with community partners to help provide resources for teachers and students to enhance the learning environment for all. The primary sources of communicating all this stated information will be social media, blackboard messenger, campus marque, monthly newsletter, and flyers.

Desired Annual Outcome: By May 2023, Cesar Chavez Middle School will retain 80% of the instructional staff from 2022-23 using various targeted and personalized strategies.

District Commitment Theory of Action: If the district supports Cesar Chavez by recruiting highly qualified candidates and developing instructional leadership skills to support staff needs, then the campus will be effective in retaining the most effective teaching staff.

Desired 90-day Outcome: By November 30, 2022, campus leadership will tier teachers based on calibrated walks and provide support with action coaching and specific feedback on behavior management.

District Actions: The district will provide Action Coaching training and coaching support by the principal supervisor and TNTP. The district provided Behavior Management training for teachers.

Did you achieve your 90 day outcome?:

Why or why not?:

| What challenges do you think you'll encounter in achieving desired campus or student outcomes for this cycle? | What specific action steps address these challenges? | How does this action step address this challenge? |
|---|--|---|
| Teachers being new to the profession coming for alternative certified programs. | None 96 | Teachers will have training to help with being new to the profession. |

| Step 1 Details | Formative Reviews |
|---|---|
| <p>Action Step 1: The campus leadership will monitor implementation of the mentor program for new teachers on campus by meeting once a month with their mentors and appraisers during the Succeed Meeting to ensure new teachers feel supported by campus mentors and staff. Leadership will adjust support based on feedback from the meetings.</p> <p>Evidence Used to Determine Progress: Surveys and weekly conversations about their successes in class.</p> <p>Person(s) Responsible: Principal, Instructional Specialist, APs</p> <p>Resources Needed: District Training and Professional Development.</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: Ongoing - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 2 Details | Formative Reviews |
| <p>Action Step 2: Provide Behavior Management Training to new teachers using CHAMPS and Restorative Training to help them get acclimated to the profession and provide job-embedded professional learning through ongoing coaching on classroom management.</p> <p>Evidence Used to Determine Progress: Number of referrals written, Behavior Management Plan</p> <p>Person(s) Responsible: Principal, APs, IS, Behavior Specialist</p> <p>Resources Needed: Campus and District Training</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: Ongoing - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 3 Details | Formative Reviews |
| <p>Action Step 3: Send out weekly Smore newsletters, social media, and emails to effectively communicate with our new teachers to build a culture of belonging.</p> <p>Evidence Used to Determine Progress: Number of visits on the Smore site, Surveys</p> <p>Person(s) Responsible: Principals, IS, APs</p> <p>Resources Needed: Smore subscription,</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: Weekly - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |

Cycle 1 - (Sept – Nov)

2. Essential Action 5.1: Effective classroom routines and instructional strategies.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders provide training and ongoing support so that teachers implement best practices for establishing and maintaining a strong classroom culture, including setting behavioral expectations, establishing routines and procedures that maximize instructional time, and building strong relationships.

Rationale: Cesar Chavez is in need of providing students with instructional strategies and classroom routines that will effectively improve the schools academic rating.

Who will you partner with?: Other

How will you build capacity in this Essential Action? Cesar Chavez leadership will work along with the district curriculum department, district leadership coach and VIP, TNTP, to provide training and coaching support so that the campus ILT can train teachers with on-going job-embedded PD.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: This information will be communicated through the campus calendar, principal lead faculty meetings, PLC agendas and Professional development offered. Encourage parent and student involvement through the creation of extended instructional activities/dates that are intended to raise awareness of the schools rating along with instructional strategies to improve the academic success of their child. We will work with community partners to help provide resources for teachers and students that will enhance the learning environment for all. The primary sources of communicating all this stated information will be through the use of social media, blackboard messenger, campus marque, monthly newsletter and flyers.

Desired Annual Outcome: By May 2023, the desired outcome is to maintain 90% of weekly lesson plans and walkthroughs being aligned, rigorous, and have data driven objectives. All activities will be from high-quality instructional materials that are align to the objectives, and performance tasks are aligned to the rigor of interim and formative assessments and objectives.

District Commitment Theory of Action: This will be evident through lesson plan and walkthroughs feedback. If the district provides ongoing training and coaching support on aligning curriculum, analyzing formative assessments and providing action coaching support to campus administrators, then the campus will attain its goal to maintain 90% of lessons and classrooms aligned with rigorous instruction.

Desired 90-day Outcome: By November 30, 2022, 60% of classrooms will implement effective strategies using CHAMPS, Restorative Training, and establishing strong expectations for communication with Parents and Students.

District Actions: The district provided Behavior Training to the teachers who are new, 1st year, 2nd year to the profession. The district will provide a principal supervisor/coach to calibrated on campus walks and provide ongoing coaching support for the campus principal.

Did you achieve your 90 day outcome?:

Why or why not?:

| What challenges do you think you'll encounter in achieving desired campus or student outcomes for this cycle? | What specific action steps address these challenges? | How does this action step address this challenge? |
|---|--|---|
| Teachers will not implement with fidelity the restorative mindset or CHAMPS expectations. | None | The action step addresses how establishing a strong foundation of belonging and student ownership will have students comply and listen to teachers. |

| Step 1 Details | Formative Reviews |
|---|---|
| <p>Action Step 1: Cesar Chavez will provide Restorative Training in September to the campus to reflect on their approach on how student expectations and behavior is managed and will provide ongoing job-embedded support through coaching.</p> <p>Evidence Used to Determine Progress: The evidence used comes from the teachers and student surveys.</p> <p>Person(s) Responsible: Behavior Specialist, APs</p> <p>Resources Needed: The district provides CHAMPS Training and the campus provides Restorative Practice Training.</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: Ongoing - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 2 Details | Formative Reviews |
| <p>Action Step 2: The leadership team will conduct eight walkthroughs and two effective Action Coaching cycles to monitor and provide ongoing observation and feedback support to ensure effective routines and procedures are evident in classrooms.</p> <p>Evidence Used to Determine Progress: Teachers turning in lesson plans that are not rigorous or an increase of referrals being written by an individual.</p> <p>Person(s) Responsible: Principal, Instructional Specialists, APs, Behavior Specialist.</p> <p>Resources Needed: The district will provide training on Action Coaching and the feedback cycle.</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: Ongoing - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 3 Details | Formative Reviews |
| <p>Action Step 3: Communicate weekly expectations about instruction and behavior through PLCs, Smore, and emails.</p> <p>Evidence Used to Determine Progress: The number of times the staff visits the Smore site, and feedback collected through PLCs.</p> <p>Person(s) Responsible: Principal, APs, ISs.</p> <p>Resources Needed: Personnel and materials to conduct effective meetings in PLCs.</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: Weekly - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |

Cycle 2 - (Dec – Feb)

Did you achieve your student performance data goals? Why or why not?:

1. **Essential Action 2.1:** Recruit, select, assign, induct and retain a full staff of highly qualified educators.

Implementation Level: Partial Implementation

Key Practices: Campus leaders implement targeted and personalized strategies to retain staff, particularly high-performing staff. • Teacher placements are strategic based on student need and teacher strengths.

Rationale: Cesar Chavez experienced a 50% turnover rate with teachers during past school years and we do not want this to become the norm. The campus principal is new to the position and the campus no longer has the position of the Dean of Instruction due to district budget cuts.

Who will you partner with?: Other

How will you build capacity in this Essential Action? Cesar Chavez's leadership will collaborate with Human Resources and district coaches and our VIP, TNTP, to recruit highly qualified teachers. We will collect survey data from various teacher groups to make decisions about school culture and teacher practices. Teacher leaders will also be utilized to guide the campus decision making process through the overseeing of committees and clubs that teachers manage.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: Create opportunities for teachers to lead district and campus initiatives. Develop incentives that motivate and encourage effective teaching practices across campus. The instructional leadership team will establish a plan to strengthen recruitment and hiring practices that enable educators to be a part of CCMS. Encourage parent and student involvement through the creation of extended instructional activities that are intended to raise awareness of the school's rating along with instructional strategies to improve the academic success of their child. We will work with community partners to help provide resources for teachers and students to enhance the learning environment for all. The primary sources of communicating all this stated information will be social media, blackboard messenger, campus marque, monthly newsletter, and flyers.

Desired Annual Outcome: By May 2023, Cesar Chavez Middle School will retain 80% of the instructional staff from 2022-23 using various targeted and personalized strategies.

District Commitment Theory of Action: If the district supports Cesar Chavez by recruiting highly qualified candidates and developing instructional leadership skills to support staff needs, then the campus will be effective in retaining the most effective teaching staff.

Desired 90-day Outcome: By February 28, 2023, campus surveys will show that 75% of staff feel supported by campus leadership.

District Actions: The district will provide ongoing supports from the principal supervisor, content coordinators as well as other departments based on the needs of the campus.

Did you achieve your 90 day outcome?:

Why or why not?:

Cycle 2 - (Dec – Feb)

2. Essential Action 5.1: Effective classroom routines and instructional strategies.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders provide training and ongoing support so that teachers implement best practices for establishing and maintaining a strong classroom culture, including setting behavioral expectations, establishing routines and procedures that maximize instructional time, and building strong relationships.

Rationale: Cesar Chavez is in need of providing students with instructional strategies and classroom routines that will effectively improve the schools academic rating.

Who will you partner with?: Other

How will you build capacity in this Essential Action? Cesar Chavez leadership will work along with the district curriculum department, district leadership coach and VIP, TNTP, to provide training and coaching support so that the campus ILT can train teachers with on-going job-embedded PD.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: This information will be communicated through the campus calendar, principal lead faculty meetings, PLC agendas and Professional development offered. Encourage parent and student involvement through the creation of extended instructional activities/dates that are intended to raise awareness of the schools rating along with instructional strategies to improve the academic success of their child. We will work with community partners to help provide resources for teachers and students that will enhance the learning environment for all. The primary sources of communicating all this stated information will be through the use of social media, blackboard messenger, campus marque, monthly newsletter and flyers.

Desired Annual Outcome: By May 2023, the desired outcome is to maintain 90% of weekly lesson plans and walkthroughs being aligned, rigorous, and have data driven objectives. All activities will be from high-quality instructional materials that are align to the objectives, and performance tasks are aligned to the rigor of interim and formative assessments and objectives.

District Commitment Theory of Action: This will be evident through lesson plan and walkthroughs feedback. If the district provides ongoing training and coaching support on aligning curriculum, analyzing formative assessments and providing action coaching support to campus administrators, then the campus will attain its goal to maintain 90% of lessons and classrooms aligned with rigorous instruction.

Desired 90-day Outcome: By February 28, 2023, 60% of teachers will demonstrate proficiency in lesson planning by showing proficiency in Domain 1 of TTESS.

District Actions: The district will provide support from content coordinators and the principal supervisor in coaching campus leaders to provide effective lesson planning feedback.

Did you achieve your 90 day outcome?:

Why or why not?:

Cycle 3 - (Mar – May)

Did you achieve your student performance data goals? Why or why not?:

1. Essential Action 2.1: Recruit, select, assign, induct and retain a full staff of highly qualified educators.

Implementation Level: Partial Implementation

Key Practices: Campus leaders implement targeted and personalized strategies to retain staff, particularly high-performing staff. • Teacher placements are strategic based on student need and teacher strengths.

Rationale: Cesar Chavez experienced a 50% turnover rate with teachers during past school years and we do not want this to become the norm. The campus principal is new to the position and the campus no longer has the position of the Dean of Instruction due to district budget cuts.

Who will you partner with?: Other

How will you build capacity in this Essential Action? Cesar Chavez's leadership will collaborate with Human Resources and district coaches and our VIP, TNTP, to recruit highly qualified teachers. We will collect survey data from various teacher groups to make decisions about school culture and teacher practices. Teacher leaders will also be utilized to guide the campus decision making process through the overseeing of committees and clubs that teachers manage.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: Create opportunities for teachers to lead district and campus initiatives. Develop incentives that motivate and encourage effective teaching practices across campus. The instructional leadership team will establish a plan to strengthen recruitment and hiring practices that enable educators to be a part of CCMS. Encourage parent and student involvement through the creation of extended instructional activities that are intended to raise awareness of the school's rating along with instructional strategies to improve the academic success of their child. We will work with community partners to help provide resources for teachers and students to enhance the learning environment for all. The primary sources of communicating all this stated information will be social media, blackboard messenger, campus marque, monthly newsletter, and flyers.

Desired Annual Outcome: By May 2023, Cesar Chavez Middle School will retain 80% of the instructional staff from 2022-23 using various targeted and personalized strategies.

District Commitment Theory of Action: If the district supports Cesar Chavez by recruiting highly qualified candidates and developing instructional leadership skills to support staff needs, then the campus will be effective in retaining the most effective teaching staff.

Desired 90-day Outcome: By May 31 2023, Cesar Chavez Middle School will retain 80% of the instructional staff from 2022-23 by completing an intent to return form to campus administrators.

District Actions: The district will provide campus leaders opportunity to collaborate with other administrators and will provide ongoing support from the campus principal supervisor.

Did you achieve your 90 day outcome?:

Why or why not?:

| What challenges do you think you'll encounter in achieving desired campus or student outcomes for this cycle? | What specific action steps address these challenges? | How does this action step address this challenge? |
|---|--|---|
| The staff and students will not feel support even though we celebrate them through incentives. | None | The action step will allow for most of the staff to feel the support from the administrative team, district, and community. |

Did you achieve your annual outcome?:

Cycle 3 - (Mar – May)

2. Essential Action 5.1: Effective classroom routines and instructional strategies.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders provide training and ongoing support so that teachers implement best practices for establishing and maintaining a strong classroom culture, including setting behavioral expectations, establishing routines and procedures that maximize instructional time, and building strong relationships.

Rationale: Cesar Chavez is in need of providing students with instructional strategies and classroom routines that will effectively improve the schools academic rating.

Who will you partner with?: Other

How will you build capacity in this Essential Action? Cesar Chavez leadership will work along with the district curriculum department, district leadership coach and VIP, TNTP, to provide training and coaching support so that the campus ILT can train teachers with on-going job-embedded PD.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: This information will be communicated through the campus calendar, principal lead faculty meetings, PLC agendas and Professional development offered. Encourage parent and student involvement through the creation of extended instructional activities/dates that are intended to raise awareness of the schools rating along with instructional strategies to improve the academic success of their child. We will work with community partners to help provide resources for teachers and students that will enhance the learning environment for all. The primary sources of communicating all this stated information will be through the use of social media, blackboard messenger, campus marquee, monthly newsletter and flyers.

Desired Annual Outcome: By May 2023, the desired outcome is to maintain 90% of weekly lesson plans and walkthroughs being aligned, rigorous, and have data driven objectives. All activities will be from high-quality instructional materials that are align to the objectives, and performance tasks are aligned to the rigor of interim and formative assessments and objectives.

District Commitment Theory of Action: This will be evident through lesson plan and walkthroughs feedback. If the district provides ongoing training and coaching support on aligning curriculum, analyzing formative assessments and providing action coaching support to campus administrators, then the campus will attain its goal to maintain 90% of lessons and classrooms aligned with rigorous instruction.

Desired 90-day Outcome: By May 31, 2023, 90% of teachers lesson plans will be aligned with the rigor of the standards and will have aligned formative assessments.

District Actions: The district will provide training and a principal coach as well as training and support and for the instructional specialist on alignment of lesson plans.

Did you achieve your 90 day outcome?:

Why or why not?:

| What challenges do you think you'll encounter in achieving desired campus or student outcomes for this cycle? | What specific action steps address these challenges? | How does this action step address this challenge? |
|---|--|---|
| Teachers will submit lesson plans but are not written at a rigorous level. | None | Teachers will see that through effective written plans then students will be able to behave when the rigor is in place. |

Did you achieve your annual outcome?:

Cycle 4 - (Jun – Aug)

Student Data

| Student Achievement and Closing the Gaps | | | | | | | | | | | | | | | | | | | |
|--|---|------------------------|---------|------------------|----------------|-------------------|----------------------|--------------------|------------------|--------------|--------------------------|--------------------|----------------|----------------|--------------------|----------------|----------------|--------------------------|----------------|
| Core Metrics | Sub Metrics | | Grade | Student Group | Subject Tested | Performance Level | Summative Assessment | 2023 Student Count | % of Assessments | | | | | | | | | | |
| | | | | | | | | | 2021 Results | 2022 Results | 2022 Participation Rates | Cycle 1 | | | Cycle 2 | | | 2023 Accountability Goal | |
| | | | | | | | | | | | | Assessment Type | Formative Goal | Actual Results | Assessment Type | Formative Goal | Actual Results | Summative Goal | Actual Results |
| Student Achievement | # of Students at Approaches, Meets, and Masters | | All | All | Reading | Approaches | STAAR | 876 | 54 | 64 | N/A | Interim Assessment | 66 | | Interim Assessment | 68 | | 71 | |
| | | | All | All | Reading | Meets | STAAR | 876 | 24 | 32 | N/A | Interim Assessment | 34 | | Interim Assessment | 36 | | 37 | |
| | | | All | All | Reading | Masters | STAAR | 876 | 11 | 16 | N/A | Interim Assessment | 18 | | Interim Assessment | 20 | | 23 | |
| | | | All | All | Mathematics | Approaches | STAAR | 876 | 48 | 51 | N/A | Interim Assessment | 53 | | Interim Assessment | 55 | | 61 | |
| | | | All | All | Mathematics | Meets | STAAR | 876 | 16 | 17 | N/A | Interim Assessment | 19 | | Interim Assessment | 22 | | 23 | |
| | | | All | All | Mathematics | Masters | STAAR | 876 | 4 | 4 | N/A | Interim Assessment | 6 | | Interim Assessment | 8 | | 10 | |
| | | | All | All | Science | Approaches | STAAR | 304 | 55 | 57 | N/A | CBM | 59 | | Interim Assessment | 61 | | 62 | |
| | | | All | All | Science | Meets | STAAR | 304 | 27 | 28 | N/A | CBM | 30 | | Interim Assessment | 32 | | 33 | |
| | | | All | All | Science | Masters | STAAR | 304 | 11 | 13 | N/A | CBM | 15 | | Interim Assessment | 17 | | 18 | |
| | | | 8th | All | Social Studies | Approaches | STAAR | 304 | 38 | 35 | N/A | CBM | 37 | | Interim Assessment | 39 | | 45 | |
| | | | 8th | All | Social Studies | Meets | STAAR | 304 | 10 | 17 | N/A | CBM | 19 | | Interim Assessment | 21 | | 22 | |
| 8th | All | Social Studies | Masters | STAAR | 304 | 4 | 7 | N/A | CBM | 9 | | Interim Assessment | 11 | | 10 | | | | |
| Closing the Gaps | Focus 1 | Academic Growth Status | All | Hispanic | Mathematics | N/A | Mathematics | N/A | 0 | 58 | 99 | Interim Assessment | 62 | | Interim Assessment | 65 | | 70 | |
| | Focus 2 | Academic Growth Status | All | African American | Mathematics | N/A | Mathematics | N/A | 0 | 58 | 99 | Interim Assessment | 62 | | Interim Assessment | 65 | | 70 | |

| Academic Growth | | | | | | | | | | | | |
|-----------------|-------------|-------|----------------------|------------------------------------|------------------------|--------------|------------------------|------------------------|------------------------|------------------------|----------------|--------------------------|
| Core Metrics | Sub Metrics | Grade | Summative Assessment | 2023 Total # of Evaluated Students | Percentage of Students | 2022 Results | Cycle 1 Formative Goal | Cycle 1 Actual Results | Cycle 2 Formative Goal | Cycle 2 Actual Results | Summative Goal | Summative Actual Results |
| Academic Growth | ELAR | All | STAAR | 876 | Did Not Meet | 36 | 34 | | 32 | | 29 | |
| | | | | | Approaches | 64 | 66 | | 68 | | 71 | |
| | | | | | Meets | 32 | 34 | | 36 | | 37 | |
| | | | | | Masters | 16 | 18 | | 20 | | 23 | |
| | Math | All | STAAR | 876 | Did Not Meet | 49 | 47 | | 45 | | 39 | |
| | | | | | Approaches | 51 | 53 | | 55 | | 61 | |
| | | | | | Meets | 17 | 19 | | 22 | | 23 | |
| | | | | | Masters | 4 | 6 | | 8 | | 10 | |

Waco Independent School District
Dean Highland Elementary School - TIP
2022-2023 Targeted Improvement Plan



Campus Number: 161914107

Board Approval Date:

Superintendent:
DCSI/Grant Coordinator:

Susan Kincannon, EdD
Karmen Logan

Principal: Sharina Hubbard
ESC Case Manager: Jessica Torres
ESC Region: 12

Assurances

DCSI/Grant Coordinator

I, the District Coordinator of School Improvement/Grant Coordinator, attest that I will provide or facilitate the provision of all the necessary district-level commitments and support mechanisms to ensure the successful implementation of the Targeted Improvement Plan for this campus. I understand I am responsible for the implementation of all intervention requirements. If I am the principal supervisor, I understand I am responsible for ensuring the principal carries out the plan elements as indicated herein.

Signature: Karmen Logan

Principal Supervisor

I, as supervisor of the principal for this campus, attest that I will coordinate with the DCSI/Grant Coordinator to provide or facilitate the provision of all the necessary district-level commitments and support mechanisms to ensure the principal I supervise can achieve successful implementation of the Targeted Improvement Plan for this campus. I understand I am responsible for ensuring the principal carries out the plan elements as indicated herein.

Signature: Keonna White

Principal

I, as principal for this campus, attest that I will coordinate with the DCSI/Grant Coordinator (and my supervisor, if they are not the same person) to use the district-provided commitments and support mechanisms to ensure the successful implementation of the Targeted Improvement Plan for this campus. I agree to carry out the plan elements as indicated herein.

Signature: Sharina Hubbard

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Data Analysis

Student Achievement

What accountability goal has your campus set for this year?

Dean Highland has been on the upward trajectory of student growth and has set goals to increase in the following:

| 2022 | 2023 |
|----------------|----------------|
| Approaches 52% | Approaches 67% |
| Meets 26% | Meets 26% |
| Masters 10% | Masters 11% |

Rationale: Due to Dean Highland still experiencing the effects of the pandemic, we feel this is a feasible and attainable goal. The campus is working of effective leadership practices and culture-wide expectations. We have implemented leadership coaching through TNTP, adopted the Opportunity Culture Model, and invested in developing teacher coaches. Our African American students achievement in reading and math is lower than other subgroups and will be a focus for the campus. Math overall is an area that is a huge focus for the campus due to only 19% of students were on grade level and only 9% of African Americans were on grade level for math.

School Progress

What accountability goal has your campus set for this year?

Domain 2B: We will achieve a scale score of at least 60% moving Domain 2 up from 57%

Rationale: Our campus Academic Growth had a component score of 74 which equated the scaled score as a 79 this past year.

We want to continue to increase growth especially in the area of math as a campus but we want to improve our relative performance goal so that our campus is scoring higher compared to other similar campuses. We believe with improving our Tier 1 instruction, our intervention systems on campus and providing teacher coaching and consistent implementation of DDI that our campus will increase in Domain 2B and achieve our campus goal.

Closing the Gaps

What accountability goal has your campus set for this year?

Domain 3: For reading our student group we are focused on for achievement is our African American students. For math, we are targeting all students and our eco-disadvantaged students which represents 94% of the population since math is currently an area of weakness for the campus. Significant growth occurred as a campus last year in math but the campus fell short of making their growth targets in math. Special education is the only subgroup that met their achievement target in math.

Growth (22 score-23 goal)

| | |
|-----------------------|------------------------------------|
| Reading | Math |
| African American- 71% | African American- 66%-70% |
| | State Target- 67% |
| | Hispanic- 64%-70% |
| | State Target- 69% |
| | Eco. Dis- 65%-70% |
| | State Target- 68% |
| | Continuously Enrolled- 67%-71% |
| | State Target- 71% |
| | Non-Continuously Enrolled- 62%-70% |
| | State Target- 70% |

Academic Achievement (22 score-23 goal)

| | |
|--------------------------------|------------------------------------|
| Reading | Math |
| African American-27%- 35% | African American- 8%-18% |
| State Target- 32% | State Target- 31% |
| Hispanic- 40% | Hispanic- 23%-33% |
| | State Target- 40% |
| Eco. Dis- 33% | Eco. Dis- 30% |
| | State Target- 36% |
| Continuously Enrolled- 33% | Continuously Enrolled- 21%-31% |
| | State Target- 47% |
| Non-Continuously Enrolled- 37% | Non-Continuously Enrolled- 14%-25% |
| | State Target- 45% |

Subject Areas and Student Groups

Which subjects are a focus this year when thinking about student performance? Why have you identified these specific subject areas? What is the intended impact on your accountability domain scores?

Math overall is a priority area for our campus due to the significant gap in performance for all of our students. Our African American population will be more closely monitored due to the number of students not on grade level or making growth on our campus. However, our focus will be for growth for all students as well as stretch goals to increase the number of students performing at grade level especially in math. By improving Tier 1 instruction with supports from district curriculum and Region 12 content coordinators, we believe that by closing the gaps with all students and especially our African American students in math that it will improve our accountability in all domains.

| Growth (22 score-23 goal) | | Academic Achievement (22 score-23 goal) | |
|---------------------------|------------------------------------|---|------------------------------------|
| Reading | Math | Reading | Math |
| African American- 71% | African American- 66%-70% | African American-27%- 35% | African American- 8%-18% |
| | State Target- 67% | State Target- 32% | State Target- 31% |
| | Hispanic- 64%-70% | Hispanic- 40% | Hispanic- 23%-33% |
| | State Target- 69% | | State Target- 40% |
| | Eco. Dis- 65%-70% | Eco. Dis- 33% | Eco. Dis- 30% |
| | State Target- 68% | | State Target- 36% |
| | Continuously Enrolled- 67%-71% | Continuously Enrolled- 33% | Continuously Enrolled- 21%-31% |
| | State Target- 71% | | State Target- 47% |
| | Non-Continuously Enrolled- 62%-70% | Non-Continuously Enrolled- 37% | Non-Continuously Enrolled- 14%-25% |
| | State Target- 70% | | State Target- 45% |

Which student group outcomes are you targeting in these goals? What is the intended impact on your accountability domain scores?

Math overall is a priority area for our campus due to the significant gap in performance for all of our students. **Our African American population will be more closely monitored due to the number of students not on grade level or making growth on our campus.** However, our focus will be for growth for all students as well as stretch goals to increase the number of students performing at grade level, especially in math. By improving Tier 1 instruction with supports from district curriculum and Region 12 content coordinators, we believe that by closing the gaps with all students and especially our African American students in math that it will improve our accountability in all domains.

Growth (22 score-23 goal)

Academic Achievement (22 score-23 goal)

Reading

Math

Reading

Math

African American- 71%

African American- 66%-70%

African American-27%- 35%

African American- 8%-18%

State Target- 67%

State Target- 32%

State Target- 31%

Hispanic- 64%-70%

Hispanic- 40%

Hispanic- 23%-33%

State Target- 69%

State Target- 40%

Eco. Dis- 65%-70%

Eco. Dis- 33%

Eco. Dis- 30%

State Target- 68%

State Target- 36%

Continuously Enrolled-
67%-71%

Continuously Enrolled- 33%

Continuously Enrolled-
21%-31%

State Target- 71%

State Target- 47%

Non-Continuously Enrolled-
62%-70%

Non-Continuously Enrolled-
37%

Non-Continuously Enrolled-
14%-25%

State Target- 70%

State Target- 45%

Essential Actions

Cycles 1-3

Essential Action 1.1: Develop campus instructional leaders with clear roles and responsibilities.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders have clear, written, and transparent roles and responsibilities, and core leadership tasks (including observations, debriefs, and leadership team meetings) are scheduled on weekly calendars. • Principal improves campus leaders through regularly scheduled job-embedded professional development and development opportunities are consistent with best practices for adult learning, deliberate modeling, and observation and feedback cycles.

Essential Action 2.1: Recruit, select, assign, induct and retain a full staff of highly qualified educators.

Implementation Level: Beginning Implementation

Key Practices:

Essential Action 3.1: Compelling and aligned vision, mission, goals, values focused on a safe environment and high expectations.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 4.1: Daily use of high-quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

Implementation Level: Fully Implemented

Key Practices:

Essential Action 5.1: Effective classroom routines and instructional strategies.

Implementation Level: Beginning Implementation

Key Practices: Campus instructional leaders provide training and ongoing support so that teachers implement best practices for establishing and maintaining a strong classroom culture, including setting behavioral expectations, establishing routines and procedures that maximize instructional time, and building strong relationships. • Campus instructional leaders provide training and ongoing support so that teachers effectively use high-quality instructional materials and research-based teaching practices that promote critical-thinking skills and include differentiated and scaffolded supports for students with disabilities, English learners, and other student groups.

Essential Action 5.3: Data-driven instruction.

Implementation Level: Fully Implemented

Key Practices:

Cycle 4

Essential Action 1.1: Develop campus instructional leaders with clear roles and responsibilities.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 2.1: Recruit, select, assign, induct and retain a full staff of highly qualified educators.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 3.1: Compelling and aligned vision, mission, goals, values focused on a safe environment and high expectations.

Implementation Level: Not Yet Started

Key Practices:

114

Essential Action 4.1: Daily use of high-quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 5.1: Effective classroom routines and instructional strategies.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 5.3: Data-driven instruction.

Implementation Level: Not Yet Started

Key Practices:

Cycles

Cycle 1 - (Sept – Nov)

Did you achieve your student performance data goals? Why or why not?:

1. Essential Action 1.1: Develop campus instructional leaders with clear roles and responsibilities.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders have clear, written, and transparent roles and responsibilities, and core leadership tasks (including observations, debriefs, and leadership team meetings) are scheduled on weekly calendars. • Principal improves campus leaders through regularly scheduled job-embedded professional development and development opportunities are consistent with best practices for adult learning, deliberate modeling, and observation and feedback cycles.

Rationale: The campus principal and one of the assistant principals are new to their role on campus. It is clear that more clarity of roles and more use of distributed leadership is needed to ensure that systems are clear and effective on the campus.

Who will you partner with?: TNTP

How will you build capacity in this Essential Action? District leadership will provide coaching support along with coaching and support from TNTP. The campus principal is also receiving training from ESC12 in Lead Like a Champion as well as district professional trainings.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: We will communicate priorities through site based decision team, in the campus improvement plan and newsletters to staff, PLCs, and community. We will incorporate teacher leaders into the planning, implementing and responding to improve leadership capacity.

Desired Annual Outcome: By May of 2023, 100% of campus leaders are proficient in executing roles and responsibilities in core leadership tasks as evidenced through leadership trackers used during ILT meetings. (weekly calendars, observation and feedback, facilitating data talks using DDI protocols)

District Commitment Theory of Action: If the district provides visioning, training and implementation support, campus leaders will accomplish personal and collective goals to improve staff and student outcomes.

Desired 90-day Outcome: By the end of cycle 1, campus leadership team members will be trained by TNTP, principal supervisor and Opportunity Culture Director to execute effective calendaring of core leadership tasks, tier teachers and design observation and feedback schedules.

District Actions: The district will collaborate with TNTP and the principal supervisor to design a 90-day action plan with clear deliverables targeted to the 90-day outcomes.

Did you achieve your 90 day outcome?:

Why or why not?:

| What challenges do you think you'll encounter in achieving desired campus or student outcomes for this cycle? | What specific action steps address these challenges? | How does this action step address this challenge? |
|---|--|--|
| Consistent execution of tasks due to vacancies: 3 teachers, 1 counselor and an instructional specialist. | None | The written action plans will anticipate the barrier and identify responsible leaders as back ups for core tasks |

| Step 1 Details | Formative Reviews |
|---|---|
| <p>Action Step 1: Collaboratively design and communicate clear expectations for systems, procedures and routines related to leadership expectations and teacher expectations. (management and rigor)</p> <p>Evidence Used to Determine Progress: Written plans, protocols and campus visioning documents as well as one page guidance summary for teachers and leaders.</p> <p>Person(s) Responsible: Principal, Assistant Principals, TNTP and Principal Supervisor</p> <p>Resources Needed: TNTP and principal supervisor : How Leadership Works Playbook, Clifton Strengths, Leverage Leadership and Get Better Faster</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: Ongoing - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 2 Details | Formative Reviews |
| <p>Action Step 2: Engage in job-embedded weekly campus leadership team coaching with principal supervisor and bi-weekly with TNTP and and/or Opportunity Culture Director.</p> <p>Evidence Used to Determine Progress: Action step tracker, written protocols, agendas and minutes and action plan progress</p> <p>Person(s) Responsible: Principal Supervisor, Principal and TNTP</p> <p>Resources Needed: Human resources: principal supervisor and TNTP</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: Weekly - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 3 Details | Formative Reviews |
| <p>Action Step 3: Create a leadership scorecard that monitors and responds to observation and feedback schedule.</p> <p>Evidence Used to Determine Progress: Tiered teacher list, shared calendar with observation and feedback scheduled and action step trackers, leadership scorecard</p> <p>Person(s) Responsible: Principal</p> <p>Resources Needed: Human resources: Principal Supervisor and TNTP</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: One Time - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |

Cycle 1 - (Sept – Nov)

2. Essential Action 5.1: Effective classroom routines and instructional strategies.

Implementation Level: Beginning Implementation

Key Practices: Campus instructional leaders provide training and ongoing support so that teachers implement best practices for establishing and maintaining a strong classroom culture, including setting behavioral expectations, establishing routines and procedures that maximize instructional time, and building strong relationships. • Campus instructional leaders provide training and ongoing support so that teachers effectively use high-quality instructional materials and research-based teaching practices that promote critical-thinking skills and include differentiated and scaffolded supports for students with disabilities, English learners, and other student groups.

Rationale: Campus climate data indicates that systems to implement instructional strategies and effective classroom routines should be a priority. Focusing on 5.1 will allow our campus to build capacity in the area of classroom management and instruction. We feel this will provide focused support needed to retain our staff. Retaining our teachers will also prevent us from repeatedly starting over with training and staff development.

Who will you partner with?: Other

How will you build capacity in this Essential Action? The campus will be supported through district leadership coaches, Region 12 planning support, and our VIP which is TNTP. By working with these partners, our teachers will receive training and on-going support to create strong classroom cultures and differentiated lessons. These partners will provide face to face PD, implementation support, and on the site coaching for our team. This program will build the capacity of instructional leaders to better coach and support the campus.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: Priorities will be communicated to stakeholders in a variety of ways: social media, weekly faculty meetings, professional learning community meetings, visuals and campus trainings. Buy-in will be established by focusing on creating collective commitments that target problems of practice across the campus or team.

Community and families will be invited to provide input and debrief progress during site-based decision making meetings, surveys and coffee chats to improve the instructional program on campus. We will communicate this priority to students through goal setting conferences so they see how instructional strategies are impacting their achievement.

Desired Annual Outcome: By May 2023, campus instructional leaders will provide training and ongoing support so that teachers implement best practices for establishing and maintaining a strong classroom culture and effectively use research based teaching practices. This will be evident through calibrated T-TESS evaluation ratings, with the expectation that 75% of teachers be at the proficient level in Domains 2 and 3. Campus Climate surveys will also show that more than 70% of teachers feel supported and equipped to do their jobs.

District Commitment Theory of Action: If the district ensures that campus leaders are trained to implement strong instructional practices and execute six week action plans, then campus teachers will be able to create aligned and rigorous lessons in a safe, accessible, and efficient classroom.

Desired 90-day Outcome: By November 30, 2022, 60% of teachers will be at the proficient level in domain 3 as evidenced in campus walkthroughs and TTESS observations completed.

District Actions: The district will collaborate with TNTP and the principal supervisor to design a 90-day action plan with clear deliverables targeted to the 90-day outcomes with weekly implementation support.

Did you achieve your 90 day outcome?:

Why or why not?:

| What challenges do you think you'll encounter in achieving desired campus or student outcomes for this cycle? | What specific action steps address these challenges? | How does this action step address this challenge? |
|---|--|---|
| Identifying differentiated support for MCLs and Campus Leaders | None 118 | Customized professional development options for teachers and leaders. |

| Step 1 Details | Formative Reviews |
|---|---|
| <p>Action Step 1: Campus leaders will ensure that 100% of the Multi-Classroom Leaders(Teacher Leads) have written well-developed classroom management plans.</p> <p>Evidence Used to Determine Progress: Information from walkthroughs, planning audits, and using success criteria.</p> <p>Person(s) Responsible: Principal and Assistant Principals</p> <p>Resources Needed: Classroom management plan rubric</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: Weekly - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 2 Details | Formative Reviews |
| <p>Action Step 2: Create a customized professional development plan to address problems of practice gathered during calibration walks.</p> <p>Evidence Used to Determine Progress: Rubrics, Agendas, Action Plans, Teacher Ratings, Action Trackers. Improvement in survey results in the category of school climate.</p> <p>Person(s) Responsible: Principal, Assistant Principals, and Campus Leadership Team</p> <p>Resources Needed: Committee Calendar</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: Ongoing - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 3 Details | Formative Reviews |
| <p>Action Step 3: Revise the campus behavior management systems training and implementation support.</p> <p>Evidence Used to Determine Progress: A written plan with clear roles and responsibilities and follow-ups. A decrease in incident referrals.</p> <p>Person(s) Responsible: Principal, Counselors, Assistant Principals, and MTSS Team</p> <p>Resources Needed: SEL Training, CIP training, Behavior Management, BRTi tracker, CHAMPS Foundation.</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: Ongoing - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |

| Step 4 Details | Formative Reviews |
|--|---|
| <p>Action Step 4: Establish a yearly committee campus meeting schedule.</p> <p>Evidence Used to Determine Progress: Campus Calendar, committee minutes</p> <p>Person(s) Responsible: Principal</p> <p>Resources Needed: Calendar; meeting agendas</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 1, 2022 - Frequency: One Time - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |

Cycle 2 - (Dec – Feb)

Did you achieve your student performance data goals? Why or why not?:

1. Essential Action 1.1: Develop campus instructional leaders with clear roles and responsibilities.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders have clear, written, and transparent roles and responsibilities, and core leadership tasks (including observations, debriefs, and leadership team meetings) are scheduled on weekly calendars. • Principal improves campus leaders through regularly scheduled job-embedded professional development and development opportunities are consistent with best practices for adult learning, deliberate modeling, and observation and feedback cycles.

Rationale: The campus principal and one of the assistant principals are new to their role on campus. It is clear that more clarity of roles and more use of distributed leadership is needed to ensure that systems are clear and effective on the campus.

Who will you partner with?: TNTP

How will you build capacity in this Essential Action? District leadership will provide coaching support along with coaching and support from TNTP. The campus principal is also receiving training from ESC12 in Lead Like a Champion as well as district professional trainings.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: We will communicate priorities through site based decision team, in the campus improvement plan and newsletters to staff, PLCs, and community. We will incorporate teacher leaders into the planning, implementing and responding to improve leadership capacity.

Desired Annual Outcome: By May of 2023, 100% of campus leaders are proficient in executing roles and responsibilities in core leadership tasks as evidenced through leadership trackers used during ILT meetings. (weekly calendars, observation and feedback, facilitating data talks using DDI protocols)

District Commitment Theory of Action: If the district provides visioning, training and implementation support, campus leaders will accomplish personal and collective goals to improve staff and student outcomes.

Desired 90-day Outcome: By February 28, 2023, campus leaders will have completed a minimum of 8 walkthroughs and 2 coaching conversations weekly that are aligned to TTESS rubric.

District Actions: The district will provide professional development in Action Coaching and provide ongoing coaching to the principal by the principal supervisor and TNTP to apply those skills to improve teacher performance.

Did you achieve your 90 day outcome?:

Why or why not?:

Cycle 2 - (Dec – Feb)

2. Essential Action 5.1: Effective classroom routines and instructional strategies.

Implementation Level: Beginning Implementation

Key Practices: Campus instructional leaders provide training and ongoing support so that teachers implement best practices for establishing and maintaining a strong classroom culture, including setting behavioral expectations, establishing routines and procedures that maximize instructional time, and building strong relationships. • Campus instructional leaders provide training and ongoing support so that teachers effectively use high-quality instructional materials and research-based teaching practices that promote critical-thinking skills and include differentiated and scaffolded supports for students with disabilities, English learners, and other student groups.

Rationale: Campus climate data indicates that systems to implement instructional strategies and effective classroom routines should be a priority. Focusing on 5.1 will allow our campus to build capacity in the area of classroom management and instruction. We feel this will provide focused support needed to retain our staff. Retaining our teachers will also prevent us from repeatedly starting over with training and staff development.

Who will you partner with?: Other

How will you build capacity in this Essential Action? The campus will be supported through district leadership coaches, Region 12 planning support, and our VIP which is TNTP. By working with these partners, our teachers will receive training and on-going support to create strong classroom cultures and differentiated lessons. These partners will provide face to face PD, implementation support, and on the site coaching for our team. This program will build the capacity of instructional leaders to better coach and support the campus.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: Priorities will be communicated to stakeholders in a variety of ways: social media, weekly faculty meetings, professional learning community meetings, visuals and campus trainings. Buy-in will be established by focusing on creating collective commitments that target problems of practice across the campus or team.

Community and families will be invited to provide input and debrief progress during site-based decision making meetings, surveys and coffee chats to improve the instructional program on campus. We will communicate this priority to students through goal setting conferences so they see how instructional strategies are impacting their achievement.

Desired Annual Outcome: By May 2023, campus instructional leaders will provide training and ongoing support so that teachers implement best practices for establishing and maintaining a strong classroom culture and effectively use research based teaching practices. This will be evident through calibrated T-TESS evaluation ratings, with the expectation that 75% of teachers be at the proficient level in Domains 2 and 3. Campus Climate surveys will also show that more than 70% of teachers feel supported and equipped to do their jobs.

District Commitment Theory of Action: If the district ensures that campus leaders are trained to implement strong instructional practices and execute six week action plans, then campus teachers will be able to create aligned and rigorous lessons in a safe, accessible, and efficient classroom.

Desired 90-day Outcome: By February 28, 2023, 50% of staff will be at a minimum of proficient in Domains 2 and 3.

District Actions: The district will provide job-embedded support through callibrated walks and action coaching with the campus leadership team to build proficiency in Domains 2 and 3 of TTESS.

Did you achieve your 90 day outcome?:

Why or why not?:

| What challenges do you think you'll encounter in achieving desired campus or student outcomes for this cycle? | What specific action steps address these challenges? | How does this action step address this challenge? |
|---|--|---|
| The number of new teachers and alternative certified teachers that need continuous feedback. | | |

Cycle 3 - (Mar – May)

Did you achieve your student performance data goals? Why or why not?:

1. Essential Action 1.1: Develop campus instructional leaders with clear roles and responsibilities.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders have clear, written, and transparent roles and responsibilities, and core leadership tasks (including observations, debriefs, and leadership team meetings) are scheduled on weekly calendars. • Principal improves campus leaders through regularly scheduled job-embedded professional development and development opportunities are consistent with best practices for adult learning, deliberate modeling, and observation and feedback cycles.

Rationale: The campus principal and one of the assistant principals are new to their role on campus. It is clear that more clarity of roles and more use of distributed leadership is needed to ensure that systems are clear and effective on the campus.

Who will you partner with?: TNTP

How will you build capacity in this Essential Action? District leadership will provide coaching support along with coaching and support from TNTP. The campus principal is also receiving training from ESC12 in Lead Like a Champion as well as district professional trainings.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: We will communicate priorities through site based decision team, in the campus improvement plan and newsletters to staff, PLCs, and community. We will incorporate teacher leaders into the planning, implementing and responding to improve leadership capacity.

Desired Annual Outcome: By May of 2023, 100% of campus leaders are proficient in executing roles and responsibilities in core leadership tasks as evidenced through leadership trackers used during ILT meetings. (weekly calendars, observation and feedback, facilitating data talks using DDI protocols)

District Commitment Theory of Action: If the district provides visioning, training and implementation support, campus leaders will accomplish personal and collective goals to improve staff and student outcomes.

Desired 90-day Outcome: By May 31, 2023, the campus leadership team members will be proficient in coaching DDI facilitators to provide high leverage action steps that are aligned as evidenced through coaching scripts and the coaching rubric.

District Actions: The district will provide DDI training and ongoing coaching of to support the campus leadership in facilitating data talks using DDI protocols.

Did you achieve your 90 day outcome?:

Why or why not?:

Did you achieve your annual outcome?:

Cycle 3 - (Mar – May)

2. Essential Action 5.1: Effective classroom routines and instructional strategies.

Implementation Level: Beginning Implementation

Key Practices: Campus instructional leaders provide training and ongoing support so that teachers implement best practices for establishing and maintaining a strong classroom culture, including setting behavioral expectations, establishing routines and procedures that maximize instructional time, and building strong relationships. • Campus instructional leaders provide training and ongoing support so that teachers effectively use high-quality instructional materials and research-based teaching practices that promote critical-thinking skills and include differentiated and scaffolded supports for students with disabilities, English learners, and other student groups.

Rationale: Campus climate data indicates that systems to implement instructional strategies and effective classroom routines should be a priority. Focusing on 5.1 will allow our campus to build capacity in the area of classroom management and instruction. We feel this will provide focused support needed to retain our staff. Retaining our teachers will also prevent us from repeatedly starting over with training and staff development.

Who will you partner with?: Other

How will you build capacity in this Essential Action? The campus will be supported through district leadership coaches, Region 12 planning support, and our VIP which is TNTP. By working with these partners, our teachers will receive training and on-going support to create strong classroom cultures and differentiated lessons. These partners will provide face to face PD, implementation support, and on the site coaching for our team. This program will build the capacity of instructional leaders to better coach and support the campus.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: Priorities will be communicated to stakeholders in a variety of ways: social media, weekly faculty meetings, professional learning community meetings, visuals and campus trainings. Buy-in will be established by focusing on creating collective commitments that target problems of practice across the campus or team.

Community and families will be invited to provide input and debrief progress during site-based decision making meetings, surveys and coffee chats to improve the instructional program on campus. We will communicate this priority to students through goal setting conferences so they see how instructional strategies are impacting their achievement.

Desired Annual Outcome: By May 2023, campus instructional leaders will provide training and ongoing support so that teachers implement best practices for establishing and maintaining a strong classroom culture and effectively use research based teaching practices. This will be evident through calibrated T-TESS evaluation ratings, with the expectation that 75% of teachers be at the proficient level in Domains 2 and 3. Campus Climate surveys will also show that more than 70% of teachers feel supported and equipped to do their jobs.

District Commitment Theory of Action: If the district ensures that campus leaders are trained to implement strong instructional practices and execute six week action plans, then campus teachers will be able to create aligned and rigorous lessons in a safe, accessible, and efficient classroom.

Desired 90-day Outcome: By May 31, 2023, 75% of teachers will be proficient in Domains 2 and 3 of TTESS and 70% of teachers will feel supported and equipped based on campus climate surveys

District Actions: The district will provide job-embedded support through callibrated walks and action coaching with the campus leadership team on teachers who are not proficient in Domains 2 and 3 to build teacher proficiency and leadership capacity in coaching teachers.

Did you achieve your 90 day outcome?:

Why or why not?:

Did you achieve your annual outcome?:

Cycle 4 - (Jun – Aug)

Student Data

| Student Achievement and Closing the Gaps | | | | | | | | | | | | | | | | | | | |
|--|---|------------------------|-------|---------------|----------------|-------------------|----------------------|--------------------|------------------|--------------|--------------------------|----------------------------|----------------|----------------|----------------------------|----------------|----------------|--------------------------|----------------|
| Core Metrics | Sub Metrics | | Grade | Student Group | Subject Tested | Performance Level | Summative Assessment | 2023 Student Count | % of Assessments | | | | | | | | | | |
| | | | | | | | | | 2021 Results | 2022 Results | 2022 Participation Rates | Cycle 1 | | | Cycle 2 | | | 2023 Accountability Goal | |
| | | | | | | | | | | | | Assessment Type | Formative Goal | Actual Results | Assessment Type | Formative Goal | Actual Results | Summative Goal | Actual Results |
| Student Achievement | # of Students at Approaches, Meets, and Masters | | All | All | Reading | Approaches | STAAR | 283 | 41 | 63 | N/A | Interim Assessment | 64 | | Interim Assessment | 65 | | 67 | |
| | | | All | All | Reading | Meets | STAAR | 283 | 20 | 37 | N/A | Interim Assessment | 20 | | Interim Assessment | 24 | | 26 | |
| | | | All | All | Reading | Masters | STAAR | 283 | 8 | 15 | N/A | Interim Assessment | 5 | | Interim Assessment | 8 | | 10 | |
| | | | All | All | Mathematics | Approaches | STAAR | 283 | 36 | 47 | N/A | Interim Assessment | 64 | | Interim Assessment | 65 | | 67 | |
| | | | All | All | Mathematics | Meets | STAAR | 283 | 15 | 19 | N/A | Interim Assessment | 20 | | Interim Assessment | 24 | | 26 | |
| | | | All | All | Mathematics | Masters | STAAR | 283 | 5 | 7 | N/A | Interim Assessment | 5 | | Interim Assessment | 8 | | 10 | |
| | | | All | All | Science | Approaches | STAAR | 92 | 17 | 37 | N/A | District Created Benchmark | 35 | | District Created Benchmark | 40 | | 50 | |
| | | | All | All | Science | Meets | STAAR | 92 | 4 | 18 | N/A | District Created Benchmark | 15 | | District Created Benchmark | 17 | | 22 | |
| Closing the Gaps | Focus 1 | Academic Achievement | All | All Students | Mathematics | N/A | Mathematics | N/A | 15 | 19 | 100 | Interim Assessment | 30 | | Interim Assessment | 40 | | 46 | |
| | Focus 2 | Academic Growth Status | All | All Students | Mathematics | N/A | Mathematics | N/A | 0 | 66 | 100 | Interim Assessment | 58 | | Interim Assessment | 67 | | 71 | |

| Academic Growth | | | | | | | | | | | | |
|-----------------|-------------|-------|----------------------|------------------------------------|------------------------|--------------|------------------------|------------------------|------------------------|------------------------|----------------|--------------------------|
| Core Metrics | Sub Metrics | Grade | Summative Assessment | 2023 Total # of Evaluated Students | Percentage of Students | 2022 Results | Cycle 1 Formative Goal | Cycle 1 Actual Results | Cycle 2 Formative Goal | Cycle 2 Actual Results | Summative Goal | Summative Actual Results |
| Academic Growth | ELAR | All | STAAR | 180 | Did Not Meet | 57 | 45 | | 30 | | 20 | |
| | | | | | Approaches | 43 | 55 | | 70 | | 80 | |
| | | | | | Meets | 19 | 22 | | 25 | | 29 | |
| | | | | | Masters | 7 | 5 | | 7 | | 8 | |
| | Math | All | STAAR | 180 | Did Not Meet | 58 | 55 | | 40 | | 30 | |
| | | | | | Approaches | 42 | 45 | | 60 | | 70 | |
| | | | | | Meets | 10 | 9 | | 12 | | 15 | |
| | | | | Masters | 7 | 5 | | 7 | | 8 | | |

**Waco Independent School District
South Waco Elementary School - TIP
2022-2023 Targeted Improvement Plan**



Campus Number: 161914130

Board Approval Date:

**Superintendent:
DCSI/Grant Coordinator:**

Susan Kincannon, EdD
Karmen Logan

Principal: Lauren Frasure
ESC Case Manager: Jessica Torres
ESC Region: 12

Assurances

DCSI/Grant Coordinator

I, the District Coordinator of School Improvement/Grant Coordinator, attest that I will provide or facilitate the provision of all the necessary district-level commitments and support mechanisms to ensure the successful implementation of the Targeted Improvement Plan for this campus. I understand I am responsible for the implementation of all intervention requirements. If I am the principal supervisor, I understand I am responsible for ensuring the principal carries out the plan elements as indicated herein.

Signature: Karmen Logan

Principal Supervisor

I, as supervisor of the principal for this campus, attest that I will coordinate with the DCSI/Grant Coordinator to provide or facilitate the provision of all the necessary district-level commitments and support mechanisms to ensure the principal I supervise can achieve successful implementation of the Targeted Improvement Plan for this campus. I understand I am responsible for ensuring the principal carries out the plan elements as indicated herein.

Signature: Keonna White

Principal

I, as principal for this campus, attest that I will coordinate with the DCSI/Grant Coordinator (and my supervisor, if they are not the same person) to use the district-provided commitments and support mechanisms to ensure the successful implementation of the Targeted Improvement Plan for this campus. I agree to carry out the plan elements as indicated herein.

Signature: Lauren Frasure

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Data Analysis

Student Achievement

What accountability goal has your campus set for this year?

We aim to recover the learning loss from the past three years. We know it is feasible and ambitious to increase our scores from:

| 2022 | To | 2023 |
|-------------------------------|-----------|-------------------------------|
| Component Score: 20 | | Component Score: 26 |
| Approaches: 37% | | Approaches: 50% |
| Meets: 17% | | Meets: 23% |
| Masters: 6% | | Masters: 10% |

We looked at our scores from 2019 through 2022 to calculate how to get a component score of 26 (which is six points higher than 2022). We will improve our Tier 1 instruction and ensure a strong delivery of the lesson cycle for all teachers as well as implement observation and coaching feedback cycles. Our focus on Data Driven Instruction will also help us prioritize which standards/students to address and improve student learning. The instructional leadership team will build its capacity through leadership coaching.

School Progress

What accountability goal has your campus set for this year?

Our focus for this domain is Part A- Growth. Our goal for this domain is 75% because this would earn us a 'C' in this domain. When looking at our data from last year, our growth was 67%. The leadership team knows if we increase the fidelity of Tier 1 instruction and express the importance of a growth mindset to teachers, parents, and students, then our growth percentage will surpass our goal. We also know that if we meet the 75% growth goal, then we will automatically meet targets in Domain 3.

Closing the Gaps

What accountability goal has your campus set for this year?

2022 Closing the Gap Current Scores

| 2022 Growth | | 2022 Academic Achievement | |
|--------------------------------|--------------------------------|--------------------------------|-------------------------------|
| Reading | Math | Reading | Math |
| African American- 71% | African American- 66% | African American- 17% | African American- 7% |
| Hispanic- 73% | Hispanic- 56% | Hispanic- 34% | Hispanic- 13% |
| Eco. Dis- 72% | Eco. Dis- 61% | Eco. Dis- 23% | Eco. Dis- 10% |
| Continuously Enrolled- 75% | Continuously Enrolled- 64% | Continuously Enrolled- 23% | Continuously Enrolled- 11% |
| Non-Continuously Enrolled- 64% | Non-Continuously Enrolled- 54% | Non-Continuously Enrolled- 27% | Non-Continuously Enrolled- 4% |

2023 Closing the Gap Goals

| Growth | | Academic Achievement | |
|--------------------------------|--------------------------------|--------------------------------|--------------------------------|
| Reading | Math | Reading | Math |
| African American- 71% | African American- 67% | African American- 27% | African American- 17% |
| Hispanic- 77% | Hispanic- 69% | Hispanic- 40% | Hispanic- 23% |
| Eco. Dis- 77% | Eco. Dis- 68% | Eco. Dis- 33% | Eco. Dis- 20% |
| Continuously Enrolled- 77% | Continuously Enrolled- 71% | Continuously Enrolled- 33% | Continuously Enrolled- 21% |
| Non-Continuously Enrolled- 70% | Non-Continuously Enrolled- 70% | Non-Continuously Enrolled- 37% | Non-Continuously Enrolled- 14% |

South Waco will focus on both reading and math, emphasizing focus on math achievement and growth for the campus since it met almost all growth goals for reading but did not meet any growth goals for math. The campus chose goals for growth that would allow it to at minimum to meet the current targets set by the state. For achievement, the goals are increased by 10% minimum which will still be below the state target. Each student will have growth goals set that are rigorous and stretch them towards grade level proficiency. We will use district based assessments, interim testing and formative assessments as well as a data tracker to monitor students progress toward growth and grade level standard.

The campus will partner with district content coordinators as well as Region 12 content supports to close the gaps in math and reading.

Subject Areas and Student Groups

Which subjects are a focus this year when thinking about student performance? Why have you identified these specific subject areas? What is the intended impact on your accountability domain scores?

Our students struggled with math growth. We need to prioritize this focus areas to support our students in making up for significant learning loss. Prioritizing math growth will positively impact math student achievement scores. Math will also be a focus because it is a tested subject in all grade levels. Improving this area will increase academic performance. We will ensure our Data Driven Instruction practices are implemented with fidelity in reading and math, specifically the reteach plans. We will ensure Tier 1 instruction aligns with the standards and that teachers plan with the end in mind utilizing our district created assessments aligned to STAAR. We will utilize tutoring and intervention in math and reading as a way to support students who did not pass STAAR exams.

Which student group outcomes are you targeting in these goals? What is the intended impact on your accountability domain scores?

Additionally, our Hispanic and African American students also need to be prioritized this year. Focusing on these student groups will support accountability scores in multiple areas, but particularly in Domain 3 since these are 8 out of 20 targets. We also know that in 2019 (prior to COVID), our African American students met both math and reading targets and our Hispanic students did not meet any targets. We know our students can meet additional targets with a growth mindset and targeted Tier 1 instruction.

Essential Actions

Cycles 1-3

Essential Action 1.1: Develop campus instructional leaders with clear roles and responsibilities.

Implementation Level: Partial Implementation

Key Practices:

Essential Action 2.1: Recruit, select, assign, induct and retain a full staff of highly qualified educators.

Implementation Level: Beginning Implementation

Key Practices:

Essential Action 3.1: Compelling and aligned vision, mission, goals, values focused on a safe environment and high expectations.

Implementation Level: Partial Implementation

Key Practices: Staff members share a common understanding of the mission, vision, and values in practice and can explain how they are present in the daily life of the school. • Regular campus climate surveys assess and measure progress on student and staff experiences.

Essential Action 4.1: Daily use of high-quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders frequently review how teachers internalize, modify and use lesson plans, providing feedback and lesson planning support regarding alignment to the scope and sequence, the standards and the expected level of rigor.

Essential Action 5.1: Effective classroom routines and instructional strategies.

Implementation Level: Planning for Implementation

Key Practices:

Essential Action 5.3: Data-driven instruction.

Implementation Level: Beginning Implementation

Key Practices:

Cycle 4

Essential Action 1.1: Develop campus instructional leaders with clear roles and responsibilities.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 2.1: Recruit, select, assign, induct and retain a full staff of highly qualified educators.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 3.1: Compelling and aligned vision, mission, goals, values focused on a safe environment and high expectations.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 4.1: Daily use of high-quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 5.1: Effective classroom routines and instructional strategies.

Implementation Level: Not Yet Started

Key Practices:

Essential Action 5.3: Data-driven instruction.

Implementation Level: Not Yet Started

Key Practices:

Cycles

Cycle 1 - (Sept – Nov)

Did you achieve your student performance data goals? Why or why not?:

1. Essential Action 3.1: Compelling and aligned vision, mission, goals, values focused on a safe environment and high expectations.

Implementation Level: Partial Implementation

Key Practices: Staff members share a common understanding of the mission, vision, and values in practice and can explain how they are present in the daily life of the school. • Regular campus climate surveys assess and measure progress on student and staff experiences.

Rationale: The campus Panorama survey showed that this is an area that needs continuous improvement.

The culture needs to improve from a contrived-collegial culture to a collaborative culture of high expectations for all.
(School Culture Rewired, Gruenert & Whitaker)

CLT will use the Kirkpatrick Model of Evaluation to audit and ensure the following improvements are made as evidenced by a variety of data sources:

High expectations and safe environments are likely to improve:

Level 1: Reactions and impressions from stakeholders will improve on-campus surveys and interactions.

Level 2: Learning-Improve leader and teacher proficiency.

Level 3: Behavior- Improve positive interactions and behaviors of staff and students to create a more inclusive, safe learning environment. This can be evidenced by a reduction in conflicts between staff, between staff and students, and between staff and parents.

Level 4: Results- Improve overall student outcomes to attain campus goals.

Who will you partner with?: TNTP

How will you build capacity in this Essential Action? South Waco Elementary School will ensure our expectations align with the mission and vision of the campus. The campus will build students' social-emotional capacity by implementing inclusion activities, teaching social skills, and developing a behavior plan that is proactive and consistent. Additionally, Spartan Circles and restorative circles will be implemented schoolwide to provide time for inclusion activities and social-emotional learning. The assistant principal and principal will work with the school counselors to prepare lesson plans that are aligned with the school's statement of belief. Furthermore, the school counselors will tie the school's success guidelines and statement of belief with the district's monthly character traits. The campus will partner with Student Services, and utilize CHAMPS and Safe and Civil Training. Our principal, assistant principal, and two teachers attended Safe and Civil Training in Portland, Oregon this summer. The campus leadership team will build a positive culture through incorporating inclusion activities during faculty meetings to build relationships among our staff. Each leader will also build staff culture time in their schedule to support their assigned staff members. Moreover, each member of the leadership team will utilize action coaching with a small group of teachers in order to build teacher capacity. A selected group of proficient teachers are being trained to build other teachers capacity in CHAMPS and positive interactions among all stakeholders.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: All stakeholders know our PRIDE statement. The next step is ensuring our stakeholders know and understand South Waco's vision and mission and how they align to student and adult behaviors and expectations. The campus has CHAMPS posters posted in each classroom, in the hallways, going out to the playground, in the restroom and in the cafeteria. We will work with the staff to ensure the CHAMPS posters are used during all transitions and when students are not following expectations. PBIS Rewards will be used as a way to track students demonstrating PRIDE throughout their daily interactions.

The campus mission and vision statement will be written and campus initiatives will be communicated using several platforms: Blackboard, the school website, campus newsletters, mobile apps, social media, and videos will be used to communicate stories and imagery of the school's impact. Other hubs: Parent engagement nights; internal postings (posters, graphs) inside the building (posters, graphs)

Desired Annual Outcome: Campus leaders and teachers will collaborate to establish systems and implement systems to promote high expectations and a sense of belonging for staff and students.

This will be evidenced by improving results:
 Panorama survey from 29% to 75% in School Leadership and 41% to 80% in School Climate.
 Reduction in student incidents from 2526 Fast Forms to 1500 Fast Forms.
 Improve teacher retention from 45% to 20%.

District Commitment Theory of Action: If the district provides data systems to track pertinent school culture data (e.g. discipline referrals, attendance, campus climate) and provide our campus with best practice resources and tools for engaging families, then South Waco stakeholders will feel a sense of belonging and we will show improvement in campus climate surveys.

Desired 90-day Outcome: By November 2022, all stakeholders will know and understand South Waco's vision and core beliefs (PRIDE). They will be able to articulate how each of these align to everything that we do at South Waco. A proactive systematic approach will be created to help teachers in the classroom with Tier 1 behaviors and all staff will become proficient in communicating expectations (proactive and redirection) using the three positive to one negative interactions. This will be evidenced by bi-weekly pop-ins into classroom indicating 50% of all communication of expectations is completed using three positive to one negative interaction.

District Actions: The campus will receive weekly implementation and job-embedded support from principal support and bi-weekly support from TNTP to monitor and respond to teacher and student data during cultural walks (referrals, opportunities to engage, attendance).

Did you achieve your 90 day outcome?:

Why or why not?:

| What challenges do you think you'll encounter in achieving desired campus or student outcomes for this cycle? | What specific action steps address these challenges? | How does this action step address this challenge? |
|---|--|---|
| Lack of positive reinforcement inventory | None | During the faculty meeting, staff will be given sentence stems as a "go to" when the positive interactions do not come naturally. |
| Lack of time for culture walk pop-ins | None | Behavior team and team leads will be included in the culture walks so that the walks do not just fall on the leadership team. |
| Lack of understanding of 3 to 1 expectations | None | Faculty will be trained on three to one positive redirections. |

| Step 1 Details | Formative Reviews |
|---|---|
| <p>Action Step 1: The leadership team will create a bulletin board focused on the tracking and success of three to one positive interactions among staff and students. The weekly and family newsletter will also include a shout out of the highest grade level percentage of three to one interactions.</p> <p>Evidence Used to Determine Progress: Increase in positive interactions among staff and students. Behavior referrals will decrease. Increase in caring referrals.</p> <p>Person(s) Responsible: Leadership team</p> <p>Resources Needed: Interaction 3 to 1 bulletin board, Smore Newsletters, 3 to 1 Google Form</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 12, 2022 - Frequency: Weekly - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 2 Details | Formative Reviews |
| <p>Action Step 2: Leadership team, behavior team, and team leads will participate in bi-weekly culture walks within all classrooms observing for three to one interactions. Culture walks will be documented through a Google Form tracker.</p> <p>Evidence Used to Determine Progress: Google Form tracker updated with culture walks, Increase in positive interactions among staff and students. Behavior referrals will decrease. Increase in caring referrals.</p> <p>Person(s) Responsible: Leadership Team, behavior team, team leads</p> <p>Resources Needed: Google Form Tracker</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 12, 2022 - Frequency: Daily - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 3 Details | Formative Reviews |
| <p>Action Step 3: We will train all staff on three to one positive interactions in a faculty meeting. The training will consist of the See it, Name it, Do it process. Campus leaders will then monitor and provide feedback on implementation of this strategy.</p> <p>Evidence Used to Determine Progress: Agenda, PowerPoint, Increase in positive interactions among staff and students. Behavior referrals will decrease. Increase in caring referrals.</p> <p>Person(s) Responsible: Three selected staff members that show 3 to 1 interactions daily, Leadership team</p> <p>Resources Needed: Agenda, PowerPoint</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 14, 2022 - Frequency: Ongoing - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |

Cycle 1 - (Sept – Nov)

2. Essential Action 4.1: Daily use of high-quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders frequently review how teachers internalize, modify and use lesson plans, providing feedback and lesson planning support regarding alignment to the scope and sequence, the standards and the expected level of rigor.

Rationale: Forty-five percent of teachers at South Waco are new to the campus. There are established written expectations for planning, delivering, and responding to student learning. The processes are not being followed with fidelity to create and deliver aligned, rigorous lessons. South Waco has two new Instructional Specialists and a new Assistant Principal.

Who will you partner with?: TNTP

How will you build capacity in this Essential Action? District personnel will collaborate and coach the principal weekly on specific action steps to increase the capacity of the leadership team. District personnel will also provide feedback to professional development sessions on campus.

Our instructional leadership team will be working closely with TNTP. They will coach the team on other coaching strategies to change teacher practice and help to create systems and structures to build teacher mindset and ownership over student data.

Through coaching, we will be able to identify what high quality teaching and learning look like in specific content and grade bands and identify action steps to improve teachers' instructional practice with regards to content.

We hope to gain insight and strategies on how to ensure daily use of high quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: The instructional leadership team will show the school data to the staff and describe the accountability system from TEA in order to help build a common understanding of teacher influence on student achievement. We will provide an exemplar of the PLC process that will show the team checking the alignment of the objective and performance task and ensuring all activities included in the I do and we do are from high-quality instructional materials.

We will also have parent conferences to discuss student data and what action steps will be taken from the school to address to increase student achievement. Teachers will have discussions with parents on steps parents can take at home to support their child's academic progress.

Teachers will hold data meetings with students to discuss their current levels for reading and math and create goals for future formative and summative assessments.

Desired Annual Outcome: By May 2023, campus instructional leaders will use consistent, written protocols and processes to lead their areas or people of responsibility in the lesson planning process. This will be evidenced by weekly Instructional Leadership meetings indicating 90% of teachers receive feedback on their lessons through the Get Better Faster framework.

This will be evident through lesson plan feedback, walkthroughs, action coaching and data driven scripts, student work samples, and data from formative and summative assessments.

District Commitment Theory of Action: If the district provides routine observation and feedback with targeted coaching support for the principal and leadership team, then the leadership team will increase their leadership capacity to establish core beliefs related to effective instruction, establish effective systems and processes, and provide consistent observation and feedback to teachers and other staff.

Desired 90-day Outcome: By the end of November, 50% of our weekly instructional leadership meetings will be focused on professional development that targets calibrating on campus leaders to land on high-leverage action steps and deliver effective professional development.

District Actions: The district will provide ongoing coaching for the principal and leadership team (ILT) to include job-embedded training that targets identifying aligned objectives and performance tasks and calibrating coaching feedback to teachers.

Did you achieve your 90 day outcome?:

Why or why not?:

| What challenges do you think you'll encounter in achieving desired campus or student outcomes for this cycle? | What specific action steps address these challenges? | How does this action step address this challenge? |
|---|--|---|
| Not 100% of lesson plans submitted | None | Calendar invites are sent out to teachers as reminders of lesson plans submitted. |
| Lack of content knowledge | None | Leadership team will meet weekly for job-embedded feedback. |
| Misconception of a specific success criteria | None | Leadership team will meet weekly for job-embedded feedback. |

| Step 1 Details | Formative Reviews |
|---|---|
| <p>Action Step 1: Instructional Leaders will engage in professional learning and collaborative problem-solving related to lesson planning, lesson delivery, analyzing student formative assessments and creating effective professional development.</p> <p>Evidence Used to Determine Progress: Agendas, calibration percentage tracker</p> <p>Person(s) Responsible: Principal, Assistant Principal, Instructional Specialist</p> <p>Resources Needed: Tracker</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 7, 2022 - Frequency: One Time - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |

| Step 2 Details | Formative Reviews |
|---|---|
| <p>Action Step 2: Instructional leadership team will meet once a week to review the protocol for identifying an aligned objective and performance task, creating exemplar coaching feedback responses to lesson plan objectives, and calibrate on objective and performance task feedback. This will ensure communication regarding lesson plan feedback to all stakeholders is aligned and effective.</p> <p>Evidence Used to Determine Progress: Coaching feedback exemplars, alignment protocol, calibration objective spreadsheet, meeting minutes</p> <p>Person(s) Responsible: Principal, assistant principal, and instructional specialists</p> <p>Resources Needed: Lesson plans, all in one, calibration spreadsheet, TEKS resource System, Lead4ward, TCAs, District Curriculum Website, Leadership Team Google Folder</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 8, 2022 - Frequency: Weekly - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 3 Details | Formative Reviews |
| <p>Action Step 3: The principal will ensure that CLT consistently calendars and executes core leadership responsibilities (lesson plan feedback, observation, and feedback conversations).</p> <p>Evidence Used to Determine Progress: Feedback portion of the meeting minutes, ILT feedback audit tracker, calendars</p> <p>Person(s) Responsible: Principal, assistant principal, and instructional specialists</p> <p>Resources Needed: Lesson plans, all in one, calibration spreadsheet, TEKS resource System, Lead4ward, TCAs, District Curriculum Website, Leadership Team Google Folder, audit tracker</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 8, 2022 - Frequency: Weekly - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |
| Step 4 Details | Formative Reviews |
| <p>Action Step 4: The instructional leadership team will complete calibration walks each week to ensure a common language, but also for the principal to conduct job-embedded feedback looks for continuous improvement.</p> <p>Evidence Used to Determine Progress: Walkthrough tracker, walkthrough forms</p> <p>Person(s) Responsible: Principal, assistant principal, instructional specialists</p> <p>Resources Needed: Lesson plans, all in one, calibration spreadsheet, TEKS resource System, Lead4ward, TCAs, District Curriculum Website, Leadership Team Google Folder, audit tracker.</p> <p>Addresses an Identified Challenge: Yes</p> <p>Start Date: September 8, 2022 - Frequency: Weekly - Evidence Collection Date: November 30, 2022</p> | <p>Progress toward Action Steps:</p> <p>Necessary Adjustments/Next Steps:</p> |

Cycle 2 - (Dec – Feb)

Did you achieve your student performance data goals? Why or why not?:

1. **Essential Action 3.1:** Compelling and aligned vision, mission, goals, values focused on a safe environment and high expectations.

Implementation Level: Partial Implementation

Key Practices: Staff members share a common understanding of the mission, vision, and values in practice and can explain how they are present in the daily life of the school. • Regular campus climate surveys assess and measure progress on student and staff experiences.

Rationale: The campus Panorama survey showed that this is an area that needs continuous improvement.

The culture needs to improve from a contrived-collegial culture to a collaborative culture of high expectations for all.
(School Culture Rewired, Gruenert & Whitaker)

CLT will use the Kirkpatrick Model of Evaluation to audit and ensure the following improvements are made as evidenced by a variety of data sources:

High expectations and safe environments are likely to improve:

Level 1: Reactions and impressions from stakeholders will improve on-campus surveys and interactions.

Level 2: Learning-Improve leader and teacher proficiency.

Level 3: Behavior- Improve positive interactions and behaviors of staff and students to create a more inclusive, safe learning environment. This can be evidenced by a reduction in conflicts between staff, between staff and students, and between staff and parents.

Level 4: Results- Improve overall student outcomes to attain campus goals.

Who will you partner with?: TNTP

How will you build capacity in this Essential Action? South Waco Elementary School will ensure our expectations align with the mission and vision of the campus. The campus will build students' social-emotional capacity by implementing inclusion activities, teaching social skills, and developing a behavior plan that is proactive and consistent. Additionally, Spartan Circles and restorative circles will be implemented schoolwide to provide time for inclusion activities and social-emotional learning. The assistant principal and principal will work with the school counselors to prepare lesson plans that are aligned with the school's statement of belief. Furthermore, the school counselors will tie the school's success guidelines and statement of belief with the district's monthly character traits. The campus will partner with Student Services, and utilize CHAMPS and Safe and Civil Training. Our principal, assistant principal, and two teachers attended Safe and Civil Training in Portland, Oregon this summer. The campus leadership team will build a positive culture through incorporating inclusion activities during faculty meetings to build relationships among our staff. Each leader will also build staff culture time in their schedule to support their assigned staff members. Moreover, each member of the leadership team will utilize action coaching with a small group of teachers in order to build teacher capacity. A selected group of proficient teachers are being trained to build other teachers capacity in CHAMPS and positive interactions among all stakeholders.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: All stakeholders know our PRIDE statement. The next step is ensuring our stakeholders know and understand South Waco's vision and mission and how they align to student and adult behaviors and expectations. The campus has CHAMPS posters posted in each classroom, in the hallways, going out to the playground, in the restroom and in the cafeteria. We will work with the staff to ensure the CHAMPS posters are used during all transitions and when students are not following expectations. PBIS Rewards will be used as a way to track students demonstrating PRIDE throughout their daily interactions.

The campus mission and vision statement will be written and campus initiatives will be communicated using several platforms: Blackboard, the school website, campus newsletters, mobile apps, social media, and videos will be used to communicate stories and imagery of the school's impact. Other hubs: Parent engagement nights; internal postings (posters, graphs) inside the building (posters, graphs)

Desired Annual Outcome: Campus leaders and teachers will collaborate to establish systems and implement systems to promote high expectations and a sense of belonging for staff and students.

This will be evidenced by improving results:

Panorama survey from 29% to 75% in School Leadership and 41% to 80% in School Climate.

Reduction in student incidents from 2526 Fast Forms to 1500 Fast Forms.

Improve teacher retention from 45% to 20%.

District Commitment Theory of Action: If the district provides data systems to track pertinent school culture data (e.g. discipline referrals, attendance, campus climate) and provide our campus with best practice resources and tools for engaging families, then South Waco stakeholders will feel a sense of belonging and we will show improvement in campus climate surveys.

Desired 90-day Outcome: By February 2023, all stakeholders will know and understand South Waco's vision and core beliefs (PRIDE). They will be able to articulate how each of these align to everything that we do at South Waco. A proactive systematic approach will be created to help teachers in the classroom with tier 1 behaviors and all staff will become proficient in communicating expectations (proactive and redirection) using the three positive to one negative interactions. This will be evidenced by bi-weekly pop-ins into classroom indicating 70% of all communication of expectations is completed using three positive to one negative interaction.

District Actions:

Did you achieve your 90 day outcome?:

Why or why not?:

Cycle 2 - (Dec – Feb)

2. Essential Action 4.1: Daily use of high-quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders frequently review how teachers internalize, modify and use lesson plans, providing feedback and lesson planning support regarding alignment to the scope and sequence, the standards and the expected level of rigor.

Rationale: Forty-five percent of teachers at South Waco are new to the campus. There are established written expectations for planning, delivering, and responding to student learning. The processes are not being followed with fidelity to create and deliver aligned, rigorous lessons. South Waco has two new Instructional Specialists and a new Assistant Principal.

Who will you partner with?: TNTP

How will you build capacity in this Essential Action? District personnel will collaborate and coach the principal weekly on specific action steps to increase the capacity of the leadership team. District personnel will also provide feedback to professional development sessions on campus.

Our instructional leadership team will be working closely with TNTP. They will coach the team on other coaching strategies to change teacher practice and help to create systems and structures to build teacher mindset and ownership over student data.

Through coaching, we will be able to identify what high quality teaching and learning look like in specific content and grade bands and identify action steps to improve teachers' instructional practice with regards to content.

We hope to gain insight and strategies on how to ensure daily use of high quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: The instructional leadership team will show the school data to the staff and describe the accountability system from TEA in order to help build a common understanding of teacher influence on student achievement. We will provide an exemplar of the PLC process that will show the team checking the alignment of the objective and performance task and ensuring all activities included in the I do and we do are from high-quality instructional materials.

We will also have parent conferences to discuss student data and what action steps will be taken from the school to address to increase student achievement. Teachers will have discussions with parents on steps parents can take at home to support their child's academic progress.

Teachers will hold data meetings with students to discuss their current levels for reading and math and create goals for future formative and summative assessments.

Desired Annual Outcome: By May 2023, campus instructional leaders will use consistent, written protocols and processes to lead their areas or people of responsibility in the lesson planning process. This will be evidenced by weekly Instructional Leadership meetings indicating 90% of teachers receive feedback on their lessons through the Get Better Faster framework.

This will be evident through lesson plan feedback, walkthroughs, action coaching and data driven scripts, student work samples, and data from formative and summative assessments.

District Commitment Theory of Action: If the district provides routine observation and feedback with targeted coaching support for the principal and leadership team, then the leadership team will increase their leadership capacity to establish core beliefs related to effective instruction, establish effective systems and processes, and provide consistent observation and feedback to teachers and other staff.

Desired 90-day Outcome: By February 28, 2023, 75% of our weekly instructional leadership meetings will be focused on professional development that targets calibrating on campus leaders to land on high-leverage action steps and deliver effective professional development.

District Actions:

Did you achieve your 90 day outcome?:

Why or why not?:

Cycle 3 - (Mar – May)

Did you achieve your student performance data goals? Why or why not?:

1. **Essential Action 3.1:** Compelling and aligned vision, mission, goals, values focused on a safe environment and high expectations.

Implementation Level: Partial Implementation

Key Practices: Staff members share a common understanding of the mission, vision, and values in practice and can explain how they are present in the daily life of the school. • Regular campus climate surveys assess and measure progress on student and staff experiences.

Rationale: The campus Panorama survey showed that this is an area that needs continuous improvement.

The culture needs to improve from a contrived-collegial culture to a collaborative culture of high expectations for all.
(School Culture Rewired, Gruenert & Whitaker)

CLT will use the Kirkpatrick Model of Evaluation to audit and ensure the following improvements are made as evidenced by a variety of data sources:

High expectations and safe environments are likely to improve:

Level 1: Reactions and impressions from stakeholders will improve on-campus surveys and interactions.

Level 2: Learning-Improve leader and teacher proficiency.

Level 3: Behavior- Improve positive interactions and behaviors of staff and students to create a more inclusive, safe learning environment. This can be evidenced by a reduction in conflicts between staff, between staff and students, and between staff and parents.

Level 4: Results- Improve overall student outcomes to attain campus goals.

Who will you partner with?: TNTP

How will you build capacity in this Essential Action? South Waco Elementary School will ensure our expectations align with the mission and vision of the campus. The campus will build students' social-emotional capacity by implementing inclusion activities, teaching social skills, and developing a behavior plan that is proactive and consistent. Additionally, Spartan Circles and restorative circles will be implemented schoolwide to provide time for inclusion activities and social-emotional learning. The assistant principal and principal will work with the school counselors to prepare lesson plans that are aligned with the school's statement of belief. Furthermore, the school counselors will tie the school's success guidelines and statement of belief with the district's monthly character traits. The campus will partner with Student Services, and utilize CHAMPS and Safe and Civil Training. Our principal, assistant principal, and two teachers attended Safe and Civil Training in Portland, Oregon this summer. The campus leadership team will build a positive culture through incorporating inclusion activities during faculty meetings to build relationships among our staff. Each leader will also build staff culture time in their schedule to support their assigned staff members. Moreover, each member of the leadership team will utilize action coaching with a small group of teachers in order to build teacher capacity. A selected group of proficient teachers are being trained to build other teachers capacity in CHAMPS and positive interactions among all stakeholders.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: All stakeholders know our PRIDE statement. The next step is ensuring our stakeholders know and understand South Waco's vision and mission and how they align to student and adult behaviors and expectations. The campus has CHAMPS posters posted in each classroom, in the hallways, going out to the playground, in the restroom and in the cafeteria. We will work with the staff to ensure the CHAMPS posters are used during all transitions and when students are not following expectations. PBIS Rewards will be used as a way to track students demonstrating PRIDE throughout their daily interactions.

The campus mission and vision statement will be written and campus initiatives will be communicated using several platforms: Blackboard, the school website, campus newsletters, mobile apps, social media, and videos will be used to communicate stories and imagery of the school's impact. Other hubs: Parent engagement nights; internal postings (posters, graphs) inside the building (posters, graphs)

Desired Annual Outcome: Campus leaders and teachers will collaborate to establish systems and implement systems to promote high expectations and a sense of belonging for staff and students.

This will be evidenced by improving results:

Panorama survey from 29% to 75% in School Leadership and 41% to 80% in School Climate.

Reduction in student incidents from 2526 Fast Forms to 1500 Fast Forms.

Improve teacher retention from 45% to 20%.

District Commitment Theory of Action: If the district provides data systems to track pertinent school culture data (e.g. discipline referrals, attendance, campus climate) and provide our campus with best practice resources and tools for engaging families, then South Waco stakeholders will feel a sense of belonging and we will show improvement in campus climate surveys.

Desired 90-day Outcome: By May 31, 2023, the campus

Panorama survey will improve from 29% to 75% in School Leadership and 41% to 80% in School Climate.

Reduction in student incidents from 2526 Fast Forms to 1500 Fast Forms.

Improve teacher retention from 45% to 20%.

District Actions:

Did you achieve your 90 day outcome?:

Why or why not?:

Did you achieve your annual outcome?:

Cycle 3 - (Mar – May)

2. Essential Action 4.1: Daily use of high-quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

Implementation Level: Partial Implementation

Key Practices: Campus instructional leaders frequently review how teachers internalize, modify and use lesson plans, providing feedback and lesson planning support regarding alignment to the scope and sequence, the standards and the expected level of rigor.

Rationale: Forty-five percent of teachers at South Waco are new to the campus. There are established written expectations for planning, delivering, and responding to student learning. The processes are not being followed with fidelity to create and deliver aligned, rigorous lessons. South Waco has two new Instructional Specialists and a new Assistant Principal.

Who will you partner with?: TNTP

How will you build capacity in this Essential Action? District personnel will collaborate and coach the principal weekly on specific action steps to increase the capacity of the leadership team. District personnel will also provide feedback to professional development sessions on campus.

Our instructional leadership team will be working closely with TNTP. They will coach the team on other coaching strategies to change teacher practice and help to create systems and structures to build teacher mindset and ownership over student data.

Through coaching, we will be able to identify what high quality teaching and learning look like in specific content and grade bands and identify action steps to improve teachers' instructional practice with regards to content.

We hope to gain insight and strategies on how to ensure daily use of high quality instructional materials aligned to instructional planning calendars and interim and formative assessments.

How will you communicate these priorities to your stakeholders? How will you create buy-in?: The instructional leadership team will show the school data to the staff and describe the accountability system from TEA in order to help build a common understanding of teacher influence on student achievement. We will provide an exemplar of the PLC process that will show the team checking the alignment of the objective and performance task and ensuring all activities included in the I do and we do are from high-quality instructional materials.

We will also have parent conferences to discuss student data and what action steps will be taken from the school to address to increase student achievement. Teachers will have discussions with parents on steps parents can take at home to support their child's academic progress.

Teachers will hold data meetings with students to discuss their current levels for reading and math and create goals for future formative and summative assessments.

Desired Annual Outcome: By May 2023, campus instructional leaders will use consistent, written protocols and processes to lead their areas or people of responsibility in the lesson planning process. This will be evidenced by weekly Instructional Leadership meetings indicating 90% of teachers receive feedback on their lessons through the Get Better Faster framework.

This will be evident through lesson plan feedback, walkthroughs, action coaching and data driven scripts, student work samples, and data from formative and summative assessments.

District Commitment Theory of Action: If the district provides routine observation and feedback with targeted coaching support for the principal and leadership team, then the leadership team will increase their leadership capacity to establish core beliefs related to effective instruction, establish effective systems and processes, and provide consistent observation and feedback to teachers and other staff.

Desired 90-day Outcome: By May 31, 2023, 90% of teachers will receive feedback on their lessons through the Get Better Faster framework.

District Actions:

148

Did you achieve your 90 day outcome?:

Why or why not?:

Did you achieve your annual outcome?:

Cycle 4 - (Jun – Aug)

Student Data

| Student Achievement and Closing the Gaps | | | | | | | | | | | | | | | | | | | |
|--|---|------------------------|-------|------------------|----------------|-------------------|----------------------|--------------------|------------------|--------------|--------------------------|----------------------------|----------------|----------------|----------------------------|----------------|----------------|--------------------------|----------------|
| Core Metrics | Sub Metrics | | Grade | Student Group | Subject Tested | Performance Level | Summative Assessment | 2023 Student Count | % of Assessments | | | | | | | | | | |
| | | | | | | | | | 2021 Results | 2022 Results | 2022 Participation Rates | Cycle 1 | | | Cycle 2 | | | 2023 Accountability Goal | |
| | | | | | | | | | | | | Assessment Type | Formative Goal | Actual Results | Assessment Type | Formative Goal | Actual Results | Summative Goal | Actual Results |
| Student Achievement | # of Students at Approaches, Meets, and Masters | | All | All | Reading | Approaches | STAAR | 465 | 43 | 45 | N/A | District Created Benchmark | 40 | | District Created Benchmark | 50 | | 55 | |
| | | | All | All | Reading | Meets | STAAR | 465 | 23 | 24 | N/A | District Created Benchmark | 15 | | District Created Benchmark | 20 | | 30 | |
| | | | All | All | Reading | Masters | STAAR | 465 | 9 | 9 | N/A | District Created Benchmark | 5 | | District Created Benchmark | 8 | | 15 | |
| | | | All | All | Mathematics | Approaches | STAAR | 465 | 27 | 30 | N/A | District Created Benchmark | 40 | | District Created Benchmark | 50 | | 50 | |
| | | | All | All | Mathematics | Meets | STAAR | 465 | 8 | 9 | N/A | District Created Benchmark | 15 | | District Created Benchmark | 20 | | 20 | |
| | | | All | All | Mathematics | Masters | STAAR | 465 | 2 | 3 | N/A | District Created Benchmark | 5 | | District Created Benchmark | 8 | | 10 | |
| | | | All | All | Science | Approaches | STAAR | 465 | 43 | 37 | N/A | District Created Benchmark | 40 | | District Created Benchmark | 50 | | 50 | |
| | | | All | All | Science | Meets | STAAR | 465 | 8 | 16 | N/A | District Created Benchmark | 15 | | District Created Benchmark | 20 | | 23 | |
| | | | All | All | Science | Masters | STAAR | 465 | 3 | 5 | N/A | District Created Benchmark | 5 | | District Created Benchmark | 8 | | 10 | |
| Closing the Gaps | Focus 1 | Academic Growth Status | All | African American | Mathematics | N/A | Mathematics | N/A | 0 | 66 | 100 | District Created Benchmark | 50 | | District Created Benchmark | 60 | | 67 | |
| | Focus 2 | Academic Growth Status | All | Hispanic | Mathematics | N/A | Mathematics | N/A | 0 | 56 | 100 | District Created Benchmark | 50 | | District Created Benchmark | 60 | | 69 | |

| Academic Growth | | | | | | | | | | | | |
|-----------------|-------------|-------|----------------------|------------------------------------|------------------------|--------------|------------------------|------------------------|------------------------|------------------------|----------------|--------------------------|
| Core Metrics | Sub Metrics | Grade | Summative Assessment | 2023 Total # of Evaluated Students | Percentage of Students | 2022 Results | Cycle 1 Formative Goal | Cycle 1 Actual Results | Cycle 2 Formative Goal | Cycle 2 Actual Results | Summative Goal | Summative Actual Results |
| Academic Growth | ELAR | All | STAAR | 108 | Did Not Meet | 42 | 55 | | 70 | | 80 | |
| | | | | | Approaches | 19 | 40 | | 60 | | 80 | |
| | | | | | Meets | 13 | 40 | | 60 | | 80 | |
| | | | | | Masters | 2 | 30 | | 60 | | 80 | |
| | Math | All | STAAR | 109 | Did Not Meet | 46 | 55 | | 70 | | 80 | |
| | | | | | Approaches | 10 | 30 | | 60 | | 80 | |
| | | | | | Meets | 6 | 30 | | 60 | | 80 | |
| | | | | | Masters | 2 | 30 | | 60 | | 80 | |

Waco Independent School District

Board of Trustee Meeting Agenda

Date: November 17, 2022

Contact Person: Dr. Josie Gutierrez

RE: Second Reading and Adoption of Board Policy DEC(LOCAL)

=====

Background Information:

DEC(LOCAL) was revised as part of the board's adoption of Update 117 on June 7, 2021. The policy did not reflect the Board's authorization of a catastrophic sick leave bank for DEC(LOCAL) at their meeting on 8/23/2018.

A first reading of the amended policy to reauthorize the catastrophic sick leave bank was part of the consent agenda for the Board's meeting on September 25, 2022.

Fiscal Implications:

None

Administrative Recommendations:

Adopt Board Policy DEC(LOCAL), as presented.

PROPOSED REVISIONS

**Leave
Administration**

The Superintendent shall develop administrative regulations addressing employee leaves and absences to implement the provisions of this policy.

Definitions

The term “immediate family” is defined as:

Immediate Family

1. Spouse.
2. Son or daughter, including a biological, adopted, or foster child, a son- or daughter-in-law, a stepchild, a legal ward, or a child for whom the employee stands *in loco parentis*.
3. Parent, stepparent, parent-in-law, or other individual who stands *in loco parentis* to the employee.
4. Sibling, stepsibling, and sibling-in-law.
5. Grandparent and grandchild.
6. Any person residing in the employee’s household at the time of illness or death.

For purposes of the Family and Medical Leave Act (FMLA), the definitions of spouse, parent, son or daughter, and next of kin are found in DECA(LEGAL).

Family Emergency

The term “family emergency” shall be limited to disasters and life-threatening situations involving the employee or a member of the employee’s immediate family.

Leave Day

A “leave day” for purposes of earning, using, or recording leave shall mean the number of hours per day equivalent to the employee’s usual assignment, whether full-time or part-time.

School Year

A “school year” for purposes of earning, using, or recording leave shall mean the term of the employee’s annual employment as set by the District for the employee’s usual assignment, whether full-time or part-time.

Catastrophic Illness
or Injury

A “catastrophic illness or injury” is a severe condition or combination of conditions affecting the mental or physical health of the employee or a member of the employee’s immediate family that requires the services of a licensed practitioner for a prolonged period of time and that forces the employee to exhaust all leave time earned by that employee and to lose compensation from the District. Such conditions typically require prolonged hospitalization or recovery or are expected to result in disability or death. Conditions relating to pregnancy or childbirth shall be considered a catastrophic illness or injury if they meet the requirements of this paragraph.

Note: For District contribution to employee insurance during leave, see CRD(LOCAL).

Availability

The District shall make state personal leave for the current year available for use at the beginning of the school year. Local leave shall be made available as earned.

State Leave Proration

If an employee separates from employment with the District before his or her last duty day of the school year or begins employment after the first duty day of the school year, state personal leave shall be prorated based on the actual time employed.

If an employee separates from employment before the last duty day of the school year, the employee's final paycheck shall be reduced for state personal leave the employee used beyond his or her pro rata entitlement for the school year.

Medical Certification

An employee shall submit medical certification of the need for leave if:

1. The employee is absent more than five consecutive workdays because of personal illness or illness in the immediate family;
2. The District requires medical certification due to a questionable pattern of absences or when deemed necessary by the supervisor or Superintendent; or
3. The employee requests FMLA leave for the employee's serious health condition; a serious health condition of the employee's spouse, parent, or child; or for military caregiver leave.

In each case, medical certification shall be made by a health-care provider as defined by the FMLA. [See DECA(LEGAL)]

State Personal Leave

The Board requires employees to differentiate the manner in which state personal leave is used.

Nondiscretionary Use

Nondiscretionary use of leave shall be for the same reasons and in the same manner as state sick leave accumulated before May 30, 1995. [See DEC(LEGAL)]

Nondiscretionary use includes leave related to the birth or placement of a child and taken within the first year after the child's birth, adoption, or foster placement.

Discretionary Use

Discretionary use of leave is at the individual employee's discretion, subject to limitations set out below.

COMPENSATION AND BENEFITS
LEAVES AND ABSENCES

DEC
(LOCAL)

*Request for
Leave*

In deciding whether to approve or deny a request for discretionary use of state personal leave, the supervisor shall not seek or consider the reasons for which an employee requests to use leave. The supervisor shall, however, consider the duration of the requested absence in conjunction with the effect of the employee's absence on the educational program and District operations, as well as the availability of substitutes.

Discretionary use of state personal leave shall not exceed three consecutive workdays.

Local Leave

Each employee shall earn five paid local leave days per school year in accordance with administrative regulations.

Local leave shall accumulate to a maximum of 120 leave days.

Local leave shall be used according to the terms and conditions of state sick leave accumulated before the 1995–96 school year. [See DEC(LEGAL)]

An employee may also use local leave for absences related to the birth or placement of a child when leave is taken within the first year after the child's birth, adoption, or foster placement.

Sick Leave Bank

The District shall establish a sick leave bank that employees may join through contribution of local leave.

Leave contributed to the sick leave bank shall be solely for the use of participating employees. An employee who is a member of the sick leave bank may request leave from the sick leave bank if the employee experiences a catastrophic illness or injury and has exhausted all paid leave and any applicable compensatory time.

The Superintendent shall develop regulations for the operation of the sick leave bank that address the following:

1. Membership in the sick leave bank, including the number of days an employee must contribute to become a member;
2. Procedures to request leave from the sick leave bank;
3. The maximum number of days per school year a member employee may receive from the sick leave bank;
4. The committee or administrator authorized to consider requests for leave from the sick leave bank and criteria for granting requests; and
5. Other procedures deemed necessary for the operation of the sick leave bank.

COMPENSATION AND BENEFITS
LEAVES AND ABSENCES

DEC
(LOCAL)

| | |
|--|---|
| Loss of Access to Days | An employee shall lose the right to utilize the benefits of the catastrophic sick leave back by: <ol style="list-style-type: none">1. Separating employment with the District.2. Canceling membership at any time, executed on the proper form. |
| Appeal | An employee may appeal a decision regarding the sick leave bank in accordance with DGBA(LOCAL), beginning with the Superintendent or Superintendent's designee. |
| Family and Medical Leave | FMLA leave shall run concurrently with applicable paid leave and compensatory time, as applicable. <hr/> <p>Note: See DECA(LEGAL) for provisions addressing FMLA.</p> <hr/> |
| Twelve-Month Period | For purposes of an employee's entitlement to FMLA leave, the 12-month period shall be July 1 through June 30. |
| Combined Leave for Spouses | When both spouses are employed by the District, the District shall limit FMLA leave for the birth, adoption, or placement of a child, or to care for a parent with a serious health condition, to a combined total of 12 weeks. The District shall limit military caregiver leave to a combined total of 26 weeks. |
| Intermittent or Reduced Schedule Leave | The District shall not permit use of intermittent or reduced schedule FMLA leave for the care of a newborn child or for the adoption or placement of a child with the employee. |
| Certification of Leave | When an employee requests leave, the employee shall provide certification, in accordance with FMLA regulations, of the need for leave. |
| Fitness-for-Duty Certification | In accordance with administrative regulations, when an employee takes FMLA leave due to the employee's own serious health condition, the employee shall provide, before resuming work, a fitness- for-duty certification. |
| Leave at the End of Semester | When a teacher takes leave near the end of the semester, the District may require the teacher to continue leave until the end of the semester. |
| Temporary Disability Leave | Any full-time employee whose position requires educator certification by the State Board for Educator Certification or by the District shall be eligible for temporary disability leave. The maximum length of temporary disability leave shall be 180 calendar days. [See DBB(LOCAL) for temporary disability leave placement and DEC(LEGAL) for return to active duty.] |

COMPENSATION AND BENEFITS
LEAVES AND ABSENCES

DEC
(LOCAL)

An employee's notification of need for extended absence due to the employee's own medical condition shall be forwarded to the Superintendent as a request for temporary disability leave.

The District shall require the employee to use temporary disability leave and paid leave, including any compensatory time, concurrently with FMLA leave.

**Workers'
Compensation**

Note: Workers' compensation is not a form of leave. The workers' compensation law does not require the continuation of the District's contribution to health insurance.

An absence due to a work-related injury or illness shall be designated as FMLA leave, temporary disability leave, and/or assault leave, as applicable.

Paid Leave Offset

The District shall permit the option for paid leave offset in conjunction with workers' compensation income benefits. [See CRE]

Court Appearances

Absences due to compliance with a valid subpoena or for jury duty shall be fully compensated by the District and shall not be deducted from the employee's pay or leave balance.

**School Involvement
Leave**

Each District employee shall be granted a maximum of eight hours of school involvement leave per school year (August through May) to be used only for participating in parent/teacher conferences or the District's volunteer program. Any use of school involvement leave shall occur only with approval from the employee's supervisor; however, a supervisor shall not approve use of school involvement leave when an employee requests release from regular duties for an entire workday. School involvement leave shall be noncumulative.

**WACO INDEPENDENT SCHOOL DISTRICT
BOARD MEETING MINUTES**

Regular Meeting, October 27, 2022 - 6:00 p.m.
WISD Administration Offices Board Room

BOARD MEMBERS PRESENT

Stephanie Korteweg
Jose Vidana
Jeremy Davis
Keith Guillory
Emily Iazzetti
Angelo Ochoa
Jonathan Grant

BOARD MEMBERS ABSENT

None

CALL TO ORDER

Stephanie Korteweg, Board President, called the meeting of the Waco Independent School District Board of Trustees to order at 6:00 p.m. She stated that a quorum of Board Members was present, that the meeting had been duly called, and that the notice of the meeting had been posted in accordance with the Texas Open Meetings Act, Texas Government Code Chapter 551.

PUBLIC COMMENTS ON AGENDA ITEMS

Public comments were made by Mary Jane Waits and Hope Mustakim.

MOMENT OF SILENCE AND PLEDGE OF ALLEGIANCE

SPECIAL RECOGNITIONS

Pledge Leaders

Miranda Ramirez and Ky'Den Kemp, students from Provident Heights Elementary, led the pledge of allegiance.

National Merit Commended Scholar

Students qualify for the National Merit program by achieving a high score on the PSAT/NMSQT. Trip Wendel, a Waco High School Senior, has been named a National Merit Commended Scholar for the National Merit Scholarship Program.

Sumdog Math Competition

The following Hillcrest PDS Elementary students made up the Sumdog Math Competition team, winning the national title:

- John Paul Pena

- Jayceon Zavala
- Cohen Callaway
- Giovanni Perez
- Brooks Heldt
- Aubrey Montoya
- Jayda Martin
- Mana Cosby

Laura Bush Foundation for America’s Libraries Grant

Joy Bulleaud, a fourth grade math and science teacher at Cedar Ridge PDS Elementary, received a \$5,000 grant that will be used to purchase new library materials.

University High School Earns Reader’s Choice Award

University High School earned the title of favorite public high school by the 2022 Waco-Tribune Herald H.O.T. Reader’s Choice Awards.

Community Partner Award

Extraco Events Center was recognized as the Outstanding Community Partner.

SUPERINTENDENT’S REPORT

Thanksgiving Family Lunches

Beginning next week, Waco ISD families will begin enjoying the annual tradition of Thanksgiving Family meals at our schools.

G.W. Carver Middle School Student Ambassadors

Approximately 40 students are participating in a Student Ambassadors group with the goal of supporting the campus culture and developing ownership of the new building. These students will also experience hands-on learning regarding the design and construction industries.

G.W. Carver Art Project Design Concept

The G.W. Carver Historical Alumni Group have shared treasured artifacts, memories and key milestones with architects, designers, and a local artist to support the design and development of key interior features, including a custom art installation, for the new school.

High School Musical Productions

Dr. Kincannon stated it was a joy this month to watch the high schools’ fine arts programs showcase their work with the productions of Waco High School’s “Into the Woods” and University High School’s “Moana, Jr.” She was able to bring back a

tradition of hosting a Superintendent's Reception on opening night of a high school musical, this year for "Moana, Jr."

Staff Appreciation and Wellness Activities

District administrators have been taking steps to share appreciation and promote wellness among our employees.

Some of the activities include:

- Administration Building Employee Trick or Treat
- Special Movie Night
- Ax Throwing Team Events
- Car Wash Gift Cards for the staff at WHS
- Waco ISD Breakfast Clubs
- WISD Employee Fitness Projects

PUBLIC MEETING ON THE 2022 ANNUAL FINANCIAL ACCOUNTABILITY MANAGEMENT REPORT (SCHOOL FIRST)

The public meeting began at 6:29 pm.

Sheryl Davis presented the School FIRST report. She stated the district once again received the state's highest financial accountability rating of "Superior" or an "A" for the 2020-2021 fiscal year with a score of 98 out of 100 points.

The public meeting ended at 6:39 pm.

INFORMATION ITEMS/REPORTS

- Report on the 2022 Delinquent Tax Collections
- Monthly and Quarterly Financial Reports for the Period Ended August 31, 2022
- Emergent Bilinguals Annual Evaluation and Program Report
- Report on Gifts to Waco ISD

CONSENT AGENDA: CONSIDER AND TAKE APPROPRIATE ACTION

- Amendments to the 2022-2023 Budget
- Bid Award for Educational Consulting, Professional Development, and Other Student-Based Contracted Services
- Bid Award for Maintenance Supplies, Equipment, and Services
- Purchases Over \$50,000 under Pre-Existing Bid, Purchasing Cooperative, or Allowed Professional Service
- Resolution of Participation with Region 5 Education Service Center's Southeast Texas Purchasing Cooperative

- Cooperative Fees Paid by Waco ISD
- Independent Sources of Investment Officer Training
- List of Qualified Brokers Authorized to Engage in Investment Transactions with the District and Local Banks for the Purchase of Certificates of Deposit
- Investment Policy and Strategies as Codified Under Policy CDA (Local) - Other Revenues: Investments
- Additional T-TESS Appraisers for 2022-2023
- First Reading of Board Policy DEC(LOCAL)
- City of Waco Request for Ingress and Egress Easement and Maintenance Agreement (to Clay Avenue at Cesar Chavez Middle School)
- Lease Agreement with City of Waco for Property at Cesar Chavez Middle School
- RE: Conveyance of Real Property (Cotton Palace Park Area, Waco Creek Frontage, 2.695 Acres) to City of Waco
- Board of Trustee Meeting Minutes
 - Regular Meeting - September 29, 2022

Jose Vidana made a motion, seconded by Jonathan Grant, to approve the Consent Agenda as presented. The motion carried unanimously (7-0).

REVIEW AND DISCUSS READING RECOVERY PROGRAM

Kourtnei Parnell, Director of Intervention Services and State/Federal Programs, presented a report on the Waco ISD Reading Recovery Program.

ITEMS REQUESTED BY TRUSTEES

Jeremy Davis introduced and discussed an agenda item that he and Trustee Guillory requested to amend the design of G. W. Carver Middle School, Tennyson Middle School, and Waco High School.

After some discussion, Jeremy Davis moved to “Amend the design of Tennyson Middle School, G.W. Carver Middle School and Waco High School to replace the walls with a ballistic resistant material.” Trustee Guillory seconded the motion.

After further discussion Stephanie Korteweg made a motion to end the discussion on the pending motion, which was seconded by Jonathan Grant. A roll call vote was taken to end the discussion on the pending motion.

Jonathan Grant - Yes

Jeremy Davis - No

Jose Vidana - Yes

Stephanie Korteweg - Yes

Emily Iazzetti - Yes

October 27, 2022

Keith Guillory - No

Angelo Ochoa - Yes

The discussion was ended by a vote of 5-2.

A roll call vote was taken on the motion made by Jeremy Davis and seconded by Keith Guillory, to “Amend the design of Tennyson Middle School, G.W. Carver Middle School and Waco High School to replace the walls with a ballistic resistant material.”

Jonathan Grant - No

Jeremy Davis - Yes

Jose Vidana - No

Stephanie Korteweg - No

Emily Iazzetti - No

Keith Guillory - Yes

Angelo Ochoa - No

The motion failed 5-2.

ANNOUNCEMENTS

Elizabeth Cox, Chief of Staff, made the following announcements:

- Monday is the Waco ISD PD Trunk or Treat at the Waco Athletic Complex
- The G.W. Carver Middle School Student Ambassador site tour is rescheduled for Thursday, November 3
- Crestview Elementary will celebrate its 70th Anniversary in conjunction with its Thanksgiving dinner at Waco High School
- The UHS Football team has made the playoffs

CONSIDERATION OF PERSONNEL

- Deliberate the Appointment, Employment, Evaluation, Reassignment, Duties, Discipline, or Dismissal of a Public Officer or Employee
- Hear a Complaint or Charge Against an Officer or Employee

The Board did not go into closed session to discuss personnel.

ADJOURNMENT

The meeting was adjourned at 8:18 pm.

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: November 17, 2022

Contact Person: Gloria Barrera

RE: Consider, Discuss and Take Appropriate Action Regarding the Award of Contract to CORE Construction, Inc. for Tennyson Middle School

=====

Background Information:

At the March 2022 Regular board meeting, the Competitive Sealed Proposal (CSP) delivery method was approved for Tennyson Middle School. The CSP delivery method allows the District to select the contractor that provides the best overall value including price, schedule, quality, and other criteria.

The Administration worked closely with O’Connell Robertson architects and District counsel to refine the Request for Proposal (RFP) package, which included a copy of the construction contract form. In September 2022, the RFP for Tennyson Middle School was issued. A pre-proposal meeting was held on October 6, 2022, at the Facilities & Maintenance Building with 3 potential bidders and several trade contractors in attendance.

Two sealed proposals were received on October 25, 2022. Both proposals were slightly over the District’s desired base bid amount.

The proposal evaluation committee included representatives from Purchasing, O’Connell Robertson, and Waco ISD Facilities and Maintenance Department. The committee thoroughly reviewed the proposals from each contractor. This included contacting references and reviewing each contractor’s approach along with the qualifications of the contractor’s proposed project team.

At the completion of the evaluation process, CORE Construction was identified as the highest ranked proposer. O’Connell Robertson contacted CORE on behalf of the District, notifying them that they were the #1 ranked proposer and requesting a list of proposed cost reduction items to bring the project within budget. Through subsequent negotiations with CORE, the base bid has been reduced by \$900,000 to a total of \$67,000,000.

At this time, we do not recommend the acceptance of any alternates. As the project progresses, the District will work with the contractor to identify contingency that can be used to incorporate project alternates. The addition of alternates exceeding \$100,000 in amount or involve contract time will be brought to the Board for approval.

The recommendation letter from O’Connell Robertson as well as the construction contract with CORE is attached.

Fiscal Implications

Funding for Tennyson Middle School construction is from the 2021 bond program. The proposed construction cost is within the project budget.

| 2021 Bond Budget for Tennyson Middle School | Amount |
|--|-------------------|
| Construction | 67,047,025 |
| Professional Services | 3,636,181 |
| Contracted Services | 3,378,257 |
| Furniture, Fixtures, Equipment | 1,763,678 |
| Technology | 1,751,158 |
| Total | 77,576,299 |

Administrative Recommendation(s):

Approve the Award of Contract for the construction of Tennyson Middle School to CORE Construction as presented and authorize the Superintendent to execute the contract.

Tennyson Middle School

CSP#22-1231 Bid Tab

| Company Name | CORE | Mazanec |
|---|---------------|---------------|
| Bid Bond (Y/N) | Y | Y |
| Addenda (1-3) | Y | Y |
| Price Submission | | |
| Base Bid | \$ 67,900,000 | \$ 67,300,000 |
| Alternate 1 - Sail Shades | \$ 96,000 | \$ 99,500 |
| Alternate 2 - Field Storage Building | \$ 234,000 | \$ 445,000 |
| Alternate 3 - Sod ilo Hydromulch | \$ 90,000 | \$ - |
| Alternate 4 - Upfit Canopies | \$ 320,000 | \$ 120,000 |
| Alternate 5 - Sandwich Track System | \$ 168,000 | \$ 204,200 |
| Alternate 6 - All Field Events | \$ 394,000 | \$ 379,000 |
| Alternate 7 - Not Used | \$ - | \$ - |
| Alternate 8 - Pre-Fab Instrument Storage | \$ 107,000 | \$ - |
| Alternate 9 - Outdoor Learning | \$ 47,000 | \$ 79,000 |
| Alternate 10 - Condensate Collection | \$ 15,000 | \$ - |
| Alternate 11 - Sod ilo Hydroseed | \$ 12,000 | \$ 19,000 |
| Alternate 12 - Demolition of Existing Buildings | \$ 600,000 | \$ 657,000 |
| Rank Base | 2 | 1 |
| Evaluation Criteria | | |
| Price (30) | 29.70 | 30 |

Tennyson Middle School - Competitive Sealed Proposal Evaluation Summary

| | | | Mazanec | CORE |
|--------------|---|------------------------|-----------------|-----------------|
| Criteria | Description | Total Points Available | Points Awarded* | Points Awarded* |
| 1 | Price (low proposer receives maximum points; remaining vendors receive a percentage of the maximum based on ratio to low bid) Calculation based on Base Bid amount. | 30.0 | 30.0 | 29.7 |
| 2 | Financial Capacity in Relation to Size and Scope of Project | 15.0 | 15.0 | 15.0 |
| 3 | Project approach | 10.0 | 5.0 | 8.0 |
| 4 | Experience doing business with Waco ISD | 5.0 | 5.0 | 3.0 |
| 5 | Quality of Goods or Services | 10.0 | 9.2 | 9.3 |
| 6 | Qualifications of Project Team | 10.0 | 8.0 | 8.0 |
| 7 | Safety Record | 20.0 | 18.0 | 18.0 |
| Total Score: | | 100.0 | 90.2 | 91.1 |
| Ranking | | | 2 | 1 |

Date: 11/04/2022

Note: * Averaged points from all evaluators.

Waco ISD



November 17, 2022

Ms. Gloria Barrera
Chief Officer of Facilities and Operations
Waco Independent School District
501 Franklin Avenue
Waco, Texas 76701

RE: Tennyson Middle School CSP #22-1231

Austin

811 Barton Springs Rd, Suite 900
Austin, TX 78704
512.478.7286

San Antonio

4040 Broadway, Suite 300
San Antonio, Texas 78209
210.224.6032

Houston

700 Milam, Suite 1300
Houston, Texas 77002
713.487.1583

oconnellrobertson.com

Dear Gloria:

It has been our pleasure to support Waco Independent School District through the 2021 Bond Program, including the efforts on the Tennyson Middle School Replacement project. O'Connell Robertson has supported Waco ISD through the competitive sealed proposal phase including evaluation, value management efforts, and contract negotiations.

Waco Independent School District has identified and plans to approve CORE Construction for the CSP Construction Contract. O'Connell Robertson's would agree and recommend for approval contract package as presented by the contractor.

We appreciate our relationship with Waco Independent School District and look forward to continuing our work with you.

Thank you,

Jarrod Sterzinger
Principal



AIA® Document A101® – 2017

Standard Form of Agreement Between Owner and Contractor where the basis of payment is a Stipulated Sum

AGREEMENT made as of the Seventeenth day of November in the year Twenty twenty-two
(In words, indicate day, month and year.)

BETWEEN the Owner:
(Name, legal status, address and other information)

Waco Independent School District
501 Franklin Avenue
Waco, Texas 76701

and the Contractor:
(Name, legal status, address and other information)

CORE Construction
6320 Research Road #200
Frisco, Texas 75033

for the following Project:
(Name, location and detailed description)

Tennyson Middle School
6100 Tennyson Drive
Waco, Texas 76710

The Architect:
(Name, legal status, address and other information)

O'Connell Robertson
811 Barton Springs Road, Suite 900
Austin, TX 78704

The Owner and Contractor agree as follows.

ADDITIONS AND DELETIONS:

The author of this document has added information needed for its completion. The author may also have revised the text of the original AIA standard form. An *Additions and Deletions Report* that notes added information as well as revisions to the standard form text is available from the author and should be reviewed. A vertical line in the left margin of this document indicates where the author has added necessary information and where the author has added to or deleted from the original AIA text.

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

The parties should complete A101®-2017, Exhibit A, Insurance and Bonds, contemporaneously with this Agreement. AIA Document A201®-2017, General Conditions of the Contract for Construction, is adopted in this document by reference. Do not use with other general conditions unless this document is modified.

TABLE OF ARTICLES

1 THE CONTRACT DOCUMENTS

2 THE WORK OF THIS CONTRACT

3 DATE OF COMMENCEMENT AND SUBSTANTIAL COMPLETION

4 CONTRACT SUM

5 PAYMENTS

6 DISPUTE RESOLUTION

7 TERMINATION OR SUSPENSION

8 MISCELLANEOUS PROVISIONS

9 ENUMERATION OF CONTRACT DOCUMENTS

ARTICLE 1 THE CONTRACT DOCUMENTS

§ 1.1 The Contract Documents consist of this Agreement, Conditions of the Contract (General, Supplementary, and other Conditions), all sections of the Project Manual and Construction Documents, Drawings, Specifications, Geotechnical Reports, Addenda issued prior to execution of this Agreement, other documents listed in this Agreement or the A201, and Modifications issued after execution of this Agreement, all of which form the Contract, and are as fully a part of the Contract as if attached to this Agreement or repeated herein.

§ 1.2 This Agreement represents the entire and integrated agreement between the Owner and the Contractor and supersedes all prior negotiations, representations or agreements, either written or oral. Any revision, amendment, or modification to the Standard Form of this Agreement shall be valid, binding, and enforceable only if said revision, amendment or modification is made conspicuous by being underlined, lined-through, or highlighted in this Agreement signed by Contractor and the authorized representative of Owner’s Board of Trustees.

§ 1.3 The Owner designates the following as the individual(s) authorized to sign documents on behalf of the Board of Trustees, following appropriate Board action: BOARD PRESIDENT, SUPERINTENDENT, or other Board designee.

§ 1.4 The Board designates the authorized representatives identified in Paragraph 8.2 to act on its behalf in other respects.

ARTICLE 2 THE WORK OF THIS CONTRACT

The Contractor shall fully execute the Work described in the Contract Documents, except as specifically indicated in the Contract Documents to be the responsibility of others.

ARTICLE 3 DATE OF COMMENCEMENT AND SUBSTANTIAL COMPLETION

§ 3.1 The date of commencement of the Work shall be:

(Check one of the following boxes.)

- The date of this Agreement.
- A date set forth in a notice to proceed issued by the Owner.
- Established as follows:
(Insert a date or a means to determine the date of commencement of the Work.)

The commencement date will be the first business day after the Contractor’s receipt of the written Notice to Proceed. The Notice to Proceed shall not be issued by Architect until the Agreement has been signed by the Contractor, approved by the Owner’s Board of Trustees, signed by the Owner’s

authorized representative, and Owner and Architect have received all required payment and performance bonds and insurance, in compliance with Article 11 of AIA Document A201-2017 and Exhibit A to the A101.

§ 3.2 The Contract Time shall be measured from the date of commencement of the Work.

§ 3.3 Substantial Completion

§ 3.3.1 Subject to adjustments of the Contract Time as provided in the Contract Documents, the Contractor shall diligently prosecute and achieve Substantial Completion of the entire Work:
(Check one of the following boxes and complete the necessary information.)

Not later than () calendar days from the date of commencement of the Work.

By the following date: November 14th, 2024

Final Completion shall be 30 calendar days after the date of Substantial Completion, subject to adjustments of the Contract Time as provided in the Contract Documents.

§ 3.3.2 Subject to adjustments of the Contract Time as provided in the Contract Documents, if portions of the Work are to be completed prior to Substantial Completion of the entire Work, the Contractor shall achieve Substantial Completion of such portions by the following dates:

| Portion of Work | Substantial Completion Date |
|-----------------|-------------------------------|
| Phase 2 | April 26 th , 2024 |

§ 3.3.3 If the Contractor fails to achieve Substantial Completion as provided in this Section 3.3, liquidated damages, if any, shall be assessed as set forth in Section 4.5.

ARTICLE 4 CONTRACT SUM

§ 4.1 The Owner shall pay the Contractor the Contract Sum in current funds for the Contractor's performance of the Contract. The Contract Sum shall be (Sixty-seven million dollars) (\$67,000,000.00), subject to additions and deductions as provided in the Contract Documents.

§ 4.1.1 The Contract Sum contains an Owner's contingency for the sole use of the Owner to be used for changes in the scope of the Work and for the betterment of the Project. Owner's authorized representative may approve any expenditure from Owner's Contingency without further Board of Trustees approval where such changes are within the Superintendent's authority under Owner's local policy. If the Owner's Contingency is not expended or not fully expended, then any unused portion shall belong to the Owner and shall be credited to the Owner in calculating final payment.

§ 4.2 Alternates

§ 4.2.1 Alternates, if any, included in the Contract Sum:

| Item | Price |
|----------------------------|-------|
| None included at this time | |

(Table deleted)
(Paragraphs deleted)

§ 4.3 Allowances, if any, included in the Contract Sum:
(Identify each allowance.)

| Item | Price |
|------------------------|----------------|
| Escalation Contingency | \$1,000,000.00 |

| | |
|-----------------------------------|----------------|
| Value Engineering/Scope Reduction | (\$582,000.00) |
| Target (Refer to Exhibit E) | |
| Owner's Contingency | \$300,000.00 |

Use of the Owner's Cost Escalation Allowance is at the Owner's sole discretion for delays arising from unforeseeable and extraordinary supply chain disruptions, or additional costs incurred by the Contractor to mitigate or avoid unforeseeable supply chain issues. The Owner will only consider requests for equitable adjustments related to such force majeure events if the costs are (i) properly documented, and (ii) substantiated with Contractor and subcontractor records. Such claims are subject to Owner approval and subject to the claims and dispute resolution procedures of the Contract Documents.

§ 4.4 Unit prices, if any:

(Identify the item and state the unit price and quantity limitations, if any, to which the unit price will be applicable.)

| Item | Units and Limitations | Price per Unit (\$0.00) |
|----------------------------|-----------------------|-------------------------|
| None included at this time | | |

§ 4.5 Liquidated damages, if any:

(Insert terms and conditions for liquidated damages, if any.)

Refer to Article 4.5.1 and 4.5.2 for liquidated damage conditions.

§ 4.5.1 Substantial Completion. Time is of the essence in all phases of the Work. It is specifically understood and agreed by and between Owner and Contractor that time is of the essence in the Substantial Completion of the Project and Owner shall sustain damages as a result of Contractor's failure, neglect or refusal to achieve said deadlines. Such damages are, and will continue to be, impracticable and extremely difficult to determine. Execution of this Agreement under these specifications shall constitute agreement by Owner and Contractor that the amounts stated below are the minimum value of the costs and damages caused by failure of Contractor to complete the Work within the allotted or agreed extended times of Substantial Completion, that such sums are liquidated damages and shall not be construed as a penalty, and that such sums may be deducted from payments due Contractor if such delay occurs. It is expressly understood that the said sum per day is agreed upon as a fair estimate of the pecuniary damages which will be sustained by the Owner in the event that the Work is not completed within the agreed time, or within the agreed extended time, if any, otherwise provided for herein. Said sum shall be considered as liquidated damages only and in no sense shall be considered a penalty, said damages being caused by, but not limited to, additional compensation for personnel, attorneys fees, architectural fees, engineering fees, program management fees, inspection fees, storage costs, food service costs, transportation costs, utilities costs, costs of temporary facilities, loss of interest on money, and other increased costs, all of which are difficult to exactly ascertain. Failure to complete the Work within the designated or agreed extended dates of Substantial Completion, shall be construed as a breach of this Agreement. It is expressly agreed as a part of the consideration inducing the Owner to execute this Agreement that the Owner may deduct from any Payment made to the Contractor a sum equal to ONE THOUSAND AND FIVE HUNDRED DOLLARS (\$1,500.00) per day for each and every additional calendar day beyond the agreed date of Substantial Completion.

§ 4.5.2 Final Completion. In addition, timely Final Completion is an essential condition of this Agreement. Contractor agrees to achieve Final Completion of the Agreement within 30 calendar days of the designated or agreed extended date of Substantial Completion. It is specifically understood and agreed by and between Owner and Contractor that time is of the essence in the Final Completion of the Project and Owner shall sustain additional damages as a result of Contractor's failure, neglect or refusal to achieve said deadline. Such damages are, and will continue to be, impracticable and extremely difficult to determine. Execution of this Agreement under these specifications shall constitute agreement by Owner and Contractor that the amounts stated below are the minimum value of the costs and damages caused by failure of Contractor to complete the Work within the allotted or agreed extended times for Final Completion, that such sums are liquidated damages and shall not be construed as a penalty. It is expressly understood that the said sum per day is agreed upon as a fair estimate of the pecuniary damages which will

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be sustained by the Owner in the event that the Work is not finally completed within the agreed time, or within the agreed extended time, if any, otherwise provided for herein. Said sum shall be considered as liquidated damages only and in no sense shall be considered a penalty, said damages being caused by, but not limited to, additional compensation for the following categories of damages to the Owner: potential hazards to students, staff and visitors, additional architectural, engineering, program management fees (and fees of any other consultants); increased administrative or operational expenses; additional attorney's fees; increased maintenance and custodial costs and additional, utilities, security and clean-up costs, and other increased costs. Failure to complete the Work within the designated or agreed extended dates of Final Completion, shall be construed as a breach of this Agreement. Owner and Contractor agree that should Contractor fail to achieve Final Completion of the Agreement by the deadline, Owner shall continue to be damaged to a greater degree by such delay. Contractor and Owner agree that the amount of liquidated damages for each calendar day Final Completion is delayed beyond the date set for Final Completion shall be the sum of FIVE HUNDRED DOLLARS (\$500.00) per day. Owner may deduct such liquidated damages from any Payment made to Contractor before or at Final Payment; or, if sufficient funds are not available, then Contractor shall pay Owner, the amounts specified per day for each and every calendar day the breach continues after the deadline for Final Completion of the Work.

§ 4.5.3 Such damages shall be in addition to, and not in lieu of, any other rights or remedies Owner may have against Contractor for failure to timely achieve Final Completion, and damages for failure to achieve Substantial Completion and failure to achieve Final Completion may run concurrently. If the Work is not finally completed by the time stated in the Agreement, or as extended, no payments for Work completed beyond that time shall be made until the Project reaches Final Completion.

§ 4.6 Other:

(Insert provisions for bonus or other incentives, if any, that might result in a change to the Contract Sum.)

ARTICLE 5 PAYMENTS

§ 5.1 Progress Payments

§ 5.1.1 Based upon Applications for Payment submitted to the Architect by the Contractor and Certificates for Payment issued by the Architect, the Owner shall make progress payments on account of the Contract Sum to the Contractor as provided below and elsewhere in the Contract Documents.

§ 5.1.2 The period covered by each Application for Payment shall be one calendar month ending on the last day of the month, or as follows:

§ 5.1.3 The Contractor shall submit monthly Applications for Payment to the Architect on AIA Form G702 for approval. Continuation sheets shall be submitted on AIA Form G703. If the Architect approves the application, then they shall submit a Certificate for Payment to the Owner. The Architect may require any additional information deemed necessary and appropriate to substantiate the Application for Payment. Materials that are verified to be on the jobsite or other approved location for use in the Project may also be incorporated into the Application for Payment. The Architect shall have seven (7) days from date of receipt from the Contractor of an Application for Payment to approve or reject all or any part of the Application for Payment. The Owner shall pay the undisputed amounts certified by the Architect to the Contractor within thirty (30) days of receipt of the Certificate for Payment from the Architect unless otherwise provided in the Contract Documents. Undisputed amounts unpaid after the date on which payment is due shall bear interest pursuant to Texas Government Code Section 2251.025.

§ 5.1.4 Each Application for Payment shall be based on the most recent schedule of values submitted by the Contractor in accordance with the Contract Documents. The schedule of values shall allocate the entire Contract Sum, less any unused Owner's Contingency Allowance, among the various portions of the Work. The schedule of values shall be prepared in such form, and supported by such data to substantiate its accuracy, as the Architect may require. This schedule of values shall be used as a basis for reviewing the Contractor's Applications for Payment.

§ 5.1.5 Applications for Payment shall show the percentage of completion of each portion of the Work as of the end of the period covered by the Application for Payment.

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§ 5.1.6 In accordance with AIA Document A201™–2017, General Conditions of the Contract for Construction, and subject to other provisions of the Contract Documents, the amount of each progress payment shall be computed as follows:

§ 5.1.6.1 The amount of each progress payment shall first include:

- .1 That portion of the Contract Sum properly allocable to completed Work as determined by multiplying the percentage completion of each portion of the Work by the share of the Contract Sum allocated to that portion of the Work in the schedule of values;
- .2 That portion of the Contract Sum properly allocable to materials and equipment delivered and suitably stored at the site for subsequent incorporation in the completed construction, or, if approved in advance by the Owner, suitably stored off the site at a location agreed upon in writing; and
- .3 That portion of Construction Change Directives that the Architect determines, in the Architect's professional judgment, to be reasonably justified to the extent approved by the Owner in writing, as provided in Article 7.3.9 of AIA Document A201™–2017, General Conditions of the Contract for Construction.

§ 5.1.6.2 The amount of each progress payment shall then be reduced by:

- .1 The aggregate of any amounts previously paid by the Owner;
- .2 The amount, if any, for Work that remains uncorrected and for which the Architect has previously withheld a Certificate for Payment as provided in Article 9 of AIA Document A201–2017;
- .3 Any amount for which the Contractor does not intend to pay a Subcontractor or material supplier, unless the Work has been performed by others the Contractor intends to pay;
- .4 For Work performed or defects discovered since the last payment application, any amount for which the Architect may withhold payment, or nullify a Certificate of Payment in whole or in part, as provided in Article 9 of AIA Document A201–2017 or amounts certified by the Architect and disputed by the Owner; and
- .5 Retainage withheld pursuant to Section 5.1.7.

§ 5.1.7 Retainage

§ 5.1.7.1 For each progress payment made prior to Substantial Completion of the Work, the Owner shall withhold the following amount, as retainage, from the payment otherwise due:

FIVE Percent (5%)

(Insert a percentage or amount to be withheld as retainage from each Application for Payment. The amount of retainage may be limited by governing law.)

(Paragraphs deleted)

§ 5.1.7.2 Reduction or limitation of retainage, if any, shall be as follows:

(If the retainage established in Section 5.1.7.1 is to be modified prior to Substantial Completion of the entire Work, including modifications for Substantial Completion of portions of the Work as provided in Section 3.3.2, insert provisions for such modifications.)

NONE

§ 5.1.7.3 Except as set forth in this Section 5.1.7.3, upon Final Completion of the Work, the Contractor may submit an Application for Payment that includes the retainage withheld from prior Applications for Payment pursuant to this Section 5.1.7.

(Paragraphs deleted)

§ 5.1.9 Except with the Owner's prior written approval, or as otherwise provided in Section 9.3.2 of the AIA Document A201-2017, the Contractor shall not make advance payments to suppliers for materials or equipment which have not been delivered and stored at the site.

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§ 5.1.10 If Owner is entitled to deduct liquidated damages, or any other damages or amounts provided in the Contract Documents, including clean-up fees, then Owner shall be entitled to deduct such liquidated damages, amounts and fees at any time.

§ 5.1.11 If Contractor fails or refuses to complete the Work, or has unsettled claims with Owner, any payment to Contractor shall be subject to deduction for such amounts as the Architect if applicable, shall determine as the cost for completing incomplete Work and the value of unsettled claim.

§ 5.2 Final Payment

§ 5.2.1 Final payment, constituting the entire unpaid balance of the Contract Sum, minus disputed sums, authorized deductions and liquidated damages, shall be made by the Owner to the Contractor after:

- .1 the Contractor has fully performed the Contract except for the Contractor's responsibility to correct nonconforming Work as provided in Article 12 of AIA Document A201-2017, and to satisfy other requirements, if any, which extend beyond final payment,
- .2 the Contractor has provided all documents required by Sections 3.5 et seq. and 9.10.2 et seq. of AIA Document A201-2017,
- .3 a final Certificate for Payment has been issued by the Architect, and
- .4 Owner's Board of Trustees has voted to accept the Work and approve the Final Payment, if such approval is required by Owner's Board Policy.

§ 5.2.2 The Owner's final payment of undisputed sums to the Contractor shall be made no later than 30 days after the later of Final Completion or Owner's Board of Trustees' vote approving Final Payment, if required.

§ 5.3 Interest

Payments due and unpaid under the Contract shall bear interest

(Paragraphs deleted)

pursuant to Texas Government Code Section 2251.025.

ARTICLE 6 DISPUTE RESOLUTION

§ 6.1 Initial Decision Maker

(Paragraphs deleted)

All disputes relating to this Agreement shall be resolved pursuant to the terms of Article 15 of the AIA Document A201-2017, as amended.

(Paragraphs deleted)

ARTICLE 7 TERMINATION OR SUSPENSION

§ 7.1 The Contract may be terminated by the Owner or the Contractor as provided in Article 14 of AIA Document A201-2017.

(Paragraphs deleted)

§ 7.2 The Work may be suspended by the Owner as provided in Article 14 of AIA Document A201-2017.

ARTICLE 8 MISCELLANEOUS PROVISIONS

§ 8.1 Where reference is made in this Agreement to a provision of AIA Document A201-2017 or another Contract Document, the reference refers to that provision as amended or supplemented by other provisions of the Contract Documents.

§ 8.2 The Owner's representative:

(Name, address, email address, and other information)

Gloria S. Barrera
Chief of Facilities and Operations
Waco Independent School District
4315 Beverly Drive

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User Notes:

Waco, Texas 76711
Office (713) 805-7499
Gloria.barrera@wacoisd.org

§ 8.3 The Contractor's representative:
(Name, address, email address, and other information)

Gary Aanenson
Core Construction
6320 Research Road #200
Frisco, Texas 75033
972.668.9340
garyaanenson@coreconstruction.com

§ 8.4 Neither the Owner's nor the Contractor's representative shall be changed without ten days' prior notice to the other party.

§ 8.5 Insurance and Bonds

§ 8.5.1 The Owner and the Contractor shall purchase and maintain insurance as set forth in AIA Document A101™-2017, Standard Form of Agreement Between Owner and Contractor where the basis of payment is a Stipulated Sum, Exhibit A, Insurance and Bonds, and elsewhere in the Contract Documents.

§ 8.5.2 The Contractor shall provide bonds as set forth in AIA Document A101™-2017 Exhibit A, and elsewhere in the Contract Documents.

§ 8.6 Notice in electronic format, pursuant to Article 1 of AIA Document A201-2017, may be given in accordance with AIA Document E203™-2013, Building Information Modeling and Digital Data Exhibit, if completed, or as otherwise set forth below:

(If other than in accordance with AIA Document E203-2013, insert requirements for delivering notice in electronic format such as name, title, and email address of the recipient and whether and how the system will be required to generate a read receipt for the transmission.)

§ 8.7 Other provisions:

§ 8.7.1 By executing this Agreement, Contractor verifies that it does not boycott Israel, and it will not boycott Israel during the terms of this Contract. Pursuant to Texas Government Code, Chapter 2270, as amended, if Contractor is a for-profit organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or limited liability company, including a wholly owned subsidiary, majority-owned subsidiary, parent company, or affiliate of those entities or business associations (specifically excluding sole proprietorships) that exists to make a profit which has ten (10) or more full-time employees and the value of the contract with Owner is \$100,000 or more, the Contractor represents and warrants to the Owner that the Contractor does not boycott Israel and will not boycott Israel during the term of this Agreement.

§ 8.7.2 Contractor verifies and affirms that it is not a foreign terrorist organization as identified on the list prepared and maintained by the Texas Comptroller of Public Accounts. If Contractor has misrepresented its inclusion on the Comptroller's list, such omission or misrepresentation will void this Contract.

§ 8.7.3 Contractor verifies and affirms that it does not and will not boycott energy companies.

§ 8.7.4 Contractor verifies and affirms that it does not and will not discriminate against a firearm entity or firearm trade association based solely on its status as a firearm entity or firearm trade association and that it does not have a written or unwritten internal practice, policy, guidance or directive that discriminates against a firearm entity or firearm trade association based solely on its status as a firearm entity or firearm trade association.

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User Notes:

ARTICLE 9 ENUMERATION OF CONTRACT DOCUMENTS

§ 9.1 This Agreement is comprised of the following documents:

- .1 AIA Document A101™–2017, Standard Form of Agreement Between Owner and Contractor, as amended
- .2 AIA Document A101™–2017, Exhibit A, Insurance and Bonds, as amended
- .3 AIA Document A201™–2017, General Conditions of the Contract for
(Paragraphs deleted)
Construction, as amended

(Paragraph deleted)

- .4 Drawings

| Number | Title | Date |
|--------|------------------------------|------|
| | Refer to attached Exhibit B. | |

- .5 Specifications

| Section | Title | Date | Pages |
|---------|------------------------------|------|-------|
| | Refer to attached Exhibit C. | | |

- .6 Addenda, if any:

| Number | Date | Pages |
|-----------|------------|-------------|
| Addenda 1 | 10.11.2022 | 2,640 pages |
| Addenda 2 | 10.19.2022 | 363 pages |
| Addenda 3 | 10.20.2022 | 11 pages |

Portions of Addenda relating to bidding or proposal requirements are not part of the Contract Documents unless the bidding or proposal requirements are also enumerated in this Article 9.

- .7 Other Exhibits:

(Check all boxes that apply and include appropriate information identifying the exhibit where required.)

AIA Document E204™–2017, Sustainable Projects Exhibit, dated as indicated below:
(Insert the date of the E204-2017 incorporated into this Agreement.)

The Sustainability Plan:

| Title | Date | Pages |
|-------|------|-------|
| | | |

Supplementary and other Conditions of the Contract:

| Document | Title | Date | Pages |
|----------|-------|------|-------|
| | | | |

- .8 Other documents, if any, listed below:

(List here any additional documents that are intended to form part of the Contract Documents. AIA Document A201™–2017 provides that the advertisement or invitation to bid, Instructions to Bidders,

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sample forms, the Contractor's bid or proposal, portions of Addenda relating to bidding or proposal requirements, and other information furnished by the Owner in anticipation of receiving bids or proposals, are not part of the Contract Documents unless enumerated in this Agreement. Any such documents should be listed here only if intended to be part of the Contract Documents.)


- Exhibit A – Insurance and Bonds (4 Pages, Bond to be Attached)
- Exhibit B – Drawing List (10 Pages)
- Exhibit C – Specification List (7 Pages)
- Exhibit D – Schedule of Prevailing Wage Rates (1 Page)
- Exhibit E – Contractor's Path to Budget (5 Pages)

EXECUTED this 17th day of November, 2022.

OWNER:

CONTRACTOR:

By: Dr. Susan Kincannon
Title: Superintendent
Waco Independent School District



(Printed Name) Gary Aanenson
Title: Vice President
Company Name: CORE Construction

(Table deleted)

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Waco Independent School District

Board of Trustees Workshop Agenda Item

Date: November 17, 2022

Contact Person: Dr. Josie Gutierrez

RE: Review and Discuss the Opportunity Culture Program

=====

Background Information:

At the October 2020 Regular meeting, the Board approved a Memorandum of Understanding (MOU) with Public Impact. The MOU outlined a partnership with Public Impact to implement the Opportunity Culture (OC) program. The OC model focuses on increasing student achievement with paid teacher residencies to build a strong teacher pipeline. The model also uses job redesign to create advanced roles for excellent teachers who teach more students and coach teacher teams. These new roles create career pathways for teachers who choose to take on greater responsibility, receive greater compensation, and remain in instructional roles rather than leave teaching for higher paying positions.

The Board will receive an update on OC that includes general information about the model, an overview of OC career pathways with salary implications, and the impact this commitment is having in Waco ISD.

In summary, OC allows excellent teachers to take their talents to the next level by leading and supporting other in-service teachers and training aspiring residents. These opportunities increase Waco ISD's ability to attract and retain high performing candidates, which lead to schools with more consistent, excellent teaching in every classroom.

Fiscal Implications:

None

Administrative Recommendation(s):

No action is requested. This information is presented for review and discussion only.



Opportunity CULTURE

Waco ISD School Board Meeting
November 17, 2022

What is Opportunity Culture?



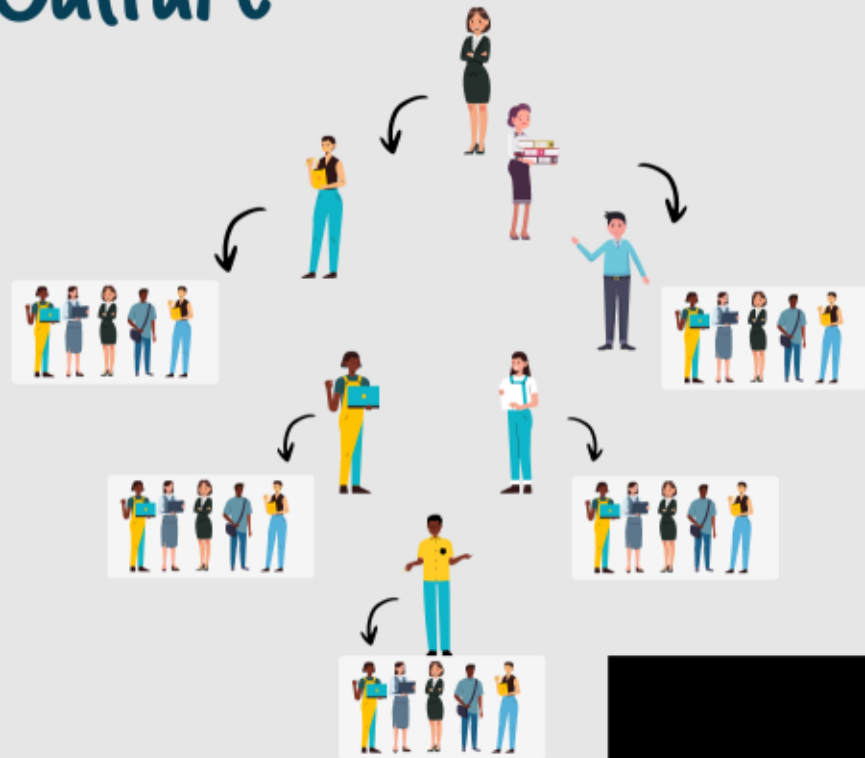
Teams of teachers and school leaders adopt roles to:

- **Reach more students** with **excellent teachers** and their teams.
- **Pay teachers more** for extending their reach.
- Fund pay within **regular budgets**.
- Provide protected in-school time and clarity about how to use it for **planning, collaboration and development**.
- Match **leadership responsibilities to each person's role**.

How is Opportunity Culture Different?



Traditional Model



Opportunity Culture Model

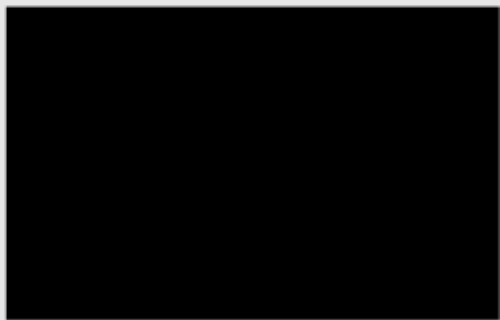
Impact of Opportunity Culture



Culture

**Student &
Teacher
Growth**

Leadership





Multi-Classroom Teacher

Using MCL methods and tools, the MCL collaborates with the team to plan, teach, coach, and analyze data to improve learning for all students.

\$13,000-\$18,000

Instructional Aide pay prorated at 80%

Teacher Resident

A student teacher who serves as a co-teacher to a MCL and develops expertise as they deliver instruction throughout a full school year.

Reach Associates

An instructional aide who provides both instructional and non-instructional support to teachers, manages procedures and supervises students.

Master Team Reach Teacher

In collaboration with the MCL, ensures alignment of lessons, activities, and assessments in a purposeful and enriched learning environment.

\$2,000

\$5,000

183



Master Team Reach Teacher

Collaborates with MCL to ensure alignment of lessons, activities, and assessments to provide an enriched learning environment. Works directly with one team teacher to provide coaching and instructional support.

\$5,000

Multi-Classroom Teacher

Collaborates with the team to plan, teach, coach, and analyze data to improve learning for all students.

\$13,000-\$18,000

Teacher Resident

A paid student teacher who develops expertise as they deliver instruction throughout a full school year.

Instructional Aide pay prorated at 80%

Reach Associates

A high performing instructional aide who provides both instructional and non-instructional support to teachers with additional leadership opportunities.

\$2,000



P-Tech

Instructional Aide

What is Possible?



Elementary Teacher Example 1

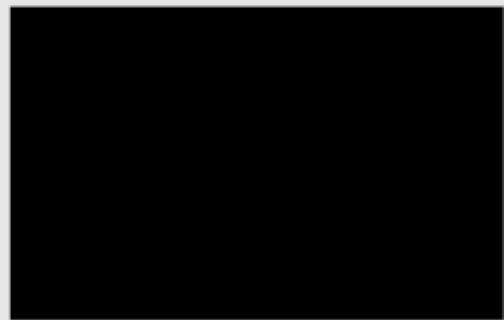
| | |
|-----------------------------------|------------------|
| Teacher Salary (15th Year) | \$57,500 |
| Multi-Classroom Leader II Stipend | \$16,000 |
| TIA Designation - Master | \$27,000 |
| | + |
| | ----- |
| | \$100,500 |

High School Teacher

| | |
|-----------------------------------|------------------|
| Teacher Salary (15th Year) | \$57,500 |
| Multi-Classroom Leader II Stipend | \$16,000 |
| TIA Designation - Master | \$27,000 |
| Math Stipend | \$ 8,000 |
| | + |
| | ----- |
| | \$108,500 |

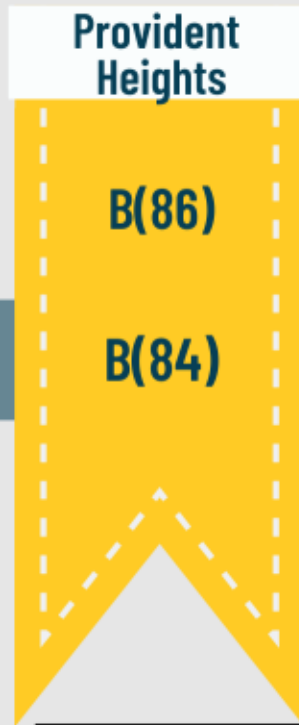
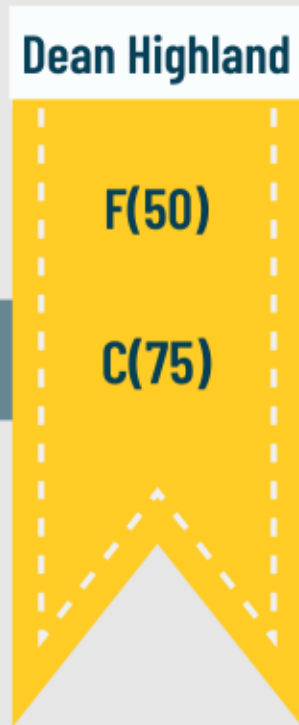
Elementary Teacher Example 2

| | |
|-----------------------------------|------------------|
| Teacher Salary (15th Year) | \$57,500 |
| Multi-Classroom Leader II Stipend | \$16,000 |
| TIA Designation - Master | \$27,000 |
| Bilingual Teacher Stipend | \$ 5,000 |
| | + |
| | ----- |
| | \$105,500 |





2019
2022



Success of Opportunity Culture Schools



5 OC Campuses



45 OC Educators



Over 2,000 students
reached

The Reach of Opportunity Culture

Impact of Opportunity Culture Schools



Opportunity Culture has been a great asset for our campus! It has helped create a culture of community, accountability, collaboration and teamwork. In addition, OC has impacted and increased our academic performance in all areas. I consider it a privilege to be a part of it!

-MCL

Opportunity Culture is about impacting systems. We work to refine each individual piece, so that the whole is made stronger.

-MCL



Identify five additional campuses for the
2023-2024 school year

Expansion process will begin in December 2022

Hiring process and professional development
redesign in Spring 2023

Next Steps for
Opportunity Culture