

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

**Thursday, October 26, 2023 - 6:00 PM**

A Regular Meeting of the Board of Trustees of Waco Independent School District will be held October 26, 2023, 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. **Moment of Silence and Pledge of Allegiance**
3. **Special Recognitions**
  - 3.A. Pledge Leaders
  - 3.B. Advanced Placement Scholar Award Recognition
  - 3.C. National Merit Commended Scholars
  - 3.D. College Board National African American and Hispanic Recognition Awards
  - 3.E. Texas Thespians Teacher of the Month
  - 3.F. College Board National Advisory Council
  - 3.G. Community Partner Award
4. **Public Comments on Agenda Items**
5. **Superintendent's Report**
  - 5.A. High School Musical Productions
  - 5.B. Thanksgiving Family Meals
  - 5.C. PEIMS Snapshot Data
  - 5.D. UIL Realignment
  - 5.E. Accountability Lawsuit Update
  - 5.F. Transformation Waco Annual Evaluation/Performance Contract/Transition Planning
6. **Public Meeting on the 2023 Annual Financial Management Report – School FIRST**  
**Presenter:** Sheryl Davis
7. **Information Items/Reports**
  - 7.A. Report on the 2023 Delinquent Tax Collections  
**Presenter:** Robert Meyers, McCreary Veselka Bragg Allen
  - 7.B. Monthly and Quarterly Financial Reports for the Period Ended August 31, 2023
  - 7.C. Monthly Financial Report for the Period Ended September 30, 2023

- 7.D. Beginning of Year Literacy Data
- 7.E. First Six Weeks School Safety and Student Behavior Report
- 7.F. First Reading of Board Policy DEC (LOCAL)
- 7.G. Emergent Bilinguals Annual Evaluation and Program Report
- 8. **Consent Agenda: Consider and Take Appropriate Action**
  - 8.A. Amendments to the 2023-2024 Budget
  - 8.B. Bid Award for Educational Consultants, Professional Development, and Other Student-Based Contracted Services
  - 8.C. Bid Award for Maintenance Supplies, Equipment, and Services
  - 8.D. Bid Award for Restaurant & Catering Services
  - 8.E. Purchases over \$50,000 under Pre-Existing Bid, Purchasing Cooperative, or Allowed Professional Service
  - 8.F. Independent Sources of Investment Officer Training
  - 8.G. List of Qualified Brokers Authorized to Engage in Investment Transactions with the District and Local Banks for the Purchase of Certificates of Deposit
  - 8.H. Investment Policy and Strategies as Codified Under Policy CDA (LOCAL) – Other Revenues: Investments
  - 8.I. Resolution to Cast Votes in the McLennan County Appraisal District Board of Directors Election
  - 8.J. Amendment to the Current District of Innovation Plan
  - 8.K. Approval of District Facility Rental Terms and Rates
  - 8.L. Review, Discuss and Take Appropriate Action Regarding an Applicant for Employment Related to a District Administrator
  - 8.M. Approve the 2023-2024 District and Campus Improvement Plans
  - 8.N. Board of Trustees Meeting Minutes
    - 8.N.1. Regular Meeting - August 24, 2023
    - 8.N.2. Regular Meeting - September 21, 2023
- 9. **Consider, Discuss and Take Appropriate Action Regarding a Resolution Approving the Renovation, Construction, and Financing of an Addition to the McLennan Central Appraisal Center**  
**Presenter:** Joe Don Bobbitt
- 10. **Review and Discuss the Waco High School Construction Project**  
**Presenter:** Gloria Barrera
- 11. **Announcements**
- 12. **Review and Discuss Potential Contracts on Real Property**
- 13. **Consideration of Personnel**
  - 13.A. Deliberate the Appointment, Employment, Evaluation, Reassignment, Duties, Discipline, or Dismissal of a Public Officer or Employee
  - 13.B. Hear a Complaint or Charge Against an Officer or Employee
- 14. **Adjournment**

**Waco Independent School District**  
***Board of Trustees Meeting Agenda Item***

**Date:** October 26, 2023

**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 October, West Avenue Elementary students Juan De Paz and Shy’La Futral were selected for this honor.

**Advanced Placement Scholar Award Recognition**

Students receive the designation of Advanced Placement (AP) Scholar through hard work and high academic achievement in AP courses and exams. There are three designations: AP Scholar, AP Scholar with Honors, and AP Scholar with Distinction. AP Exams are scored on a one to five scale, and scores of 3 or better earn the student college credit for the course at most universities across the United States.

The award of AP Scholar with Distinction is awarded to students who receive an average score of at least 3.5 on all AP exams taken, and scores of 3 or higher on five or more of these exams.

Anna Hogue is a Waco High School student who earned the AP Scholar with Distinction award.

**National Merit Commended Scholars**

The National Merit Scholarship Program is a national academic competition for high school students to provide financial aid to attend college. It is administered by the National Merit Scholarship Corporation (NMSC).

To qualify for the National Merit Scholarship Program, students must take the Preliminary SAT/National Merit Scholarship Qualifying Test (PSAT/NMSQT) in the fall of their Junior year.

Two Waco High School seniors have been named National Merit Commended Scholars in the 69th Annual National Merit Scholarship Program. These students

scored in the top three percent of students taking the 2021 PSAT, an achievement that fewer than 34,000 students across the nation earned.

Samuel Everett plans to attend Rice University with a double major in Math and Chemical Physics. He would like to become a natural sciences professor. Everett serves on the student council, plays on the school tennis team, is a member of the National Honor Society, works part-time at an ice cream store, and is an avid ping pong player.

Jude Wendel is leaning toward attending Texas A&M University and is interested in pursuing a career in the culinary arts. Wendel enjoys volunteering through community outreach activities and enjoys web comics and video gaming.

### **College Board National African American and Hispanic Recognition Awards**

In August 2023, the College Board awarded thousands of students from across the country with academic honors from the annual College Board National Recognition Programs for excelling in their classrooms and on College Board assessments, including PSAT/NMSQT®, PSAT™ 10, and AP® exams. High-achieving students from all 50 states and U.S. territories were eligible to apply to four programs: National African American Recognition Program, National Hispanic Recognition Program, National Indigenous Recognition Program, and/or National Rural/Small Town Recognition Program.

This year, 31 Waco ISD students are recipients of the National African American Recognition Award (NAARA) or the National Hispanic Recognition Award (NHRA). 27 of the 31 are also Superintendent Scholars.

The University High School recipients are as follows:

NAARA- Jazlyn Davis, Jautyrael Kendricks, and Taniya Wicks

NHRA- Jazlyn Davis, Daniel Angulo, Daisy Barco, Ramiro Castillo, Giselle Favela, Iliana Garcia, Valerie Garcia-Perez, Alanie Gonzalez, Skylar Goodman, Kevin Gutierrez, Daneida Hernandez, Araceli Herrera, Emilio Lopez, Andres Luevano, Sara Olguin, Joshua Olvera, Elayna Ortiz, Blanca Torres, Stiven Uceda, and Emanuel Zuniga.

The Waco High School award recipients are:

NAARA- Justyce Allen and Aaliyah Mathews

NHRA- Yessenia Antonio, Cassandra Garcia, Anthony Gonzalez, Luis Gonzalez, Juan Medina, Aidan Ortiz, and Athan Zimmerman

### **Texas Thespians Teacher of the Month**

Texas Thespians, an affiliate chapter of the Educational Theatre Association, is one of the largest chapters in the nation. A chapter is established to support the mission of the Educational Theatre Association's student honor organization, the International Thespian Society. As an affiliate of the International Thespian Society, Texas Thespians follows the national model for promoting excellence in middle and high school theatre departments across Texas.

Texas Thespians recently recognized Kathryn Davis with the distinguished honor of Teacher of the Month for September 2023.

### **College Board National Advisory Council**

College Board is a mission-driven not-for-profit organization that connects students to college success and opportunity. The membership association is made up of over 6,000 of the world's leading educational institutions and is dedicated to promoting excellence and equity in education.

College Board has elected Waco ISD Superintendent Dr. Susan Kincannon to its National Superintendent's Advisory Council.

Designed to ensure the College Board receives valuable input to refine its programs and services, the Advisory Council shares ideas and best practices about educational improvement and engages College Board leaders on how they can add value to the educational institutions and students they all serve. Advisory Council members provide College Board with guidance on key issues and initiatives to help ensure a balance of regional and professional perspectives.

### **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 2023-2024 school year "Lead for Results" and acknowledges the impact that our community partners make in the lives of our students and staff.

In October, the district is recognizing VOICE. A nonprofit with a mission to empower children and their families to lead healthy and productive lives by promoting success in education, nurturing wellness in mind and body, and developing skills in tomorrow's global leaders.

VOICE serves Waco ISD by partnering with Waco High and Kendrick Elementary through the Adopt-a-School program, helping high school students plan for college, conducting a teen leadership program, making Red Ribbon presentations and distributing awareness item including bracelets, volunteering for and supplying Family Fest t-shirts, and providing students with school supplies.

They also recently sponsored an outdoor learning space at Mountainview Elementary which was enhanced for outdoor classroom use and for stress relief activities for staff and students.

**Fiscal Implications:**

None

**Administration Recommendations:**

For discussion only

**Waco Independent School District**

**Board of Trustee Meeting Agenda Item**

**Date:** October 26, 2023

**Contact Person:** Sheryl Davis

**RE: Public Meeting on the 2023 Annual Financial Accountability Management Report (School FIRST)**

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**Background Information:**

School FIRST (Financial Accountability Rating System of Texas) is the financial accountability system developed by the Texas Education Agency in response to Senate Bill 875 of the 76<sup>th</sup> Texas Legislature. The primary goal of Schools FIRST is to achieve quality performance in the management of a school districts’ financial resources, a goal made more significant due to the complexity of accounting associated with Texas’ school finance system.

There are twenty accountability indicators including five critical indicators, nine solvency indicators, and six financial competence indicators. Financial accountability rating indicators for 2023 are based on fiscal year 2021-2022 financial data.

The first three of the five critical indicators do not receive a point value. They are either validated or not. Failure to pass any of the three critical indicators results an automatic rating of “Substandard Achievement”. While indicators 4 and 5 do not receive a point value, they are “ceiling indicators”. Ceiling indicators limit the maximum points allowed by the applicable indicator. The District will receive a rating based on the lesser points earned. The ceiling indicators apply to indicators 4, 5, 6, 16, 17, and 20.

The types of financial accountability ratings that school districts may receive are as follows:

Rating	Description
A	Superior Achievement
B	Above Standard Achievement
C	Standard Achievement
F	Substandard Achievement
No Rating	Districts receiving territory due to an annexation order or consolidation

The letter grade will be assigned depending on the District’s score on the solvency and financial competence indicators and, of course, passing all the critical indicators. The highest possible score on the indicators is 100 points. Any district scoring below 70 points will receive a rating of “F - Substandard Achievement”. The school district receives an “F” if it scores below the minimum passing score, if it failed any critical indicators 1 through 5, if the annual financial report or the data were not both complete, or if either the annual financial report or the data were not submitted on time for FIRST analysis. Districts that do not receive a passing score must file a corrective action plan with the Texas Education Agency.

Within two months of receiving the final financial accountability rating, school districts are required to prepare an annual financial management report that includes the following:

- The district’s financial management performance rating provided by the Texas Education Agency (TEA) based on its comparison with indicators established by the Commissioner of Education;
- The district’s financial management performance under each indicator for the current and previous years’ financial accountability ratings;
- Additional information required by the Commissioner of Education, including:
  - a copy of the Superintendent’s current employment contract;
  - a summary schedule for the fiscal year (12-month period) of total reimbursements received by the superintendent and each board member;
  - a summary schedule for the fiscal year of the dollar amount of compensation or fees received by the superintendent from another school district or any other outside entity in exchange for professional consulting or other personal services;
  - a summary schedule for the fiscal year of the dollar amount by the executive officers and board members of gifts that had an economic value of \$250 or more in the aggregate in the fiscal year; and
  - a summary schedule for the fiscal year of the dollar amount, by board member, for the aggregate amount of business transactions with the school district; and
- Additional information that the district’s board of trustees deems useful.

The financial management report is required to be made available to attendees at a public hearing for School FIRST. Notice of the hearing, including date, time and location, must be provided to a newspaper of general circulation in the district prior to holding the public meeting. The District published the public hearing notification, as required, in the Waco Tribune-Herald on October 3, 2023.

The District once again received the state’s highest financial accountability rating of **“Superior” or an “A”** for the 2021-2022 fiscal year with a score of 94 out of 100 points.

A copy of the report is attached along with a brief overview that will be presented at the Public Meeting.

**Fiscal Implications:**

None

**Administrative Recommendations:**

The administration recommends the Board invite public input in response to the District’s 2023 School FIRST rating, as presented.

# 2023 School FIRST

Annual Financial Accountability Management Report  
Public Hearing  
October 26, 2023



# Background

- Authorized by the Legislature in 1999
- Financial Accountability Rating System and “School FIRST” was implemented in 2000
- Primary Goal: To achieve improved performance in the management of school district resources
- Objectives:
  - To assess the quality of financial management in Texas Public Schools
  - To measure and report the extent financial resources are used for instructional purposes
  - To evaluate the quality of financial management decisions

# Rating System Indicators

- Twenty Indicators
  - 5 Critical indicators
  - 9 Solvency indicators
  - 6 Financial Competence indicators
- Measurement Indicators
  - Critical indicators (Yes/No)
  - Ceiling indicators (limit maximum total points available and the applicable rating for financial accountability)
  - Other indicators (0-10 points, based on performance)

# District Requirements

- Annual Financial Management Report
  - Include the results of the District's performance on the School FIRST indicators, as published by the Texas Education Agency
  - Explain the District's performance on those indicators, including a comparison to the prior year
- Public Hearing
  - Conduct a public hearing on the District's performance on the School FIRST indicators
  - Publish notice of the public hearing in local newspaper
  - Receive public input

# Indicators

Critical Indicators (Yes/No)

- Was the complete annual financial report and data submitted to the Texas Education Agency within 30 days of the January 28 deadline?
- Was there an unmodified opinion in the annual financial report on the financial statements as a whole?
- Was the school district in compliance with the payment terms of all debt agreements at fiscal year end?
- Did the school district make timely payments to the Teachers Retirement System, Teas Workforce Commission, Internal Revenue Services, and other government agencies?
- Was the total unrestricted net position balance in the governmental activities column in the Statement of Net Position greater than zero? *This indicator has not been scored in the past four years due to the impact of recording the long-term liabilities for pension and other post-employment benefits*

# Indicators

## Solvency Indicators

- Was the average change in fund balance over 3 years less than a 25% decrease or did the current year fund balance exceed 75 days of operational expenditures?
- Was the number of days of cash on hand and current investments in the general fund sufficient to cover operating expenditures?
- Was the measure of current assets to current liabilities ratio sufficient to cover short-term debt?
- Did general fund revenues cover expenditures or was the number of days of cash on hand greater than or equal to 60 days?
- Was the variance less than 10 percent when comparing budgeted revenues to actual for the last 3 fiscal years? *The indicator was not scored for the 2021-2022 fiscal year due to the impact of the COVID-19 pandemic on enrollment and attendance and the resulting loss in State revenue*
- Was the ratio of long-term liabilities to total assets sufficient to support long-term solvency?
- Was the debt per \$100 of assessed property value ratio sufficient to support future debt repayments?
- Was the administrative cost ratio equal to or less than the threshold ratio?
- Was there not a 15% decline in the students to staff ratio over 3 years? *The indicator was not scored for the 2021-2022 fiscal year due to the impact of the COVID-19 pandemic on enrollment and attendance*

# Indicators

## Financial Competence Indicators

- Was the actual ADA within the allotted range of the biennial projection submitted to TEA? *This indicator was not scored for 2021-2022 because of the impact of the COVID-19 pandemic on enrollments and attendance*
- Did the comparison of PEIMS data to the information in the annual financial report result in a total variance of less than 3%?
- Did the external auditor report that the annual financial report was free of any material weakness in internal controls over financial reporting and compliance for local, state, or federal funds?
- Did the external auditor indicate the annual financial report was free of any instances of material noncompliance for grants, contracts, and laws related to local, state, or federal funds?
- Was required financial information posted on the District's website in accordance with statutes, laws, and rules?
- Were property values discussed at a board meeting within 120 days of adopting the budget?

## Required Disclosures

- Superintendent's current contract
- Schedule of lodging, meals, travel, and other reimbursements to the Superintendent and Board members
- Schedule of outside compensation paid to the Superintendent
- Schedule of gifts with an aggregate value in excess of \$250 to the Superintendent and Board from outside entities
- Schedule of business transactions between Board members and the District

# Determination of Rating

- Ratings:
  - A = Superior Achievement (90 – 100 points)
  - B = Above Standard (80 – 89 points)
  - C = Meets Standard (70 – 79 points)
  - F = Substandard Achievement (0 – 69 points)
  - No Rating will be issued for a school district receiving territory under annexation with a school district ordered by the Commissioner, TEC §13.054, or consolidation under Subchapter H, Chapter 41, until the third year after the annexation/consolidation.
- Substandard Achievement Rating and TEA Sanctions:
  - District must file a corrective action plan with TEA
  - Assignment of financial monitor or master
  - Accreditation investigation

# Ceiling Indicators

Did the school district meet the criteria for any of the following ceiling indicators 4, 6, 16, 17, or 20? If so, the school district's applicable maximum points and rating are disclosed below. Please note, an F = Substandard Achievement Rating supersedes any rating earned as the result of the school district meeting the criteria of a ceiling indicator.

Determination of rating based on meeting ceiling criteria	Maximum Points	Maximum Rating
<b>Indicator 4</b> (Timely Payments) – School district was issued a warrant hold	95	A = Superior Achievement
<b>Indicator 6</b> (Average Change in Fund Balance) – Response to indicator is <i>No</i> .	89	B = Above Standard Achievement
<b>Indicator 16</b> (PEIMS to AFR) – Response to indicator is <i>No</i> .	89	B = Above Standard Achievement
<b>Indicator 17</b> (Material Weaknesses) – Response to indicator is <i>No</i> .	79	C = Meets Standard Achievement
<b>Indicator 20</b> (Property Values and Tax Discussion) – Response to indicator is <i>No</i> .	89	B = Above Standard Achievement

2023 Waco ISD Results

# A = Superior Achievement

Waco ISD Scored 94 Out of 100 Points



## 2023 Waco ISD Results

- 'Yes' to the four scored Critical Indicators (indicator 5 was not evaluated)
- Maximum points for each of the scored Solvency indicators with the exception of indicators 11, 12, and 13 (indicators 10 and 13 were not evaluated)
- Maximum points for each of the scored Financial Competence Indicators (indicator 15 was not evaluated)

# 2023 Waco ISD Results

- Solvency Indicator #11

- Was the ratio of long-term liabilities to total assets for the school district sufficient to support long-term solvency? (If the school district’s increase of students in membership over 5 years was 7 percent or more or 1,000 or more students in membership, then the school district passes this indicator)
- This question is like asking someone if their mortgage exceeds the market value of their home.
- *At August 31, 2022, the District has a ratio of long-term liabilities to total assets of 0.684. At August 31, 2021, the District has a ratio of long-term liabilities to total assets of 0.552. With the issuance of \$189,500,000 in the Unlimited School Building Bonds, Series 2022, the ratio increased resulting in a loss of two points for this indicator.*

10	8	6	4	2	0
≤ 0.60	> 0.60 ≤ 0.70	> 0.70 ≤ 0.80	> 0.80 ≤ 0.90	> 0.90 ≤ 1.00	> 1.00

# 2023 Waco ISD Results

- Solvency Indicator #12

- What is the correlation between future debt requirements and the district’s assessed property value?
- This indicator asks about the school district’s ability to make debt principal and interest payments that will become due during the year. Did you meet or exceed the target amount in School FIRST?
- *At August 31, 2022, the District’s debt per \$100 of assessed property value ratio has a debt service coverage ratio of 5.0046. At August 31, 2021, the District’s ratio was 2.2232. Again, the District lost two points for this indicator due to the issuance of bonded debt.*

10	8	6	4	2	0
≤ 4	> 4 ≤ 7	> 7 ≤ 10	> 10 ≤ 11.5	> 11.5 ≤ 13.5	> 13.5

# 2023 Waco ISD Results

- Solvency Indicator #13

- Was the school district’s administrative cost ratio equal to or less than the threshold ratio?
- TEA and state law set a standard on the percentage of the budget that Texas School districts can spend on administration. Where did we fall in relationship to that standard for district’s our size?
- The District’s Administrative Cost Ratio was 9.33% compared to 9.78% for the prior year. The rate falls between 8.55% and 11.05 percent, garnering only 8 points for this indicator.

ADA Size	10	8	6	4	2	0
≥ 10,000	≤ 0.0855	> 0.0855 ≤ 0.1105	> 0.1105 ≤ 0.1355	> 0.1355 ≤ 0.1605	> 0.1605 ≤ 0.1855	> 0.1855
≥ 5,000 to < 10,000	≤ 0.1000	> 0.1000 ≤ 0.1250	> 0.1250 ≤ 0.1500	> 0.1500 ≤ 0.1750	> 0.1750 ≤ 0.2000	> 0.2000
≥ 1,000 to < 5,000	≤ 0.1151	> 0.1151 ≤ 0.1401	> 0.1401 ≤ 0.1651	> 0.1651 ≤ 0.1901	> 0.1901 ≤ 0.2151	> 0.2151
≥ 500 to < 1,000	≤ 0.1311	> 0.1311 ≤ 0.1561	> 0.1561 ≤ 0.1811	> 0.1811 ≤ 0.2061	> 0.2061 ≤ 0.2311	> 0.2311
< 500	≤ 0.2404	> 0.2404 ≤ 0.2654	> 0.2654 ≤ 0.2904	> 0.2904 ≤ 0.3154	> 0.3154 ≤ 0.3404	> 0.3404
Sparse	≤ 0.3364	> 0.3364 ≤ 0.3614	> 0.3614 ≤ 0.3864	> 0.3864 ≤ 0.4114	> 0.4114 ≤ 0.4364	> 0.4364

## Invitation for Public Input

A copy of the "School FIRST" report is available on the "Financial Transparency" page of the Waco ISD website at:

[wacoisd.org/Domain/7079](http://wacoisd.org/Domain/7079)

Copies are also available upon request from the Waco ISD Public Information Office





# 2023 Annual Financial Accountability Management Report

Based on Data from the Fiscal Year Ended August 31, 2022





# 2023 Annual Financial Accountability Management Report

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School FIRST (Financial Accountability Rating System of Texas) was first developed as the financial accountability system for Texas school districts by the Texas Education Agency in response to Senate Bill 875 of the 76<sup>th</sup> Texas Legislature in 1999. The purpose of the financial accountability rating system is to ensure that school districts will be held accountable for the quality of their financial management practices and achieve improved performance in the management of their financial resources. The system is designed to encourage Texas public schools to manage their financial resources better in order to provide the maximum allocation possible for direct instructional purposes.

The system will also disclose the quality of local management and decision-making processes that impact the allocation of financial resources in Texas public schools. An evaluation of the long-term effectiveness of the system should disclose a measurable improvement in the quality of Texas public schools' financial decision-making processes. The importance of the rating system's goal is underscored by the steadily increasing complexity of the State's funding of public schools compounded by the increasing sophistication of the associated accounting system.

In accordance with Texas Education Code (TEC), Chapter 39, Subchapter D, each school district must be assigned a financial accountability rating by the Texas Education Agency (TEA). The specific procedures for determining financial accountability ratings will be established annually by the Commissioner of Education and communicated to all school districts.

As authorized by House Bill 5, Section 49, of the 83<sup>rd</sup> Texas Legislature, Regular Session, the Commissioner and the Texas Education Agency implemented major changes to the School FIRST system. Beginning with the 2015 report, the changes were phased in over three years.

As shown on the following chart, there are twenty accountability indicators. Financial accountability rating indicators for 2023 are based on fiscal year 2021-2022 financial data.

Indicator Category	Number of Indicators
Critical	5
Solvency	9
Financial Competence	6

The first three of the five critical indicators do not receive a point value. They are either validated or not. As in the previous system, failure to pass any of these three critical indicators results an automatic rating of "Substandard Achievement". While indicators 4 and 5 also do not receive a point value, they are "ceiling indicators". For 2023, Indicator 5 regarding a district's unrestricted net position was again not scored due to the impact of recording the long-term liabilities for pension and post-employment benefits.

Ceiling indicators were introduced with the 2021 accountability rating. Indicators 4, 5, 6, 16, 17, and 20 are ceiling indicators. The scoring of these indicators limits the maximum points available and the applicable rating. If the district’s overall points earned is less than the maximum points allowed by the applicable ceiling indicator, the district will receive a rating based on the lesser points earned. If the district fails a critical indicator or the district’s total number of points is equal to or less than 69 points, the school district will receive an “F = Substandard Achievement” rating, regardless of any ceiling indicator criteria met. The section on “How the Ratings are Assessed” gives a more detailed explanation of the determination of ratings based on meeting ceiling criteria.

With the exception of the ceiling indicators listed above, indicators in the solvency and financial competence categories may receive up to ten points.

Beginning with the 2020 report, a letter grade of “A” through “F” is assigned depending on the District’s score on the solvency and financial competence indicators and, of course, passing all the critical indicators. The highest possible score on the indicators is 100 points. Any district scoring below 70 points will receive a rating of “Substandard Achievement”. The following chart illustrates the scoring criterion for determination of ratings:

Rating	Points
A = Superior Achievement	90 through 100
B = Above Standard	80 through 89
C = Meets Standard	70 through 79
F = Substandard Achievement	0 through 69
No Rating = A school district receiving territory that annexes with a school district ordered by the commissioner under TEC 13.054, or consolidation under Subchapter H, Chapter 41. No rating will be issued for the school district receiving territory until the third year after the annexation/consolidation.	

The school district receives an “F” if it scores below the minimum passing score, if it failed any of the critical indicators 1, 2, 3, 4, or 5, if the annual financial report (AFR) or the data file were not both complete or were not submitted on time for FIRST analysis.

Districts that do not receive a passing score must file a corrective action plan with the Texas Education Agency. The commissioner of education may apply sanctions to a district that is assigned a “Substandard Achievement” rating. Additional sanctions could apply if issues arise relating to data quality. Sanctions could result in the assignment of a financial monitor or master by the Texas Education Agency Accountability Department in accordance with Chapter 39 of the Education Code. Additional sanctions could involve an accreditation investigation that could result in specific requirements for improvements in financial management. A lowered rating status resulting from an investigation would remain in effect until the commissioner acknowledges that significant improvement was being made in financial management problem areas.

In December 2007, TEA Adopted 19 TAC Chapter 97, Planning and Accountability Subchapter EE, Accreditation Status, Standards, and Sanctions. The subchapter defined the accreditation statuses and stated how accreditation statuses would be determined and assigned to school districts. In accordance with these rules, TEA will take into consideration a district's School FIRST rating when assigning an accreditation status. Additionally, a district's final School FIRST rating may affect its special education determination status as issued by the TEA under the requirements of the Individuals with Disabilities Education Act (IDEA).

Sanctions may also be applied because of data problems of a sufficient magnitude to raise questions about the validity of measurements used in the financial accountability rating system indicators. The district's rating would be suspended if serious, systemic data quality problems occurred.

The Texas Education Agency posts districts' final reports to the Agency's web site. Interested parties are able to print copies of all materials from that source.

On August 4, 2023, the Texas Education Agency posted the district's preliminary School FIRST rating. The School FIRST ratings were based upon an analysis of data reported for the 2021-2022 fiscal year. The District passed all the critical indicators and received a score of 94 out of a possible 100 points for the other indicators, losing two points each on indicators 11, 12, and 13. This scoring will be discussed later in the section on "How the Ratings are Assessed".

**Waco Independent School District's 2023 Rating is "A – Superior Achievement"**

Upon notification of the district's rating, the ratings report must be disseminated by a school district to all the district's taxpayers, in addition to the parents and guardians of students. After receipt of the financial accountability rating system report generated by the Texas Education Agency, the district level decision-making committee must hold at least one public meeting annually for discussing the financial performance of the district and district performance objectives.

The board of trustees shall hold the hearing for public discussion of the annual financial accountability system report within 60 days of receiving the final notification. The board shall notify property owners, parents, and guardians in the district of the hearing. The District published notification, as required, in the Waco Tribune-Herald on October 3, 2023, as well as in their online advertising. The public meeting will be held on October 26, 2023.

The board of trustees will publish, or cause to be published, an annual report describing the financial management performance of the district. The report must include the information provided by the Texas Education Agency including the district's financial management performance under each indicator for both the current and previous years' financial accountability ratings.

The financial management report issued at the Schools FIRST hearing must contain certain required disclosures, in accordance with Title 19 Texas Administrative Code, Chapter 109, Budgeting, Accounting, and Auditing, Subchapter AA, Commissioner's Rules Concerning Financial Accountability Rating System. These disclosures include:

1. A copy of the superintendent's current employment contract or other written documentation of employment if no contract exists. This must disclose all compensation and benefits paid to the superintendent. The school district may publish the superintendent's employment contract on its website instead of publishing it in the annual financial management report.
2. A summary schedule for the fiscal year of expenditures paid on behalf of and/or total reimbursements received by the superintendent and each board member, including transactions resulting from use of the school district's credit card(s) to cover expenses incurred by the superintendent and each board member.
3. A summary schedule for the fiscal year of the dollar amount of compensation and/or fees received by the superintendent from another school district or any other outside entity in exchange for professional consulting and/or other personal services;
4. A summary schedule for the fiscal year of the total dollar amount by the executive officers and board members of gifts that had an aggregate economic value of \$250 or more. This reporting requirement applies only to gifts received from an outside entity that received payments from the school district, in the prior fiscal year and to gifts from competing vendors that were not awarded contracts in the prior fiscal year. This reporting requirement does not apply to reimbursement by an outside entity for travel-related expenses when the purpose of the travel was to investigate matters directly related to the executive officer or board member's duties. Nor does it apply when the purpose is related to attendance at education-related conferences and seminars with the primary purpose of providing continuing education (this exclusion does not apply to trips for entertainment purposes or pleasure trips).
5. A summary schedule for the fiscal year of the dollar amount by board member for the aggregate amount of business transactions with the school district;
6. Any other information the local board of trustees determines to be useful.

A corrective action plan is to be filed with the TEA by each school district that received a rating of "Substandard Achievement".

If you have any questions about the report or need additional financial information about the District, please contact the Chief Financial Officer, Waco ISD, 501 Franklin Avenue, Waco, Texas 76701. A copy of this report is available upon request through the Office of Public Information and may be found on the Financial Transparency page of the District's website.

# The Ratings Worksheet

The following pages contain the 2022-2023 School FIRST rating worksheet detailing the District's performance on each of the 20 indicators as published by the Texas Education Agency. The worksheet is followed by an explanation of the indicators and information as to how ratings are assessed as well as a comparison with last year's performance.



## Financial Integrity Rating System of Texas

### 2022-2023 RATINGS BASED ON SCHOOL YEAR 2021-2022 DATA - DISTRICT STATUS DETAIL

<b>Name: WACO ISD (161914)</b>		<b>Publication Level 1:</b> 8/4/2023 12:02:16 PM	
<b>Status: Passed</b>		<b>Publication Level 2:</b> 8/7/2023 3:01:39 PM	
<b>Rating:</b> A = Superior Achievement		<b>Last Updated:</b> 8/7/2023 3:01:39 PM	
<b>District Score:</b> 94		<b>Passing Score:</b> 70	
#	Indicator Description	Updated	Score
1	<u>Was the complete annual financial report (AFR) and data submitted to the TEA within 30 days of the November 27 or January 28 deadline depending on the school district's fiscal year end date of June 30 or August 31, respectively?</u>	7/13/2023 6:19:27 PM	Yes
2	<u>Was there an unmodified opinion in the AFR on the financial statements as a whole? (The American Institute of Certified Public Accountants (AICPA) defines unmodified opinion. The external independent auditor determines if there was an unmodified opinion.)</u>	7/13/2023 6:19:27 PM	Yes
3	<u>Was the school district in compliance with the payment terms of all debt agreements at fiscal year end? (If the school district was in default in a prior fiscal year, an exemption applies in following years if the school district is current on its forbearance or payment plan with the lender and the payments are made on schedule for the fiscal year being rated. Also exempted are technical defaults that are not related to monetary defaults. A technical default is a failure to uphold the terms of a debt covenant, contract, or master promissory note even though payments to the lender, trust, or sinking fund are current. A debt agreement is a legal agreement between a debtor (= person, company, etc. that owes money) and their creditors, which includes a plan for paying back the debt.)</u>	7/13/2023 6:19:27 PM	Yes

4	<u>Did the school district make timely payments to the Teachers Retirement System (TRS), Texas Workforce Commission (TWC), Internal Revenue Service (IRS), and other government agencies? (If the school district received a warrant hold and the warrant hold was not cleared within 30 days from the date the warrant hold was issued, the school district is considered to not have made timely payments and will fail critical indicator 4. If the school district was issued a warrant hold, the maximum points and highest rating that the school district may receive is 95 points, A = Superior Achievement, even if the issue surrounding the initial warrant hold was resolved and cleared within 30 days.)</u>	7/13/2023 6:19:27 PM	Yes  Ceiling Passed
5	This indicator is not being evaluated.		
			1 Multiplier Sum
6	<u>Was the average change in (assigned and unassigned) fund balances over 3 years less than a 25 percent decrease or did the current year's assigned and unassigned fund balances exceed 75 days of operational expenditures? (If the school district fails indicator 6, the maximum points and highest rating that the school district may receive is 89 points, B = Above Standard Achievement.)</u>	7/13/2023 6:19:28 PM	Ceiling Passed
7	<u>Was the number of days of cash on hand and current investments in the general fund for the school district sufficient to cover operating expenditures (excluding facilities acquisition and construction)? See ranges below in the Determination of Points section.</u>	7/13/2023 6:19:27 PM	10
8	<u>Was the measure of current assets to current liabilities ratio for the school district sufficient to cover short-term debt? See ranges below in the Determination of Points section.</u>	7/13/2023 6:19:27 PM	10
9	<u>Did the school district's general fund revenues equal or exceed expenditures (excluding facilities acquisition and construction)? If not, was the school district's number of days of cash on hand greater than or equal to 60 days? See ranges below in the Determination of Points section.</u>	7/13/2023 6:19:27 PM	10
10	This indicator is not being evaluated.		10
11	<u>Was the ratio of long-term liabilities to total assets for the school district sufficient to support long-term solvency? (If the school district's increase of students in membership over 5 years was 7 percent or more or 1,000 or more students in membership, then the school district passes this indicator.)</u>	7/13/2023 6:19:27 PM	8
12	<u>What is the correlation between future debt requirements and the district's assessed property value?</u>	7/13/2023 6:19:27 PM	8

13	<u>Was the school district's administrative cost ratio equal to or less than the threshold ratio? See ranges below in the Determination of Points section.</u>	7/13/2023 6:19:27 PM	8
14	This indicator is not being evaluated.		10
15	This indicator is not being evaluated.		5
16	<u>Did the comparison of Public Education Information Management System (PEIMS) data to like information in the school district's AFR result in a total variance of less than 3 percent of all expenditures by function? (If the school district fails indicator 16, the maximum points and highest rating that the school district may receive is 89 points, B = Above Standard Achievement.)</u>	7/13/2023 6:19:27 PM	Ceiling Passed
17	<u>Did the external independent auditor report that the AFR was free of any instance(s) of material weaknesses in internal controls over financial reporting and compliance for local, state, or federal funds and free from substantial doubt about the school district's ability to continue as a going concern? (The AICPA defines material weakness.) (If the school district fails indicator 17, the maximum points and highest rating that the school district may receive is 79 points, C = Meets Standard Achievement.)</u>	7/13/2023 6:19:27 PM	Ceiling Passed
18	<u>Did the external independent auditor indicate the AFR was free of any instance(s) of material noncompliance for grants, contracts, and laws related to local, state, or federal funds? (The AICPA defines material noncompliance.)</u>	7/13/2023 6:19:27 PM	10
19	<u>Did the school district post the required financial information on its website in accordance with Government Code, Local Government Code, Texas Education Code, Texas Administrative Code and other statutes, laws and rules that were in effect at the school district's fiscal year end?</u>	7/13/2023 6:19:28 PM	5
20	<u>Did the school district's administration and school board members discuss any changes and/or impact to local, state, and federal funding at a board meeting within 120 days before the district adopted its budget?</u>	7/13/2023 6:19:27 PM	Ceiling Passed
			94 Weighted Sum
			1 Multiplier Sum
			(100 Ceiling)
			94 Score

## DETERMINATION OF RATING

<b>A.</b>	Did the school district fail any of the critical indicators 1, 2, 3, or 4? If so, the school district's rating is <b>F for Substandard Achievement</b> regardless of points earned.	
<b>B.</b>	Determine the rating by the applicable number of points.	
	<b>A = Superior Achievement</b>	90-100
	<b>B = Above Standard Achievement</b>	80-89
	<b>C = Meets Standard Achievement</b>	70-79
	<b>F = Substandard Achievement</b>	<70
<p><b>No Rating = A school district receiving territory that annexes with a school district ordered by the commissioner under TEC 13.054, or consolidation under Subchapter H, Chapter 41. No rating will be issued for the school district receiving territory until the third year after the annexation/consolidation.</b></p> <p>The school district receives an <b>F</b> if it scores below the minimum passing score, if it failed any critical indicator 1, 2, 3, or 4, if the AFR or the data were not both complete, or if either the AFR or the data were not submitted on time for FIRST analysis.</p>		

## CEILING INDICATORS

<p>Did the school district meet the criteria for any of the following <b>ceiling indicators</b> 4, 6, 16, 17, or 20? If so, the school district's applicable maximum points and rating are disclosed below. Please note, an F = Substandard Achievement Rating supersedes any rating earned as the result of the school district meeting the criteria of a ceiling indicator.</p>		
<b>Determination of rating based on meeting ceiling criteria.</b>	<b>Maximum Points</b>	<b>Maximum Rating</b>
<b>Indicator 4</b> (Timely Payments) - School district was issued a warrant hold.	95	A = Superior Achievement
<b>Indicator 6</b> (Average Change in Fund Balance) - Response to indicator is <i>No</i> .	89	B = Above Standard Achievement
<b>Indicator 16</b> (PEIMS to AFR) - Response to indicator is <i>No</i> .	89	B = Above Standard Achievement
<b>Indicator 17</b> (Material Weaknesses) - Response to indicator is <i>No</i> .	79	C = Meets Standard Achievement
<b>Indicator 20</b> (Property Values and Tax Discussion) - Response to indicator is <i>No</i> .	89	B = Above Standard Achievement

Home Page: [Financial Compliance | Texas Education Agency](#) | Send comments or suggestions to [FinancialAccountability@tea.texas.gov](mailto:FinancialAccountability@tea.texas.gov)

## How the Ratings Are Assessed

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The Texas Education Agency (TEA) uses the following sources of data in calculating the financial accountability indicators for districts:

- The Annual Financial Report (AFR): For each district, TEA will use audited financial data in the district's AFR. The AFR, submitted as an electronic submission through the TEA website, must include data required in the Financial Accountability System Resource Guide (FASRG).
- Texas Student Data System Public Education Information Management System (TSDS PEIMS): The TEA will use data submitted by the school district through the TSDS PEIMS system.
- Warrant holds: The TEA will use warrant hold as reported by the Texas Comptroller of Public Accounts.
- Average Daily Attendance (ADA): The TEA will use the ADA information used for Foundation School Program (FSP) funding purposes.

The questions a school district must address in completing the worksheet used to assess its financial management system can be confusing to non-accountants. The following is a nonprofessional's explanation of what the questions mean – and what our answers can mean to the Waco Independent School District's rating.

- 1. Was the complete annual financial report (AFR) and data submitted to the TEA within 30 days of the November 27 or January 28 deadline depending on the school district's fiscal year end date of June 30 or August 31, respectively?**

A simple indicator, was the Annual Financial Report filed by the deadline?

*The Annual Financial Report for the fiscal year ended August 31, 2022 was approved by the Board of Trustees on January 26, 2023 and received by the Texas Education Agency on January 26, 2023. The Annual Financial Report for the fiscal year ended August 31, 2021 was approved by the Board of Trustees on January 27, 2022 and received by the Texas Education Agency by January 28, 2022.*

- 2. Was there an unmodified opinion in the AFR on the financial statements as a whole? (The American Institute of Certified Public Accountants (AICPA) defines unmodified opinion. The external independent auditor determines if there was an unmodified opinion.)**

An auditor's audit opinion is contained within the audit report. Modified opinions are given for two reasons. The first is scope limitation, which means that the auditor does not have access to enough information, or to relevant information. The second is in the circumstance that there is a departure from applicable financial reporting framework, which may be the result of either an accident or negligence on the part of the district. The district's goal, therefore, is to receive an "unmodified opinion" on its Annual Financial Report. This is a simple "Yes" or "No" indicator.

*The opinion expressed by our independent auditors on the Annual Financial Report for both the fiscal years ended August 31, 2022 and August 31, 2021 was unmodified.*

3. **Was the school district in compliance with the payment terms of all debt agreements at fiscal year end? (If the school district was in default in a prior fiscal year, an exemption applies in following years if the district is current on its forbearance or payment plan with the lender and the payments are made on schedule for the fiscal year being rated. Also exempted are technical defaults that are not related to monetary defaults. A technical default is a failure to uphold the terms of a debt covenant, contract, or master promissory note even though payments to the lender, trust, or sinking fund are current. A debt agreement is a legal agreement between a debtor (person, company, etc. that owes money) and their creditors, which includes a plan for paying back the debt.)**

This indicator seeks to make certain that the district has timely paid all bills and obligations, including any financing arrangements, to pay for school construction, school buses, photocopiers, etc.

*Waco ISD had no disclosures concerning default on bonded indebtedness for the fiscal years ended August 31, 2022 or August 31, 2021.*

4. **Did the school district make timely payments to the Teachers Retirement System (TRS), Texas Workforce Commission (TWC), Internal Revenue Service (IRS), and other government agencies? If the school district received a warrant hold and the warrant hold was not cleared within 30 days from the date the warrant hold was issued, the school district is considered not to have made timely payments and will fail this indicator. *Ceiling Indicator: If the school district was issued a warrant hold, the maximum points and highest rating that the school district may receive is 95 points, A = Superior Achievement (even if the issue surrounding the initial warrant hold was resolved and cleared within 30 days).***

This indicator seeks to make sure the district fulfilled its obligation to the TRS, TWC, and IRS to transfer payroll withholdings and to fulfill any additional payroll-related obligations, required to be paid by the district.

*Waco ISD made timely payments to the TRS, TWC, IRS, and other government agencies for the fiscal years ended August 31, 2022 and August 31, 2021.*

5. **Was the total unrestricted net position balance (net of accretion of interest for capital appreciation bonds and net pension liability (NPL)) in the governmental activities column in the Statement of Net Position greater than zero? If the school district's change of students in enrollment over five-years was 7 percent or more, then the school district passes this indicator.) *Ceiling Indicator: If the school district passes indicator 5 based on the school district's 7 percent or more increase in students in enrollment, the maximum points and highest rating that the school district may receive is 79 points, C = Meets Standard Achievement.***

This indicator simply asks, "Did the district's total assets exceed the total amount of liabilities (according to the very first financial statement in the annual audit report)?" Fortunately, this indicator recognizes that high-growth districts incur large amounts of debt to fund construction, and that total debt may exceed the total amount of assets under certain scenarios.

At August 31, 2022, Waco ISD had a total unrestricted net deficit of \$57,438,274 with accumulated accretion of interest for capital appreciation bonds of \$9,690,217, a net pension liability of \$23,898,324, and a net other post-employment benefit liability of \$47,362,589. At August 31, 2021, the total unrestricted net deficit was \$66,366,290 with accumulated accretion of interest for capital appreciation bonds of \$9,616,813, a net pension liability of \$50,061,628, and a net other post-employment benefit liability of \$47,648,616. The deficit net position results from the recording of pension and other post-employment liabilities and the inflows and outflows related to these programs.

**This indicator was not scored for the past four fiscal years due to the impact of recording the long-term liabilities for pension and post-employment benefits.**

6. **Was the average change in (assigned and unassigned) fund balance over three years less than a 25 percent decrease or did the current year assigned and unassigned fund balance exceed 75 days of operational expenditures?** *Ceiling Indicator: If the school district fails indicator 6, the maximum points and highest rating that the school district may receive is 89 points, B – Above Standard Achievement.*

This indicator measures the percentage change in fund balance to see whether the fund balance is declining too quickly, and if it is declining, whether sufficient fund balance remains to operate for at least 75 days.

At August 31, 2022, the District’s average change in fund balance over three years was an increase of 2.85 percent. The fund balance of \$45,710,678 was sufficient to operate for at least 75 days, an amount computed to be \$32,312,076. At August 31, 2021, the District’s average change in fund balance over three years was a decrease of 4.42 percent, the fund balance was \$35,684,218 and the amount computed as sufficient to operate for at least 75 days was \$32,638,699.

7. **Was the number of days of cash on hand and current investments in the general fund for the school district sufficient to cover operating expenditures (excluding facilities acquisition and construction)?**

<b>10</b>	<b>8</b>	<b>6</b>	<b>4</b>	<b>2</b>	<b>0</b>
≥ 90	< 90 ≥ 75	< 75 ≥ 60	< 60 ≥ 45	< 45 ≥ 30	< 30

This indicator measures how long in days after the end of the fiscal year the school district could have disbursed funds for its operating expenditures without receiving any new revenues. Did you meet or exceed the target amount in School FIRST?

At August 31, 2022, the District had cash on hand and current investments in the general fund to cover 157.381 days of operating expenditures. At August 31, 2021, the District had cash on hand and current investments in the general fund to cover 142.246 days of operating expenditures.

8. **Was the measure of current assets to current liabilities ratio for the school district sufficient to cover short-term debt?**

<b>10</b>	<b>8</b>	<b>6</b>	<b>4</b>	<b>2</b>	<b>0</b>
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≥ 3.00	< 3.00 ≥ 2.50	< 2.50 ≥ 2.00	< 2.00 ≥ 1.50	< 1.50 ≥ 1.00	< 1.00
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This indicator measures whether the school district had sufficient short-term assets at the end of the fiscal year to pay off its short-term liabilities. Did you meet or exceed the target amount in School FIRST?

*At August 31, 2022, the District had a ratio of current assets to current liabilities of 7.9807. At August 31, 2021, the District had a ratio of current assets to current liabilities of 3.0974.*

9. **Did the school district’s general fund revenues equal or exceed expenditures (excluding facilities acquisition and construction)? If not, was the school district’s number of days of cash on hand greater than or equal to 60 days?**

5	5 points are awarded if the school district has at least 60 days cash on hand as determined in indicator #7	0
≥ 0%		< 0%

This indicator simply asks, “Did you spend more than you earned?” (The school district will automatically pass this indicator, if the school district had at least 60 days cash on hand.)

*For the fiscal year ended August 31, 2022, the District’s general fund revenues exceeded expenditures (excluding facilities acquisition and construction) by \$5,218,328. Additionally, at August 31, 2022, the District had cash on hand and current investments to cover 157.381 days of operating expenditures. For the fiscal year ended August 31, 2021, the District’s general fund revenues exceeded expenditures (excluding facilities acquisition and construction) by \$6,014,842 and had cash equivalents and current investments to cover 142.246 days of operating expenditures.*

10. **Did the school district average less than a 10 percent variance (90%-110%) when comparing budgeted revenues to actual revenues for the last 3 fiscal years?**

10	10 points are awarded if the school district’s budgeted to actual revenues are < 10% variance (90% to 110%)	0
≥ 10%		< 10%

This indicator measures how accurately the district forecast projected revenue by comparing budgeted revenue submitted through PEIMS in October of the fiscal year to actual revenue submitted after the close of the fiscal year.

*For the fiscal year ended August 31, 2022, the District’s variance in budgeted to actual revenues was 0.3 percent or 0.7 percent, less than the allowed variance of 10 percent. For the fiscal year ended August 31, 2021, the District’s variance in budgeted to actual revenues was 0.9 percent less than the allowed variance.*

**Because of the impact of the COVID-19 pandemic on District enrollments, attendance and resulting State Foundation School Program revenues, this indicator was not scored for the 2021-2022 fiscal year.**

11. Was the ratio of long-term liabilities to total assets for the school district sufficient to support long-term solvency? (If the school district's change of students in enrollment over 5 years was 7 percent or more, then the school district passes this indicator.)

10	8	6	4	2	0
≤ 0.60	> 0.60 ≤ 0.70	> 0.70 ≤ 0.80	> 0.80 ≤ 0.90	> 0.90 ≤ 1.00	> 1.00

This question is like asking someone if their mortgage exceeds the market value of their home. Were you below the cap for this ratio in School FIRST? Fortunately, this indicator recognizes that high-growth districts incur additional operating costs to open new instructional campuses.

*At August 31, 2022, the District has a ratio of long-term liabilities to total assets of 0.684. At August 31, 2021, the District has a ratio of long-term liabilities to total assets of 0.552. With the issuance of \$189,500,000 in the Unlimited School Building Bonds, Series 2022, the ratio increased resulting in a loss of two points for this indicator.*

12. Was the debt per \$100 of assessed property value ratio sufficient to support future debt repayments?

10	8	6	4	2	0
≤ 4	> 4 ≤ 7	> 7 ≤ 10	> 10 ≤ 11.5	> 11.5 ≤ 13.5	> 13.5

This indicator asks about the school district's ability to make debt principal and interest payments that will become due during the year. Did you meet or exceed the target amount in School FIRST?

*At August 31, 2022, the District's debt per \$100 of assessed property value ratio has a debt service coverage ratio of 5.0046. At August 31, 2021, the District's ratio was 2.2232. Again, the District lost two points for this indicator due to the issuance of bonded debt.*

13. Was the school district's administrative cost ratio equal to or less than the threshold ratio? (See ranges below.)

ADA Size	10	8	6	4	2	0
≥ 10,000	≤ 0.0855	> 0.0855 ≤ 0.1105	> 0.1105 ≤ 0.1355	> 0.1355 ≤ 0.1605	> 0.1605 ≤ 0.1855	> 0.1855
≥ 5,000 to < 10,000	≤ 0.1000	> 0.1000 ≤ 0.1250	> 0.1250 ≤ 0.1500	> 0.1500 ≤ 0.1750	> 0.1750 ≤ 0.2000	> 0.2000
≥ 1,000 to < 5,000	≤ 0.1151	> 0.1151 ≤ 0.1401	> 0.1401 ≤ 0.1651	> 0.1651 ≤ 0.1901	> 0.1901 ≤ 0.2151	> 0.2151
≥ 500 to < 1,000	≤ 0.1311	> 0.1311 ≤ 0.1561	> 0.1561 ≤ 0.1811	> 0.1811 ≤ 0.2061	> 0.2061 ≤ 0.2311	> 0.2311
< 500	≤ 0.2404	> 0.2404 ≤ 0.2654	> 0.2654 ≤ 0.2904	> 0.2904 ≤ 0.3154	> 0.3154 ≤ 0.3404	> 0.3404
Sparse	≤ 0.3364	> 0.3364 ≤ 0.3614	> 0.3614 ≤ 0.3864	> 0.3864 ≤ 0.4114	> 0.4114 ≤ 0.4364	> 0.4364

TEA and state law set a standard on the percentage of the budget that Texas school districts can spend on administration. Where did we fall in relationship to that standard for districts of our size?

*The District's Administrative Cost Ratio was computed at 9.33 percent for the fiscal year ended August 31, 2022 compared to 9.78 percent for the prior year. The rate falls between 8.55 and 11.05 percent, garnering only eight points for this indicator.*

14. **Did the school district not have a 15 percent decline in the students to staff ratio over three years (total enrollment to total staff)? (If the student enrollment did not decrease, the school district will automatically pass this indicator. A Yes/No indicator. A response of Yes generates 10 points.)**

If the school district had a decline in students over three school years, this indicator asks if the school district decreased the number of the staff on the payroll in proportion to the decline in students. (The school district automatically passes this indicator if there was no decline in students.)

*For the 2021-2022 school year, the District had a student to staff ratio of 6.424:1 compared to 6.303:1 in 2019-2020. This represents a 1.93 percent decrease in the student to staff ratio over three years. The percent decline in the students to staff ratio was less than the allowed 15 percent, so the District passed the indicator.*

*For the 2020-2021 school year, the District had a student to staff ratio of 6.230:1 compared to 6.389:1 in 2018-2019, or a 2.46 percent increase over the three years.*

**Because of the impact of the COVID-19 pandemic on District enrollments, attendance and resulting State Foundation School Program revenues, this indicator was not scored for the 2021-2022 fiscal year.**

15. **Was the school district's actual ADA within the allotted range of the district's biennial pupil projections submitted to TEA? Alternatively, if the district did not submit pupil projections to TEA, did it certify TEA's projections? (A Yes/No indicator. A response of Yes generates 5 points).**

This indicator measures how well the district was able to project average daily attendance for the coming biennium for payment purposes. Projected ADA is compared to actual.

*For the 2021-2022 school year, the District's projection of ADA was 13,305.111 and actual ADA was 11,923.316, a variance of 11.59 percent. However, because of the losses in enrollment and attendance resulting from the COVID-19 pandemic, the Texas Education Agency funded the District on a hold-harmless ADA of 12,502.687. For the 2020-2021 school year, the District's projection of ADA was 13,310.468 and actual ADA was 12,308.604, a variance of 7.53 percent. Again, because of the losses in enrollment and attendance resulting from the COVID-19 pandemic, the District was funded on a hold-harmless ADA of 13,188.498.*

**Because of the impact of the COVID-19 pandemic on District enrollments, attendance and resulting State Foundation School Program revenues, this indicator was not scored for the 2021-2022 fiscal year.**

16. **Did the comparison of Public Education Information Management System (PEIMS) data to like information in the school district's AFR result in a total variance of less than three percent of all expenditures by function? *Ceiling Indicator: If the school district fails***

*indicator 16, the maximum points and highest rating that the school district may receive is 89 points, B = Above Standard Achievement.*

This indicator measures the quality of data reported to PEIMS and in the Annual Financial Report to make certain that the data reported in each case “matches up.” If the difference in numbers reported in any fund type is more than three percent, the district “fails” this measure.

*The comparison of the District’s PEIMS data to like information in the Annual Financial Report resulted in a variance of 0.0000937 for the fiscal year ended August 31, 2022 compared to a variance of 0.0000496 in the previous year.*

- 17. Did the external independent auditor report that the AFR was free of any instance(s) of material weaknesses in internal controls over financial reporting and compliance for local, state, or federal funds? (The AICPA defines material weakness.)** *Ceiling Indicator: If the school district fails indicator 17, the maximum points and highest rating that the school district may receive is 79 points, C = Meets Standard Achievement.*

The independent auditor’s reports include both a report on internal controls over financial reporting and a report in regards to compliance for local, state, and federal funds. Weaknesses in Internal controls create a risk of the district not being able to properly account for its use of public funds, and should be immediately addressed. Likewise, disclosure of noncompliance means that the school district failed to comply with laws, rules, and regulations for a government entity.

*The Annual Financial Report for fiscal years ended August 31, 2022 and August 31, 2021 disclosed no material weaknesses in internal controls over financial reporting or compliance for local, state, or federal funds.*

- 18. Did the external independent auditor indicate the AFR was free of any instance(s) of material noncompliance for grants, contracts, and laws related to local, state, or federal funds? (The AICPA defines material noncompliance.)**

This indicator measures whether the district is complying with laws, rules, and regulations related to the expenditure of grant funds, contracts, and other state and federal funds.

*The Annual Financial Report for fiscal years ended August 31, 2022 and August 31, 2021 disclosed no material noncompliance for grants, contracts, and laws related to local, state, or federal funds.*

- 19. Did the school district post the required financial information on its website in accordance with Government Code, Local Government Code, Texas Education Code, Texas Administrative Code, and other statutes, laws and rules?**

This indicator measures whether the district is complying with legal requirements related to financial transparency by posting all required information.

*For the 2021-2022 fiscal year, the District posted all required financial information on the District’s website. The District has been in compliance with required postings since 2008.*

- 20. Did the school board members discuss the district's property values at a board meeting within 120 days before the district adopted its budget?** *Ceiling Indicator: If the school district fails indicator 20, the maximum points and highest rating that the school district may receive is 89 points, B = Above Standard Achievement.*

This indicator asks if the district had to ask for an easy payment plan to return monies to TEA after spending the overpayment from the Foundation School Program state aid.

*For the 2021-2022, fiscal year, the district's property values were discussed with the school board members at the May 13, 2021, meeting. For the prior year, the district's property values were discussed at the June 11, 2020, meeting.*

**Superintendent’s Current Employment Contract**

The school district is to provide a copy of the superintendent's employment contract that is effective on the date of the Schools FIRST hearing. In lieu of publication in the Schools FIRST financial management report, the school district may choose to publish the superintendent's employment contract on the school district's Internet site. If published on the Internet, the contract is to remain accessible for twelve months.

**SUPERINTENDENT'S EMPLOYMENT CONTRACT**

STATE OF TEXAS                    §  
   §                    KNOW ALL MEN BY THESE PRESENTS:  
 COUNTY OF MCLENNAN        §

THIS AGREEMENT ("Contract") is made and entered into on the 29th day of August 2019, by and between the Board of Trustees (the "Board") of the Waco Independent School District (the "District") and Dr. Susan Kincannon (the "Superintendent").

WITNESSETH:

NOW, THEREFORE, the Board and the Superintendent, for and in consideration of the terms hereinafter established and pursuant to Section 11.201 of the Texas Education Code, have agreed, and do hereby agree, as follows:

I. Term

1.1 Term. The Board, by and on behalf of the District, does hereby employ the Superintendent, and the Superintendent does hereby accept employment as Superintendent of Schools for the District for a term of approximately three (3) years, commencing on Thursday, September 5, 2019 and ending on June 30, 2022. The District may, by action of the Board, and with the consent and approval of the Superintendent, extend the term of this Contract as permitted by state law.

1.2 No Tenure. The Board has not adopted any policy, rule, regulation, law, or practice providing for tenure. No right of tenure is created by this Contract. No property interest, express or implied, is created in continued employment beyond the Contract term.

## II. Employment

2.1 Duties. The Superintendent is the chief executive of the District and shall faithfully perform the duties of the Superintendent of Schools for the District as prescribed in the job description and as may be lawfully assigned by the Board, and shall comply with all lawful Board directives, state and federal law, district policy, rules, and regulations as they exist or may hereafter be amended. Specifically, it shall be the duty of the Superintendent to recommend for employment all contracted administrative employees of the District subject to the Board's approval. It shall be the further duty of the Superintendent to employ all other personnel consistent with the Board's policies. It shall be the further duty of the Superintendent to direct, assign, reassign, and evaluate all of the employees of the District consistent with Board policies and federal and state law. It shall be the further duty of the Superintendent to organize, reorganize, and arrange the staff of the District, and to develop and establish administrative regulations, rules, and procedures which the Superintendent deems necessary for the efficient and effective operation of the District consistent with the Board's lawful directives, the Board's policies, and state and federal law. It shall be the further duty of the Superintendent to accept all resignations of employees of the District consistent with the Board's policies, except the Superintendent's resignation, which must be accepted by the Board. The Superintendent shall perform the duties of the Superintendent of Schools for the District with reasonable care, diligence, skill, and expertise.

2.2 Professional Certification. The Superintendent shall at all times during the term of this Contract, and any renewal or extension thereof, hold and maintain a valid certificate required of a superintendent by the State of Texas and issued by the State Board for Educator Certification and any other certificates required by law.

2.3 Reassignment. The Superintendent cannot be reassigned from the position of Superintendent to another position without the Superintendent's express written consent.

2.4 Board Meetings. The Superintendent shall attend, and shall be permitted to attend, all meetings of the Board, both public and closed, with the exception of those closed meetings devoted to the consideration of any action or lack of action on the Superintendent's Contract, or the Superintendent's evaluation, or for purposes of resolving conflicts between individual Board members, or when the Board is acting in its capacity as a tribunal. In the event of illness or Board-approved absence, the Superintendent's designee shall attend such meetings.

2.5 Criticisms, Complaints, and Suggestions. The Board, individually and collectively, shall refer all substantive criticisms, complaints, and suggestions called to the Board's attention to the Superintendent for study and appropriate action, and the Superintendent shall investigate such matters and inform the Board of the results of such efforts.

2.6 Indemnification. The District shall defend, hold harmless and indemnify the Superintendent regarding any claims, demands, duties, actions or other legal proceedings against the Superintendent for any act or failure to act involving the exercise of judgment and discretion within the normal course and scope of the Superintendent's duties as Superintendent of the District, to the extent and to the limit permitted by law. This paragraph does not apply if the Superintendent is found to have acted with gross negligence or with intent to violate a person's clearly established legal rights, or to have engaged in criminal conduct. The District may, at its sole discretion, fulfill its obligation under this paragraph by purchasing appropriate insurance coverage for the benefit of the Superintendent. No individual member of the Board shall be personally liable for indemnifying or defending the Superintendent under this paragraph. The District's obligation to indemnify,

defend and hold the Superintendent harmless under this paragraph survives the termination of this Contract.

### III. Compensation

3.1 Salary. The District shall provide the Superintendent with an annual salary in the sum of Two Hundred fifty-two Thousand five hundred and No/100 Dollars (\$252,500.00). This annual salary rate shall be paid to the Superintendent in equal installments consistent with the Board's policies.

3.1.1 Payment of TRS Contribution. The District shall supplement the Superintendent's annual salary by an amount equal to the Superintendent's portion of the monthly member contribution to the Texas Retirement System ("TRS"). This supplement shall include the retirement part of the TRS member contribution, as applicable. This additional salary supplement shall be paid to the Superintendent in regular monthly payroll installments and shall be reported as "creditable compensation" by the District for purposes of TRS, to the extent permitted by TRS. To the extent that the District's payment of this TRS contribution benefit as "creditable compensation" to the Superintendent results in an increase in the amount of the TRS member contribution, the Superintendent shall be responsible to pay the difference.

3.2 Salary Adjustments. The Board may, in its discretion, review and adjust the salary of the Superintendent, but in no event shall the Superintendent be paid less than the salary and TRS Contribution set forth pursuant to Sections 3.1 and 3.1.1 of this Contract except by mutual agreement of the two parties. Such adjustments, if any, shall be made pursuant to a lawful Board resolution. In such event, the parties agree to provide their best efforts and reasonable cooperation to execute a new contract incorporating the adjusted salary.

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**Superintendent's Current Employment Contract**

3.3 Vacation, Holidays, Leave. The Superintendent may take, at the Superintendent's choice, subject to the Board's approval, the greater of ten (10) vacation days annually or the same number of days of vacation authorized by policies adopted by the Board for administrative employees on twelve-month contracts, the days to be in a single period or at different times. The vacation days taken by the Superintendent will be taken at such time or times as will least interfere with the performance of the Superintendent's duties as set forth in this Contract. The Superintendent shall observe the same legal holidays as provided by Board policies for administrative employees on twelve-month contracts. The Superintendent is hereby granted the same personal leave benefits as authorized by Board policies for administrative employees on twelve-month contracts. Any unused vacation days that have accrued during the previous twelve (12) months ending on June 30, shall be carried forward by the Superintendent and will be taken at such time or times as will least interfere with the performance of the Superintendent's duties as set forth in this Contract.

3.4 Health Insurance. The District shall pay the same premiums for hospitalization, major medical and dental insurance coverage for the Superintendent pursuant to the group health care plan provided by the District for its administrative employees.

3.5 Professional Growth. The Superintendent shall devote the Superintendent's time, attention, and energy to the direction, administration, and supervision of the District. The Board, however, encourages the continued professional growth of the Superintendent through the Superintendent's active attendance and participation in appropriate professional meetings at the local, regional, state, and national levels. The Board shall encourage the use of data and information sources, and shall encourage the participation of the Superintendent in pertinent education seminars and courses offered by public or private institutions or by educational associations, as well as the participation in informational meetings with those individuals whose

particular skills, expertise, or backgrounds would serve to improve the capacity of the Superintendent to perform the Superintendent's professional responsibilities for the District. In its encouragement of the Superintendent to grow professionally, the Board shall permit a reasonable amount of release time for the Superintendent, as the Superintendent and Board deem appropriate, to attend such seminars, courses, or meetings. The District shall pay the Superintendent's membership dues to the American Association of School Administrators and the Texas Association of School Administrators, as well as other memberships necessary to maintain and improve the Superintendent's professional skills. The District shall bear the reasonable costs and expenses for such attendance or membership.

3.6 In-District Travel. The District shall provide the Superintendent with an automobile allowance in the sum of Five Hundred and No/100 Dollars (\$500.00) per month.

3.7 Reimbursement for Out-of-District Travel. The District shall reimburse the Superintendent for out-of-District travel incurred by the Superintendent in the continuing performance of the Superintendent's duties under this Contract at the standard mileage rate per mile as established by the Internal Revenue Service during each year of this Contract.

3.8 Personal Protection. Should the life or safety of the Superintendent or her family be threatened or appear to be in danger because of her performance of official duties, the District is authorized, by a subsequent vote of the Board, to pay reasonable costs for the instant protection of the Superintendent and her family. Such protection, if required, will be first sought from regular police authorities.

3.9 Civic and Community. The Superintendent is encouraged to participate in community and civic affairs and the Chamber of Commerce. The expense of such activities, subject to Board approval, shall be borne by the District.

3.10 Professional Legal Liability. The District shall obtain and pay premiums for a professional legal liability insurance policy through the Superintendent's membership with a professional organization.

3.11 Outside Consultant Activities. With the prior written approval of the Board, the Superintendent may serve as a consultant to other school districts or educational agencies, lecture, engage in writing activities and speaking engagements, and engage in other activities that are of a short-term duration, at the expense of the District.

3.12 Moving/Relocation Expense – Reimbursement. In connection with the necessary relocation of the Superintendent and the Superintendent's family to the District, the District shall reimburse the Superintendent for necessary and reasonable expenses incurred in moving the Superintendent's family and belongings from Belton, Texas to a residence located in the District. The Superintendent shall document all expenses for which reimbursement is requested with receipts, cancelled checks or credit card statements and the District shall reimburse the Superintendent for all such necessary and reasonable documented expenses, within thirty (30) days of the District's receipt of such documented expenses.

#### IV. Annual Performance Goals

4.1 Development of Goals. The Superintendent shall submit to the Board each year, for the Board's consideration and adoption, a preliminary list of goals for the District. The goals approved

by the Board shall at all times be reduced to writing and shall be among the criteria on which the Superintendent's performance is reviewed and evaluated.

#### V. Review of Performance

5.1 Time and Basis of Evaluation. The Board shall evaluate and assess in writing the performance of the Superintendent in January of each year during the term of this Contract ("Superintendent's Evaluation"). The Superintendent's Evaluation instrument and process shall be developed and/or revised with input from the Superintendent and shall be reasonably related to the duties of the Superintendent as outlined in the Superintendent's job description.

5.2 Confidentiality. Unless the Superintendent expressly requests otherwise in writing, the Superintendent's Evaluation shall at all times be conducted in executive session and shall be considered confidential to the extent permitted by law. Nothing herein shall prohibit the Board or the Superintendent from sharing the content of the Superintendent's Evaluation with their respective legal counsel.

5.3 Evaluation Format and Procedures. The evaluation format and procedure shall be in accordance with the evaluation instrument selected by the Board in accordance with the provisions of Article V of this Contract, the Board's policies, and state and federal law. In the event the Board deems that the evaluation instrument, format and/or procedure is to be modified by the Board, such modification must be adopted at least 12 months prior to its implementation.

#### VI. Renewal or Nonrenewal of Employment Contract

6.1 Renewal/Nonrenewal. Renewal or nonrenewal shall be in accordance with Board policy and applicable law. Notwithstanding anything to the contrary in Section 21.212(a) of the Texas Education Code, the Superintendent shall be entitled to written notice, containing reasonable

notice of the reason for the proposed nonrenewal, not later than 365 days before the last day of the Contract term, containing reasonable notice of the reason(s) for the proposed nonrenewal of the Superintendent's Contract with the District.

VII. Termination of Employment Contract

7.1 Mutual Agreement. This Contract shall be terminated by the mutual agreement of the Superintendent and the Board in writing, upon such terms and conditions as may be mutually agreed upon.

7.2 Retirement or Death. This Contract shall be terminated upon the retirement or death of the Superintendent.

7.3 Dismissal for Good Cause. The Board may dismiss the Superintendent during the term of the contract for good cause. The term "good cause" is defined as follows:

- (a) Failure to fulfill duties or responsibilities as set forth under the terms and conditions of this Contract;
- (b) Incompetence or inefficiency in the performance of required or assigned duties as documented by evaluations, supplemental memoranda, or other written communication from the Board; provided, however, the terms and conditions of the paragraph shall not justify good cause unless the Board has provided the Superintendent a reasonable opportunity to remediate any incompetency or inefficiency;
- (c) Insubordination or failure to comply with lawful written Board directives;
- (d) Failure to comply with the Board's policies or the District's administrative regulations;
- (e) Neglect of duties;
- (f) Drunkenness or excessive use of alcoholic beverages;
- (g) Illegal use of drugs, hallucinogens, or other substances regulated by the Texas Controlled Substances Act;
- (h) Conviction of a felony or crime involving moral turpitude;
- (i) Failure to meet the District's standards of professional conduct;

## Superintendent's Current Employment Contract

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- (j) Failure to comply with reasonable District professional development requirements regarding advanced course work or professional development;
- (k) Disability, not otherwise protected by law, that impairs performance of the required duties of the superintendent;
- (l) Immorality, which is conduct the Board determines is not in conformity with the accepted moral standards of the community encompassed by the District. Immorality is not confined to sexual matters, but includes conduct inconsistent with rectitude or indicative of corruption, indecency, or depravity;
- (m) Assault on an employee or student;
- (n) Knowingly falsifying records or documents related to the District's activities;
- (o) Conscious misrepresentation of facts to the Board or other District officials in the conduct of the District's business;
- (p) Failure to fulfill requirements for superintendent certification;
- (q) Failure to fulfill the requirements of a deficiency plan under an Emergency Permit; or
- (r) Any other reason constituting "good cause" under Texas law.

7.4 Termination Procedure. In the event that the Board proposes to terminate and/or terminates this Contract for "good cause," the Superintendent shall be afforded all the rights as set forth in the Board's policies, and state and federal law.

### VIII. Miscellaneous

8.1 Controlling Law. This Contract shall be governed by the laws of the State of Texas and shall be performable in McLennan County, Texas, unless otherwise provided by law.


8.2 Complete Agreement. This Contract embodies the entire agreement between the parties hereto and cannot be varied except by written agreement of the undersigned parties, except as expressly provided herein.

8.3 Conflicts. In the event of any conflict between the terms, conditions, and provisions of this Contract and the provisions of the Board's policies, or any permissive state or federal law, then, unless otherwise prohibited by law, the terms of this Contract shall take precedence over the contrary provisions of the Board's policies or any such permissive law during the term of the Contract.

8.4 Savings Clause. In the event any one or more of the provisions contained in this Contract shall, for any reason, be held to be invalid, illegal, or unenforceable, such invalidity, illegality, or unenforceability shall not affect any other provision thereof, and this Contract shall be construed as if such invalid, illegal, or unenforceable provision had never been contained herein. All existing agreements and contract, both verbal and written, between the parties hereto regarding the employment of the Superintendent have been superseded by this Contract, and this Contract constitutes the entire agreement between the parties unless amended pursuant to the terms of this Contract.

8.5 Acceptance. This offer will expire unless signed and returned to the Board President or Board Secretary by 5:00 p.m. on the 30th day of August 2019.

Board of Trustees of the  
Waco Independent School District

By:   
\_\_\_\_\_  
Angela Tekell, President

  
\_\_\_\_\_  
Dr. Susan Kincannon, Superintendent

ATTEST:  
  
\_\_\_\_\_  
Norman Manning, Secretary

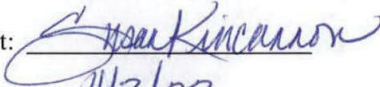
**Salary Addendum to Superintendent's Contract**

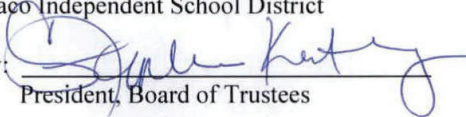
The Board of Trustees (the "Board") of WACO INDEPENDENT SCHOOL DISTRICT and DR. SUSAN KINCANNON (the "Superintendent") agree to amend the Superintendent's Contract (the "Contract") initially approved by the Board on August 29, 2019 (with an effective date of September 5, 2019) and extended and amended by the Board on March 23, 2023, as follows:

Paragraph 3.1 Salary is changed to increase the annual salary by 3% from the sum of Two Hundred sixty-two Thousand six hundred seventy-five and 75/100 Dollars (\$262,675.75) to the sum of Two Hundred seventy Thousand five hundred fifty-six and 02/100 Dollars (\$270,556.02).

The Board and the Superintendent agree that there have been no oral modifications to the Superintendent's Contract. All other terms and conditions of the Contract, as amended, shall remain in full force and effect.

I have read this Addendum and agree to abide by its terms and conditions:

Superintendent:   
Date signed: 4/3/23

Waco Independent School District  
By:   
President, Board of Trustees  
Date signed: 4/4/23

**Exhibit A-2**

**Summary Schedule of Total Reimbursements Received by Superintendent  
and Board Members  
For the Twelve-Month Period Ended August 31, 2022**

Description of Reimbursements	Meals	Lodging	Transportation	Motor Fuel	Other	Total
Superintendent:						
Dr. Susan Kincannon	\$ 792	\$ 1,938	\$ 7,488	\$ -	\$ 5,465	15,683
Board Members:						
Jeremy Davis	324	1,114	199	-	1,570	3,207
Cary DuPuy	-	-	-	-	50	50
Jonathan Grant	173	892	201	-	895	2,161
Keith Guillory	324	1,069	199	-	1,465	3,057
Emily Iazzetti	412	726	306	-	1,320	2,764
Stephanie Korteweg	435	1,617	306	-	1,265	3,623
Angelo Ochoa	173	892	201	-	840	2,106
Allen Sykes	-	-	-	-	50	50
Angela Tekell	188	-	-	-	125	313
Jose Vidana	412	1,617	306	-	1,265	3,600

All "reimbursements" expenses, regardless of the manner of payment, including direct pay, credit card, cash, and purchase order are to be reported. Items to be reported per category include:

*Meals – Meals consumed out of town, and in-district meals at area restaurants (outside of board meetings, excludes catered board meeting meals).*

*Lodging - Hotel charges.*

*Transportation - Airfare, car rental (can include fuel on rental, taxis, mileage reimbursements, leased cars, parking and tolls), and travel allowances.*

*Motor fuel – Gasoline.*

*Other - Registration fees, telephone/cell phone, internet service, fax machine, dues, and other reimbursements (or on-behalf of) to the superintendent and board member not defined above.*

**Exhibit A-3**

**Compensation and/or Fees Received by Superintendent from Outside  
Entities for Professional Consulting and/or Other Personal Services  
For the Twelve-Month Period Ended August 31, 2022**

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Name(s) of Entity(ies)	Amount Received
None	\$ -

*Compensation does not include business revenues generated from a family business (farming, ranching, etc.) that has no relation to school district business.*

**Exhibit A-4**

**Summary Schedule of Total Dollar Amount of Superintendent and Board  
Members (and First Degree Relatives) of Gifts That Had an Economic Value  
Exceeding \$250 in the Aggregate  
For the Twelve-Month Period Ended August 31, 2022**

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	<b>Total</b>
Superintendent:	
Dr. Susan Kincannon	\$ -
Board Members:	
Jeremy Davis	-
Cary DuPuy	-
Jonathan Grant	-
Keith Guillory	-
Emily Iazzetti	-
Stephanie Korteweg	-
Angelo Ochoa	-
Allen Sykes	-
Angela Tekell	-
Jose Vidana	-

*Note -- An executive officer is defined as the superintendent, unless the board of trustees or the district administration names additional staff under this classification for local officials.*

**Exhibit A-5**

**Summary Schedule of the Total Dollar Amount by Board Member of  
Business Transactions with the School District  
For the Twelve-Month Period Ended August 31, 2022**

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	<b>Total</b>
Superintendent:	
Dr. Susan Kincannon	\$ -
Board Members:	
Jeremy Davis	-
Cary DuPuy	1,805
Jonathan Grant	-
Keith Guillory	-
Emily Iazzetti	-
Stephanie Korteweg	-
Angelo Ochoa	-
Allen Sykes	-
Angela Tekell	-
Jose Vidana	-

*Note -- The summary amounts reported under this disclosure are not to duplicate the items disclosed in the summary schedule of reimbursements received by board members.*

The following words and terms, when used in the financial accountability ratings, have the following meanings, unless the context clearly indicates otherwise.

**Accounting:** A standard school fiscal accounting system must be adopted and installed by the board of trustees of each school district. The accounting system must conform to generally accepted accounting principles. This accounting system must also meet at least the minimum requirements prescribed by the state board of education, subject to review and comment by the state auditor.

**Accretion of Interest:** The interest that accrues on a capital appreciation bond until it reaches maturity. The accreted value of a bond at a particular time equates to the initial amount invested, plus the accumulated interest over the period to that date.

**Ad Valorem Property Tax:** Literally, the term means “according to value.” Ad valorem taxes are based on a fixed proportion of the value of the property with respect to which the tax is assessed. They require an appraisal of the taxable subject matter’s worth. General property taxes are almost invariably of this type. Ad valorem property taxes are based on ownership of the property, and are payable regardless of whether the property is used or not and whether it generates income for the owner (although these factors may affect the assessed value).

**Adopted Tax Rate:** This is the tax rate set by the school district to meet its legally adopted budget for a specific calendar year.

**Annual Financial Report (AFR):** The audited annual report required by the Texas Education Code (TEC), §44.008, that is due to the Texas Education Agency (TEA) by no later than 150 days after the close of a school district’s fiscal year.

**Assessed Property Value:** This is a valuation set upon real estate or other property by a government as a basis for levying taxes.

**Assigned Fund Balance:** The assigned fund balance represents tentative plans for the future use of financial resources. Assignments require executive management (per board policy to assign this responsibility to executive management prior to end of fiscal year) action to earmark fund balance for bona fide purposes that will be fulfilled within a reasonable period. The assignment and dollar amount for the assignment may be determined after the end of the fiscal year when final fund balance is known.

**Auditing:** Accounting documents and records must be audited annually by an independent auditor. The Texas Education Agency (TEA) is charged with review of the independent audit of the local education agencies.

**Average Daily Attendance (ADA):** The number of students in average daily attendance, or the sum of attendance for each day of the minimum number of days of instruction as described under the TEC, §25.081(a), divided by the minimum numbers of days of instruction.

**Beginning Fund Balance:** The General Fund balance on the first day of a new school year. This is, typically, equivalent to the fund balance at the end of the previous school year.

**Budget:** The projected financial data for the current school year. Budget data are collected for the general fund, food service fund, and debt service fund.

**Budgeting:** Not later than August 20<sup>th</sup> of each year, the superintendent (or designee) must prepare a budget for the school district if the fiscal year begins on September 1. (For those districts with fiscal years beginning July 1, this date would be June 20.) The legal requirements for funds to be budgeted are included in the Budgeting module of the TEA Resource Guide. The budget must be adopted before expenditures can be made, and this adoption must be prior to the setting of the tax rate for the budget year. The budget must be itemized in detail according to classification and purpose of expenditure, and must be prepared according to rules and regulations established by the State Board of Education. The adopted budget, as necessarily amended, shall be filed with TEA through the Public Education Information Management System (PEIMS) as of the date prescribed by TEA.

**Capital Appreciation Bonds (CABs):** A government security on which the investment return on an initial principal amount is reinvested at a stated compounded rate until maturity. At maturity, the investor receives a single payment representing both the initial principal amount and the total investment return. CABs typically are sold at a deeply discounted price with maturity values in multiples of \$5,000. The investment return is considered to be in the form of compounded interest rather than accreted original issue discount. For this reason, only the initial principal amount of a CAB is counted against an issuer's statutory debt limit, rather than the total par value, as is the case of a traditional zero coupon bond.

**Capital Outlay:** This term is used as both a Function and an Object. Expenditures for land, buildings, and equipment are covered under Object 6600. The amount spent on acquisitions, construction, or major renovation of school district facilities are reported under Function 81. Capitalization thresholds are generally established by district policy.

**Capital Projects Funds:** Fund type used to account for financial resources to be used for the acquisition or construction of major capital facilities (other than those financed by proprietary funds and trust funds).

**Cash and Cash Equivalents:** The term, as used in connection with cash flows reporting, includes not only currency on hand, but also demand deposits with banks or other financial institutions. Cash also includes deposits in other kinds of accounts or cash management pools that have the general characteristics of demand deposit accounts in that the governmental enterprise may deposit additional cash at any time and effectively may withdraw cash at any time without prior notice or penalty.

**Ceiling Indicator:** An upper limit (the maximum score) at which a score from a standard limit of a specific indicator will result regardless of overall points.

**Chapter 49 (previously Chapter 41):** A key "equity" chapter in the Texas Education Code (TEC) is Chapter 49. This chapter is devoted to wealth equalization through the mechanism of recapture, the recovery of financial resources from districts defined by the state as high property wealth. Resources are recovered for the purpose of sharing them with low-wealth districts. Districts that are subject to the provisions of Chapter 49 must make a choice among several options in order to reduce their property wealth and share financial resources.

**Committed Fund Balance:** The committed fund balance represents constraints made by the board of trustees for planned future use of financial resources through a resolution by the board, for various specified purposes including commitments of fund balance earned through campus activity funds. Commitments are to be made as to purpose prior to the end of the fiscal year. The dollar amount for the commitment may be determined after the end of the fiscal year when final fund balance is known.

**Comptroller Certified Property Value:** The district's total taxable property value as certified by the Comptroller's Property Tax Division (Comptroller Valuation).

**Current Assets:** Current assets are assets that are expected to be consumed, sold, or converted into cash in one year. They are usually presented in order of liquidity on the balance sheet and include cash and cash equivalents, accounts receivables, inventory, prepaid and other short-term assets.

**Current Investments:** A current investment is an investment that is, by its nature, readily available and is intended to be held for not more than one year from the date on which such investment is made.

**Current Liabilities:** Financial obligations that are due and payable within one year usually by current assets or by the creation of new current liabilities.

**Days of Cash on Hand:** The number of days the school district can disburse funds for its operating expenditures without receiving any new revenues.

**Debt Service Fund:** Governmental fund type used to account for the accumulation of resources for, and the payment of, general long-term debt principal and interest. Also may be referred to as the Interest and Sinking Fund.

**Debt:** An amount of money owed to a person, bank, company, or other organization.

**Debt Services:** Two function areas (70 and 71) and one object code series (6500) are identified using this terminology "debt services." Function 70 is a major functional area that is used for expenditures that are used for the payment of debt principal and interest including Function 71. Expenditures that are for the retirement of recurring bond, capital lease principal, and other debt, related debt service fees, and for all debt interest fall under Function 71. Although these expenditures are budgeted and expended as function 71, financial statement presentation may break the expenditures into three functions to differentiate expenditures: function 71, principal, function 72, interest, and function 73, related debt service fees. Object code series 6500 covers all expenditures for debt service.

**Debt Service Coverage Ratio:** This ratio measures an organization's ability to make debt principal and interest payments that will become due during the year.

**Deferred Revenue:** Previously reported as liabilities, terminology for resource inflows that do not yet meet the criteria for revenue recognition. These deferred amounts include resources available but unearned, unearned revenue reported as a liability, and revenues earned but not available, reported in a separate section of the financial statements as deferred inflows of resources. This terminology is no longer used; see definitions under deferred outflow/inflow of resources and unearned revenue.

**Deferred Outflow/Inflow of Resources:** Items previously reported as assets and liabilities in the financial statements. A deferred outflow of resources is defined as “a consumption of net assets by the government that is applicable to a future reporting period,” and a deferred inflow of resources is defined as “an acquisition of net assets by the government that is applicable to a future reporting period.” Only those instances identified by the Governmental Accounting Standards Board (GASB) will be considered a deferred outflow or inflow of resources. Deferred outflows of resources are reported on the government-wide statement of financial position in a separate section directly following assets, and deferred inflows of resources section should directly follow liabilities.

**Electronic Submission:** The TEA electronic data feed format required for use by school districts, open-enrollment charter schools, and regional education service centers (ESCs).

**Ending Fund Balance:** The ending fund balance is the amount of unencumbered surplus fund balance reported by the district at the end of the specified school year. For most school districts, this will be equivalent to the fund balance at the beginning of the next school year.

**Enrollment:** Students reported as enrolled as of the last Friday in October.

**Existing Debt Allotment (EDA):** Is the amount of state funds to be allocated to the district for assistance with existing debt.

**Expenditures:** The cost of goods delivered or services rendered, whether paid or unpaid including expenses, provisions for debt retirement not reported as a liability of the fund from which retired and capital outlays.

**Facilities Acquisition and Construction (Function 81):** Used to accounts for costs incurred to acquire, construct, equip, or make major renovations/additions to school district facilities, including capital lease transactions.

**Federal Revenues:** Revenues paid either directly to the district or indirectly through a local or state government entity for federally subsidized programs including the School Breakfast Program, National School Lunch Program, and School Health and Related Services Program. This amount is recorded as Revenue Object 5900.

**Financial Integrity Rating System of Texas (FIRST):** The financial accountability rating system administered by the TEA in accordance with the TEC, §39.082 and §39.085. The system provides additional transparency to public education finance and meaningful financial oversight and improvement for school districts (School FIRST) and open-enrollment charter schools and charter schools operated by a public institution of higher education under TEC, Chapter 12, Subchapters D and E (Charter FIRST).

**Fiscal Year:** A period of twelve consecutive months legislatively selected as a basis for annual financial reporting, planning, and budgeting. The fiscal year of a school district or an open-enrollment charter school, which begins on July 1 or September 1 of each year, as determined by the board of trustees of the district or the governing body of the charter holder in accordance with the TEC, §44.0011.

**Foundation School Program (FSP):** The program established under the TEC, Chapters 41, 42, and 46, or any successor program of state-appropriated funding for school districts in the state. The FSP is the shared financial arrangement between the state and the school district, where property taxes are blended with revenues from the state to cover the cost of basic and mandated programs. The nature of this arrangement falls in one of the following status categories: Regular, Special Statutory, State Administered, Education Service Center, or Open Enrollment Charter School District.

**Full-Time Equivalent (FTE):** Measures the extent to which one individual or student occupies a fulltime position or provides instruction, e.g., a person who works four hours a day or a student that attends a half of a day represents a .5 FTE.

**Function:** Function codes identify the expenditures of an operational area or a group of related activities. For example, in order to provide the appropriate atmosphere for learning, school districts transport students to school, teach students, feed students and provide health services. Each of these activities is a function. The major functional areas are:

- Instruction and Instructional-Related Services
- Instructional and School Leadership
- Support Services - Student
- Administrative Support Services
- Support Services - Non-Student Based
- Ancillary Services
- Debt Service
- Capital Outlay
- Intergovernmental Charges

**Funds:** A school district's accounting system is organized and operated on a fund basis where each fund is a separate fiscal entity in the school district much the same as various corporate subsidiaries are fiscally separate in private enterprise. All Funds refers to the combined total of all the funds listed below:

- The General Fund
- Special Revenue Funds (Federal Programs, Federally Funded Shared Services, State Programs, Shared State/Local Services, Local Programs)
- Debt Service Funds
- Capital Projects Funds
- Enterprise Funds.

**Fund Balance:** The difference between assets and liabilities reported in a governmental fund. The fund balance may be further delineated as required into the following components: Nonspendable, Restricted, Committed, or Assigned with the remaining balance identified as the Unassigned Fund Balance.

**General Administration:** The amount spent on managing or governing the school district as an overall entity. Expenditures associated with this functional area are reported under Function 41.

**General Fund:** This fund finances the fundamental operations of the district in partnership with the community. All revenues and expenditures not accounted for by other funds are

included. This is a budgeted fund and any fund balances are considered resources available for current operations.

**Governmental Activities:** Activities of the government financed by taxes and intergovernmental revenues and other non-exchange revenues, activities reported in governmental funds and internal service funds, and internal clearing account funds.

**Interest & Sinking (I&S) Tax Rate:** The tax rate calculated to provide the revenues needed to cover interest and sinking requirements (also referred to as Debt Service). Debt Service includes the interest and principal on bonds and other debt secured by property tax revenues.

**Incremental Costs:** The amount spent by a school district with excess wealth per WADA on the purchase of attendance credits either from the state or from other school district(s). Expenditures associated with this functional area are reported under Function 92.

**Instruction:** The amount spent on direct classroom instruction and other activities that deliver, enhance, or direct the delivery of learning situations to students regardless of location or medium. Expenditures associated with this functional area are reported under Function 11.

**Instructional Facilities Allotment (IFA):** (State Aid) Provides assistance to school districts in making debt service payments on qualifying bonds and lease-purchase agreements. Proceeds must be used for the construction or renovation of an instructional facility.

**Intergovernmental Charges:** "Intergovernmental" is a classification used when one governmental unit transfers resources to another. In particular, when a Revenue Sharing District purchases WADA or where one school district pays another school district to educate transfer students. Expenditures associated with this functional area are reported under Function 90.

**Investments in Capital Assets, Net of Related Debt:** One of three components of Net Position that must be reported in both government-wide and proprietary fund financial statements. Related debt, for this purpose, includes the outstanding balances of any bonds, mortgages, notes, or other borrowings that are attributable to the acquisition, construction, of improvement of capital assets of the government.

**Local & Intermediate Source Revenues:** All revenues from local taxes and other local and intermediate source revenues. For specifics, see the definitions for Local Property Tax and Other Local & Intermediate Source Revenues. This amount is recorded under Object 5700.

**Local Property Tax:** This is all revenues from local real and personal property taxes, including recaptured funds from 1) Contracted Instructional Services Between Public Schools (Function 91) and 2) Incremental Costs associated with Chapter 41 of the Texas Education Code (Function 92).

**Long-term Liabilities:** Non-current liabilities that are due beyond a year. On the balance sheet, accounts are listed in order of liquidity, so long-term liabilities come after current liabilities. In addition, the specific long-term liability accounts are listed on the balance sheet in order of liquidity.

**Major Program:** A Federal program determined by the auditor to be a major program in accordance with 2 CFR §200.518 or a program identified as a major program by a Federal awarding agency or pass-through entity in accordance with §200.503.

**Material Noncompliance:** Material noncompliance with the provisions of Federal statutes, regulations, or the terms and conditions of Federal awards related to a major program. The auditor's determination of whether a noncompliance is material for reporting an audit finding is in relation to a type of compliance requirement for a major program identified in the Compliance Supplement.

**Material Weaknesses in Internal Controls:** Significant deficiencies and material weaknesses in internal control over major programs and significant instances of abuse relating to major programs. The auditor's determination of whether a deficiency in internal control is a significant deficiency or a material weakness for reporting an audit finding is in relation to a type of compliance requirement for a major program identified in the Compliance Supplement.

**Membership:** Membership differs from enrollment, as it does not include those students who are served for less than two hours per day. A student is in membership if he/she is enrolled and is either scheduled to attend at least two hours of instruction each school day or participating in an alternative attendance accounting program.

**Maintenance & Operations (M&O) Tax Rate:** The tax rate calculated to provide the revenues needed to cover maintenance and operations. M&O includes such things as salaries, utilities, and day-to-day operations.

**Modified Opinion:** A term used in connection with financial auditing. A modification of the independent auditor's report on the fair presentation of the financial statements indicates that there exists one or more specific exception to the auditor's general assertion that the financial statements present fairly the financial information contained therein according to generally accepted accounting principles.

**Net Investment in Capital Assets:** One of three components of net position that must be reported in both government-wide and proprietary fund financial statements. The calculation includes capital assets net of accumulated depreciation less the outstanding balances of any bonds, mortgages, notes, or other borrowings attributable to the acquisition, construction, or improvement of capital assets. Once called "Invested in Capital Assets, Net of Related Debt" the designation now includes deferred outflows, such as deferred losses on refunding of debt, and deferred inflows attributable to capital assets and capital related debt in the calculation. Deferred gains/losses on refunding of debt is the difference between the reacquisition price and the net carrying amount of the old debt and is classified as a deferred inflow or outflow depending on whether it is a gain or loss on the refunding.

**Net Pension Liability (NPL):** The net pension liability is the difference between the total pension liability (the present value of projected benefit payments to employees based on their past service) and the assets (mostly investments reported at fair value) set aside in a trust and restricted to paying benefits to current employees, retirees, and their beneficiaries.

**No New Revenue Tax Rate (previously known as the Effective Tax Rate):** Provides the unit with approximately the same amount of revenue it had the year before on properties taxes in both years. A comparison of the effective tax rate to the taxing unit's proposed tax rate shows if there will be a tax increase.

**Nonspendable Fund Balance:** The portion of fund balance that is in non-liquid form, including inventories, prepaid items, deferred expenditures, long-term receivables, and encumbrances (if significant). Nonspendable fund balance may also be in the form of an endowment fund balance that is required to remain intact.

**Object:** An object is the highest level of accounting classification used to identify either the transaction posted or the source to which the associated monies are related. Each object is assigned a code that identifies in which of the following eight major object groupings it belongs:

- 1000 Assets
- 2000 Liabilities
- 3000 Fund Balances
- 5000 Revenue
- 6000 Expenditures/Expenses
- 7000 Other Resources/Non-Operating Revenue/Residual Equity Transfers In
- 8000 Other Uses/Non-Operating Revenue/Residual Equity Transfers Out

**Operating (or Operational) Expenditures:** Operating expenditures are a wide variety of expenditures necessary to a district's operations fall into this category with the largest portion going to payroll and related employee benefits and the purchase of goods and services.

**Operating Expenditures per Student:** Total Operating Expenditures divided by the total number of enrolled students. Student enrollment is typically reported as of fall PEIMS.

**Operating Revenues and Expenses:** Operating revenues and expenses are terms used in connection with the proprietary fund statement of revenues, expenses, and changes in net assets. The term is not defined as such in the authoritative accounting and financial reporting standards, although financial statement preparers are advised to consider the definition of operating activities for cash flows reporting in establishing their own definition.

**Other Local & Intermediate Source Revenues:** All local and intermediate revenues NOT from local real and personal property taxes including:

- Revenues realized because of services rendered to other school districts
- Tuition and Fees
- Rental payments, interest, investment income
- Sale of food and revenues from athletic and extra/co-curricular activities
- Revenues from counties, municipalities, utility districts, etc.

**Other Operating Costs:** Expenditures necessary for the operation of the school district that are not covered by Payroll Costs, Professional and Contracted Services, Supplies and Materials, Debt Services, and Capital Outlay fall into this category and include travel, insurance and bonding costs, election costs, depreciation, and other costs not defined elsewhere. This amount is recorded as Expenditure/Expense Object 6400.

**Other Post-Employment Benefits (OPEB):** Other post-employment benefits are benefits that will need to be paid after the employee has completed his/her employment such as post-employment medical insurance. The net OPEB liability equals the total OPEB liability minus the value of the assets in the OPEB plan that is administered through a trust that meets the specified criteria. The total OPEB liability and the OPEB plan's net position are measured as of the same date.

**Other Resources:** This amount is credited to total actual other resources or non-operating revenues received, such as the sale of real or personal property, bond proceeds, etc., or residual equity transfers in. This amount is recorded under Object 7020.

**Payments for Shared Services Arrangements:** Payments made from a member district to a fiscal agent or payments from a fiscal agent to a member district as part of a Shared Services Arrangement (SSA). The most common types of SSAs relate to special education services, adult education services, and activities funded by the Elementary and Secondary Education Act (ESEA). Expenditures associated with this functional area are reported under Function 93.

**Payroll:** Payroll costs include the gross salaries or wages and benefit costs for services or tasks performed by employees at the general direction of the school district. This amount is recorded as Expenditure/Expense Object 6100. *(NOTE: Payroll amounts do not include salaries for contract workers. Therefore, this figure will vary significantly between districts and campuses that use contract workers and those that do not.)*

**Public Education Information Management System (PEIMS):** See *Texas Student Data System Public Education Information Management System (TSDS PEIMS)*.

**Plant Maintenance & Operations:** The amount spent on the maintenance and operation of the physical plant and grounds and for warehousing and receiving services. Expenditures associated with this functional area are reported under Function 51.

**Property Value per Refined ADA:** The district's Comptroller Certified Property Value divided by its total Refined ADA (Average Daily Attendance).

**Property Value per WADA:** The district's Comptroller Certified Property Value divided by its total WADA (Weighted Average Daily Attendance).

**Refined ADA:** Refined Average Daily Attendance (also called RADA) is based on the number of days of instruction in the school year. The aggregate eligible day's attendance is divided by the number of days of instruction to compute the refined average daily attendance.

**Restricted Fund Balance:** This is that portion of fund balance that has externally enforceable constraints made by outside parties. The restricted fund balance, shown on the balance sheet in the governmental fund statements, may not equal the restricted component of net position of governmental activities due to different measurement focus and/or different basis of accounting.

**Restricted Net Position:** The second of three components of net position of governmental activities reported as restricted when constraints placed on its use are either:

- Externally imposed by creditors (such as through debt covenants), grantors, contributors, or

laws or regulations of other governments, or

- Imposed by law through constitutional provisions or enabling legislation.

The restricted component of net position is reduced by liabilities and deferred inflows, related to those assets. This component must be reported by the major categories of restrictions, e.g., restricted for capital projects, debt service, etc. No category of restricted net position can be negative. If liabilities related to restricted assets exceed those assets, no balance should be reported. The negative amount should be reported as a reduction of the unrestricted component of net position.

**Revenues:** Any increase in a school district's financial resources from property taxes, foundation fund entitlements, user charges, grants, and other sources. Revenues fall into the three broad sources of revenues: Local & Intermediate Source, State, and Federal.

**Short-term Debt:** See *Current Liabilities*.

**Snapshot:** PEIMS data is submitted four times per year. Submission 1 is the fall submission and contains data pertaining to student enrollment, staff employed, and budgeted expenditures as of the last Friday in October. Snapshot provides an overview of public education in Texas, at both the state and district levels, and includes almost 100 separate data elements.

**Special Revenue Fund:** A governmental fund type used to account for the proceeds of specific revenue sources (other than for major capital projects) that are legally restricted to expenditures for specified purposes.

**State Revenues:** Revenues realized from the Texas Education Agency, other state agencies, shared services arrangements, or allocated based on state laws relating to the Foundation School Program Act. This amount is recorded as Revenue Object 5800.

**Summary of Finances (SOF) Report:** The document of record for FSP allocations. An SOF report is produced for each school district and open-enrollment charter school by the TEA division responsible for state funding that describes the school district's or open-enrollment charter school's funding elements and FSP state aid.

**Texas Student Data System Public Education Information Management System (TSDS PEIMS):** A statewide data management system for public education information in the State of Texas. One of the basic goals of PEIMS, as adopted by the State Board of Education in 1986, is to improve education practices of local school districts. PEIMS is a major improvement over previous information sources gathered from aggregated data available on paper reports. School districts submit their data via standardized computer files. These are defined in a yearly publication, the [PEIMS Data Standards](#).

**Unassigned Fund Balance:** Available expendable financial resources in a governmental fund that are not the object of tentative management plans (i.e., committed or assigned). One primary criterion of rating agencies for school bonds is the relative amount of unassigned fund balance. Bond rating agencies view unassigned fund balances as a reflection of the financial strength of school districts and show concern when district fund balances decrease.

**Unearned Revenue:** Unearned revenues are resource inflows that do not yet meet the criteria for revenue recognition. Unearned amounts are always reported as unearned revenue. Generally, accepted accounting principles require that contract and grant revenue be recognized when earned, which is typically based on when expenses are incurred. Grant fund awards made in advance of expenses are reported as unearned revenue at the close of the fiscal period. In governmental funds, earned amounts also are reported as unearned revenue until they are available to liquidate liabilities of the current period.

**Unmodified Opinion:** Term used in connection with financial auditing. An unmodified independent auditor's opinion means there are no stated exceptions to the auditor's general assertion that the district's financial statements present fairly the financial information contained according to generally accepted accounting principles.

**Unrestricted Net Position:** The final of three components of net position of governmental activities, the term net position refers to the amount of total assets less total liabilities. Unrestricted net position balance refers to the portion of total net position that is neither included in the calculation of the net investment in capital assets nor restricted.

**Voter-Approval (Rollback) Tax Rate:** The rollback tax rate provided for under Tax Code, §26.08, has been renamed the voter-approval tax rate. There is no longer an effective tax rate calculation. The voter-approval tax rate is a calculated maximum rate allowed by law without voter approval. School district's voter-approval rate is equal to the district's maximum compressed rate plus the greater of the previous year's enrichment rate or five cents per \$100 of taxable value plus the current debt rate. Each year, school districts must get approval from the Texas Education Agency of their maximum compression rate.

**Weighted Average Daily Attendance (WADA):** A Weighted Average Daily Attendance (WADA) is used to measure the extent students are participating in special programs. The concept of WADA converts all of a school district's students with their different weights to a calculated number of regular students required to raise the same amount of revenue. The greater the number of students eligible for special entitlements, the greater a school district's WADA.

**Warrant Hold:** The process by which state payments issued to payees indebted to the state, or payees with a tax delinquency, are held by the Texas Comptroller of Public Accounts until the debt is satisfied in accordance with the Texas Government Code, §403.055.

**Wealth Equalization Transfer:** The amount budgeted by districts for the cost of reducing their property wealth to the required equalized wealth level (Function 91). These funds are sometimes referred to as 'Robin Hood Funds'.

Recognition is given to the Texas Association of School Business Officials (TASBO) and the Texas School Public Relations Association (TSPRA) for their joint effort in creating the Schools FIRST Communication Resources Kit to assist districts in publicizing financial ratings and complying with Commissioner's rules concerning the Financial Accountability Rating System.

**DISCLAIMER ON GLOSSARY:**

*All of the information provided is believed to be accurate and reliable; however, TASBO and TSPRA assume no responsibility for any errors, appearing in this information or otherwise. Further, TASBO and TSPRA assume no responsibility for the use of the information provided.*

**Waco Independent School District**

**Board of Trustee Meeting Agenda Item**

**Date:** October 26, 2023

**Contact Person:** Sheryl Davis

**RE: Report on the 2023 Delinquent Tax Collections**

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**Background Information:**

The law firms of McCreary, Veselka, Bragg & Allen, P.C. and Beard, Kultgen, Brophy, Bostwick and Dickson, L.L.P., represent Waco ISD in the collection of its delinquent property taxes. Taxes unpaid each year at July 1<sup>st</sup> are referred for collection. Annually, staff prepare a report detailing activities undertaken to collect the delinquent taxes. The report explains procedures followed and legal steps to be taken if payment is not made.

Additionally, the firms also file requests for audits of the District's taxable property values with the Texas Comptroller of Public Accounts. This past year, the audit of the 2020 property values resulted in additional State Foundation Program revenue of \$1,732,108 for the 2020-2021 school year. These funds were received by the district on March 8, 2023.

A copy of the annual report is attached. Mr. Robert Meyers of McCreary, Veselka, Bragg & Allen, P.C., and Mr. Rick Bostwick of Beard, Kultgen, Brophy, Bostwick and Dickson, L.L.P., will be present at the meeting to present the report and answer any questions the Board might have.

**Fiscal Implications:**

None

**Administrative Recommendation(s):**

The report is presented for information, only. No action is required.

**McCREARY  
VESELKA  
BRAGG &  
ALLEN, P.C.**

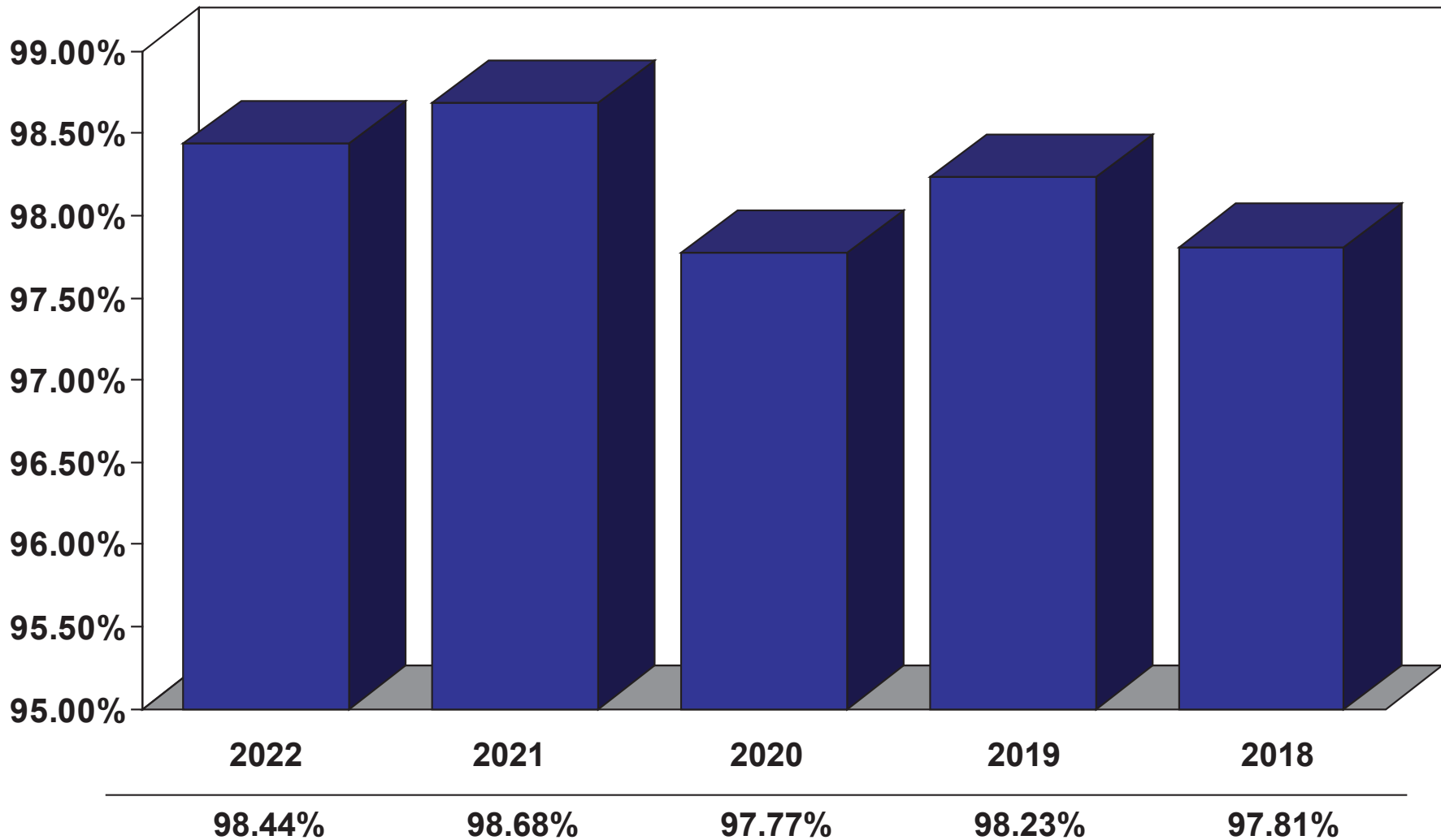
**BEARD  
KULTGEN  
BROPHY  
BOSTWICK &  
DICKSON,  
L.L.P.**



**REPORT ON DELINQUENT  
PROPERTY TAX COLLECTIONS**

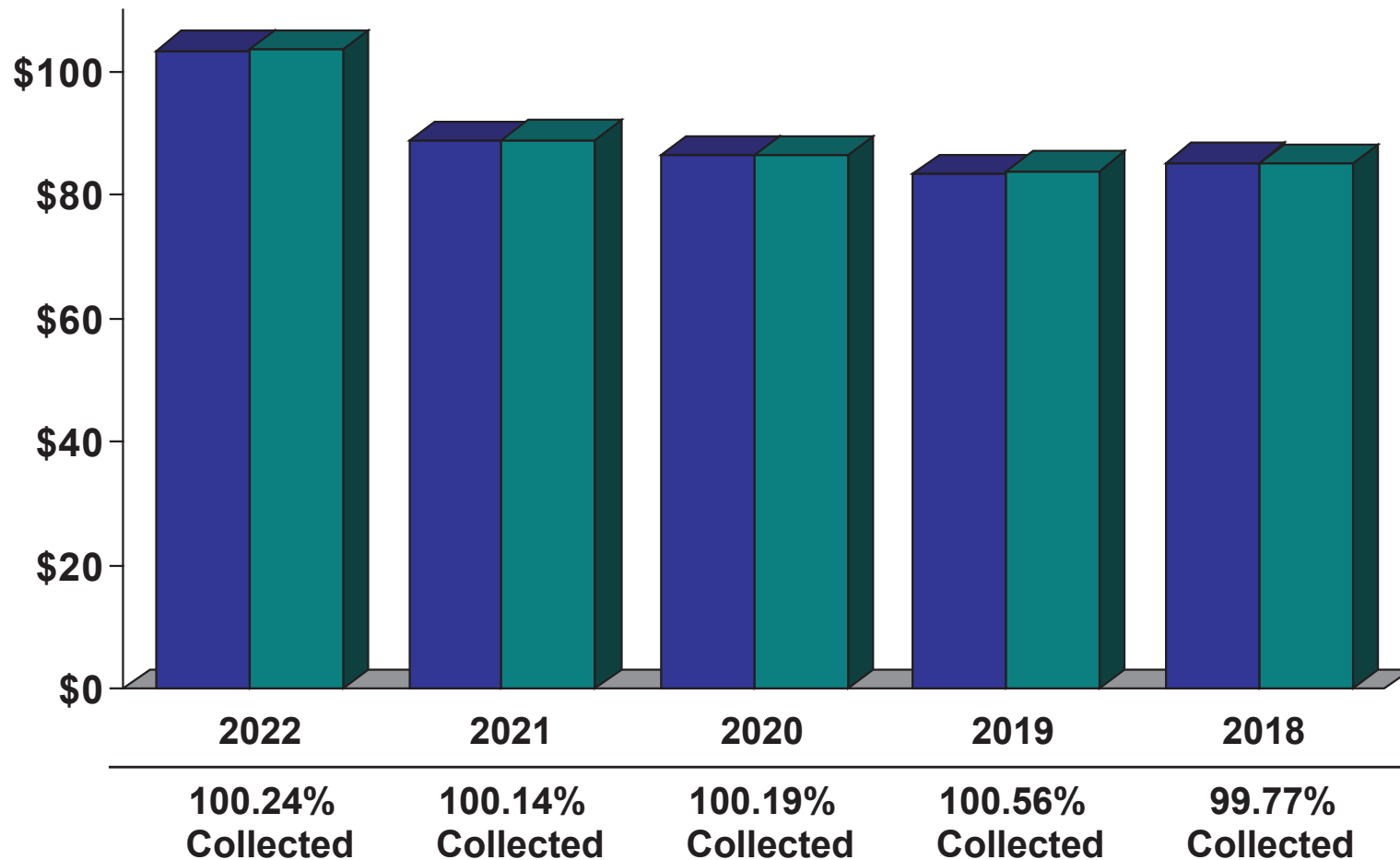
**October 26, 2022**

# WACO INDEPENDENT SCHOOL DISTRICT CURRENT TAX COLLECTIONS

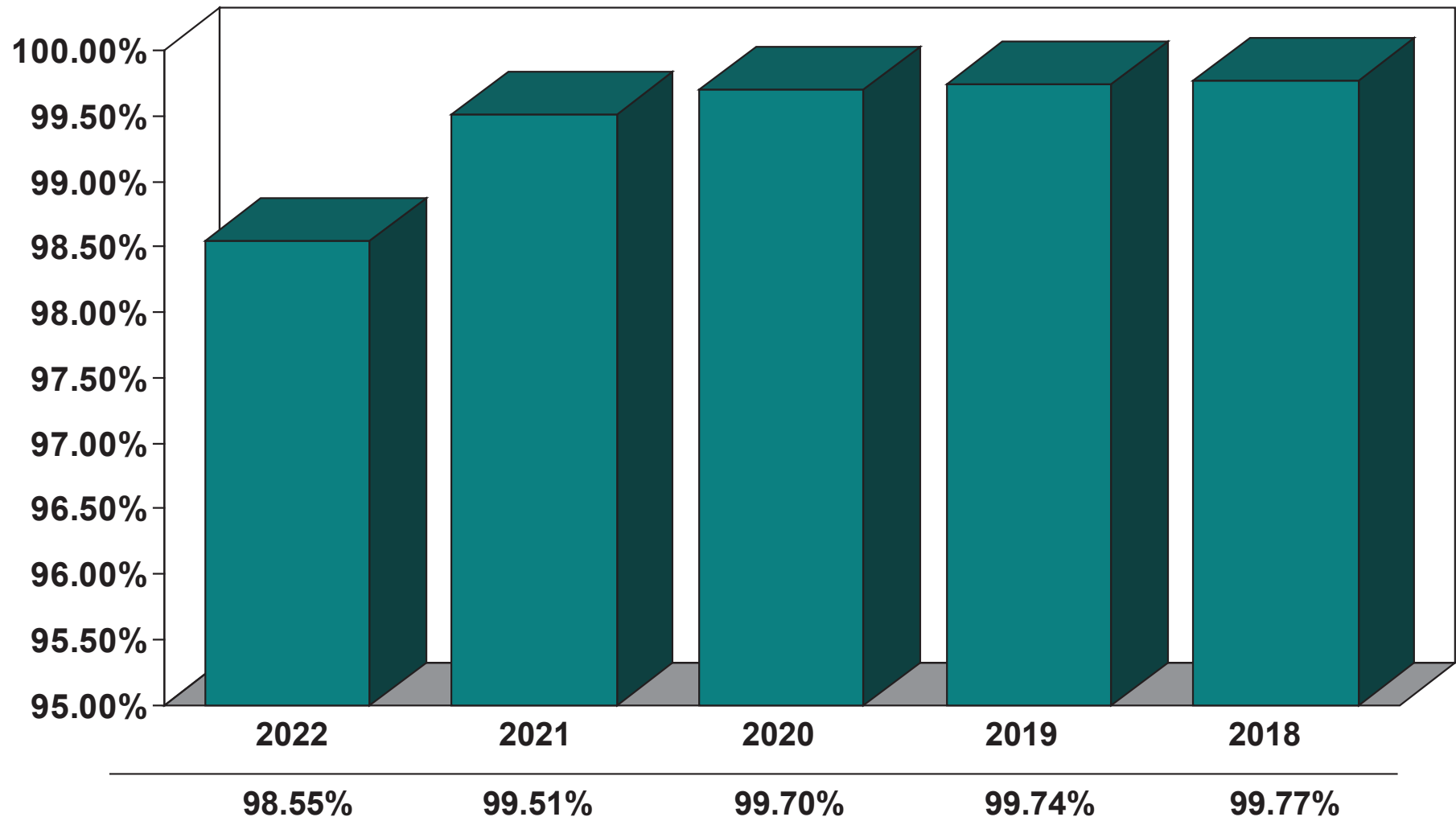


# WACO INDEPENDENT SCHOOL DISTRICT TOTAL ANNUAL TAX COLLECTIONS

Millions

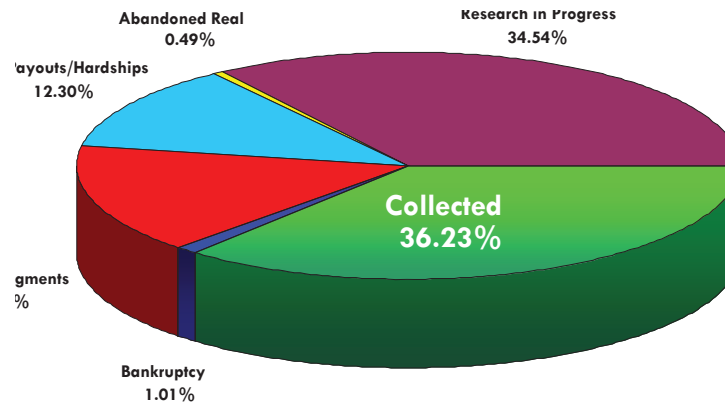


# WACO INDEPENDENT SCHOOL DISTRICT COLLECTION OF TAX LEVY



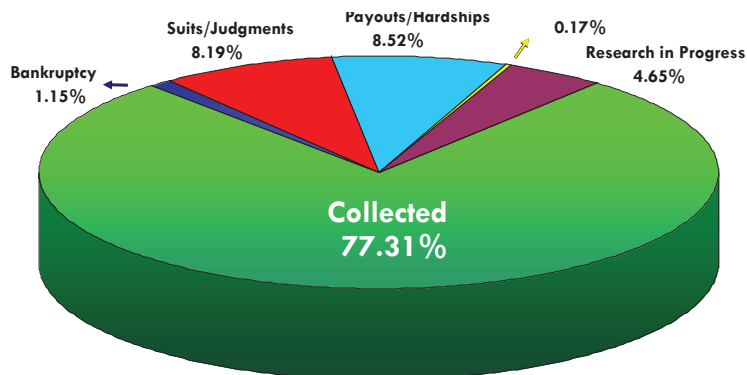
# WACO INDEPENDENT SCHOOL DISTRICT COLLECTION STATUS OF DELINQUENT TAXES

## 2022 Delinquent Taxes



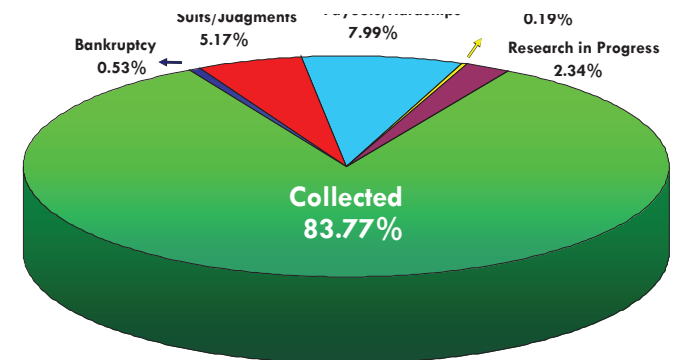
Delinquent Taxes Collected: \$852,205

## 2021 Delinquent Taxes



Delinquent Taxes Collected: \$1,466,891

## 2020 Delinquent Taxes



Delinquent Taxes Collected: \$1,353,177

# WACO INDEPENDENT SCHOOL DISTRICT TAX COLLECTION ACTIVITY

<i>Tax Notices</i>	6,200
<i>Tax Lawsuits</i>	144
<i>Tax Judgments</i>	92
<i>Tax Sales</i>	79

# WACO INDEPENDENT SCHOOL DISTRICT PROPERTY VALUE AUDIT

<i>Tax Year</i>	<i>Additional State Aid</i>
<i>2016</i>	\$453,605
<i>2017</i>	\$824,758
<i>2018</i>	\$1,283,139
<i>2019</i>	\$1,482,071
<i>2020</i>	<b>\$1,732,108</b>
<i>Total</i>	<b>\$5,775,681</b>

# WACO INDEPENDENT SCHOOL DISTRICT

## 2023 PROPERTY TAX CHANGES – SB 2

### Tax Rate Compression Reduced 2023 Tax Levy

<i>Tax Year</i>	<i>Tax Levy</i>
2023	\$89,618,879
2022	\$103,375,935
2021	\$88,756,641

### Homestead Exemption Amount Increased to \$100,000

There are 584 residences that have a taxable value of \$100,000 or less and will not be taxed by Waco ISD for 2023.

**McCREARY  
VESELKA  
BRAGG &  
ALLEN, P.C.**

**BEARD  
KULTGEN  
BROPHY  
BOSTWICK &  
DICKSON, L.L.P.**

# **REPORT ON DELINQUENT PROPERTY TAX COLLECTIONS**

*for the*



**October 26, 2023**

**Robert L. Meyers**  
Attorney at Law  
100 North 6<sup>th</sup>, Suite 602  
Waco, Texas 76701

**Frederick deB. Bostwick**  
Attorney at Law  
220 South 4<sup>th</sup> Street  
Waco, Texas 76701

**MCCREARY, VESELKA, BRAGG & ALLEN, P.C.**  
*and*  
**BEARD, KULTGEN, BROPHY, BOSTWICK & DICKSON, L.L.P.**  
ATTORNEYS AT LAW  
Waco, Texas

October 26, 2023

Dr. Susan Kincannon  
Superintendent  
Waco Independent School District  
501 Franklin Avenue  
Waco Texas 76703

**Re: Report on Delinquent Property Tax Collections**

Dear Dr. Kincannon:

We are enclosing for you and the Board of Trustees copies of our latest Report on Delinquent Property Tax Collections. Our report details our activities undertaken to collect the delinquent taxes due to the Waco Independent School District. The report also explains the procedures we follow to ensure that each property owner is notified of their tax delinquency, and the legal steps that will be taken when prompt payment of the taxes is not made.

We believe that our collection procedures provide the Waco Independent School District with maximum recovery of its delinquent taxes in the shortest period of time possible. In addition to our collection activities, we will advise the Waco Independent School District on any ad valorem tax matter.

We appreciate the opportunity to represent the Waco Independent School District in the collection of its delinquent taxes and invite your questions and comments in order that we may better serve your needs.

Sincerely,



Robert L. Meyers  
McCreary, Veselka, Bragg & Allen, P.C.

*Rick Bostwick*

Frederick deB. Bostwick, III  
Beard, Kultgen, Brophy, Bostwick & Dickson, L.L.P.

**MCCREARY, VESELKA, BRAGG & ALLEN, P.C.**  
*and*  
**BEARD, KULTGEN, BROPHY, BOSTWICK & DICKSON, L.L.P.**

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**REPORT ON DELINQUENT PROPERTY TAX COLLECTIONS**  
*for the*  
**WACO INDEPENDENT SCHOOL DISTRICT**

The goal of our tax collection program is to collect the greatest amount of tax in the shortest period of time. **McCreary, Veselka, Bragg & Allen, P.C.** and **Beard, Kultgen, Brophy, Bostwick & Dickson, L.L.P.** believe they have met this goal for the **Waco Independent School District**.

Tax Collections generally fall into two categories, *current tax collections*, the collection of the current levy of taxes within the fiscal year in which they are assessed, and *delinquent tax collections*, taxes that are unpaid and referred to a law firm for collection. It is our belief that an effective delinquent tax collection program will not only result in the quick recovery of delinquent taxes but will also enhance current collections. When the taxpaying public is aware that the **District** aggressively, but fairly, pursues unpaid taxes, there is more incentive for a property owner to timely pay their current taxes. The following are some of the significant points contained in our report.

**CURRENT TAX COLLECTIONS**

- The **District** collected **98.44%** of its current year's taxes. (Chart Page 2)
- The **District's** Total Annual Tax Collections (current and delinquent taxes, penalties and interest) typically **exceeds** the amount of taxes that have been levied (Chart Page 3)

**DELINQUENT TAX COLLECTIONS**

- The **District** ultimately collects over **99.00%** of the taxes that it levies. (Chart Page 4)
- We have collected **36.23%** of the taxes referred to us in July 2023, **77.31%** of the taxes referred to us in July 2022, and **83.77%** of the taxes referred in July 2021. The balance of these taxes is being quickly and efficiently collected. (Charts Page 5).
- In order to collect the **District's** delinquent taxes, we have:
  - Sent over **6,200** Delinquent Tax Notices
  - Filed **144** Delinquent Tax Suits
  - Recovered **92** Judgments, and
  - Posted **79** properties for sale

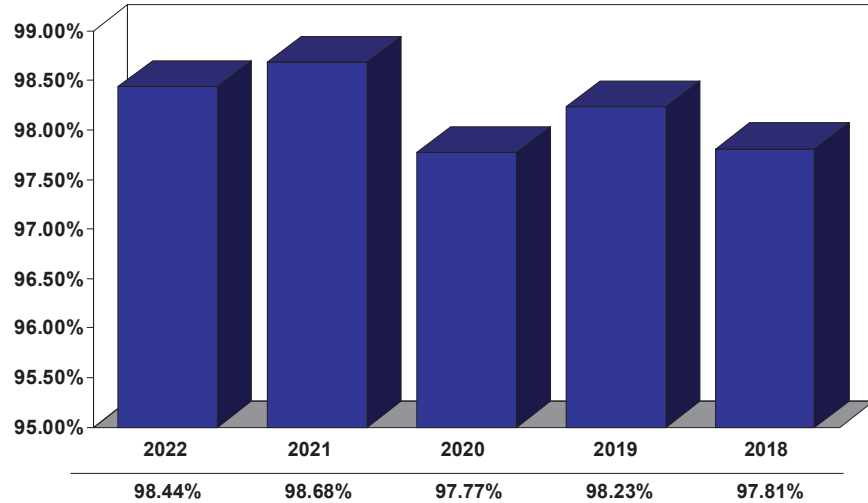
**PROPERTY VALUE AUDITS**

- We filed an audit of the District's taxable value for tax year 2020 with the Comptroller of Public Accounts that resulted in the District receiving **\$1,732,108** in additional state aid. (Page 11)

## CURRENT TAX COLLECTIONS

Displayed below are the District’s current tax collection amounts and percentages. This is the amount of taxes levied by the District for the past five years and the amount of those taxes collected in that budget year.

*The District collected **98.44%** of its tax levy for the 2022 tax year.*



Variances in the Current Collection Percentages from year to year are primarily influenced by the ability of taxpayers to pay their taxes. This past year the District experienced one of the highest percentages of collections of its current taxes ever.

The Table below and the Chart above list the original amount of taxes levied by the District and the amount and percentage of collection of these taxes from October 1 through August 31 of each year. The amount of each year’s tax levy has been adjusted for Tax Office corrections to the District’s tax roll.

### CURRENT TAX COLLECTIONS (OCTOBER 1 THROUGH AUGUST 31)

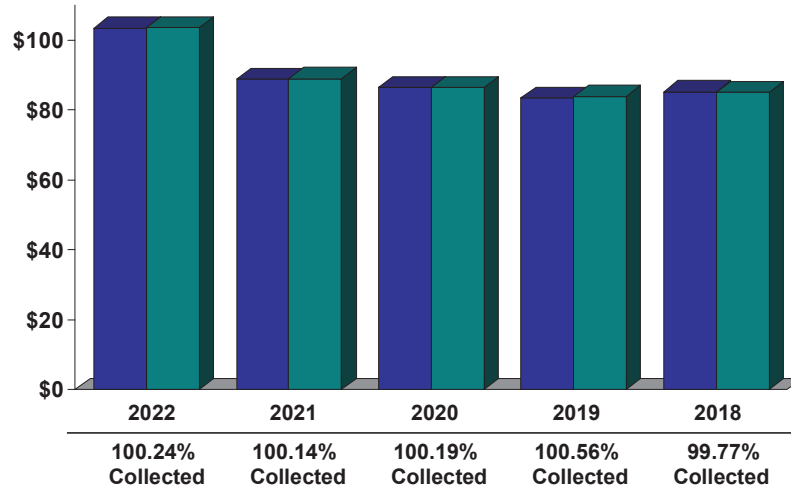
<i><b>Tax Year</b></i>	<b>Original Tax Levy (Adjusted)</b>	<b>Current Tax Collections</b>	<b>Percent Collected</b>
<i><b>2022</b></i>	\$103,375,935	\$101,763,018	98.44%
<i><b>2021</b></i>	\$88,756,641	\$87,582,184	98.68%
<i><b>2020</b></i>	\$86,341,927	\$84,416,904	97.77%
<i><b>2019</b></i>	\$83,424,154	\$81,947,735	98.23%
<i><b>2018</b></i>	\$85,230,805	\$83,362,597	97.81%

## TOTAL ANNUAL TAX COLLECTIONS

In most years, the District’s Total Annual Tax Collections *actually exceeds the amount of taxes that were levied.*

*The District historically collects over **100%** of its tax levy each year.*

Millions



Typically, the District’s Total Annual Collections that includes the amount of the Current Taxes collected added to the Delinquent Taxes, Penalties and Interest is greater than the amount of taxes levied by the District. Thus, the District is assured that each year it will collect over 100% of the taxes that are levied.

The District’s 2018 levy *was adjusted upward by the addition of over three hundred thousand dollars in taxes*, although these taxes were ultimately collected, the late addition of such a large amount of current year taxes prevented the District from statistically collecting over one hundred percent of its levy that year.  
(The amounts listed have been adjusted for tax office corrections.)

### TOTAL ANNUAL TAX COLLECTIONS\* (SEPTEMBER 1 THROUGH AUGUST 31)

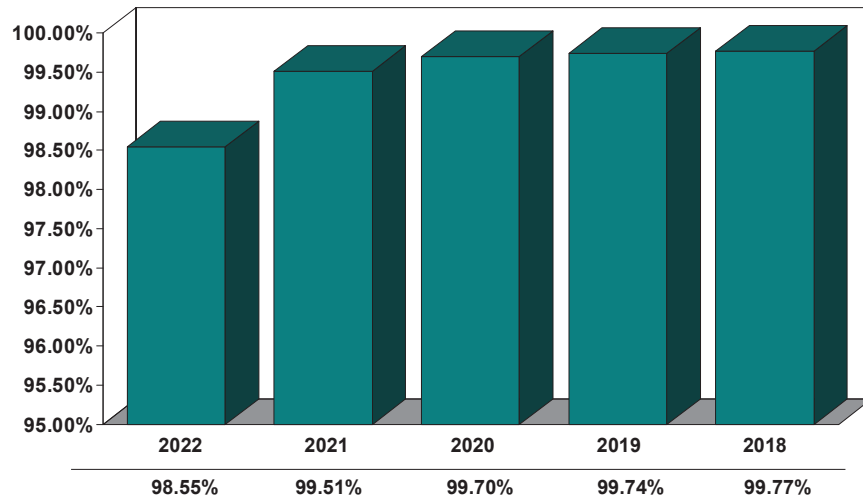
Tax Year	Original Tax Levy (Adjusted)	Total Annual Tax Collections	Percent Collected
<b>2022</b>	\$103,375,935	\$103,619,937	100.24%
<b>2021</b>	\$88,756,641	\$88,882,345	100.14%
<b>2020</b>	\$86,341,927	\$86,504,516	100.19%
<b>2019</b>	\$83,424,154	\$83,888,701	100.56%
<b>2018</b>	\$85,230,805	\$85,038,045	99.77%

*\*Includes Current and Delinquent Taxes, Penalties, and Interest*

## COLLECTION OF TAX LEVY

Ultimately over **99%** of the District's taxes are collected. Listed below are the last five tax years. As of September 30, 2023, **98.55 to 99.77%** of the taxes levied for the tax years 2022 through 2018 have been recovered. For each of the tax years prior to 2018, the District has collected over 99.00% of the taxes that were levied

*Ultimately, the District collects over **99.00%** of the taxes that it levies.*



This Chart and the Table below list the actual amount of taxes levied for the past five years and the amount and percentage of each year's tax levy that have been collected. The amounts included are original tax amounts only *and do not include penalties and interest that have also been collected.*

It is a historical reality that a small percentage of each year's tax levy will be uncollectable due to a number of reasons such as insolvent business personal property accounts, bankruptcies, tax deferrals, medical hardships, and the fact that some property owners are judgment proof. Therefore, the cumulative percent collected, while extremely high, will never be one hundred percent.

### COLLECTION OF TAX LEVY (TAX COLLECTIONS FROM OCTOBER 1 OF EACH TAX YEAR THROUGH SEPTEMBER 30, 2023)

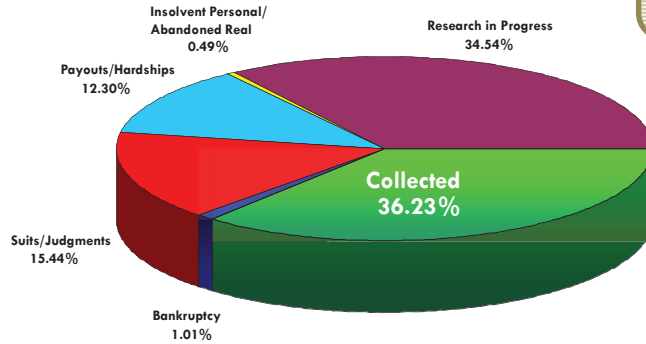
<b>Tax Year</b>	<b>Original Tax Levy (Adjusted)</b>	<b>Total Tax Collections</b>	<b>Percent Collected</b>	<b>Number Of Months</b>
<b>2022</b>	\$103,375,935	\$101,875,746	98.55%	12
<b>2021</b>	\$88,756,641	\$88,326,132	99.51%	24
<b>2020</b>	\$86,341,927	\$86,079,819	99.70%	36
<b>2019</b>	\$83,424,154	\$83,207,868	99.74%	48
<b>2018</b>	\$85,230,805	\$85,038,050	99.77%	60

## COLLECTION STATUS OF DELINQUENT TAXES

Each July 1, the District refers to us its unpaid delinquent taxes from the prior year for collection. The following charts depict the success we have had in collecting the taxes referred to us. As of September 30, 2023, we have collected:

### COLLECTION STATUS OF 2022 DELINQUENT TAXES

Category	Amount	Percent
<b>Total Due (7/1/23)</b>	\$2,352,394	
<b>Collected**</b>	<b>\$852,205</b>	<b>36.23%</b>
Bankruptcy	\$23,796	1.01%
Suits & Judgments	\$363,198	15.44%
Payout & Hardships	\$289,290	12.30%
Insolvent & Abandoned Property	\$11,420	0.49%
Research in Progress	\$812,486	34.54%

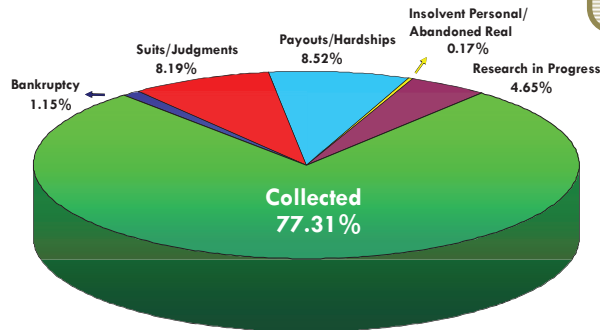


**36.23%**  
Collected in  
**3 Months**

**Delinquent Taxes Collected: \$852,205**

### COLLECTION STATUS OF 2021 DELINQUENT TAXES

Category	Amount	Percent
<b>Total Due (7/1/22)</b>	\$1,897,400	
<b>Collected**</b>	<b>\$1,466,891</b>	<b>77.31%</b>
Bankruptcy	\$21,866	1.15%
Suits & Judgments	\$155,356	8.19%
Payout & Hardships	\$161,747	8.52%
Insolvent & Abandoned Property	\$3,260	0.17%
Research in Progress	\$88,281	4.65%

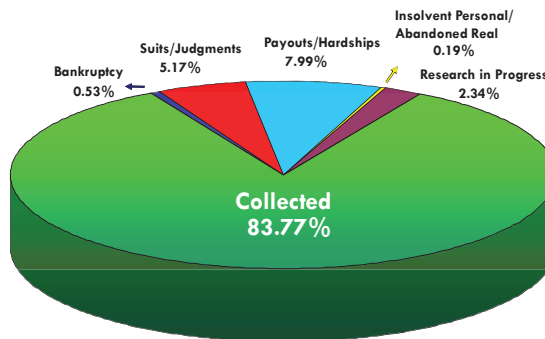


**77.31%**  
Collected in  
**15 Months**

**Delinquent Taxes Collected: \$1,466,891**

### COLLECTION STATUS OF 2020 DELINQUENT TAXES

Category	Amount	Percent
<b>Total Due* (7/1/20)</b>	\$1,615,285	
<b>Collected**</b>	<b>\$1,353,177</b>	<b>83.77%</b>
Bankruptcy	\$8,610	0.53%
Suits & Judgments	\$83,503	5.17%
Payout & Hardships	\$129,109	7.99%
Insolvent & Abandoned Property	\$3,023	0.19%
Research in Progress	\$37,863	2.34%



**83.77%**  
Collected in  
**27 Months**

**Delinquent Taxes Collected: \$1,353,177**

\*2020 Total Due was reduced by tax office adjustments of \$875,011

\*\* Collected amount listed includes taxes collected and taxes deleted due to tax office adjustments

## **THIS OUTSTANDING LEVEL OF COLLECTIONS DID NOT SIMPLY HAPPEN.**

- We have worked diligently collecting these taxes. MVBA has conducted a comprehensive delinquent tax collection program, which provides for:
  - Regular and systematic mailing of delinquent tax notices to delinquent property owners.
  - Thorough title examinations and ownership verification on selected delinquent tax accounts.
  - Pre-litigation notices to all property owners and lienholders on each delinquent tract of real property; and
  - The filing and prosecuting of delinquent tax suits to judgment and the final sale of the property to satisfy the tax delinquency if payment arrangements were not satisfactory made.
  - We believe that these charts graphically depict the results of MVBA's aggressive delinquent tax collection program.

## **DEFINITIONS AND COMMENTS REGARDING CHARTS ON PAGE 5**

### **Lawsuits/Judgments**

MVBA files delinquent tax suits for the collection of delinquent taxes. Often property owners enter into payment arrangements subsequent to the filing of suit. Further prosecution of these delinquent tax suits is abated as long as the taxpayer complies with the payout agreement. If the property owner makes no effort to pay after suit is filed and citation is served, or if the taxpayer defaults on a payout agreement, judgment is sought. If taxes remain unpaid, subsequent to judgment, an order of sale is issued, and the property is posted for sale.

### **Bankruptcy**

When a property owner files bankruptcy collection activity is prohibited under the United States Bankruptcy Code. MVBA monitors the progress of bankruptcy cases and filed appropriate motions and objections with the Bankruptcy Court to ensure that the tax claims and the tax liens are accorded the highest possible priority. The amount of the claims that will ultimately be paid, particularly in Chapter 7 cases, cannot be estimated.

### **Insolvent Personal & Abandoned Real Property**

Tax accounts on which delinquent notices mailed by MVBA have been returned to us by the U. S. Postal Service as undeliverable or accounts for which the Appraisal District or Tax Office has been unable to determine an address. MVBA is engaged in an extensive address research program. When new addresses are found, notices are promptly sent. However, without an

accurate address personal property delinquent taxes are, as a practical matter, uncollectable. Some of these accounts represent mobile homes that are no longer in the County. In most cases, the Appraisal District has no knowledge of the whereabouts of the owners of these mobile homes. These accounts are uncollectable because collection activity against the owners is effectively precluded. There are numerous business personal accounts where the business is no longer operating. When a business ceases operation, often the owner leaves the County and/or State. Even if the owners of the business can be located, they are usually “judgment proof”. Many of these businesses were corporations which are either defunct or have no assets. The whereabouts of the owners of a few real property accounts are unknown. These are unimproved lots or vacant acreage tracts making it extremely difficult to locate the owners. In some cases, the record owners are deceased, and their heirs are unknown or cannot be located. The owners of these vacant and abandoned properties will be served with citation by publication and the properties sold at tax sales.

#### **Pre-Litigation Payouts/Deferrals & Hardships**

Property owners enter into written installment payment agreements pursuant to §33.02 of the Property Tax Code prior to suit being filed. These payment agreements are tailored to the individual taxpayer’s ability to pay based on their particular financial problems. As a result of the payout agreements, a steady flow of tax payments is received.

There are also, taxpayers who have claimed the over-65 deferral provided by the Tax Code, which prevents the collection of the delinquent taxes assessed against their homesteads. In addition, a few property owners have been designated as hardship cases. Hardship cases are those in which the property owners have documented severe medical conditions or acute financial problems that warrant unusual consideration. Designation as a hardship merely delays collection but does allow for the eventual collection of the taxes.

#### **Research in Progress**

This segment refers to those accounts, which do not have any known impediment to the collection process or specific collection activity pending. MVBA has sent several notices of delinquency on each account. We are continuing to place additional accounts under litigation. However, we stress that there may be circumstances which may preclude the collection of some of these taxes. These may include bankruptcies, insolvent or closed businesses, hardship cases, and/or incorrect addresses which are unknown. Nevertheless, MVBA will continue to use all appropriate efforts to collect the delinquent taxes that are due.

## DELINQUENT PROPERTY TAX COLLECTION ACTIVITY

(October 1, 2022 through September 30, 2023)

### TAXPAYER NOTIFICATION

Our experience has proven that the right notice to the right person at the right time results in the payment of taxes to our client. For this reason, *McCreary, Veselka, Bragg & Allen* sends a series of letters to property owners both before and after we have filed a delinquent tax suit against a property owner and the property. Listed below are various types of notices sent by MVBA to property owners notifying them of their tax delinquency and the status of legal action taken by MVBA to collect the taxes.

Many delinquent accounts are collected as a result of giving the property attention to finding the correct address of a property owner. Delinquent accounts with unknown or incorrect addresses are researched by MVBA through the use of Texas Motor Vehicle registration information, internet databases, telephone directories, city directories, utility records, voter registration records, assumed name files and the records of the Secretary of State. When MVBA obtains new addresses, notices are immediately sent informing the property owner of their tax and notifies the Tax Office of the new address so that the tax records can be updated.

<i>Type of Notices</i>	<i>Number of Notices</i>
<b>Initial Notices</b> are polite, but pointed, notices designed to remind the delinquent property owner of their tax liability and urging voluntary payment of the taxes due.	2,595
<b>Delinquent Notices</b> are more insistent notices requiring payment of the delinquent taxes.	2,178
<b>Demand Notices</b> are sent on selected accounts giving notice that if the taxes are not paid, a delinquent tax suit will be filed against the property owner and the property.	1,427
<b>TOTAL NOTICES</b>	<b>6,200</b>

## *LITIGATION*

MVBA files delinquent tax suits when property owners and all other parties whom MVBA has determined to have an interest in the property fail to respond to the notices sent to them. Delinquent tax suits filed by MVBA seek a personal judgment against the property owner and foreclosure and sale of the property to satisfy the tax delinquency. When all delinquent taxes, penalties and interest have been paid to the taxing jurisdiction, and all costs of court have been paid in the lawsuit, the lawsuit is dismissed against both the property owner and the property.

<i>Number of Suits</i>	<i>Number of Defendants</i>	<i>Number of Properties</i>	<i>Amount Due</i>
144	396	179	\$664,989

## *JUDGMENTS*

When the property owner and all parties who have an interest in the property have been served with citation, MVBA notifies the property owner and all other defendants in the lawsuit of the date at which a hearing will be held in District Court to seek a judgment against the property owner and the property. MVBA recovers judgments against the property owner and the property, authorizing sale of the property in order to recover the delinquent taxes, penalties and interest owed. If the property owner pays the total amount of taxes, penalties, interest and costs after judgment has been rendered by the District Court, the judgment is released against both the property owner and the property.

<i>Number of Judgments</i>	<i>Number of Defendants</i>	<i>Number of Properties</i>	<i>Amount Due</i>
92	505	124	\$578,112

## ***TAX SALES***

Should the property owner fail to respond to the notice of judgment, MVBA proceeds with a Sheriff's Sale of the property. MVBA publishes a Notice of Sale in the local newspaper and sends copies to the property owner and all other defendants in the delinquent tax suit, as required by law. In many instances, the property owner either pays the taxes prior to sale or enters into satisfactory arrangements for the payment of the taxes, in which case the property is withdrawn from the Sheriff's Sale. Properties offered for sale are either conveyed to purchasers, or if no acceptable bid is made on the property, conveyed to the taxing units in lieu of payment of taxes. MVBA assists the Sheriff in conducting the sale and prepares the deeds to the purchasers, finalizes the sale papers and supervises the distribution of the sale proceeds to the taxing authorities in order to satisfy the tax delinquency.

<i>Properties Posted for Sale</i>	<i>Properties Paid/Payout</i>	<i>Properties Sold/Conveyed into Trust</i>	<i>Amount Due</i>
79	58	21	\$346,281

## ***BANKRUPTCY LITIGATION***

**McCreary, Veselka, Bragg & Allen's** bankruptcy department closely supervises those individuals and corporations that file for protection under the bankruptcy laws who owe taxes. Through our fully computerized bankruptcy tracking system, MVBA files and monitors all claims for taxes owed by the bankrupt debtor. Proofs of Claim are filed by MVBA to assert the amount of tax, penalty and interest due when the bankruptcy is filed. Administrative claims are filed to seek recovery of taxes that arise after the debtor has filed bankruptcy. Our attorneys review all Motions and Plans for Reorganization filed by the debtor or any other creditor with the Bankruptcy Court, aggressively assert the tax claims, and defend the tax liens of our clients to the fullest extent allowed under the Bankruptcy Code.

<i>Type</i>	<i>Number of Bankruptcies</i>	<i>Number of Properties</i>	<i>Amount Due</i>
<b>Bankruptcies Filed</b>	27	31	\$230,741
<b>Bankruptcies Dismissed</b>	13	19	175,863

***PROPERTY VALUE AUDIT***

Our firm filed audits of the district’s taxable value with the Comptroller of Public Accounts. The audits reported corrections and changes to the District’s tax roll which decreased the District’s taxable value and tax levy. The audit lowered the Comptroller’s finding of the District’s taxable which it reported to the Texas Education Agency and entitled the District to additional state aid. The amount of additional state aid is set out below:

<i>Tax Year</i>	<i>Additional State Aid</i>
<b>2016</b>	\$453,605
<b>2017</b>	\$824,758
<b>2018</b>	\$1,283,139
<b>2019</b>	\$1,482,071
<b>2020</b>	<b>\$1,732,108</b>
<b>Total</b>	<b>\$5,775,681</b>

***FEE FOR SERVICES***

MVBA provides all legal representation for a contingent fee of the delinquent taxes, penalties and interest collected. Our attorney fees are paid entirely by the delinquent property owners upon payment of the delinquent taxes as an additional penalty pursuant to the Texas Tax Code.

*All of our collection services are provided at no cost to the district*

**Waco Independent School District**

**Board of Trustee Meeting Agenda Item**

**Date:** October 26, 2023

**Contact Person:** Sheryl Davis

**RE: Monthly and Quarterly Financial Reports for the Period Ended August 31, 2023**

=====

**Background Information:**

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

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

Also attached are the quarterly reports for the following:

- Tax Collection Report
- Cash and Investment Report
- Cash Flow Projection

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 and quarterly financial reports for the period ended August 31, 2023, 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

October 20, 2023

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 August 31, 2023 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 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 audited 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 August 31, 2023**

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 August have increased \$10.9 million over last year. \$5.4 million of the increase is a change in accounting for properties in the Tax Increment Zone 1, which would have been reported as Other Local Revenue in last year's financial statements as discussed below. As a percent of estimated revenue, current year collections lag last year's by approximately 3.3%. Approximately, \$1.3 million of this difference results from cumulative value adjustments in the current year. This year, we have experienced a cumulative decrease in values of \$85.8 million compared to an increase last year in values of \$248.2 million.

5740 Other Local Revenue – Revenues have decreased \$4.4 million from last year. This is primarily attributable to the expiration of the District's participation in the Tax Increment Fund, which decreased revenues by \$5.4 million. Other revenue decreases include \$0.7 million in insurance recoveries received last year and the \$1.4 million refund from the expiration of the Tax Increment Reinvestment Zone #2. This decrease in revenue is partially offset by an increase in investment earnings of \$3.1 million.

5750 Extracurricular Activities – Revenues from extracurricular activities, primarily athletics, continue to be down from the prior year, decreasing \$150,744.

5760 Intermediate Source Revenue – The District received its second payment on the \$2.5 million that the County has pledged to reimburse the District for the rebuild of Paul Tyson Stadium. Because the County began to service the debt incurred in building its new facilities from the venue taxes collected, the excess amount available to pay the City and Waco ISD was greatly reduced from 2022. Waco ISD received a payment of \$1.0 million last year and only \$310,435 this year. I have requested an anticipated repayment schedule from the County. Based on the schedule provided, the District will receive three more payments averaging \$357,000 and a final payment in 2027 of approximately \$92,000. The payment schedule estimates revenue increases for the venue of 3% each year. If the increase in revenue is higher, as anticipated, the pay back will be accelerated.

5810 Per Capita and Foundation School Program Revenue – Revenue from the Foundation School Program has decreased \$16.4 million from last year. Because of the interplay with property tax revenue increases (local fund assignment), this represents a \$7.6 loss in revenue. This is due to a continued loss in enrollment as well as a lower than pre-COVID average daily attendance rate. The loss in revenue for the current school year is partially offset by \$1.7 million received from an appeal of our 2021 property values.

5900 Federal Sources Revenue – Additional revenue of \$0.9 million is due to an increase in indirect cost recoveries from federal grants, primarily ESSER funds.

## **Functional Expenditures:**

Expenditures in the functional categories appear to be consistent with last year's spending pattern and increases related to salary rate and benefit increases with the exceptions shown below.

12 Instructional Resources & Media – Expenditures have decreased \$0.4 million. This is a result of professional librarian and instructional media staff being funded through federal stimulus grants with an accompanying reduction of library aides in the general fund.

13 Curriculum & Instructional Staff Development – The decrease in expenditures of \$0.4 million is due to a decrease in the instructional specialist positions to fund supplemental instructional teachers funded in function 11.

31 Guidance, Counseling & Evaluation – Expenditures have increased \$0.5 million or 9.1% over last year. Increases in special education services such as diagnosticians and school psychologists are a result of the increases in identified special education students.

34 Student Transportation – The increase of \$0.4 is due in part to the annual rate increase as well as \$89,149 in white fleet purchases to assist in the transportation of homeless students as well as increases in fuel costs.

41 General Administration – Expenditures have increased \$0.5 million over last year. This increase is primarily due to increases in payroll costs, salaries and benefits.

52 Security & Monitoring Services – Expenditures have increased 10.3% or \$0.3 million over last year. Most of the increase is due to the purchase of the EVOLV systems, metal detectors, and an increase in contracted security rates that, because of the late bid award last summer, was not anticipated in building the 2023-2024 budget.

53 Data Processing Services – Expenditures decreased \$0.8 million from last year. Most of the decrease was due to the ability to fund technology expenditures from federal fund sources such as E-Rate and stimulus funds.

71 Debt Service – Debt service expenditures are due to the implementation of Governmental Accounting Standards Board (GASB) Statement 87 for Leases. The District is now required to capitalize and amortize leases of more than one-year. These leases include copiers, districtwide, as well as the dark fiber installed through Erate funding.

81 Facilities Acquisition and Construction – Expenditures have decreased \$4.8 million due to the completion of construction projects, particularly the Paul Tyson Stadium. Expenditures for the infrastructure for the child nutrition program's walk-in cooler/freezer was distributed over both fiscal years.

97 Payments to Tax Increment Fund – As discussed above, the decrease of \$7.0 million is due to the expiration of the District's participation in the Tax Increment Fund.

99 Other Intergovernmental Charges – The 15.3% increase is attributable to an increase in Waco ISD's share of costs for the McLennan County Central Appraisal District.

## Child Nutrition Fund

### **Revenues:**

5740 Other Local Revenue – The revenue increase of \$34,875 reflects investment earnings on child nutrition funds.

5750 Extracurricular Activities – Revenues generated through adult meals and catering have increased \$92,938 or 21.0% over last year. Although there was an increase in adult meal rates, most of this increase is due to increased participation as well as catering services.

5900 Federal Sources Revenue – Federal reimbursements for meals reflect a decrease of \$0.4 million. In spite of the decreased percentage, participation was back to normal and we saw an increase in the number breakfast and lunch served. However, 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 1<sup>st</sup>. The District was reimbursed at 95% for the 2022-2023 school year rather than the 100% received for the past five years under the program. The District was recently informed that the reimbursement rate would return to 100% for the 2023-2024 school year. Other losses in revenue were attributable to a decrease in commodities of approximately \$0.4 million (because we received additional commodities last year due to stimulus funding) and there was an over-accrual of revenues for the 2021-2022 school year of \$296,652 that was adjusted in the current 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 increased \$0.5 million over last year. The increase is due to the receipt of \$1.9 million in equipment and vehicle purchases offset by salary savings. Most of these purchases had been planned for the 2021-2022 fiscal year to draw down the program's excess fund balance. However, supply chain issues had delayed the purchases.

Even though we were able to purchase much of the equipment and vehicles planned for the prior year, the unavailability of items and continued vacancies resulted in an increase in the fund balance of \$364,398 bringing the ending fund balance to \$6.0 million. This amount exceeds the allowable amount by \$3.3 million. An amendment to budget the excess resources has been submitted with the October agenda for approval.

## Debt Service Fund

### **Revenues:**

5710 Local Property Taxes – Property tax collections at the end of June have increased \$10.3 million 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. The increase in tax rate was required to service the newly issued debt from the 2021 bond election.

5740 Other Local Revenue – Because of the expiration of the District’s participation in Tax Increment Zones 1 and 2, pass-through property tax collections for those properties have decreased \$1.2 million. This decrease in revenue is offset by a like decrease in pass-through expenditures shown in function 97. The decrease in collections is partially offset by an increase in investment income of \$285,347.

5820 Other State Program (TEA) – Revenues from I&S Hold Harmless funds, allotted by the State to offset the impact of the increase in the homestead exemption, increased by \$147,900.

**Functional Expenditures:**

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

71 Debt Service – Expenditures had increased \$8.8 million over last year due to payment of principal and interest on bonds issued in 2022.

97 Payments to Tax Increment Fund – As discussed above, expenditures have decreased \$1.2 million due to the expiration of the TIF Zone #1.

**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 August 31, 2023, expenditures exceeded revenues by \$1.8 million, a decline of \$1.2 million from last year. The decline is largely due to the increase in prescription drug claims of \$1.3 million as well as a decrease in prescription drug rebates of \$0.4 million. In July, expenditures for medical claims had increased 29.4% over the same month last year and expenditures for prescription drugs increased 50.9%. However, in August, while prescription drug claims continued to increase by 31.8% over last year, monthly medical claims expenditures were down by 44.9%. This decrease was due in large part to the receipt of stop-loss coverage for large claims of \$350,341.

The following chart reflects net operations for the various programs accounted for in the fund:

Program	Revenues	Expenditures	Net
Group Health Insurance	\$ 14,000,368	\$ 15,961,442	\$ (1,961,073)
Unemployment Compensation	118,930	21,210	97,721
Workers’ Compensation	383,718	207,043	176,675
Wellness Programs*	0	60,345	(59,915)
Total	\$ 14,503,016	\$ 16,250,039	\$ (1,747,023)

\*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 \$21,210 for the year. Charges for the second quarter of 2023 totaled \$8,121 with \$5 recouped from overpayments under the federal Cares Act and credit adjustments of \$289.

Workers' compensation claims expenditures have decreased \$99,674 from last year, the administrative fee for the program is now due at the beginning of the fiscal year rather than in monthly installments. Part of the decrease is attributable to a refund of \$27,936 of 2021-2022 premiums based on the workers' compensation payroll audit. The remainder is due to a decrease in the reserves for the estimated allocated loss adjustment expense at August 31, 2023.

Beginning 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. The ending reserves for the estimated allocated loss adjustment expense (ALAE) for the partially self-funded workers' compensation plan totaled \$228,137. The unaudited beginning net position at September 1, 2022 was \$2,992,233.

### **Tax Collections**

Cumulative value adjustments as of August 31, 2023, have decreased the certified taxable values by \$85.8 million bringing the adjusted taxable value to \$8.7 billion. This is an increase of \$1.2 billion over last year's adjusted values.

The number of accounts paid has decreased 147 from this time last year; current year tax collections have increased \$14.2 million; and collections on prior years' levies with related penalties, interest, and attorney fees have increased \$0.6 million.

Taxes receivable at August 31, 2023, total \$3.9 million.

Waco Independent School District  
**BALANCE SHEET**  
**GENERAL FUND**  
As of August 31, 2023

**ASSETS**

Cash and Temporary Investments	75,382,882
Property Taxes Receivable, Net of Allowance of \$2,216,808	869,765
Due from Other Governments	75,915
Accrued Interest	388,137
Due from Other Funds	12,055,068
Other Receivables	970,716
Inventories	315,905
Deferred Expenditures	525
Total Assets	\$ 90,058,914

**LIABILITIES**

Accounts Payable	2,464,192
Other Current Liabilities	-
Payroll Withholdings and Contributions Payable	1,534,017
Accrued Wages Payable	5,714,474
Due to Other Funds	3,796,866
Due to Other Governments	17,887,458
Unearned Revenue	10,685
Total Liabilities	\$ 31,407,692

**DEFERRED INFLOWS OF RESOURCES**

Unavailable Revenues - Property Taxes	\$ 869,765
Total Deferred Inflows of Resources	\$ 869,765

**FUND BALANCES**

Nonspendable Fund Balance	\$ 316,430
Restricted Fund Balance	2,972,739
Committed Fund Balance	2,038,326
Unassigned Fund Balance	52,453,961
Total Fund Balances	\$ 57,781,456
Total Liabilities and Fund Balances	\$ 90,058,914

**Waco Independent School District**  
**STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE**  
**BUDGET AND ACTUAL**  
**For the Period Ended August 31, 2023**

**GENERAL 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 8/31/2023	Prior Year 8/31/2022	Current 8/31/2023	Prior Year 8/31/2022			
<b>REVENUES</b>									
<b>LOCAL SOURCES</b>									
5710 Local Property Taxes	\$ 81,805,900	81,805,900	316,085	336,342	78,726,124	67,787,638	(3,079,776)	96.24%	99.53%
5720 Services to Other Districts	74,000	74,000	8,728	-	82,097	68,512	8,097	110.94%	75.98%
5730 Tuition & Fees	193,000	193,000	-	452	187,843	190,447	(5,157)	97.33%	224.06%
5740 Other Local Revenue	468,300	481,350	1,206,851	64,188	4,572,256	8,958,853	4,090,906	949.88%	85.43%
5750 Extracurricular Activities	390,400	390,400	19,246	21,760	291,941	442,685	(98,459)	74.78%	200.31%
5760 Intermediate Source (C.E.D.)	1,000,000	1,000,000	-	-	310,434	1,000,004	(689,566)	0.00%	0.00%
Total Local Sources	\$ 83,931,600	83,944,650	1,550,910	422,742	84,170,694	78,448,139	226,044	100.27%	99.31%
<b>STATE SOURCES</b>									
5810 Per Capita & FSP Act	\$ 58,788,960	60,471,715	(4,228,011)	3,431,575	57,244,931	73,666,255	(3,226,784)	94.66%	93.45%
5830 Other State Program	7,165,711	7,165,711	1,189,123	1,031,286	7,154,819	7,157,003	(10,892)	99.85%	98.57%
Total State Sources	\$ 65,954,671	67,637,426	(3,038,888)	4,462,861	64,399,750	80,823,258	(3,237,676)	95.21%	93.88%
<b>FEDERAL SOURCES</b>									
5900 Federal Sources Revenue	8,090,727	5,245,682	68,727	2,023,912	6,276,910	5,426,351	1,031,228	119.66%	138.82%
Total Revenues	\$ 157,976,998	156,827,758	(1,419,251)	6,909,515	154,847,354	164,697,748	(1,980,404)	98.74%	97.46%
<b>EXPENDITURES</b>									
11 Instruction	\$ 88,908,434	89,467,825	10,196,576	9,040,692	84,193,930	84,131,453	5,273,895	94.11%	92.55%
12 Instructional Resources & Media	558,313	596,335	72,966	65,460	525,762	923,496	70,573	88.17%	87.25%
13 Curriculum & Staff Development	4,368,265	4,244,968	441,404	470,749	3,529,625	3,928,495	715,343	83.15%	85.41%
21 Instructional Leadership	4,131,369	4,062,044	405,236	390,013	3,737,713	3,641,031	324,331	92.02%	95.95%
23 School Leadership	10,144,781	10,484,083	1,159,899	1,149,731	10,314,008	9,973,004	170,075	98.38%	97.23%
31 Guidance, Counseling & Evaluation	5,785,954	5,985,878	656,423	579,609	5,819,092	5,331,987	166,786	97.21%	101.80%
32 Social Work Services	806,369	817,506	85,788	76,385	710,532	733,384	106,974	86.91%	77.05%
33 Health Services	1,501,102	1,523,331	186,592	176,486	1,496,013	1,428,087	27,318	98.21%	91.43%
34 Student Transportation	3,761,600	5,397,248	220,085	188,822	3,004,194	2,612,824	2,393,054	55.66%	58.22%
35 Food Services	-	-	-	-	-	46,652	-	0.00%	0.00%
36 Extracurricular Activities	5,686,449	5,801,287	505,794	595,292	5,512,026	5,522,909	289,261	95.01%	96.42%
41 General Administration	7,323,927	7,452,032	713,241	631,603	6,745,136	6,224,476	706,896	90.51%	87.88%
51 Plant Maintenance & Operations	17,617,917	19,768,116	1,759,625	2,594,945	17,434,959	17,391,239	2,333,157	88.20%	82.26%
52 Security & Monitoring Services	2,765,386	3,516,730	379,841	265,184	2,887,015	2,615,472	629,715	82.09%	90.16%
53 Data Processing Services	4,289,383	3,646,355	334,410	248,513	3,624,642	4,448,508	21,713	99.40%	96.57%
61 Community Services	487,519	685,140	33,034	43,552	633,311	584,904	51,829	92.44%	85.41%
71 Debt Service	345,000	780,071	73,794	26,197	599,712	321,805	180,359	0.00%	0.00%
81 Facilities Acquisition & Construction	-	809,668	(29,191)	251,584	457,622	5,218,328	352,046	0.00%	0.00%
93 Shared Services Arrangements	345,000	414,911	299,000	-	299,000	290,000	115,911	72.06%	84.06%
95 Juvenile Justice Program	650,000	670,000	35,070	55,242	601,613	601,643	68,387	89.79%	85.95%
97 Payments to Tax Increment Fund	25,000	25,000	(6,477)	55,379	(5,691)	6,969,754	30,691	-22.77%	85.69%
99 Other Intergovernmental Charges	808,424	832,984	-	-	832,484	721,825	500	99.94%	88.00%
Total Expenditures	\$ 160,310,192	166,981,512	17,523,109	16,905,438	152,952,698	163,661,276	14,028,814	91.60%	90.06%
Excess (Deficiency) of Revenues Over (Under) Expenditures	\$ (2,333,194)	(10,153,754)	(18,942,359)	(9,995,923)	1,894,656	1,036,472	12,048,410		
<b>OTHER FINANCING SOURCES (USES)</b>									
7900 Other Sources	-	1,423,500	-	-	984,172	1,339,520	(439,328)		
8900 Other Uses	(1,030,292)	(1,030,292)	(351,301)	(521,432)	(351,301)	(521,432)	(678,991)		
Total Other Financing Source (Uses)	\$ (1,030,292)	393,208	(351,301)	(521,432)	632,871	818,088	(1,118,318)		
Total Changes in Fund Balances	\$ (3,363,486)	(9,760,546)	(19,293,661)	(10,517,355)	2,527,527	1,854,560	12,288,073		
Fund Balances, Beginning	41,078,214	55,253,929			55,253,929	53,543,235	-		
Fund Balances, Ending	\$ 37,714,728	45,493,383			57,781,456	55,397,795	12,288,073		

Waco Independent School District  
**EXPENDITURES AND ENCUMBERED FUNDS BY FUNCTION AND MAJOR OBJECT**  
**GENERAL FUND**  
For the Period Ended August 31, 2023

								<i>(Memo)</i>	
		Payroll	Purchased & Contracted	Supplies & Materials	Other Operating	Debt Services	Capital Outlay	Total Year-to-Date	Total Year-to-Date
		6100	6200	6300	6400	6500	6600	6000	6000
11	Instruction	\$ 77,056,554	2,355,144	4,005,728	579,756		197,199	84,194,380	84,131,453
12	Instructional Resources & Media	400,743	35,359	69,485	4,088			509,674	923,496
13	Curriculum & Staff Development	2,779,347	313,674	96,164	340,973		-	3,530,157	3,928,496
21	Instructional Leadership	3,260,406	162,850	132,652	181,806			3,737,713	3,641,031
23	School Leadership	9,815,099	105,675	225,323	169,230			10,315,327	9,973,003
31	Guidance, Counseling & Evaluation	5,370,688	227,018	155,479	57,846			5,811,031	5,331,988
32	Social Work Services	692,826	-	6,295	11,412			710,532	733,385
33	Health Services	1,438,915	6,381	46,929	3,788			1,496,013	1,428,087
34	Student Transportation		3,172,510	365,255	(623,520)		89,950	3,004,194	2,612,824
35	Food Services							-	46,652
36	Co/Extracurricular Activities	3,098,942	606,992	711,552	1,005,848		89,082	5,512,416	5,522,908
41	General Administration	4,963,155	1,015,170	257,700	443,446		65,665	6,745,136	6,224,476
51	Plant Maintenance & Operations	7,883,142	6,893,084	1,213,727	1,043,459		401,847	17,435,259	17,391,239
52	Security & Monitoring Services	1,666,315	525,265	285,572	17,916		391,946	2,887,015	2,615,472
53	Data Processing Services	1,644,749	280,188	1,380,702	32,544		286,460	3,624,642	4,448,508
61	Community Services	282,638	321,422	19,713	9,396			633,169	584,904
71	Debt Service					599,712		599,712	321,805
81	Facilities Acquisition & Construction	634					456,989	457,622	5,218,328
93	Shared Services Arrangements				299,000			299,000	290,000
95	Juvenile Justice Program				601,613			601,613	601,643
97	Payments to Tax Increment Fund				(5,691)			(5,691)	6,969,753
99	Other Intergovernmental Charges		832,484					832,484	721,825
Total Expenditures & Encumbered Funds		<u>\$ 120,354,151</u>	<u>16,853,215</u>	<u>8,972,275</u>	<u>4,172,908</u>	<u>599,712</u>	<u>1,979,137</u>	<u>152,931,399</u>	<u>163,661,276</u>

Waco Independent School District  
**BALANCE SHEET**  
**CHILD NUTRITION FUND**  
As of August 31, 2023

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**ASSETS**

Cash and Temporary Investments	\$ 5,533,765
Due from Other Governments	962,123
Accrued Interest	4,271
Due from Other Funds	683,520
Other Receivables	3,342
Total Assets	<u>\$ 7,187,021</u>

**LIABILITIES**

Accounts Payable	\$ 528,243
Accrued Wages Payable	115,006
Due to Other Funds	503,087
Total Liabilities	<u>\$ 1,146,337</u>

**FUND BALANCES**

Restricted Fund Balance	\$ 6,040,684
Total Fund Balances	<u>\$ 6,040,684</u>
Total Liabilities and Fund Balances	<u>\$ 7,187,021</u>

Waco Independent School District  
**STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE**  
**BUDGET AND ACTUAL**  
For the Period Ended August 31, 2023

**CHILD NUTRITION 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			
			8/31/2023	8/31/2022	8/31/2023	8/31/2022			
<b>REVENUES</b>									
LOCAL SOURCES									
5740 Other Local Revenue	\$ 32,000	32,000	(5,249)	820	41,288	6,413	9,288	129.03%	25.65%
5750 Extracurricular Activities	403,000	403,000	57,084	50,615	535,474	442,536	132,474	132.87%	109.84%
Total Local Sources	\$ 435,000	435,000	51,835	51,435	576,762	448,949	141,762	132.59%	104.92%
STATE SOURCES									
5820 Other State Program (TEA)	\$ -	-	-	-	173,594	-	173,594	0.00%	0.00%
Total State Sources	\$ -	-	-	-	173,594	-	173,594	0.00%	0.00%
FEDERAL SOURCES									
5900 Federal Sources Revenue	\$ 9,485,099	9,910,206	789,750	715,297	10,596,485	10,986,866	686,279	106.92%	113.95%
Total Revenues	\$ 9,920,099	10,345,206	841,585	766,732	11,346,841	11,435,815	1,001,635	109.68%	113.57%
<b>EXPENDITURES</b>									
35 Food Services	\$ 10,978,538	13,688,922	1,080,035	1,740,436	11,077,963	10,602,235	2,610,959	80.93%	76.72%
Total Expenditures	\$ 10,978,538	13,688,922	1,080,035	1,740,436	11,077,963	10,602,235	2,610,959	80.93%	76.72%
Excess (Deficiency) of Revenues Over (Under) Expenditures	\$ (1,058,439)	(3,343,716)	(238,450)	(973,704)	268,878	833,580	3,612,594		
<b>OTHER FINANCING SOURCES (USES)</b>									
7900 Other Sources	-	-	-	135,985	95,520	135,985	95,520		
Total Other Financing Sources (Uses)	\$ -	-	-	135,985	95,520	135,985	95,520		
Total Changes in Fund Balances	\$ (1,058,439)	(3,343,716)	(238,450)	(837,719)	364,398	969,565	3,708,114		
Fund Balances, Beginning	2,758,147	5,676,286			5,676,286	4,698,491	-		
Fund Balances, Ending	\$ 1,699,708	2,332,570			6,040,684	5,668,056	3,708,114		

Waco Independent School District  
**EXPENDITURES AND ENCUMBERED FUNDS BY FUNCTION AND MAJOR OBJECT**  
**CHILD NUTRITION FUND**  
For the Period Ended August 31, 2023

							<i>(Memo)</i>
							<b>Total</b>
							<b>Year-to-Date</b>
							<b>8/31/2023</b>
							<b>8/31/2022</b>
							<b>6000</b>
<b>Payroll</b>	<b>Purchased &amp;</b>			<b>Other</b>	<b>Capital</b>		
<b>Costs</b>	<b>Contracted</b>	<b>Supplies &amp;</b>	<b>Operating</b>	<b>Costs</b>	<b>Outlay</b>		
<b>6100</b>	<b>Services</b>	<b>Materials</b>	<b>Costs</b>	<b>6400</b>	<b>6600</b>		
<b>6100</b>	<b>6200</b>	<b>6300</b>	<b>6400</b>	<b>6600</b>	<b>6000</b>		
35 Food Services	\$ 3,033,503	4,507,588	1,764,249	14,822	1,757,802	11,077,963	10,602,235
Total Expenditures & Encumbered Funds	<u>\$ 3,033,503</u>	<u>4,507,588</u>	<u>1,764,249</u>	<u>14,822</u>	<u>1,757,802</u>	<u>11,077,963</u>	<u>10,602,235</u>

Waco Independent School District  
**BALANCE SHEET**  
**DEBT SERVICE FUND**  
As of August 31, 2023

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**ASSETS**

Cash and Temporary Investments	\$ 5,240,648
Property Taxes Receivable, Net of Allowance of \$548,099	255,845
Due from Other Governments	<u>(124,021)</u>
Total Assets	<u><u>\$ 5,372,472</u></u>

**LIABILITIES**

Due to Other Funds	31,653
Due to Other Governments	<u>-</u>
Total Liabilities	<u><u>\$ 31,653</u></u>

**DEFERRED INFLOWS OF RESOURCES**

Unavailable Revenues - Property Taxes	<u>\$ 255,845</u>
Total Deferred Inflows of Resources	<u><u>\$ 255,845</u></u>

**FUND BALANCES**

Restricted Fund Balance	<u>\$ 5,084,974</u>
Total Fund Balances	<u><u>\$ 5,084,974</u></u>
Total Liabilities and Fund Balances	<u><u>\$ 5,372,472</u></u>

Waco Independent School District  
**STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE**  
**BUDGET AND ACTUAL**  
For the Period Ended August 31, 2023

**DEBT SERVICE 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 8/31/2023	Prior Year 8/31/2022	Current 8/31/2023	Prior Year 8/31/2022			
<b>REVENUES</b>									
<b>LOCAL SOURCES</b>									
5710	\$ 24,654,348	24,654,348	92,753	72,261	24,843,904	14,575,069	189,556	100.77%	99.94%
5740	25,000	25,000	50,175	17,212	651,423	1,518,876	626,423	2605.69%	86.05%
Total Local Sources	\$ 24,679,348	24,679,348	142,928	89,473	25,495,326	16,093,945	815,978	103.31%	98.44%
<b>STATE SOURCES</b>									
5820	\$ 221,700	221,700	(127,275)	15,069	449,138	301,238	227,438	202.59%	98.03%
Total State Sources	\$ 221,700	221,700	(127,275)	15,069	449,138	301,238	227,438	202.59%	98.03%
Total Revenues	\$ 24,901,048	24,901,048	15,653	104,542	25,944,464	16,395,183	1,043,416	104.19%	98.43%
<b>EXPENDITURES</b>									
71	\$ 24,896,048	24,896,048	15,890,011	12,385,759	24,864,058	16,091,216	31,991	99.87%	99.29%
97	5,000	5,000	(1,729)	4,259	1,667	1,154,468	3,333	33.35%	78.50%
Total Expenditures	\$ 24,901,048	24,901,048	15,888,282	12,390,018	24,865,725	17,245,684	35,323	99.86%	97.56%
Total Changes in Fund Balances	\$ -	-	(15,872,629)	(12,285,476)	1,078,739	(850,501)	1,078,739		
Fund Balances, Beginning	4,816,349	4,006,234			4,006,234	4,866,235	-		
Fund Balances, Ending	\$ 4,816,349	4,006,234			5,084,973	4,015,734	1,078,739		

Waco Independent School District  
**Statement of Net Position**  
**Proprietary Fund**  
As of August 31, 2023

	Governmental Activities ----- Internal Service Fund
<b>Assets</b>	
Current assets:	
Due from other funds	1,840,024
Other receivables	94,567
Total Assets	\$ 1,934,591
<b>Liabilities</b>	
Current liabilities:	
Accounts payable	\$ 109,306
Other current liabilities	1,022,182
Health claims payable	-
Due to other funds	(369,627)
Total current liabilities	\$ 761,860
Total liabilities	\$ 761,860
<b>Net position</b>	
Unrestricted net position	\$ 1,172,731
Total net position	\$ 1,934,591

**Waco Independent School District**  
**Statement of Revenues, Expenses, and Changes in Net Position**  
**Budget and Actual**  
**For the Period Ended August 31, 2023**

**Proprietary Fund**  
**Governmental Activities - Internal Service Fund**

	Budget	<i>(Memo)</i>		<i>(Memo)</i>		Difference Budget to Current Year-to-Date	CY YTD As % of Budget	PY YTD As % of Budget
		Monthly		Year-to-Date				
		Current 8/31/2023	Prior Year 8/31/2022	Current 8/31/2023	Prior Year 8/31/2022			
<b>Operating revenues:</b>								
Employee contributions:								
Group health	\$ 3,631,100	282,703	\$ 280,848	3,430,177	\$ 3,384,415	(200,923)	94.47%	111.55%
Assessments to other funds:								
Group health	10,236,500	790,853	792,656	9,766,473	9,582,168	(470,027)	95.41%	97.78%
Unemployment	112,000	12,763	20,490	118,930	234,319	6,930	106.19%	151.17%
Workers compensation	358,000	42,990	30,825	383,718	281,946	25,718	107.18%	122.59%
Prescription drug rebates	1,187,000	330,667	233,954	803,719	1,192,146	(383,281)	67.71%	138.62%
Insurance recovery	-	-	-	-	79,071	-	0.00%	0.00%
Total operating revenues	<u>\$ 15,524,600</u>	<u>1,459,975</u>	<u>1,358,773</u>	<u>14,503,016</u>	<u>14,754,065</u>	<u>(1,021,584)</u>	<u>93.42%</u>	<u>104.79%</u>
<b>Operating expenses:</b>								
Administrative fees	\$ 1,344,000	103,576	94,177	1,331,116	1,222,608	12,884	99.04%	79.40%
Claims expense:								
Medical claims	9,431,000	304,492	553,013	8,374,223	8,662,023	1,056,777	88.79%	121.09%
Prescription drug claims	3,928,000	458,506	347,850	4,917,840	3,601,629	(989,840)	125.20%	91.73%
Unemployment	102,000	-	-	21,210	90,665	80,790	20.79%	49.01%
Workers compensation	260,000	26,389	4,424	176,250	203,441	83,750	67.79%	76.77%
Stop-loss insurance	1,739,000	120,673	120,924	1,441,537	1,510,875	297,463	82.89%	92.98%
Wellness Program	67,000	430	4,293	60,345	82,395	6,655	90.07%	152.58%
Total operating expenses	<u>\$ 16,871,000</u>	<u>1,014,065</u>	<u>1,124,681</u>	<u>16,322,519</u>	<u>15,373,636</u>	<u>548,481</u>	<u>96.75%</u>	<u>104.24%</u>
Change in net position	<u>\$ (1,346,400)</u>	<u>445,910</u>	<u>234,092</u>	<u>(1,819,503)</u>	<u>(619,571)</u>	<u>(473,103)</u>		
<b>Net position:</b>								
Net position, beginning	<u>\$ 3,187,944</u>			<u>2,992,233</u>	<u>3,564,375</u>	<u>(195,711)</u>		
Net position, ending	<u>\$ 1,841,544</u>			<u>1,172,730</u>	<u>2,944,804</u>	<u>(668,814)</u>		

Waco Independent School District  
**Statement of Cash Flows**  
For the Period Ended August 31, 2023

**Proprietary Fund**

	Governmental Activities ----- Internal Service Fund
<b>Cash flows from operating activities:</b>	
Cash received from employee contributions	\$ 282,703
Cash received from assessments to other funds	477,589
Cash payments for claims	(789,387)
Cash payments for stop loss premiums	(120,673)
Cash payments for professional and contracted services	(103,576)
Net cash provided by operating activities	\$ 76,893
Net increase in cash and cash equivalents	\$ 76,893
Cash and cash equivalents at beginning of year	-
Cash and cash equivalents at end of year	\$ 76,893
 <b>Reconciliation of operating income to net cash provided by operating activities:</b>	
Operating gain (loss)	\$ 445,910
Effects of increases and decreases in current assets and liabilities:	
Decrease in receivables	(464,135)
Increase in accounts payable	95,118
Decrease in current liabilities	(72,480)
Net cash provided by operating activities	\$ 76,893

**Waco Independent School District**  
**TAX COLLECTION REPORT**  
For the Quarter Ended August 31, 2023

	Year-to-Date	
	Current 8/31/2023	Prior Year 8/31/2022
Certified Taxable Value	\$ 8,757,329,270	\$ 7,261,923,785
Cumulative Value Adjustments	(85,812,432)	248,172,937
Adjusted Taxable Value	<u>\$ 8,671,516,838</u>	<u>\$ 7,510,096,722</u>
Tax Rate	<u>\$ 1.241869</u>	<u>\$ 1.244640</u>
Paid Accounts	<u>42,094</u>	<u>42,241</u>

	Quarter		Year-to-Date	
	Current 8/31/2023	Prior Year 8/31/2022	Current 8/31/2023	Prior Year 8/31/2022
<b>Collections:</b>				
Current Year	\$ 1,096,992	\$ 1,120,994	101,763,018	87,582,185
Prior Years	134,874	70,255	630,618	363,549
Penalties & Interest	258,606	202,187	1,167,189	879,506
Other	172,112	154,348	417,907	390,073
Total Collections	<u>\$ 1,662,584</u>	<u>\$ 1,547,784</u>	<u>103,978,732</u>	<u>89,215,313</u>
<b>Disbursements:</b>				
Payments to Tax Increment Fund	\$ 10,574	\$ 1,776	59,114	(45,383)
Attorney Fees	(172,112)	(154,348)	(417,907)	(390,073)
Appraisal Commission Fees	(108)	(176)	(1,759)	(2,346)
Total Disbursements	<u>\$ (161,647)</u>	<u>\$ (152,748)</u>	<u>(360,552)</u>	<u>(437,802)</u>
Net Cash Inflow	<u>\$ 1,500,937</u>	<u>\$ 1,395,036</u>	<u>103,618,180</u>	<u>88,777,511</u>

**Collections as a Percent of Original Levy:**

Current Collections	1.0%	1.3%	97.4%	102.3%
Total Collections	1.2%	1.4%	98.0%	102.7%

	Current Year's Levy	Prior Years' Levies	Total
<b>Taxes Receivable at Period End:</b>			
Beginning Balance	\$ -	3,446,222	3,446,222
Tax Levy	104,503,899	-	104,503,899
Levy Adjustments	(1,127,963)	(538,073)	(1,666,036)
Levy Paid	<u>(101,763,018)</u>	<u>(630,618)</u>	<u>(102,393,636)</u>
Ending Balance	<u>\$ 1,612,918</u>	<u>2,277,530</u>	<u>3,890,448</u>



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

Sheryl Davis  
Chief Finance Officer

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

October 20, 2023

Board of Trustees  
Waco Independent School District  
Waco, Texas

Following is the quarterly summary of cash and investments held by the school district as of August 31, 2023. As of that date, the District had approximately \$14.5 million in on demand deposits at Extraco Bank. Another \$22.6 million was deposited in other FDIC insured investments including: \$3.0 million in the Texas Range Certificate of Deposit program, \$10.4 million in a TFNB Insured Deposit Program, and \$9.1 million in a Landing Rock Funds account. The Landing Rock Fund is a liquid investment alternative that combines no risk (100% FDIC insured) with a higher yield than we were achieving through the insured cash shelter account. The District's investments in public funds investment pools totaled \$307.0 million.

Additionally, the District had \$17.2 million invested in the Texas TERM program, these investments are record at net asset value, and \$995,940 invested in a government agency security with the Federal Home Loan Mortgage Corporation (Freddie Mac). As of the end of February, the District had net unrecognized losses in fair value of \$17,188. Accrued interest on investments totaled \$410,658.

Total cash and investments for the District as of August 31, 2023 was \$362.3 million. This is down \$66.3 million from total cash and investments at the end of the last quarter. \$30.1 million of the decrease results from payments on bond projects and another \$15.3 million is from the payment of debt service principal due in August each year. Approximately \$5.2 million of the total cash and investments is restricted for debt service, \$4.7 million for Child Nutrition Services, and \$190.9 million for capital projects funds.

Also attached is the cash flow projection for the quarter ending November 30, 2023. If you have any questions, please do not hesitate to call.

Sheryl Davis  
Chief Finance Officer  
Business and Financial Services


Waco Independent School District  
**CASH AND INVESTMENT REPORT**  
For the Quarter Ended August 31, 2023  
**REPORT OF INVESTMENT ACTIVITY**

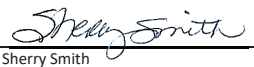
Description	Coupon or Average Rate of Return	Weighted Average Maturity or Maturity Date	Market Value 5/31/2023	Book Value 5/31/2023	Interest Earnings	Purchases & Transfers In	Sales & Transfers Out	Changes in Market Value	Market Value 8/31/2023	Book Value 8/31/2023	Accrued Interest
<b>CASH IN DEPOSITORY (EXTRACO):</b>											
Operating Revenues	0.000%		\$ 6,502,349	\$ 6,502,349	\$ -				\$ 180,349	\$ 180,349	\$ -
Accounts Payable	0.000%		9,141,037	9,141,037	-				2,896,682	2,896,682	-
Payroll	0.000%		201,694	201,694	-				99,210	99,210	-
District Activity	0.050%		994,383	994,383	131				1,103,804	1,103,804	-
Child Nutrition Services	0.050%		4,330,645	4,330,645	560				4,510,969	4,510,969	-
High Yield Money Market	2.990%		253,623	253,623	1,758				255,382	255,382	-
Capital Projects 2022	0.000%		24,446	24,446	-				5,436,527	5,436,527	-
<b>Total Cash in Depository (Extraco)</b>			<b>21,448,178</b>	<b>21,448,178</b>	<b>2,450</b>				<b>14,482,923</b>	<b>14,482,923</b>	<b>-</b>
<b>FDIC INSURED INVESTMENTS:</b>											
Texas Range-Certificate of Deposit Program											
General Fund			3,588,000	3,588,000	-	\$ 236,000	\$ (971,000)	\$ -	2,853,000	2,853,000	22,181
Child Nutrition Services			-	-	-	243,000	-	-	243,000	243,000	3,399
Landing Rock-FDIC Insured Deposit Program											
General Fund	4.880%		8,851,708	8,851,708	97,209	-	(3,200,000)	-	5,748,917	5,748,917	-
Debt Service Fund	4.880%		3,279,825	3,279,825	39,348	-	-	-	3,319,173	3,319,173	-
TFNB-FDIC Insured Deposit Program	4.750%		7,236,931	7,236,931	87,159	-	-	-	7,324,091	7,324,091	-
TFNB-FDIC Insured Deposit Program	4.750%		3,088,432	3,088,432	37,196	-	-	-	3,125,628	3,125,628	-
<b>Total Other FDIC Insured Investments</b>			<b>26,044,897</b>	<b>26,044,897</b>	<b>260,912</b>	<b>479,000</b>	<b>(4,171,000)</b>	<b>-</b>	<b>22,613,809</b>	<b>22,613,809</b>	<b>25,580</b>
<b>PUBLIC FUNDS INVESTMENT POOLS</b>											
LONE STAR: (S&P Rating = AAAM)											
Corporate Overnight Plus Fund	5.530%	44	1,045,652	1,045,652	14,295	-	-	-	1,059,947	1,059,947	-
Government Overnight Fund											
General Fund	5.300%	18	30,361,577	30,361,577	374,495	-	(4,000,000)	-	26,736,072	26,736,072	-
Capital Projects 2022	5.300%	18	143,658,240	143,658,240	1,601,235	-	(38,153,862)	-	107,105,614	107,105,614	-
TEXAS CLASS: (S & P AAAM)											
General Fund	5.475%	40	5,082,037	5,082,037	69,072	-	-	-	5,151,109	5,151,109	-
Capital Projects 2022B	5.475%	40	77287810.66	77,287,811	1,050,442	-	-	-	78,338,253	78,338,253	-
TEXASDAILY: (S&P Rating = AAAM)											
General Fund	5.360%	36	119,203	119,203	4,402	4,480,562.03	(3,349,698.11)	-	1,254,468	1,254,468	-
Child Nutrition Services	5.360%	36	255,834	255,834	166	779,196	(1,022,376)	-	12,820	12,820	-
Capital Projects 2023	5.360%	36	80,177,765	80,177,765	1,054,464	-	-	-	81,232,229	81,232,229	-
TEXPOOL: (S&P Rating = AAAM)											
General Fund	5.305%	24	7,194,695	7,194,695	49,570	34,658,517	(37,710,000)	-	4,192,781	4,192,781	-
Debt Service Fund	5.305%	24	17,228,492	17,228,492	186,659	392,917	(15,890,011)	-	1,918,056	1,918,056	-
<b>Total for Public Funds Investment Pools</b>			<b>362,411,305</b>	<b>362,411,305</b>	<b>4,404,800</b>	<b>40,311,192</b>	<b>(100,125,947)</b>	<b>-</b>	<b>307,001,349</b>	<b>307,001,349</b>	<b>-</b>
<b>Total Cash and Cash Equivalents</b>			<b>409,904,380</b>	<b>409,904,380</b>	<b>4,668,161</b>	<b>40,790,192</b>	<b>(104,296,947)</b>	<b>-</b>	<b>344,098,081</b>	<b>344,098,081</b>	<b>25,580</b>
<b>INVESTMENTS by Net Asset Value (NAV)</b>											
Texas Term Dec 23-General Fund	0.991%	8/3/2023	593,400.00	593,400	-	-	(600,000)	6,600	-	-	19,729
Texas Term Dec 23-Child Nutrition	0.991%	8/25/2023	741,750.00	741,750	-	-	(750,000)	8,250	-	-	27,767
Texas Term Dec 23-General Fund	0.991%	8/25/2023	2,967,000.00	2,967,000	-	-	(3,000,000)	33,000	-	-	107,860
Texas Term Dec 23-General Fund	0.991%	10/5/2023	494,500.00	494,500	-	-	-	1,000	495,500	495,500	19,344
Texas Term Dec 23-General Fund	0.991%	11/16/2023	1,483,500.00	1,483,500	-	-	-	3,000	1,486,500	1,486,500	49,088
Texas Term Dec 23-General Fund	0.991%	12/11/2023	1,499,625.86	1,499,626	-	-	-	3,033	1,502,658	1,502,658	27,616
Texas Term Dec 23-General Fund	0.991%	12/27/2023	9,890,000.00	9,890,000	-	-	-	20,000	9,910,000	9,910,000	92,135
Texas Term Dec 24-General Fund	0.976%	8/23/2024	-	-	-	3,113,344	-	(74,720)	3,038,624	3,038,624	67
Texas Term Dec 24-Child Nutrition	0.976%	8/23/2024	-	-	-	779,196	-	(18,701)	760,495	760,495	17
<b>Total Investments by Net Asset Value</b>			<b>17,669,776</b>	<b>17,669,776</b>	<b>-</b>	<b>3,892,540</b>	<b>(4,350,000)</b>	<b>(18,538)</b>	<b>17,193,777</b>	<b>17,193,777</b>	<b>343,623</b>

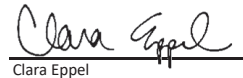
Waco Independent School District  
**CASH AND INVESTMENT REPORT**  
For the Quarter Ended August 31, 2023  
**REPORT OF INVESTMENT ACTIVITY**

Description	Coupon or Average Rate of Return	Weighted Average Maturity or Maturity Date	Market Value 5/31/2023	Book Value 5/31/2023	Interest Earnings	Purchases & Transfers In	Sales & Transfers Out	Changes in Market Value	Market Value 8/31/2023	Book Value 8/31/2023	Accrued Interest
<b>SEPARATELY INVESTED ASSETS</b>											
Federal Home Loan Mortgage Corporation	5.200%	5/17/2024	994,590	994,590	-	-	-	1,350	995,940	995,940	41,456
<b>Total for Separately Invested Assets</b>			994,590	994,590	-	-	-	1,350	995,940	995,940	41,456
<b>Total Investments</b>			18,664,366	18,664,366	-	3,892,540	(4,350,000)	(17,188)	18,189,717	18,189,717	385,078
<b>Total Cash, Cash Equivalents, and Investments</b>			\$ 428,568,746	\$ 428,568,746	\$ 4,668,161	\$ 44,682,732	\$ (108,646,947)	\$ (17,188)	\$ 362,287,798	\$ 362,287,798	\$ 410,658

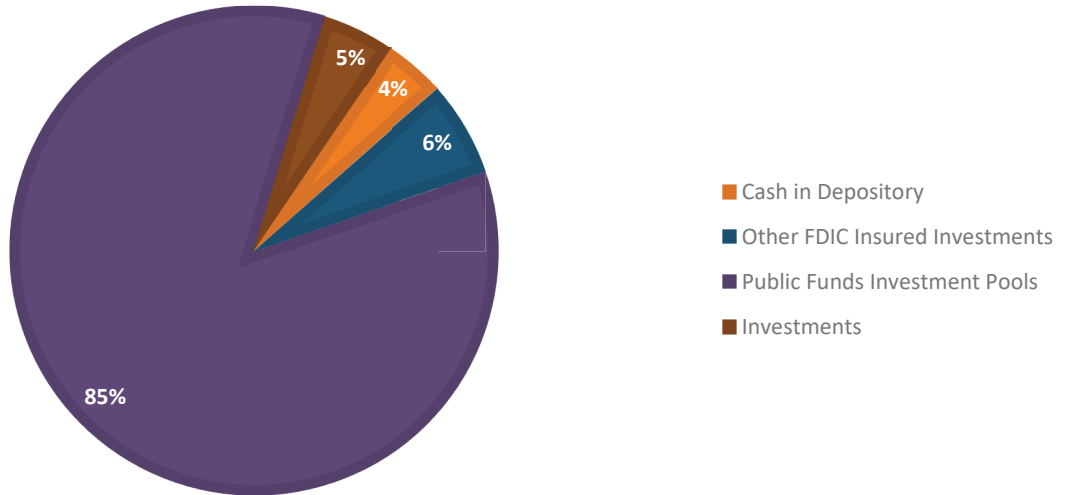
*We believe the data presented for the quarter ended November 30, 2022 are accurate in all material respects, and are presented in a manner that fairly sets forth the investment standing of the Waco Independent School District. This report was prepared in compliance with the Waco Independent School District's Investment Policy and the Public Funds Investment Act of the State of Texas.*

  
\_\_\_\_\_  
Sheryl Davis  
Chief Financial Officer  
10/20/2023  
Date

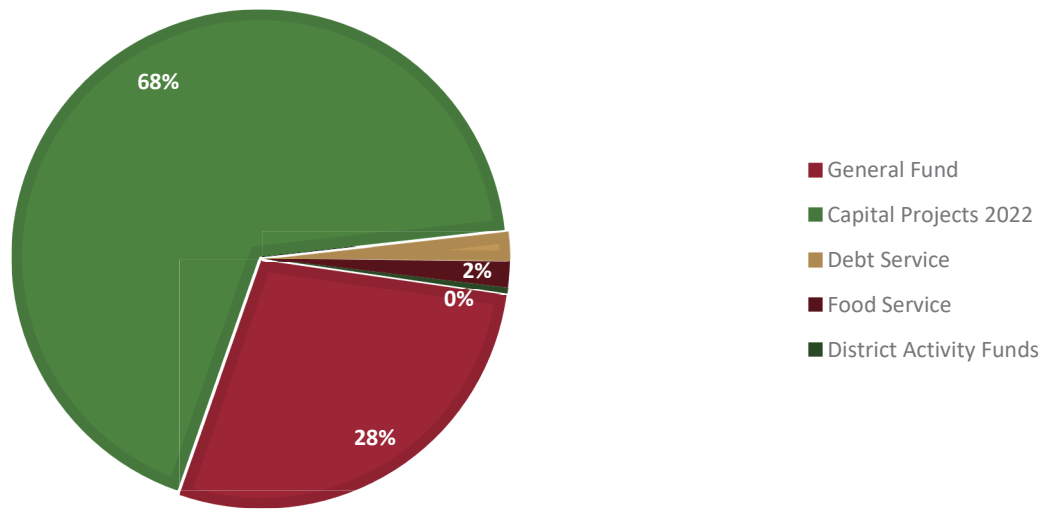
  
\_\_\_\_\_  
Sherry Smith  
Executive Director of Finance  
10/20/2023  
Date

  
\_\_\_\_\_  
Clara Eppel  
Accounting Director  
10/20/2023

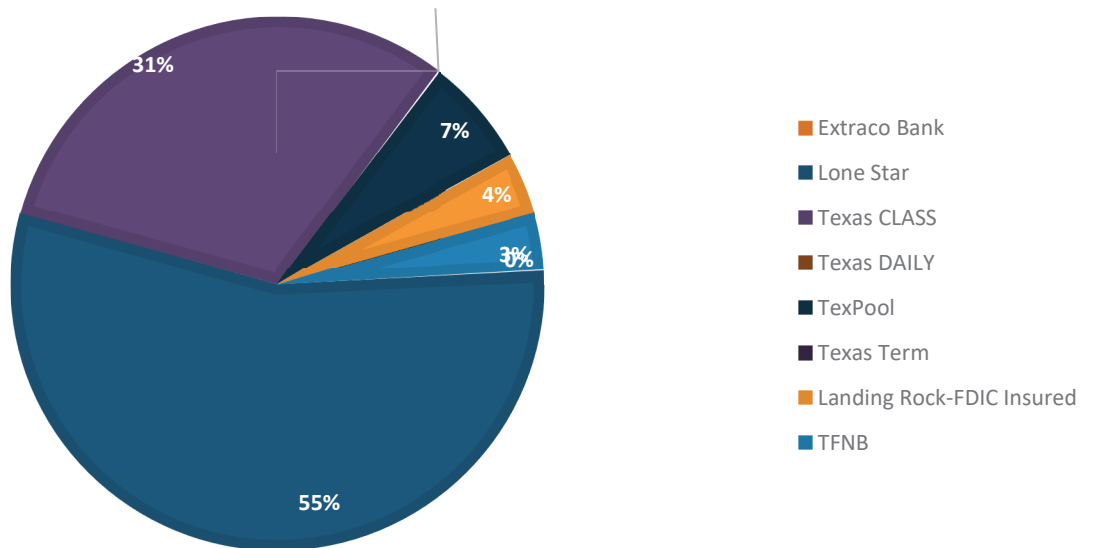
### PORTFOLIO COMPOSITION BY INVESTMENT



### PORTFOLIO COMPOSITION BY FUND



### INTEREST EARNINGS BY ISSUER



**Waco Independent School District**  
**CASH FLOW PROJECTIONS**  
For the Quarter Ended August 31, 2023

	<u>September</u>	<u>October</u>	<u>November</u>
Cash and Cash Equivalents, Beginning Balance	\$ 344,098,081	\$ 331,874,375	\$ 323,891,036
Tax Revenue	185,732	2,205,915	5,458,953
Investment Earnings Revenue	1,556,054	1,556,054	1,556,054
Other Local Revenue	1,841,629	1,987,826	1,619,810
State Revenue	16,353,630	13,377,958	7,328,400
Federal Revenue	4,434,869	6,395,418	2,165,557
Payroll Disbursements	(7,650,000)	(7,650,000)	(7,650,000)
Accounts Payable Disbursements	(28,945,618)	(25,856,510)	(25,859,775)
Cash and Cash Equivalents, Ending Balance	<u>\$ 331,874,375</u>	<u>\$ 323,891,036</u>	<u>\$ 308,510,033</u>

**2023 Actual and Projected Tax Collections (net of TIF Pass-Through)**

	<u>Current Year's Levy</u>	<u>Prior Years' Levy</u>	<u>Penalty &amp; Interest</u>	<u>Total</u>
September, 2022	\$ -	\$ 140,658	\$ 67,511	\$ 208,169
October	2,405,005	16,499	50,889	2,472,393
November	6,064,468	24,342	29,592	6,118,402
December	29,575,689	105,818	28,628	29,710,135
January, 2023	41,731,543	61,096	15,652	41,808,291
February	17,250,952	15,209	274,702	17,540,864
March	2,168,485	39,932	201,950	2,410,367
April	695,920	56,761	121,616	874,296
May	773,964	35,430	118,043	927,437
June	549,061	50,420	113,548	713,030
July	286,577	29,138	61,095	376,810
August	261,354	55,315	83,962	400,632
Total Collections	<u>\$ 101,763,019</u>	<u>\$ 630,618</u>	<u>\$ 1,167,188</u>	<u>\$ 103,560,825</u>

**2024 Actual and Projected Tax Collections (Net of TIF Pass-Through)**

Current Year's	Prior Years'	Penalty &
----------------	--------------	-----------

**Waco Independent School District**

**Board of Trustee Meeting Agenda Item**

**Date:** October 26, 2023

**Contact Person:** Sheryl Davis

**RE: Monthly Financial Reports for the Period Ended September 30, 2023**

=====

**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, 2023, 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

October 20, 2023

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, 2023 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 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, 2024.
- 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, 2024. Outstanding encumbrances are included on the "Encumbrances and Expenditures by Fund, Function, and Object" schedule, only.
- Beginning  
Fund Balance: Represents August 31, 2023 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, 2023

**ASSETS**

Cash and Temporary Investments	74,286,814
Property Taxes Receivable, Net of Allowance of \$2,216,808	869,765
Due from Other Governments	-
Accrued Interest	471,402
Due from Other Funds	10,124,593
Other Receivables	74,400
Inventories	320,468
Deferred Expenditures	525
Total Assets	\$ 86,147,967

**LIABILITIES**

Accounts Payable	3,345,916
Other Current Liabilities	-
Payroll Withholdings and Contributions Payable	1,421,838
Accrued Wages Payable	7,357,913
Due to Other Funds	-
Due to Other Governments	17,814,291
Unearned Revenue	-
Total Liabilities	\$ 29,939,958

**DEFERRED INFLOWS OF RESOURCES**

Unavailable Revenues - Property Taxes	\$ 869,765
Total Deferred Inflows of Resources	\$ 869,765

**FUND BALANCES**

Nonspendable Fund Balance	\$ 320,993
Restricted Fund Balance	1,929,075
Committed Fund Balance	1,905,948
Unassigned Fund Balance	51,182,227
Total Fund Balances	\$ 55,338,244
Total Liabilities and Fund Balances	\$ 86,147,967

Waco Independent School District  
**STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE**  
**BUDGET AND ACTUAL**  
For the Period Ended September 30, 2023

<b>GENERAL FUND</b>										
	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				
			9/30/2023	9/30/2022	9/30/2023	9/30/2022				
<b>REVENUES</b>										
<b>LOCAL SOURCES</b>										
5710	Local Property Taxes	\$ 69,432,000	69,432,000	100,206	199,642	100,206	199,642	(69,331,794)	0.14%	0.24%
5720	Services to Other Districts	76,000	76,000	7,899	8,397	7,899	8,397	(68,101)	10.39%	11.35%
5730	Tuition & Fees	189,000	189,000	15,095	32,136	15,095	32,136	(173,905)	7.99%	16.65%
5740	Other Local Revenue	3,143,200	3,143,200	355,728	44,085	355,728	44,085	(2,787,472)	11.32%	9.41%
5750	Extracurricular Activities	314,300	314,300	60,381	68,583	60,381	68,583	(253,919)	19.21%	17.57%
5760	Intermediate Source (C.E.D.)	334,000	334,000	-	-	-	-	(334,000)	0.00%	0.00%
	Total Local Sources	\$ 73,488,500	73,488,500	539,309	352,843	539,309	352,843	(72,949,191)	0.73%	0.42%
<b>STATE SOURCES</b>										
5810	Per Capita & FSP Act	\$ 71,253,781	71,253,781	14,333,201	15,619,975	14,333,201	15,619,975	(56,920,580)	20.12%	26.57%
5830	Other State Program	7,451,780	7,451,780	560,164	536,024	560,164	536,024	(6,891,616)	7.52%	7.48%
	Total State Sources	\$ 78,705,561	78,705,561	14,893,365	16,155,999	14,893,365	16,155,999	(63,812,196)	18.92%	24.50%
<b>FEDERAL SOURCES</b>										
5900	Federal Sources Revenue	5,405,000	5,405,000	82,454	76,673	82,454	76,673	(5,322,546)	1.53%	0.95%
	Total Revenues	\$ 157,599,061	157,599,061	15,515,129	16,585,515	15,515,129	16,585,515	(142,083,932)	9.84%	10.50%
<b>EXPENDITURES</b>										
11	Instruction	\$ 88,456,586	88,704,717	10,169,370	8,566,963	10,169,370	8,566,963	78,535,347	11.46%	9.64%
12	Instructional Resources & Media	530,514	530,514	89,815	45,008	89,815	45,008	440,699	16.93%	8.06%
13	Curriculum & Staff Development	4,585,198	4,587,198	314,538	292,355	314,538	292,355	4,272,660	6.86%	6.89%
21	Instructional Leadership	4,007,386	4,015,338	322,733	355,351	322,733	355,351	3,692,605	8.04%	8.85%
23	School Leadership	10,496,861	10,496,861	928,082	977,871	928,082	977,871	9,568,779	8.84%	9.60%
31	Guidance, Counseling & Evaluation	6,502,343	6,502,343	628,438	542,712	628,438	542,712	5,873,905	9.66%	9.38%
32	Social Work Services	829,625	829,625	74,884	66,576	74,884	66,576	754,741	9.03%	8.26%
33	Health Services	1,544,147	1,544,147	150,129	151,781	150,129	151,781	1,394,018	9.72%	10.11%
34	Student Transportation	3,729,228	5,113,349	76,853	326,153	76,853	326,153	5,036,496	1.50%	6.18%
35	Food Services	-	-	-	-	-	-	-	0.00%	0.00%
36	Extracurricular Activities	5,870,373	5,877,766	574,968	682,434	574,968	682,434	5,302,798	9.78%	11.84%
41	General Administration	7,443,184	7,443,184	737,159	746,808	737,159	746,808	6,706,025	9.90%	10.05%
51	Plant Maintenance & Operations	18,408,136	18,947,273	2,576,705	2,212,253	2,576,705	2,212,253	16,370,568	13.60%	11.14%
52	Security & Monitoring Services	3,602,281	3,602,281	262,799	279,009	262,799	279,009	3,339,482	7.30%	9.81%
53	Data Processing Services	2,979,816	2,979,816	773,436	971,664	773,436	971,664	2,206,380	25.96%	22.47%
61	Community Services	520,969	520,969	46,362	53,210	46,362	53,210	474,607	8.90%	8.33%
71	Debt Service	302,000	302,000	17,869	-	17,869	-	284,131	0.00%	0.00%
81	Facilities Acquisition & Construction	-	-	-	-	-	-	-	0.00%	0.00%
93	Shared Services Arrangements	300,000	300,000	-	-	-	-	300,000	0.00%	0.00%
95	Juvenile Justice Program	585,000	585,000	1,500	1,500	1,500	1,500	583,500	0.26%	0.23%
97	Payments to Tax Increment Fund	25,000	25,000	-	(28,434)	-	(28,434)	25,000	0.00%	-113.74%
99	Other Intergovernmental Charges	938,000	938,000	212,703	194,376	212,703	194,376	725,297	22.68%	24.04%
	Total Expenditures	\$ 161,656,647	163,845,381	17,958,341	16,437,590	17,958,341	16,437,590	145,887,040	10.96%	9.97%
	Excess (Deficiency) of Revenues Over (Under) Expenditures	\$ (4,057,586)	(6,246,320)	(2,443,212)	147,925	(2,443,212)	147,925	3,803,108		
<b>OTHER FINANCING SOURCES (USES)</b>										
7900	Other Sources	-	-	-	-	-	-	-		
8900	Other Uses	(565,731)	(565,731)	-	-	-	-	(565,731)		
	Total Other Financing Source (Uses)	\$ (565,731)	(565,731)	-	-	-	-	(565,731)		
	Total Changes in Fund Balances	\$ (4,623,317)	(6,812,051)	(2,443,212)	147,925	(2,443,212)	147,925	4,368,839		
	Fund Balances, Beginning	55,358,526	55,358,526			57,781,456	53,543,235	2,422,930		
	Fund Balances, Ending	\$ 50,735,209	48,546,475			55,338,244	53,691,160	6,791,769		

Waco Independent School District  
**EXPENDITURES AND ENCUMBERED FUNDS BY FUNCTION AND MAJOR OBJECT**  
**GENERAL FUND**  
For the Period Ended September 30, 2023

								<i>(Memo)</i>	
		Payroll	Purchased & Contracted	Supplies & Materials	Other Operating	Debt Services	Capital Outlay	Total Year-to-Date	Total Year-to-Date
		6100	6200	6300	6400	6500	6600	9/30/2023	9/30/2022
11	Instruction	\$ 7,869,886	1,821,294	961,997	135,254	-	-	10,788,432	9,069,383
12	Instructional Resources & Media	50,316	35,156	6,428	-	-	-	91,901	81,250
13	Curriculum & Staff Development	287,542	43,397	14,588	30,138	-	-	375,665	452,172
21	Instructional Leadership	289,600	77,868	22,907	59,226	-	-	449,601	529,676
23	School Leadership	907,671	18,593	31,575	18,803	-	-	976,643	1,020,371
31	Guidance, Counseling & Evaluation	551,031	39,292	173,818	4,596	-	-	768,737	612,872
32	Social Work Services	74,044	-	68	3,144	-	-	77,256	73,984
33	Health Services	148,556	633	2,509	-	-	-	151,699	162,639
34	Student Transportation	-	2,898,784	44,545	-	-	-	2,943,329	2,940,413
35	Food Services	-	-	-	-	-	-	-	-
36	Co/Extracurricular Activities	294,142	242,800	231,054	440,159	-	39,225	1,247,381	1,155,834
41	General Administration	455,707	344,887	101,100	176,856	-	5,388	1,083,939	1,098,123
51	Plant Maintenance & Operations	712,460	1,541,009	496,699	1,238,429	-	62,122	4,050,719	4,918,039
52	Security & Monitoring Services	125,064	538,701	111,572	749	-	-	776,086	611,053
53	Data Processing Services	146,658	140,925	1,078,198	6,222	-	-	1,372,002	1,371,321
61	Community Services	24,328	119,889	8,962	1,478	-	-	154,656	262,395
71	Debt Service	-	-	-	-	17,869	-	17,869	-
81	Facilities Acquisition & Construction	-	-	-	-	-	11,059	11,059	497,239
93	Shared Services Arrangements	-	-	-	-	-	-	-	-
95	Juvenile Justice Program	-	-	-	51,860	-	-	51,860	74,634
97	Payments to Tax Increment Fund	-	-	-	-	-	-	-	(28,434)
99	Other Intergovernmental Charges	-	212,703	-	-	-	-	212,703	194,376
Total Expenditures & Encumbered Funds		<u>\$ 11,937,005</u>	<u>8,075,932</u>	<u>3,286,022</u>	<u>2,166,915</u>	<u>17,869</u>	<u>117,794</u>	<u>25,601,536</u>	<u>25,097,340</u>

Waco Independent School District  
**BALANCE SHEET**  
**CHILD NUTRITION FUND**  
As of September 30, 2023

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**ASSETS**

Cash and Temporary Investments	\$ 5,650,771
Due from Other Governments	2,071,496
Accrued Interest	9,116
Due from Other Funds	-
Other Receivables	(18)
Total Assets	<u>\$ 7,731,365</u>

**LIABILITIES**

Accounts Payable	\$ 548,498
Accrued Wages Payable	144,758
Due to Other Funds	663,943
Total Liabilities	<u>\$ 1,357,200</u>

**FUND BALANCES**

Restricted Fund Balance	\$ 6,374,166
Total Fund Balances	<u>\$ 6,374,166</u>
Total Liabilities and Fund Balances	<u>\$ 7,731,365</u>

Waco Independent School District  
**STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE**  
**BUDGET AND ACTUAL**  
For the Period Ended September 30, 2023

**CHILD NUTRITION 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 9/30/2023	Prior Year 9/30/2022	Current 9/30/2023	Prior Year 9/30/2022			
<b>REVENUES</b>									
LOCAL SOURCES									
5740 Other Local Revenue	\$ 25,000	25,000	24,262	(9,767)	24,262	(9,767)	(738)	97.05%	-30.52%
5750 Extracurricular Activities	379,000	379,000	64,189	58,945	64,189	58,945	(314,811)	16.94%	14.63%
Total Local Sources	\$ 404,000	404,000	88,451	49,178	88,451	49,178	(315,549)	21.89%	11.31%
FEDERAL SOURCES									
5900 Federal Sources Revenue	\$ 10,585,000	10,585,000	1,233,653	1,172,378	1,233,653	1,172,378	(9,351,347)	11.65%	12.25%
Total Revenues	\$ 10,989,000	10,989,000	1,322,105	1,221,556	1,322,105	1,221,556	(9,666,895)	12.03%	12.21%
<b>EXPENDITURES</b>									
35 Food Services	\$ 11,281,649	11,395,118	988,623	893,061	988,623	893,061	10,406,495	8.68%	7.04%
Total Expenditures	\$ 11,281,649	11,395,118	988,623	893,061	988,623	893,061	10,406,495	8.68%	7.04%
Excess (Deficiency) of Revenues Over (Under) Expenditures	\$ (292,649)	(406,118)	333,481	328,495	333,481	328,495	739,599		
Total Changes in Fund Balances	\$ (292,649)	(406,118)	333,481	328,495	333,481	328,495	739,599		
Fund Balances, Beginning	6,040,684	6,040,684			6,040,684	4,698,491	-		
Fund Balances, Ending	\$ 5,748,035	5,634,566			6,374,165	5,026,986	739,599		

Waco Independent School District  
**EXPENDITURES AND ENCUMBERED FUNDS BY FUNCTION AND MAJOR OBJECT**  
**CHILD NUTRITION FUND**  
For the Period Ended September 30, 2023

							<i>(Memo)</i>
							<b>Total</b>
							<b>Year-to-Date</b>
							<b>9/30/2023</b>
							<b>9/30/2022</b>
							<b>6000</b>
							<b>6000</b>
	<u>Payroll</u>	<u>Purchased &amp;</u>	<u>Supplies &amp;</u>	<u>Other</u>	<u>Capital</u>	<u>Total</u>	
	<u>Costs</u>	<u>Contracted</u>	<u>Materials</u>	<u>Operating</u>	<u>Outlay</u>	<u>Year-to-Date</u>	
	<u>6100</u>	<u>Services</u>	<u>6300</u>	<u>Costs</u>	<u>6600</u>	<u>9/30/2023</u>	<u>9/30/2022</u>
	<u>6100</u>	<u>6200</u>	<u>6300</u>	<u>6400</u>	<u>6600</u>	<u>6000</u>	<u>6000</u>
35 Food Services	\$ 305,894	675,407	204,403	985	157,893	1,344,581	3,029,745
Total Expenditures & Encumbered Funds	<u>\$ 305,894</u>	<u>675,407</u>	<u>204,403</u>	<u>985</u>	<u>157,893</u>	<u>1,344,581</u>	<u>3,029,745</u>

Waco Independent School District  
**BALANCE SHEET**  
**DEBT SERVICE FUND**  
As of September 30, 2023

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**ASSETS**

Cash and Temporary Investments	\$ 5,293,043
Property Taxes Receivable, Net of Allowance of \$548,098.99	255,845
Due from Other Governments	-
	<hr/>
Total Assets	<u>\$ 5,548,889</u>

**LIABILITIES**

Accounts Payable	\$ -
Due to Other Funds	31,653
Due to Other Governments	124,021
	<hr/>
Total Liabilities	<u>\$ 155,674</u>

**DEFERRED INFLOWS OF RESOURCES**

Unavailable Revenues - Property Taxes	\$ 255,845
	<hr/>
Total Deferred Inflows of Resources	<u>\$ 255,845</u>

**FUND BALANCES**

Restricted Fund Balance	\$ 5,137,369
	<hr/>
Total Fund Balances	<u>\$ 5,137,369</u>
	<hr/>
Total Liabilities and Fund Balances	<u>\$ 5,548,889</u>

Waco Independent School District  
**STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE**  
**BUDGET AND ACTUAL**  
For the Period Ended September 30, 2023

**DEBT SERVICE 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 9/30/2023	Prior Year 9/30/2022	Current 9/30/2023	Prior Year 9/30/2022			
<b>REVENUES</b>									
<b>LOCAL SOURCES</b>									
5710 Local Property Taxes	\$ 22,304,772	22,304,772	30,435	42,852	30,435	42,852	(22,274,337)	0.14%	0.17%
5740 Other Local Revenue	505,000	505,000	21,961	995	21,961	995	(483,039)	4.35%	3.98%
Total Local Sources	\$ 22,809,772	22,809,772	52,396	43,847	52,396	43,847	(22,757,376)	0.23%	0.18%
<b>STATE SOURCES</b>									
5820 Other State Program (TEA)	\$ 2,359,589	2,359,589	-	-	-	-	(2,359,589)	0.00%	0.00%
Total State Sources	\$ 2,359,589	2,359,589	-	-	-	-	(2,359,589)	0.00%	0.00%
Total Revenues	\$ 25,169,361	25,169,361	52,396	43,847	52,396	43,847	(25,116,965)	0.21%	0.18%
<b>EXPENDITURES</b>									
71 Debt Service	\$ 25,914,221	25,914,221		750	-	750	25,914,221	0.00%	0.00%
97 Payments to Tax Increment Fund	6,000	6,000		(5,891)	-	(5,891)	6,000	0.00%	-0.40%
Total Expenditures	\$ 25,920,221	25,920,221		(5,141)	-	(5,141)	25,920,221	0.00%	-0.03%
Total Changes in Fund Balances	\$ (750,860)	(750,860)	52,396	48,988	52,396	48,988	803,256		
Fund Balances, Beginning	5,084,973	5,084,973			5,084,973	4,866,235	-		
Fund Balances, Ending	\$ 4,334,113	4,334,113			5,137,369	4,915,223	803,256		

Waco Independent School District  
**Statement of Net Position**  
**Proprietary Fund**  
As of September 30, 2023

	Governmental Activities ----- Internal Service Fund
<b>Assets</b>	
Current assets:	
Due from other funds	2,032,394
Other receivables	33,746
Total Assets	\$ 2,066,139
<b>Liabilities</b>	
Current liabilities:	
Accounts payable	\$ 476,664
Other current liabilities	949,703
Due to other funds	
Total current liabilities	\$ 1,426,366
Total liabilities	\$ 1,426,366
<b>Net position</b>	
Unrestricted net position	\$ 639,773
Total net position	\$ 2,066,139

**Waco Independent School District**  
**Statement of Revenues, Expenses, and Changes in Net Position**  
**Budget and Actual**  
**For the Period Ended September 30, 2023**

**Proprietary Fund**  
**Governmental Activities - Internal Service Fund**

	Budget	<i>(Memo)</i>		<i>(Memo)</i>		Difference Budget to Current Year-to-Date	CY YTD As % of Budget	PY YTD As % of Budget
		Monthly		Year-to-Date				
		Current 9/30/2023	Prior Year 9/30/2022	Current 9/30/2023	Prior Year 9/30/2022			
<b>Operating revenues:</b>								
Employee contributions:								
Group health	\$ 3,690,000	286,685	\$ 278,404	286,685	\$ 278,404	(3,403,315)	7.77%	9.18%
Assessments to other funds:								
Group health	9,770,000	783,101	760,556	783,101	760,556	(8,986,899)	8.02%	7.76%
Unemployment	38,485	3,153	9,456	3,153	9,456	(35,332)	8.19%	6.10%
Workers compensation	441,187	8,675	29,427	8,675	29,427	(432,512)	1.97%	12.79%
Prescription drug rebates	804,000	-	-	-	-	(804,000)	0.00%	0.00%
Total operating revenues	<u>\$ 14,743,672</u>	<u>1,081,614</u>	<u>1,077,843</u>	<u>1,081,614</u>	<u>1,077,843</u>	<u>(13,662,059)</u>	<u>7.34%</u>	<u>7.66%</u>
<b>Operating expenses:</b>								
Administrative fees	\$ 1,148,347	222,646	191,699	222,646	191,699	925,701	19.39%	12.45%
Claims expense:								
Medical claims	8,889,635	640,126	395,598	640,126	395,598	8,249,509	7.20%	5.53%
Prescription drug claims	4,730,506	581,691	224,278	581,691	224,278	4,148,815	12.30%	5.71%
Unemployment	22,000	-	-	-	-	22,000	0.00%	0.00%
Workers compensation	189,570	5,176	620	5,176	620	184,394	2.73%	0.23%
Stop-loss insurance	1,513,614	237,411	108,417	237,411	108,417	1,276,203	15.69%	6.67%
Wellness Program	50,000	-	5,705	-	5,705	50,000	0.00%	10.56%
Total operating expenses	<u>\$ 16,543,672</u>	<u>1,687,050</u>	<u>926,317</u>	<u>1,687,050</u>	<u>926,317</u>	<u>14,856,622</u>	<u>10.20%</u>	<u>6.28%</u>
Change in net position	<u>\$ (1,800,000)</u>	<u>(605,436)</u>	<u>151,526</u>	<u>(605,436)</u>	<u>151,526</u>	<u>1,194,564</u>		
<b>Net position:</b>								
Net position, beginning	<u>\$ 1,172,730</u>			<u>1,245,210</u>	<u>3,564,375</u>	<u>72,480</u>		
Net position, ending	<u>\$ (627,270)</u>			<u>639,774</u>	<u>3,715,901</u>	<u>1,267,044</u>		

Waco Independent School District  
**Statement of Cash Flows**  
For the Period Ended September 30, 2023

**Proprietary Fund**

	Governmental Activities ----- Internal Service Fund
<b>Cash flows from operating activities:</b>	
Cash received from employee contributions	\$ 286,685
Cash received from assessments to other funds	1,400,365
Cash payments for claims	(1,226,993)
Cash payments for stop loss premiums	(237,411)
Cash payments for professional and contracted services	(222,646)
Net cash provided by operating activities	\$ (0)
Net increase in cash and cash equivalents	\$ (0)
Cash and cash equivalents at beginning of year	-
Cash and cash equivalents at end of year	\$ (0)
<b>Reconciliation of operating income to net cash provided by operating activities:</b>	
Operating gain (loss)	\$ (605,436)
Effects of increases and decreases in current assets and liabilities:	
Decrease in receivables	128,772
Increase in accounts payable	476,664
Decrease in current liabilities	949,703
Net cash provided by operating activities	\$ (0)

**Waco Independent School District**

***Board of Trustees Meeting Agenda Item***

**Date:** October 26, 2023

**Contact Person:** Dr. Susan Kincannon

**RE: Beginning of Year Literacy Data**

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**Background Information:**

In March 2023, the Board approved four goals as priorities for 2023 (attached). Each of the goals identified data sources for evaluating performance.

For the goal regarding **Literacy**, trustees specified STAAR Reading Data, STAR Renaissance Reading Data (beginning, middle, and end of year), Number of Parental Involvement Activities Conducted, and Number of Parents Participating in Activities. Data from the 2022-2023 school year for each of the specified items was included in the packet for the September 21, 2023, Regular meeting.

Attached with this report is beginning of year STAR Renaissance Reading data for 1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> grades.

**Fiscal Implications:**

N/A

**Administration Recommendations:**

This item is informational and no action is required.

# SUPERINTENDENT'S PERFORMANCE GOALS

2023



## LITERACY

Continue to develop the district's literacy and intervention systems at the elementary level, focusing on decreasing the third grade reading gap between students in ESC 12 and Waco ISD and designing and implementing parental involvement activities to support increased reading achievement.

*Evaluation Data Sources: STAAR Reading Data, STAR Renaissance Reading Data (beginning, middle, and end-of year), Number of Parental Involvement Activities Conducted, Number of Parents Participating in Activities*



## SCHOOL SAFETY & STUDENT BEHAVIOR

Review and refine current systems for discipline support with attention toward programs, staffing, policies, and previous and future training to support improved school safety.

*Evaluation Data Sources: PEIMS Offense Data for Fights, Assaults, Weapons, Vapes, Drugs, Panorama Teacher Survey Result on the following Question: During the past week, how often did you feel safe at work?*

**The Waco ISD Board of Trustees has identified these four goals as priorities for 2023. They will be incorporated into the District Improvement Plan in the fall of 2023.**



## EMPLOYEE RETENTION & SATISFACTION

Identify and implement strategies to improve teacher retention and satisfaction including improved working conditions, focusing on competitive compensation packages, and continued leadership development.

*Evaluation Data Sources: Teacher Turnover Rates, Number of Ready and High Potential Leaders (Holdsworth Dashboard), TASB Compensation Comparisons (at or above 90% of market by employee group), Panorama Teacher Survey Result on the following Question: How Positive is the working environment at your school?, Teacher Experience Data*



## BUDGET

Develop a five-year budget forecast using anticipated revenues and expenditures to attempt to project and prepare for any significant future fiscal challenges.

*Evaluation Data Sources: School FIRST Report, Annual Audit, Five-Year Student Projections*



STAR RENAISSANCE EARLY LITERACY 1ST GRADE - PROFICIENCY RATE (DISTRICT BENCHMARK PERCENTAGES)	
Campus	BOY 23-24
Bells Hill Elementary	81.3
Cedar Ridge Elementary	62.3
Crestview Elementary	60.5
Dean Highland Elementary	70.3
Hillcrest Pds	85.7
Kendrick Elementary	75.5
Lake Air Montessori	89.4
Mountainview Elementary	62
Parkdale Elementary	65.6
Provident Heights Elementary	77.5
South Waco Elementary	63.6
West Avenue Elementary	78.9

*\*Each test administration reflects the number of students enrolled at that time. This number may vary for each test administration.*

STAR RENAISSANCE READING 2ND GRADE - PROFICIENCY RATE (DISTRICT BENCHMARK PERCENTAGES)	
Campus	BOY 23-24
Bells Hill Elementary	22.7
Cedar Ridge Elementary	25
Crestview Elementary	29.8
Dean Highland Elementary	30.9
Hillcrest Pds	24.5
Kendrick Elementary	20
Mountainview Elementary	37.7
Parkdale Elementary	34
Provident Heights Elementary	28.9
Lake Air Montessori	52.2
West Avenue Elementary	31
South Waco Elementary	17.5

*\*Each test administration reflects the number of students enrolled at that time. This number may vary for each test administration.*

STAR RENAISSANCE READING 3RD GRADE - PROFICIENCY RATE (DISTRICT BENCHMARK PERCENTAGES)	
Campus	BOY 23-24
Bells Hill Elementary	17.9
Cedar Ridge Elementary	15.5
Crestview Elementary	24.3
Dean Highland Elementar	16.7
Hillcrest Pds	32.8
Kendrick Elementary	16.9
Mountainview Elementary	33.3
Parkdale Elementary	29.7
Provident Heights Elemen	38.6
Lake Air Montessori	43
West Avenue Elementary	21.7
South Waco Elementary	13.5

*\*Each test administration reflects the number of students enrolled at that time. This number may vary for each test administration.*

**Waco Independent School District**

***Board of Trustees Meeting Agenda Item***

**Date:** October 26, 2023

**Contact Person:** Dr. Susan Kincannon

**RE: First Six Weeks School Safety and Student Behavior Report**

=====

**Background Information:**

In March 2023, the Board approved four goals as priorities for 2023 (attached). Each of the goals identified data sources for evaluating performance.

For the goal regarding **Student Safety & Student Behavior**, trustees specified PEIMS Offense Data for Fights, Assaults, Weapons, Vapes, and Drugs for evaluation purposes. For the 2023-2024 school year, the Administration will provide the Board a dashboard report at the end of each grading period.

Attached is a dashboard report for the first six weeks of the 2023-2024 school year. The dashboard has been revised from the previous version presented at the August 24, 2023, Regular meeting to incorporate legislative changes. School districts are now required to implement mandatory Disciplinary Alternative Education Program (DAEP) placements for students found in possession of, using, selling, giving, or delivering e-cigarettes on school grounds or at a school-related event.

The *Substances* column now includes three new PEIMS codes implemented on September 1, 2023, in compliance with House Bill 114. Data regarding Felony Controlled Substances with a PEIMS code of 36 are also included in this category. New PEIMS codes include e-marijuana (62), e-Cigarettes (63) and other controlled Substances (64). Columns two and three of the dashboard offer greater detail regarding vape offenses using a local code. These counts are included in the overall data for *Substances*.

The *Weapons* column includes offenses for possession of Knife (12) and Gun (11).

**Fiscal Implications:**

N/A

**Administration Recommendations:**

This item is informational. No action is required.

# SUPERINTENDENT'S PERFORMANCE GOALS

2023



## LITERACY

Continue to develop the district's literacy and intervention systems at the elementary level, focusing on decreasing the third grade reading gap between students in ESC 12 and Waco ISD and designing and implementing parental involvement activities to support increased reading achievement.

*Evaluation Data Sources: STAAR Reading Data, STAR Renaissance Reading Data (beginning, middle, and end-of year), Number of Parental Involvement Activities Conducted, Number of Parents Participating in Activities*



## SCHOOL SAFETY & STUDENT BEHAVIOR

Review and refine current systems for discipline support with attention toward programs, staffing, policies, and previous and future training to support improved school safety.

*Evaluation Data Sources: PEIMS Offense Data for Fights, Assaults, Weapons, Vapes, Drugs, Panorama Teacher Survey Result on the following Question: During the past week, how often did you feel safe at work?*

**The Waco ISD Board of Trustees has identified these four goals as priorities for 2023. They will be incorporated into the District Improvement Plan in the fall of 2023.**



## EMPLOYEE RETENTION & SATISFACTION

Identify and implement strategies to improve teacher retention and satisfaction including improved working conditions, focusing on competitive compensation packages, and continued leadership development.

*Evaluation Data Sources: Teacher Turnover Rates, Number of Ready and High Potential Leaders (Holdsworth Dashboard), TASB Compensation Comparisons (at or above 90% of market by employee group), Panorama Teacher Survey Result on the following Question: How Positive is the working environment at your school?, Teacher Experience Data*



## BUDGET

Develop a five-year budget forecast using anticipated revenues and expenditures to attempt to project and prepare for any significant future fiscal challenges.

*Evaluation Data Sources: School FIRST Report, Annual Audit, Five-Year Student Projections*





# SCHOOL SAFETY & STUDENT BEHAVIOR

LAST UPDATED

## CAMPUS

Substances\*

L34 Non-THC Vape

L35 THC Vape

41 Fights

Weapons^

27 Assault Against Employee

28 Assault Student to Student

32 Sexual Assault of Student †

HIGH SCHOOLS

Waco High

University High

Brazos High

Wiley Opportunity\*\*

ELEMENTARY SCHOOLS

Bell's Hill

Cedar Ridge

Crestview

Dean Highland

Hillcrest

Kendrick

Lake Air

Mountainview

Parkdale

Prov. Heights

South Waco

West Avenue

MIDDLE SCHOOLS

Cesar Chavez

Tennyson

Wiley Opportunity\*\*

TRANSFORMATION WACO

Alta Vista

Brook Avenue

J.H. Hines

G.W. Carver

\*New HB-114-Related [62, 63, 64] & On-Campus Felony Controlled Substances [36] ^Knives [12] & Firearms [11] † On Campus  
 \*\*Wiley Opportunity data may include continuations from previous reports.

**Waco Independent School District**

***Board of Trustee Meeting Agenda***

**Date:** October 26, 2023

**Contact Person:** Dr. Josie Gutierrez

**RE: First Reading 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. Additional revisions included the addition of catastrophic sick leave on November 17, 2022, and the addition of non-monetary incentives to reward longevity with Waco ISD on April 27, 2023.

As of September 1, 2023, statutory changes became effective that require districts with commissioned peace officers to provide certain types of leave. Districts are required to update policy to adhere to the following two bills:

**HB 1486**

This bill requires that full-time telecommunicators who are licensed by the Texas Commission on Law Enforcement (TCOLE) be provided mental health leave like peace officers. Policy revisions include 5 days of mental health leave for the District’s full-time licensed telecommunicator when a traumatic event is experienced in the scope of employment.

**HB 471**

This bill requires a district to provide paid leave to police officers and emergency medical services (EMS) personnel who experience an illness or injury related to their line of duty. The District should determine how to address an extended leave of absence following the required leave of absence with full pay for a period commensurate with the nature of the illness or injury, as required by law. The District proposes to not extend the leave of absence, but allow the police officer to use accumulated leave, if necessary.

In summary, the new revisions include 5 mental health leave days for the District’s full-time telecommunicator and guidance for handling an extended leave of absence for police officers who experience an illness or injury related to their line of duty.

**Fiscal Implications:**

None

**Administrative Recommendations:**

This is the first reading of Board Policy DEC(LOCAL). The second reading will be part of the agenda for the November 30 Regular<sup>137</sup> board meeting.

## PROPOSED REVISIONS

(see page 4)

### 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.

---

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

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### 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.

COMPENSATION AND BENEFITS  
LEAVES AND ABSENCES

DEC  
(LOCAL)

**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.

*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 bank shall be solely for the use of participating employees. An employee who is a member of the bank may request leave from the 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.

**Loss of Access to Days**

An employee shall lose the right to utilize the benefits of the sick leave bank by:

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 appropriate administrator.

### Mental Health Leave

A District peace officer or a full-time District telecommunicator, as defined by law, who experiences a traumatic event in the scope of employment shall be granted a maximum of five days of mental health leave per traumatic event. Such leave shall be provided in accordance with administrative regulations and shall not be deducted from the employee's pay or leave balance.

The Superintendent shall develop regulations regarding mental health leave that address the following:

1. Circumstances or reasons under which an eligible employee may use mental health leave;
2. Procedures for requesting mental health leave and maintaining the anonymity of the requester;
3. The administrator authorized to approve requests for mental health leave; and
4. Other procedures deemed necessary for administering this provision.

### Quarantine Leave

A District peace officer shall be granted quarantine leave when ordered by the local health authority or the peace officer's supervisor to quarantine or isolate due to possible or known exposure to a communicable disease while on duty. Such leave shall be provided in accordance with administrative regulations and shall not be deducted from the employee's pay or leave balance.

The Superintendent shall develop regulations regarding quarantine leave that address the following:

1. Continuation of all employment benefits and compensation for the duration of the leave;
2. Reimbursement for reasonable costs related to the quarantine; and
3. Other procedures deemed necessary for administering this provision.

### Line of Duty Illness or Injury Leave of Absence

Following a leave of absence with full pay as required by law, the District shall not extend the leave of absence for a police officer's line of duty illness or injury. In accordance with law, the police officer may use accumulated leave.

**Family and Medical Leave**

FMLA leave shall run concurrently with applicable paid leave and compensatory time, as applicable.

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**Note:** See DECA(LEGAL) for provisions addressing FMLA.

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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.]

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**

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**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 of Trustee Workshop Agenda Item***

**Date:** October 26, 2023

**Contact Person:** Mrs. Grace Benson

**RE:** Emergent Bilinguals Annual Evaluation and Program Report

=====

**Background Information:**

***Texas Administrative Code §89.1265. Evaluation.***

*(a) All school districts required to conduct a bilingual education or English as a second language (ESL) program shall conduct an annual evaluation in accordance with Texas Education Code (TEC), §29.053, collecting a full range of data to determine program effectiveness to ensure student academic success. The annual evaluation report shall be presented to the board of trustees before November 1 of each year and the report shall be retained at the school district level in accordance with TEC, §29.062.*

The purpose of the Emergent Bilinguals Annual Evaluation and Program Report is to provide the Board of Trustees with the annual report of the Bilingual and ESL programs within Waco ISD for the 2022-2023 school year. Areas addressed in the report are listed below:

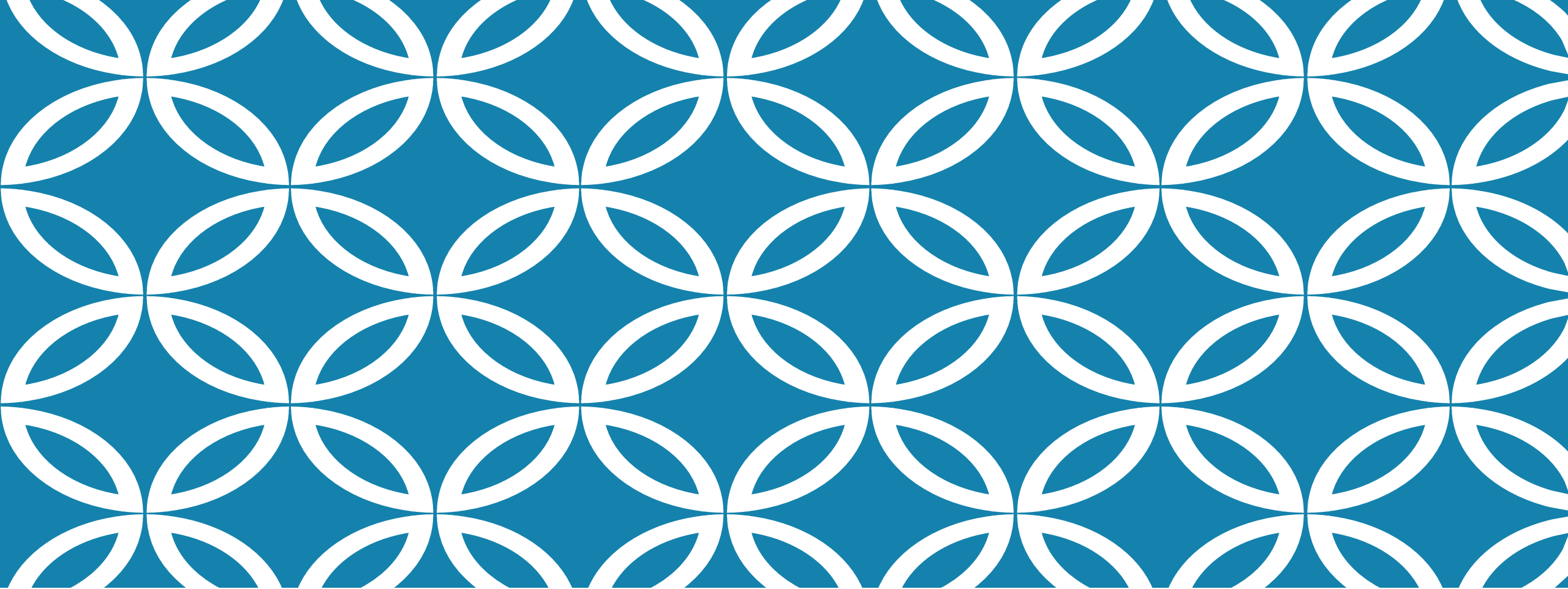
- ESL and Bilingual Programs Offered at Waco ISD
- Programming Updates
- Demographics
- Language Acquisition Summer School
- ESL and Bilingual Programs Staffing
- Professional Development
- Student, Family, and Community Engagement
- Academic and Linguistic Progress for Emergent Bilinguals

**Fiscal Implications:**

None

**Administrative Recommendation(s):**

This report is for information only. No action is necessary.



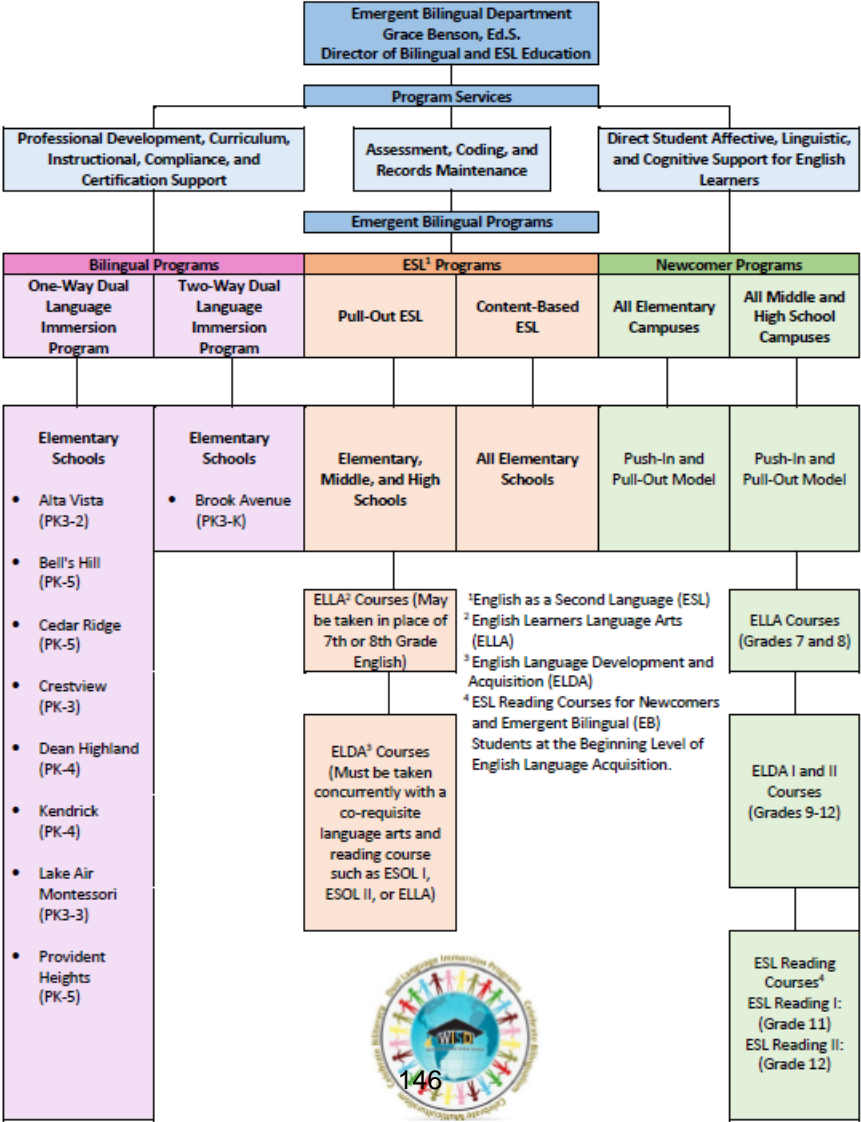
**EMERGENT BILINGUALS ANNUAL EVALUATION  
AND PROGRAM REPORT  
WACO ISD  
2022-2023**

145



**Grace Benson, Ed. S.**  
**Director of ESL and Bilingual Education**  
**Waco ISD**

# ESL and Bilingual Programs Offered at Waco ISD 2022-2023



# DUAL LANGUAGE IMMERSION PROGRAMS



# DUAL LANGUAGE IMMERSION/ONE-WAY

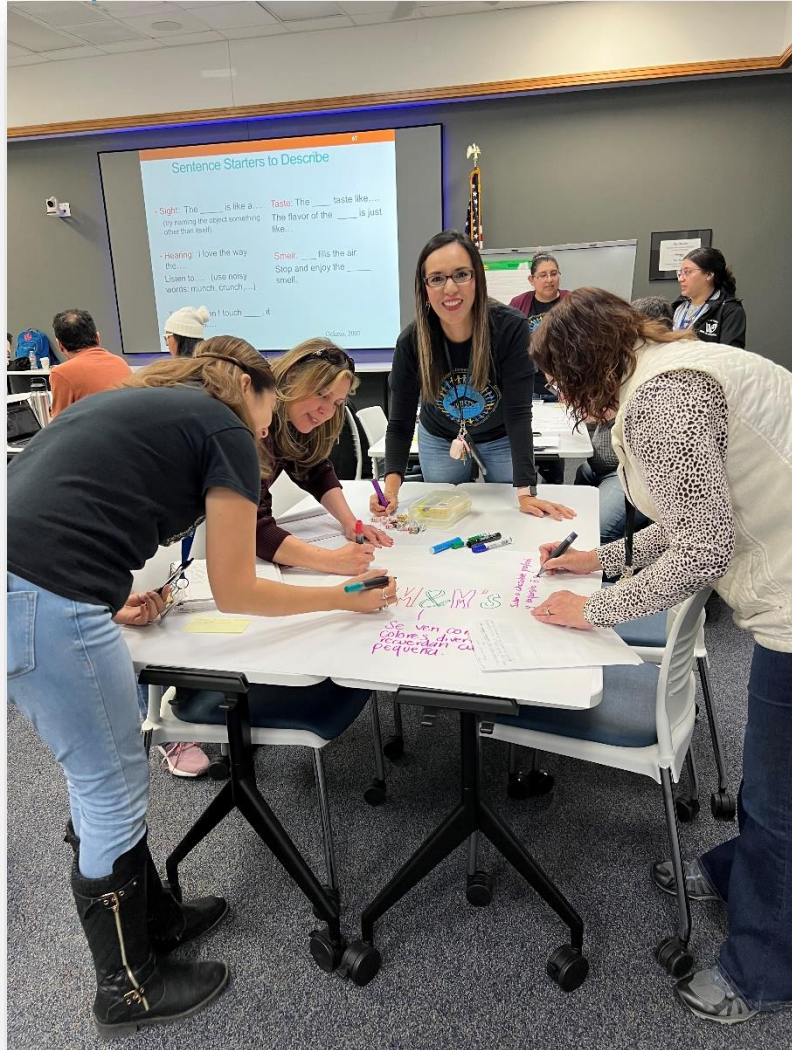
Dual language immersion/one-way is a bilingual/biliteracy program model in which students identified as English learners are served in both English and another language and are prepared to meet reclassification criteria in order to be successful in English-only instruction not earlier than six or later than seven years after the student enrolls in school. Instruction provided in a language other than English in this program model is delivered by a teacher appropriately certified in bilingual education under TEC, §29.061. Instruction provided in English in this program model may be delivered either by a teacher appropriately certified in bilingual education or by a different teacher certified in ESL in accordance with TEC, §29.061. The goal of one-way dual language immersion is for program participants to attain full proficiency in another language as well as English. This model provides ongoing instruction in literacy and academic content in the students' primary language as well as English, with at least half of the instruction delivered in the students' primary language for the duration of the program.

# DUAL LANGUAGE IMMERSION/TWO-WAY

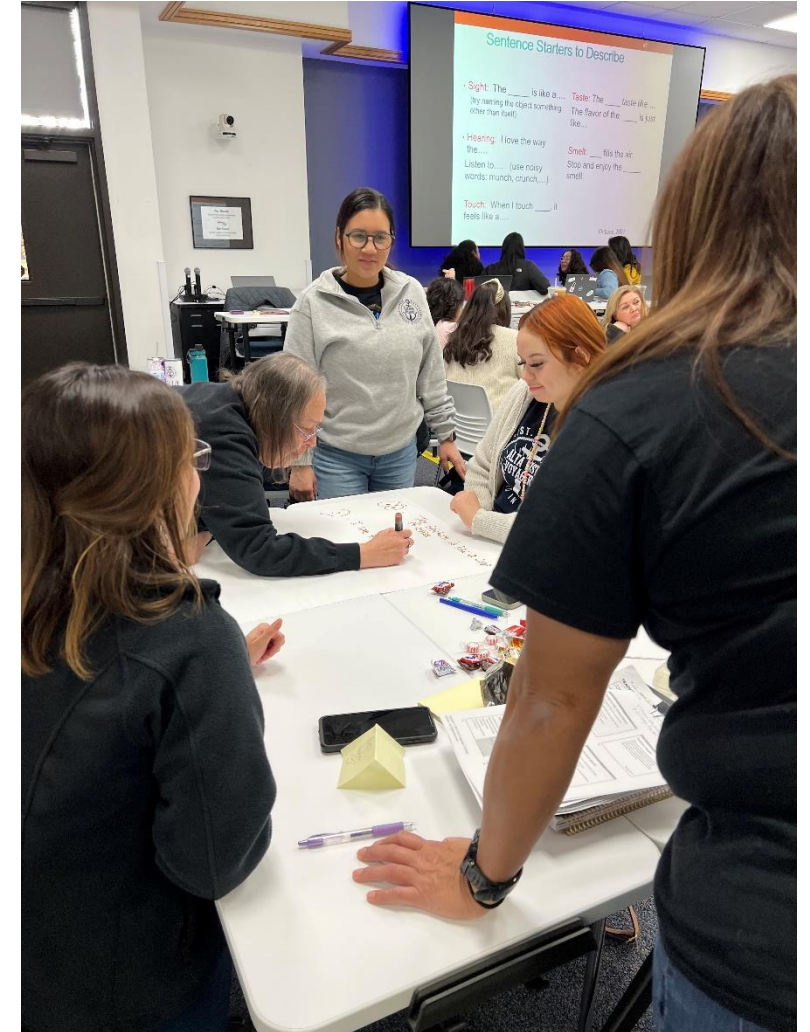
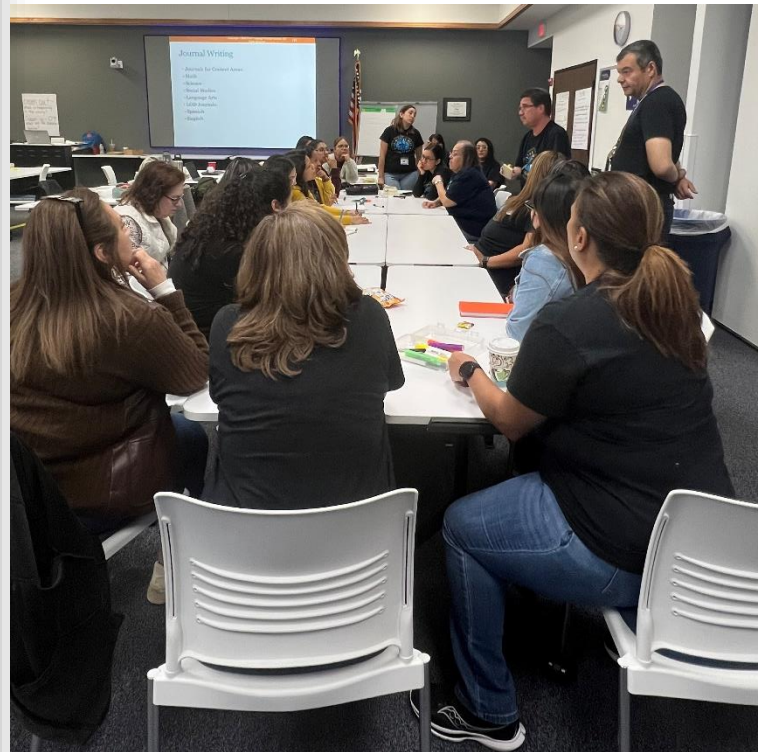
“Dual language immersion/two-way is a bilingual/biliteracy program model in which students identified as English learners are integrated with students proficient in English and are served in both English and another language and are prepared to meet reclassification criteria in order to be successful in English-only instruction not earlier than six or later than seven years after the student enrolls in school. Instruction provided in a language other than English in this program model is delivered by a teacher appropriately certified in bilingual education under TEC, §29.061, for the assigned grade level and content area. Instruction provided in English in this program model may be delivered either by a teacher appropriately certified in bilingual education or by a different teacher certified in ESL in accordance with TEC, §29.061, for the assigned grade level and content area. The goal of two-way dual language immersion is for program participants to attain full proficiency in another language as well as English. This model provides ongoing instruction in literacy and academic content in English and another language with at least half of the instruction delivered in the non-English program language for the duration of the program.”

**From §89.1210. Program Content and Design.**

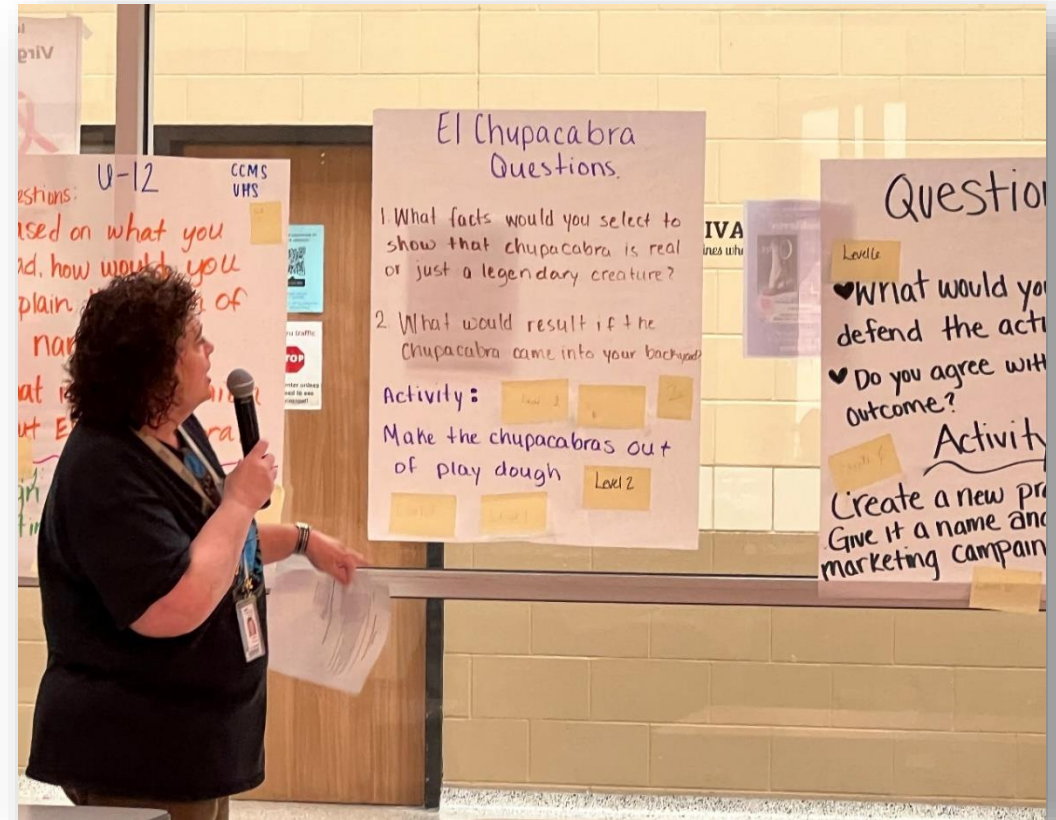
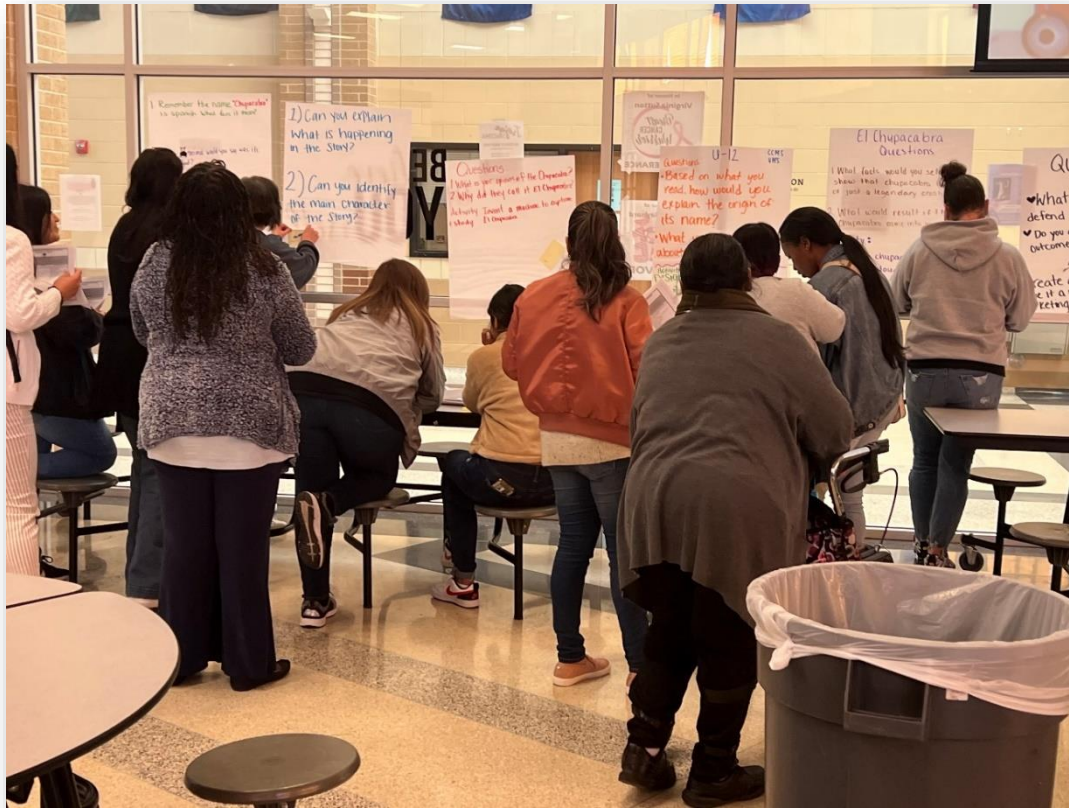
# PROFESSIONAL DEVELOPMENT HIGHLIGHTS



Bilingual Teachers and Paraprofessionals:  
Written Expression

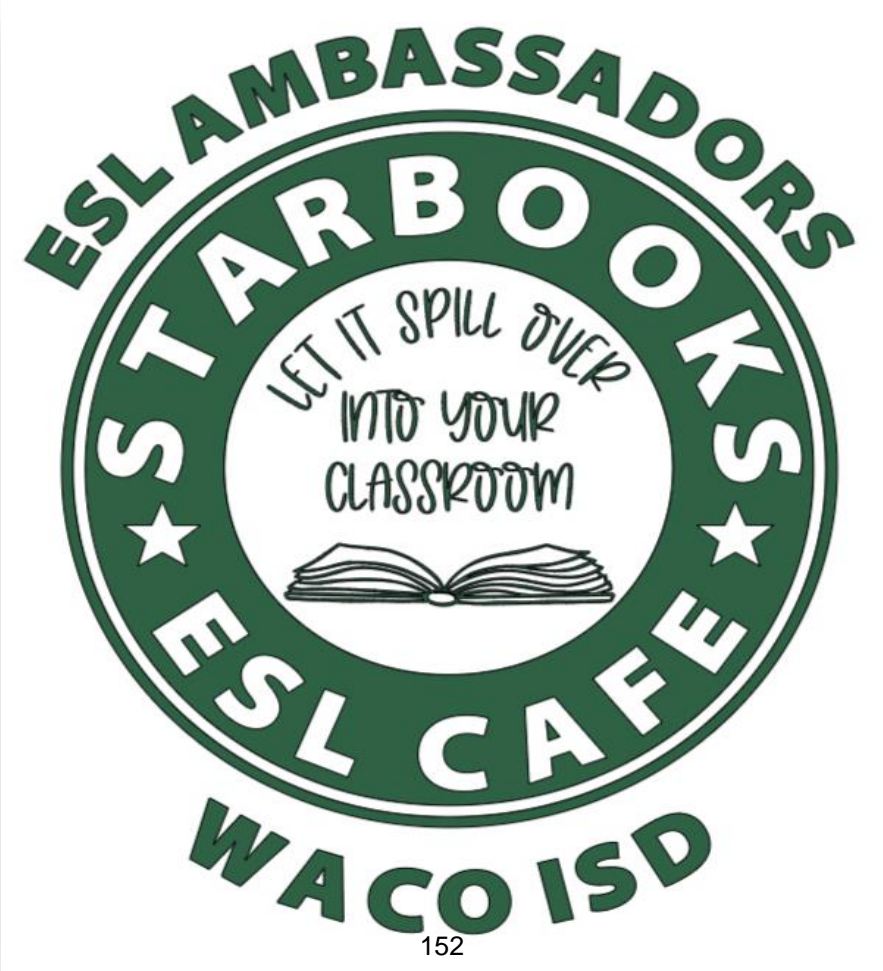


# PROFESSIONAL DEVELOPMENT HIGHLIGHTS



Our wonderful paraprofessionals: A Gallery Walk During Emergent Bilingual Higher Order Questioning Strategies Professional Development

# ENGLISH AS A SECOND LANGUAGE (ESL) PROGRAMS



# ESL/Content-Based

“An ESL/content-based program model is an English acquisition program that serves students identified as English learners through English instruction by a teacher appropriately certified in ESL under TEC, §29.061(c), through English language arts and reading, mathematics, science, and social studies. The goal of content-based ESL is for English learners to attain full proficiency in English in order to participate equitably in school. This model targets English language development through academic content instruction that is linguistically and culturally responsive in English language arts and reading, mathematics, science, and social studies.”

**From §89.1210. Program Content and Design.**

# ESL/Pull-Out

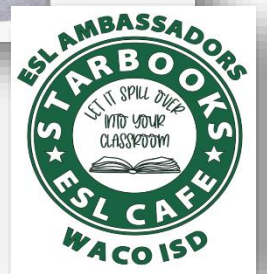
“An ESL/pull-out program model is an English acquisition program that serves students identified as English learners through English instruction provided by an appropriately certified ESL teacher under the TEC, §29.061(c), through English language arts and reading. The goal of ESL pull-out is for English learners to attain full proficiency in English in order to participate equitably in school. This model targets English language development through academic content instruction that is linguistically and culturally responsive in English language arts and reading. Instruction shall be provided by the ESL teacher in a pull-out or inclusionary delivery model.”

# WACO ISD ESL CAFE

ESL Cafe Port of Call: Ireland

Topic of Focus:

Strategies to get Students Talking:  
Would You Rather, Picture and  
Sequence Cards



# ESL CAFE PORT OF CALL: FRANCE

**Topic of Focus:** *Chat Mats: Incorporating Writing and Speaking Stems into Instruction*



# STUDENT DEMOGRAPHICS

Program Specification	Number of Students 2022-2023
Total Limited English Proficient (LEP) Students	3,235
Bilingual	924
ESL	2,311

# MONITORED YEAR 1 AND YEAR 2 STUDENTS

**Monitored Year 1 & Year 2 (Includes Reclassified Students)**

44 (includes students that met reclassification criteria)

# ESL AND BILINGUAL PROGRAMS STAFFING: 2022-2023

## ESL and Bilingual Programs Staffing:

- 234 teachers at Waco ISD taught in an ESL Program.
- 49 teachers taught in a Bilingual Education Program.
- 4 teachers needed to instruct Emergent Bilinguals under a bilingual education exception (Spanish).
- 10 teachers needed to instruct Emergent Bilinguals under an ESL waiver.



Two of Waco ISD's Talented ESL Ambassadors:  
Teachers from left to right: Ms. Elizabeth Nelon  
and Ms. Angela Boettcher

# Community Partnerships



# DESIGN THINKING WORKSHOP IN SPANISH

Inaugural  
Cohort:  
2022-2023

(Waco ISD and  
Creative Waco  
Partnership)



161



# STUDENTS FROM UHS AT DESIGN THINKING PD IN SPANISH



162



# MENTORING TO INSPIRE: PARTNERSHIP WITH WACO ISD AND THE HISPANIC LEADERS NETWORK, *NAVEGANDO*, MENTORS



# BUILDING A CEILING WITH NO LIMITS: PARTNERSHIP WITH WACO ISD, BAYLOR, AND NAVEGANDO

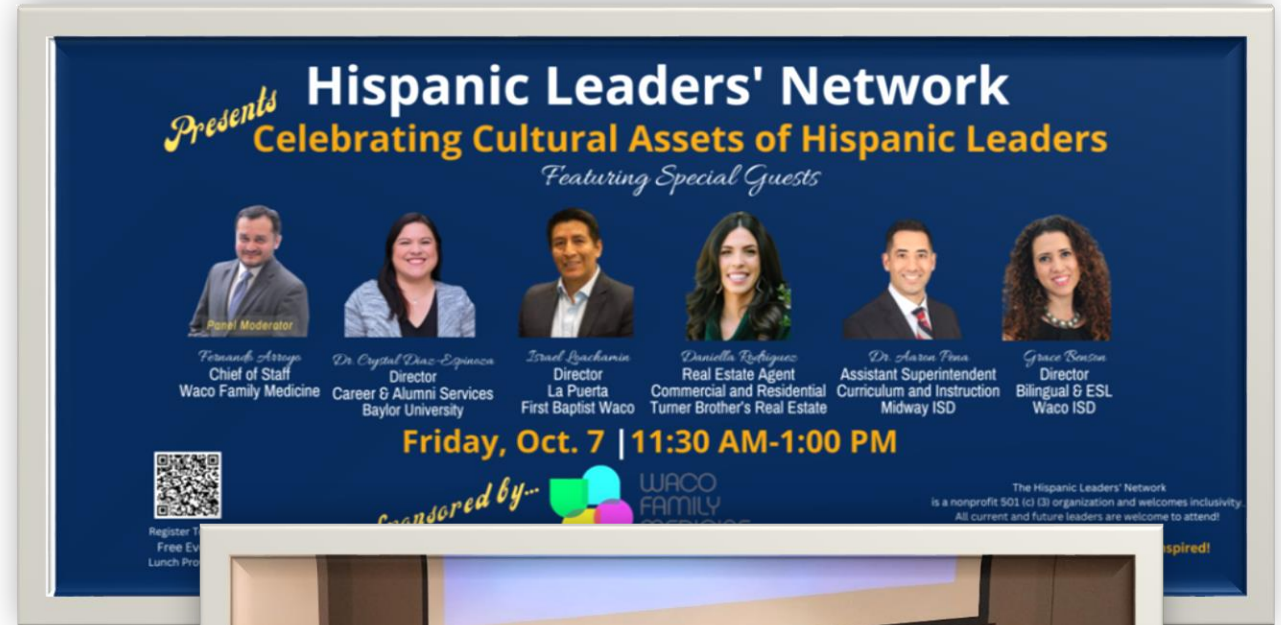
## Baylor Tour-May 15, 2023

The Baylor tour was provided in Spanish so that our newcomers could fully participate. Students learned all about Baylor, academic programs, the application process, and financial aid resources. All students also received a complimentary lunch and a Baylor T-Shirt.



# LOCAL RECOGNITIONS

On October of 2022, Grace Benson served as a panel for the Hispanic Leaders Network monthly luncheon that focused on celebrating “Cultural Assets of Hispanic Leaders”. Each panel guests shared their unique stories of how their cultural assets has contributed to their leadership style and professional achievements.



# REGIONAL RECOGNITIONS



**Maria Antonio**  
*Region 12 Title III Influencer*



**Grace Benson**

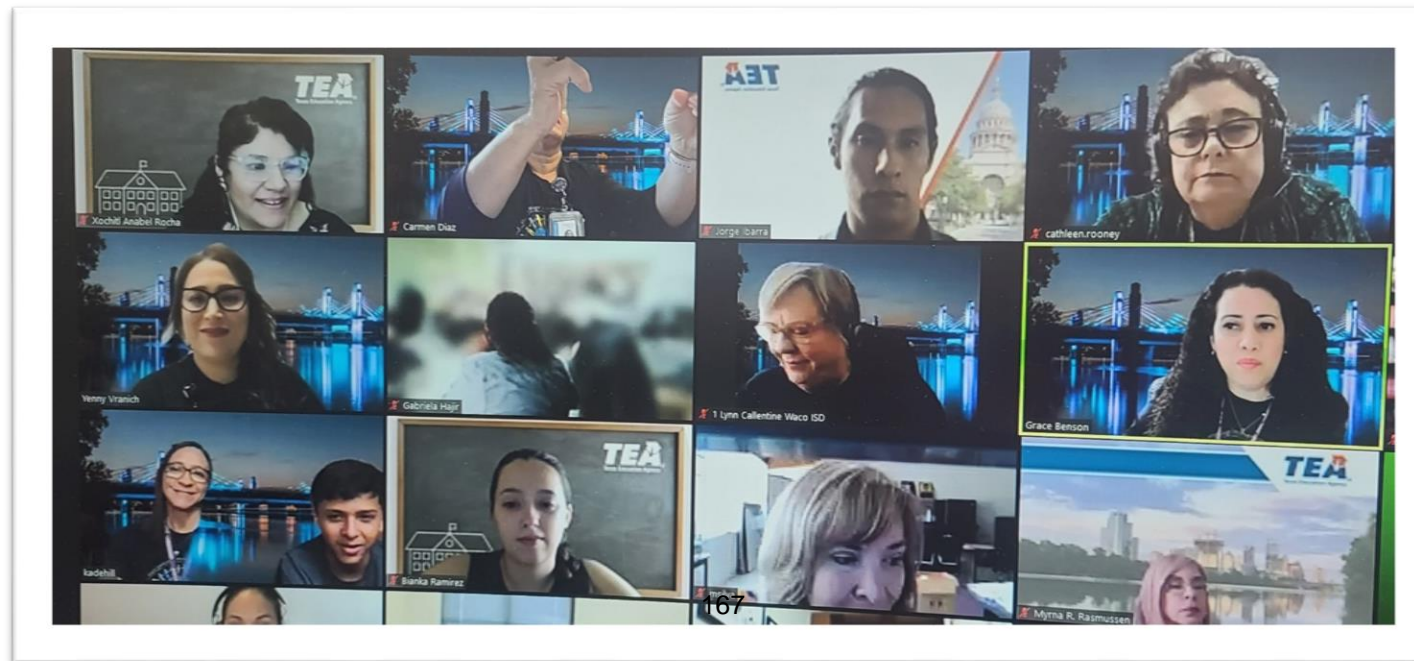
- *Region 12 Title III Leader of the Year*
- *Region 12 Title III Influencer*



**Krisol Villa-Flores**  
*Region 12*  
*Bilingual Teacher of the Year*

# TEXAS EDUCATION AGENCY (TEA) RECOGNITION

As part of the TEA's Newcomer Community of Practice, the agency highlights districts across the state that are implementing high quality English as a Second Language (ESL), Bilingual, Dual Language Immersion, and Newcomer programs that foster success for Emergent Bilingual students. During 2022-2023, Waco ISD was highlighted by the Texas Education Agency. On May 17, 2023, the English Learners Department presented to the TEA and districts across the state to share highlights and celebrations about ESL, Dual Language Immersion, and Newcomer programming at Waco ISD. The presentation was titled: *Building Unity and Equity Through Strength-Based Program Design*.

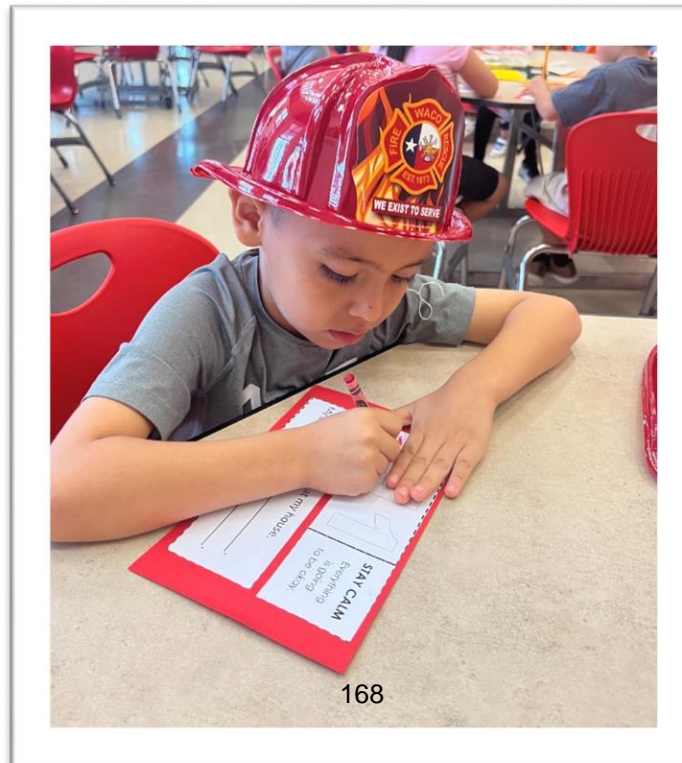


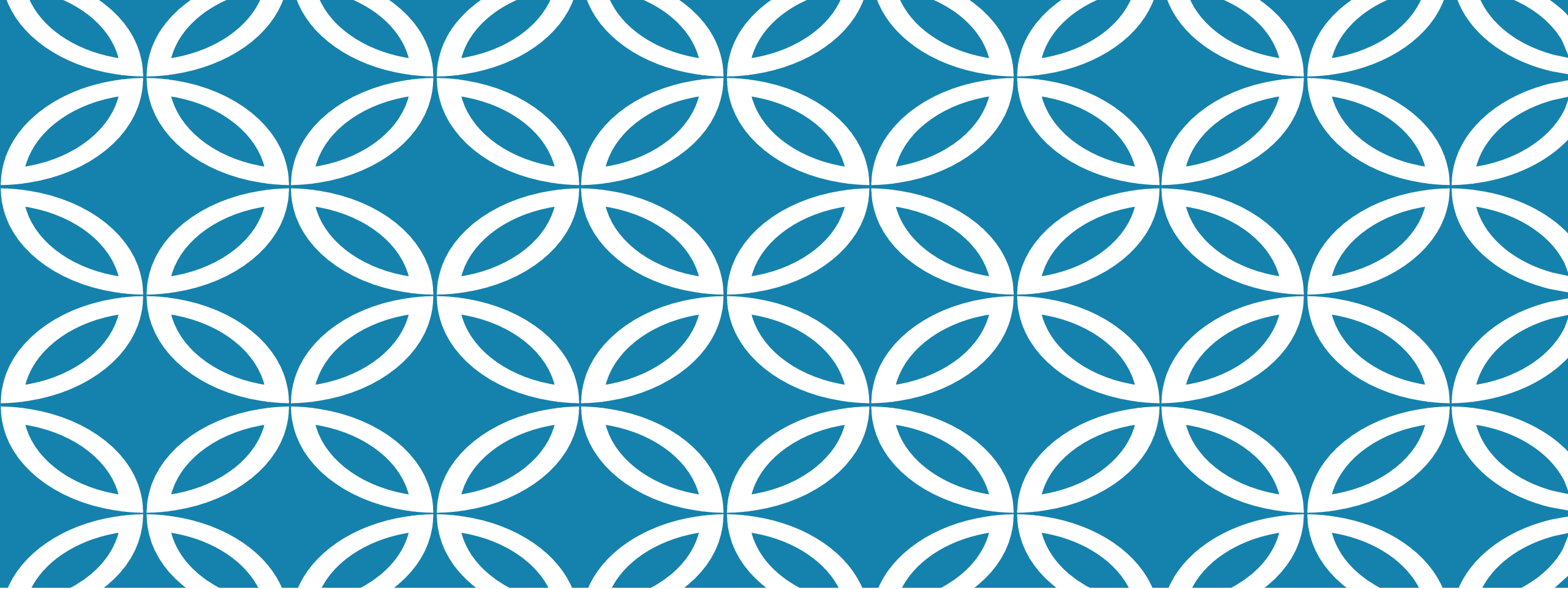
# LANGUAGE ACQUISITION SUMMER SCHOOL: MAY 31-JUNE 29

We want to thank our dedicated and talented lead teacher, Ms. Carolyn Green and the incredible Language Acquisition Summer School teachers, paraprofessionals, lead clerk, and nurse for the valuable time they took this summer to ensure that students had continuous academic and linguistic growth.

We also want to thank the administration at Bell's Hill for always welcoming our Emergent Bilingual students from all over the district and hosting our program at Bell's Hill Elementary each year.

All Emergent Bilinguals in PK and Kindergarten were invited to the program and a total of 140 students attended.

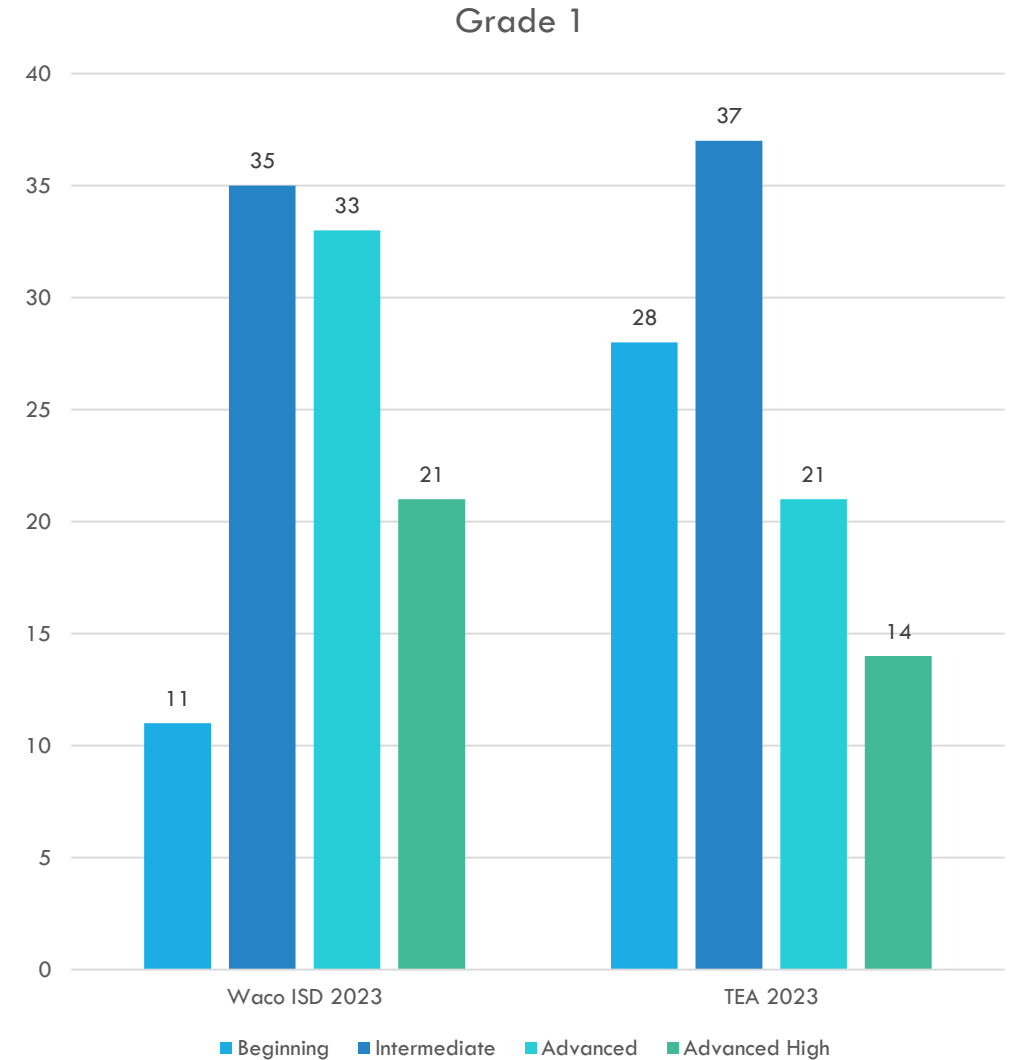
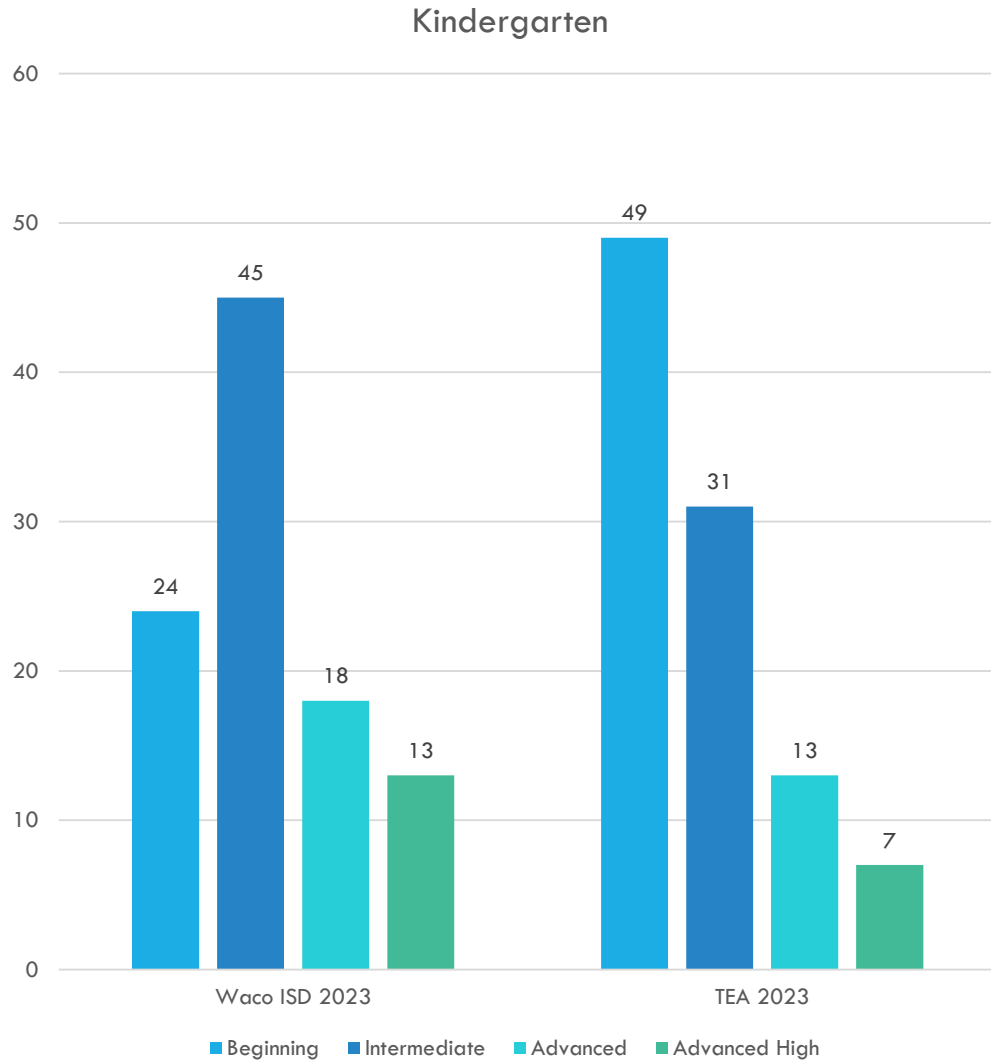




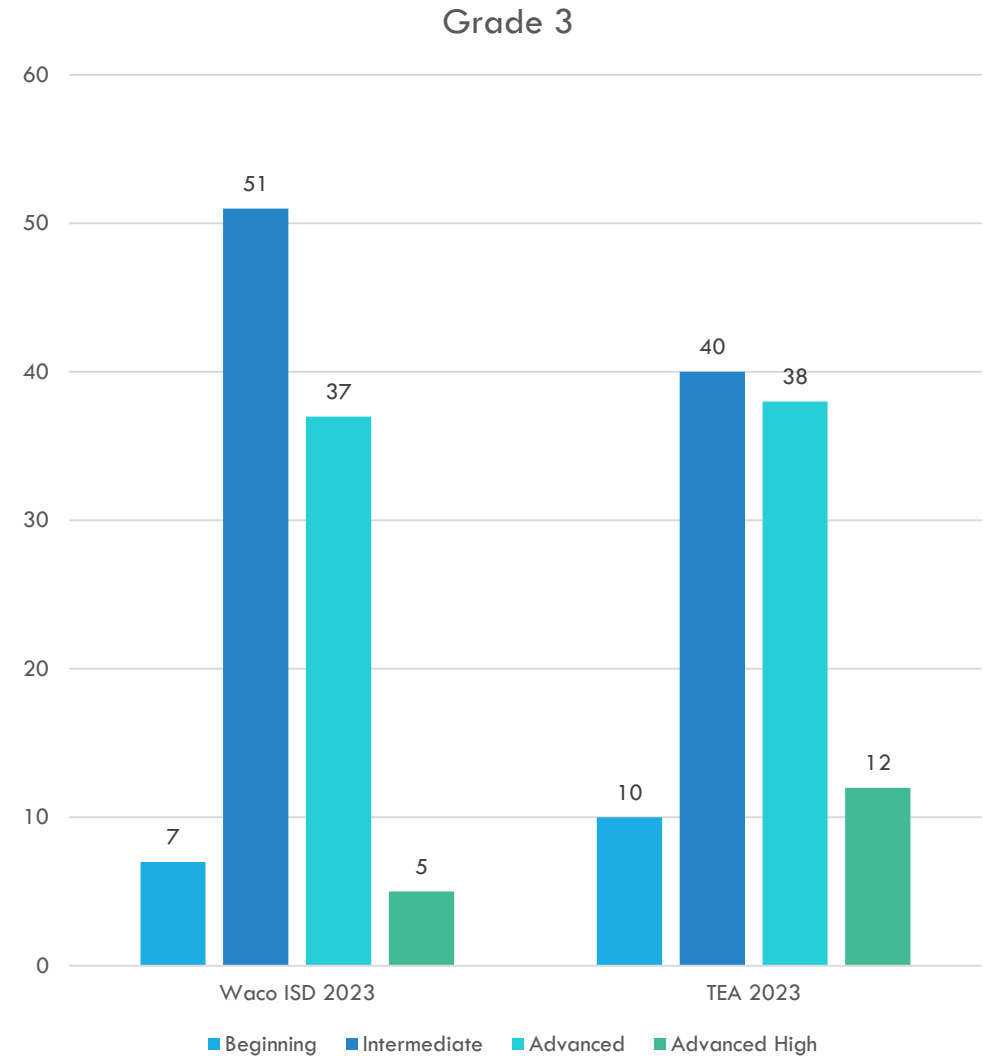
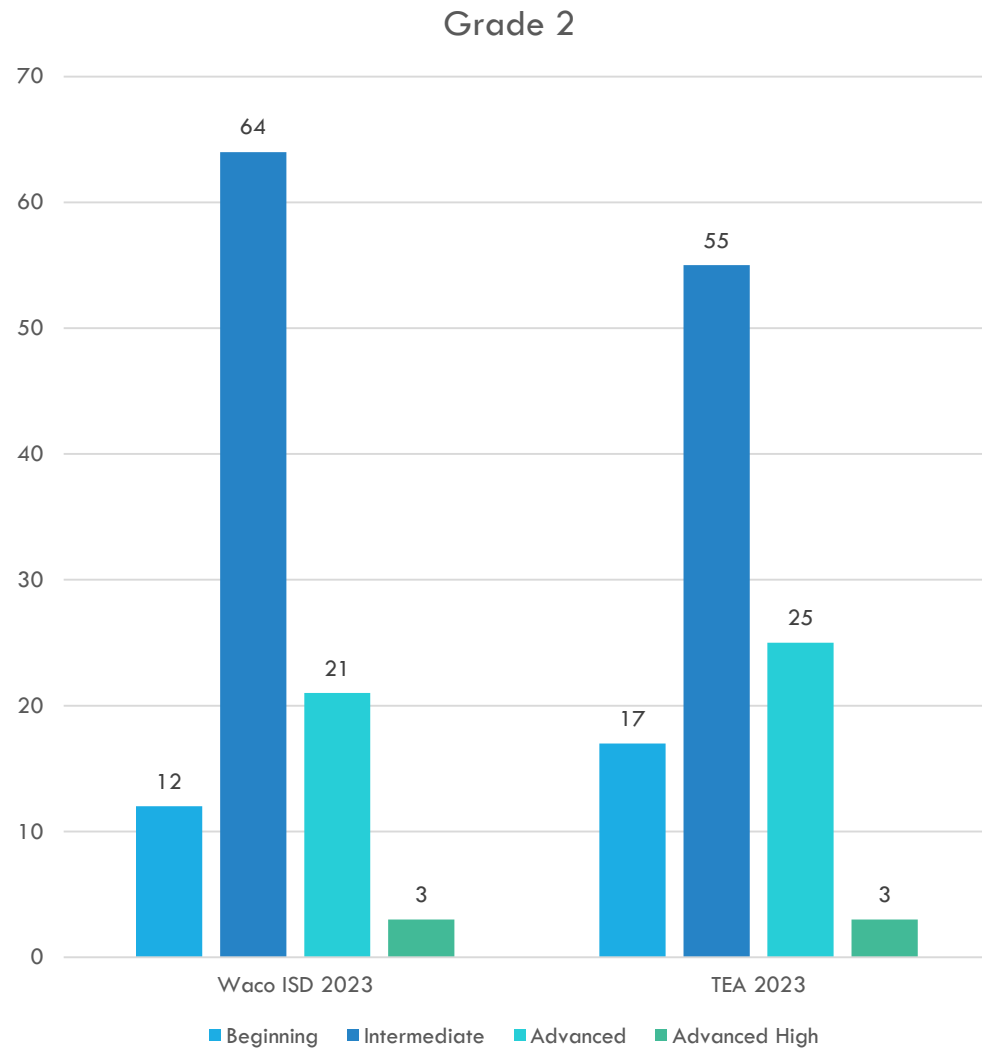
**TELPAS RESULTS:  
COMPOSITE SCORES  
2022-2023 (GRADES K-12)**



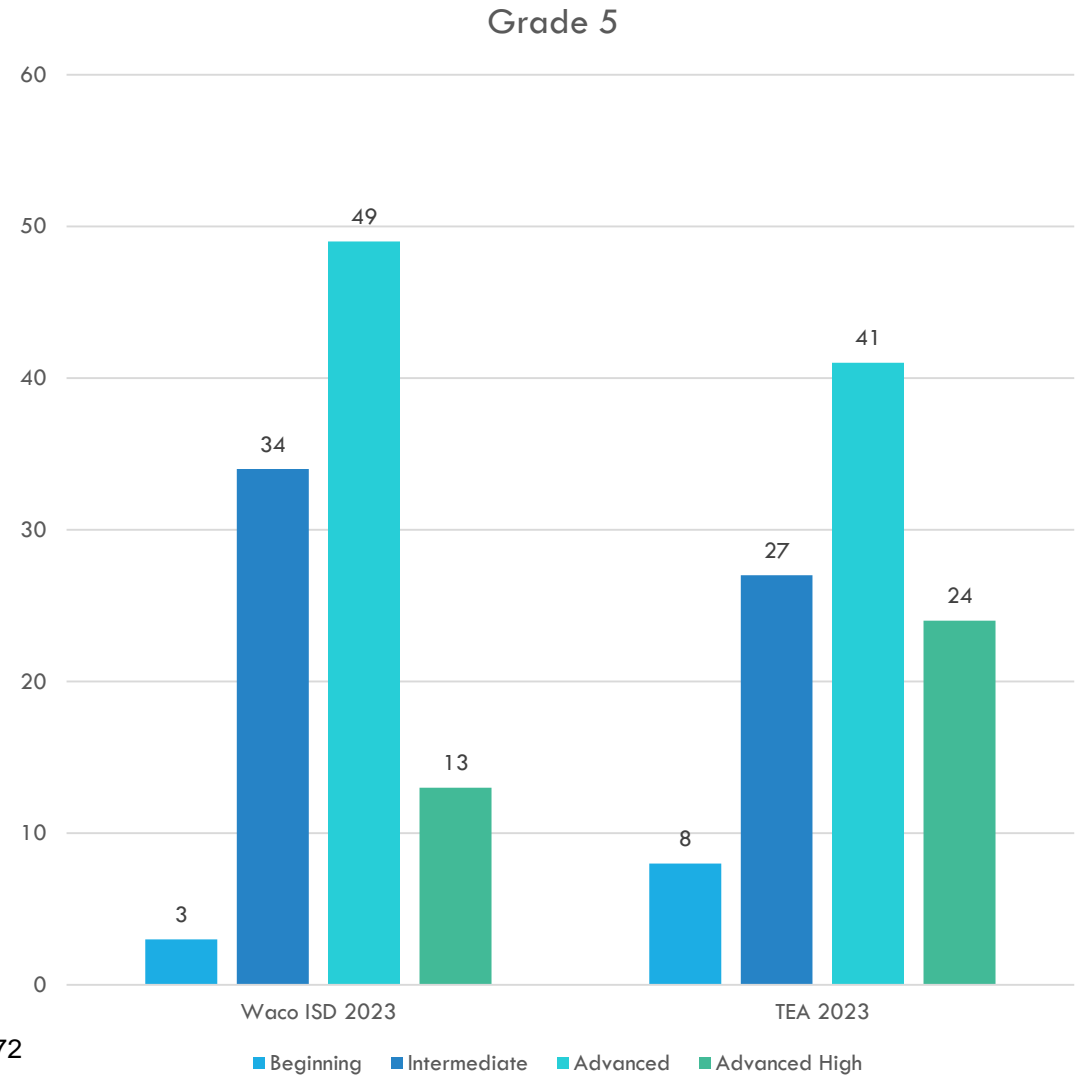
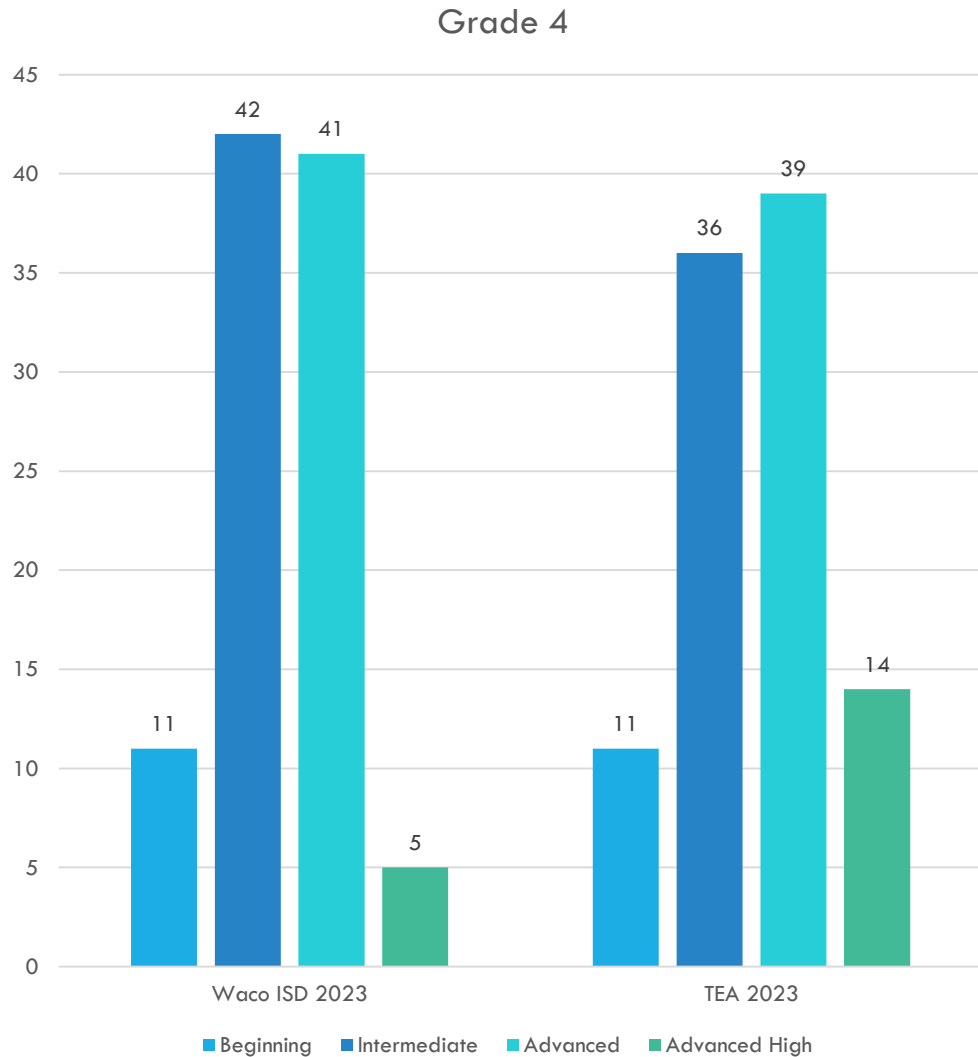
# TELPAS COMPOSITE SCORES: KINDERGARTEN-GRADE 1



# TELPAS COMPOSITE SCORES: GRADE 2 AND GRADE 3

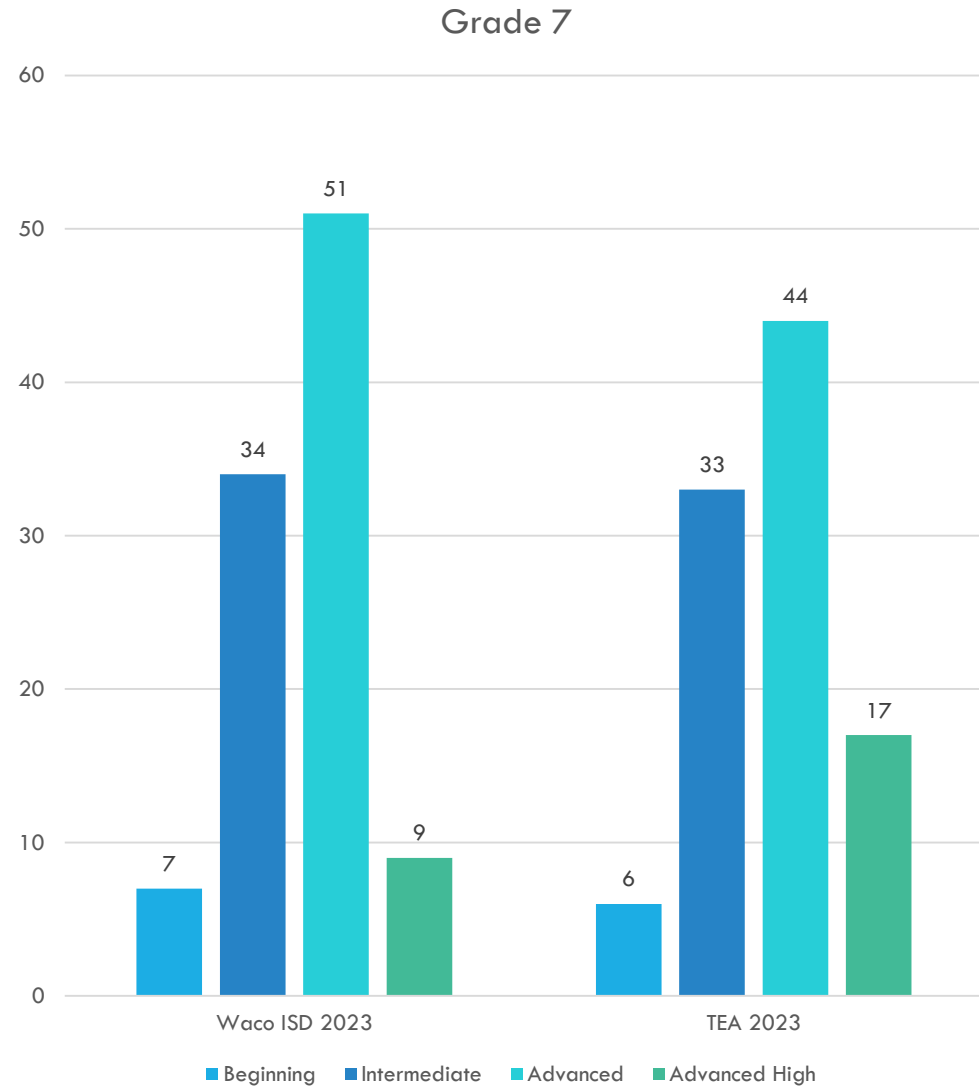
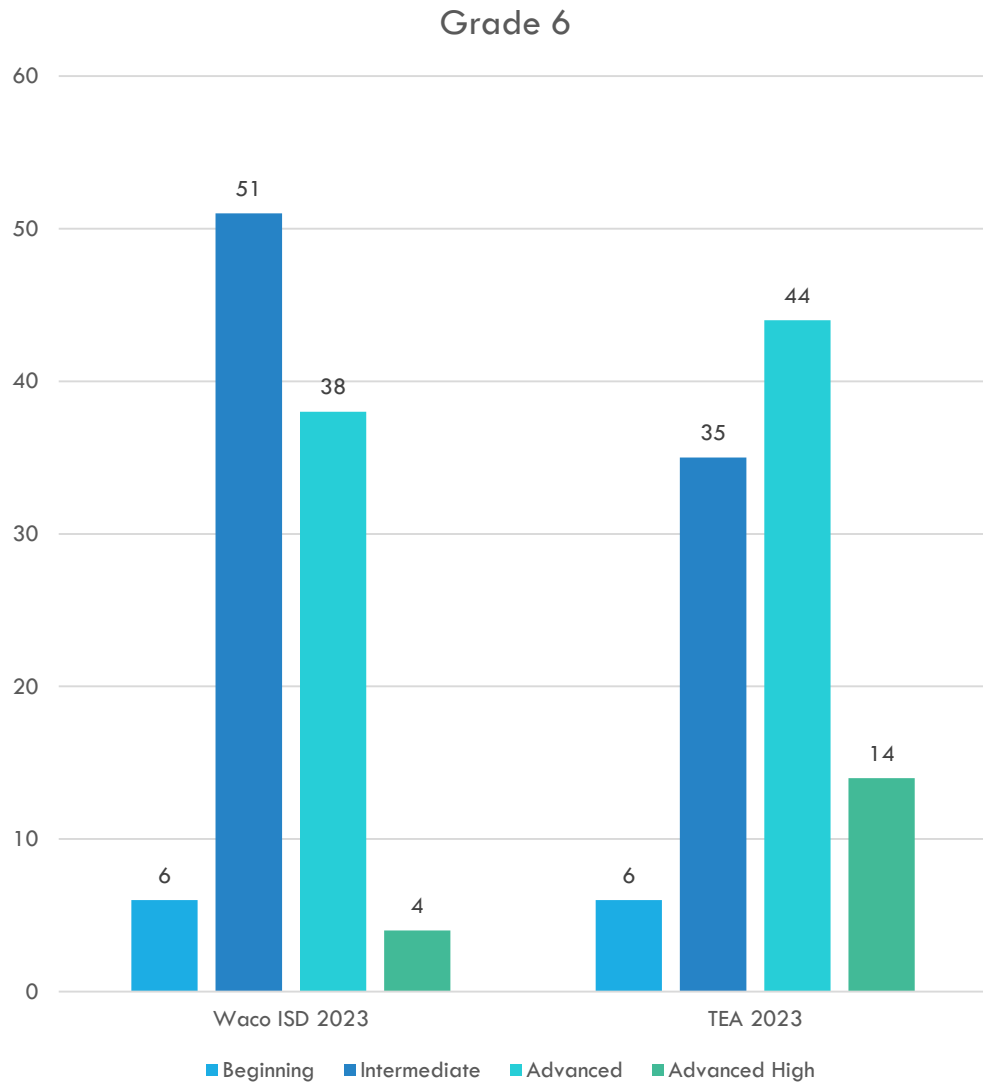


# TELPAS COMPOSITE SCORES: GRADE 4 AND GRADE 5



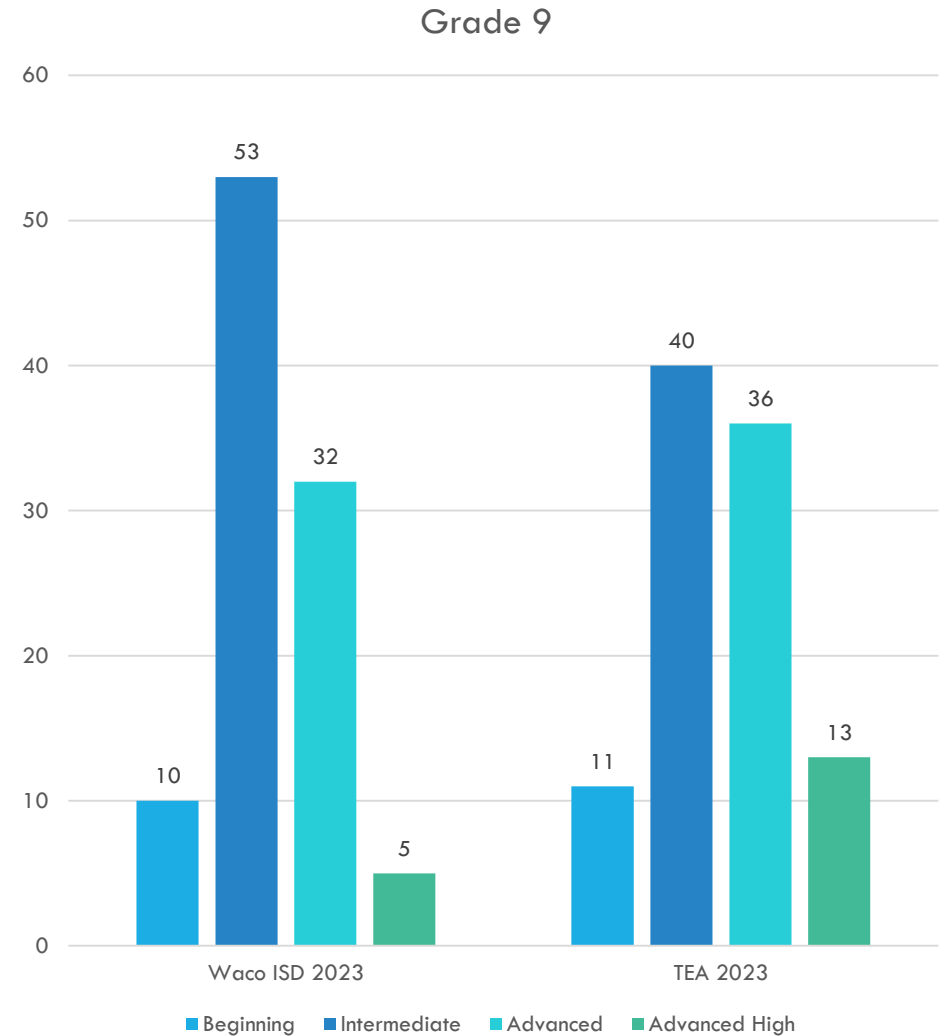
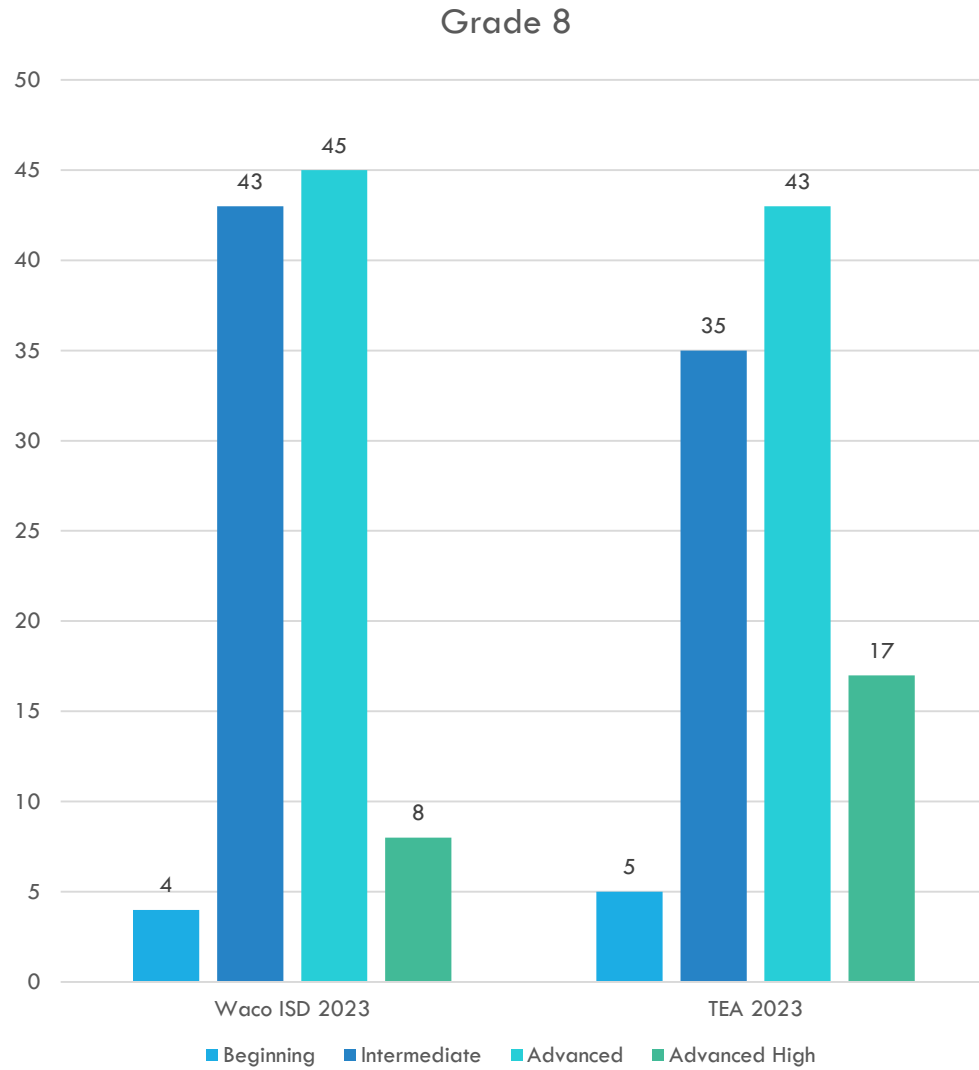
172

# TELPAS COMPOSITE SCORES: GRADE 6 AND GRADE 7

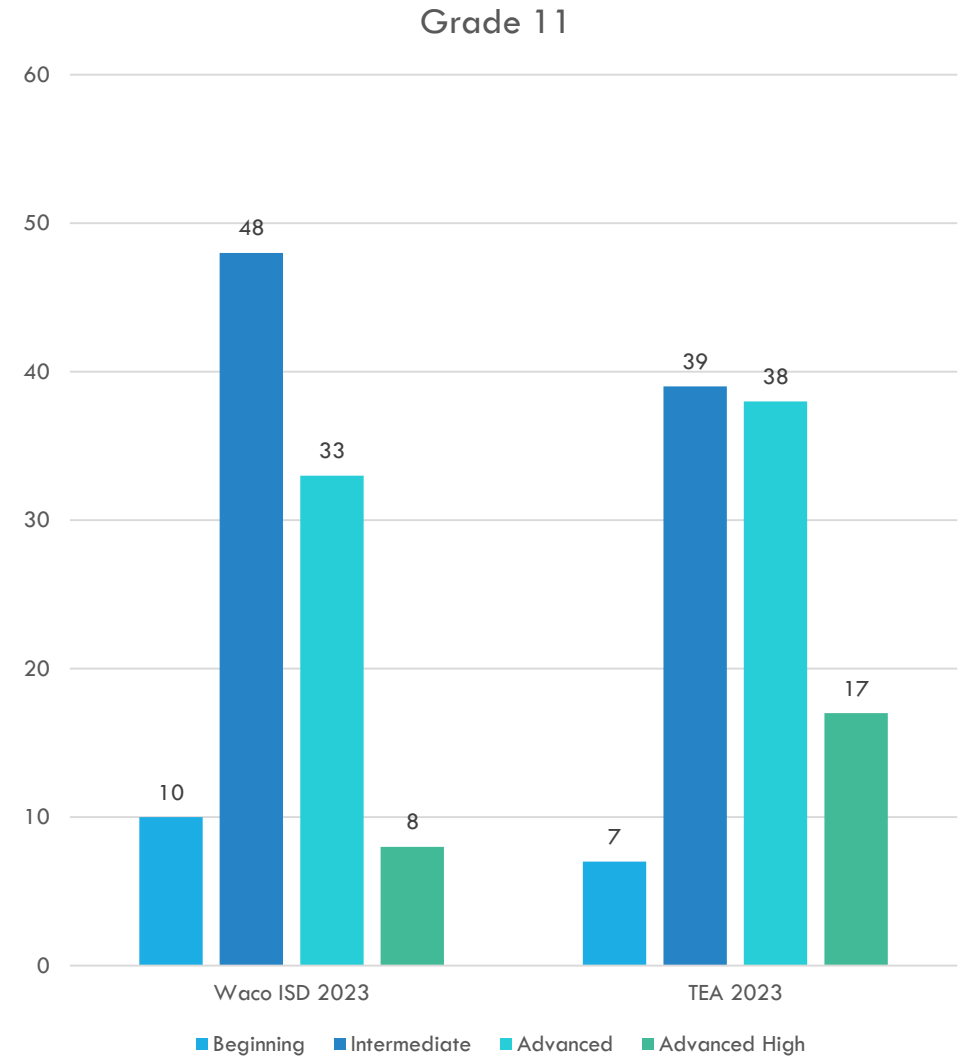
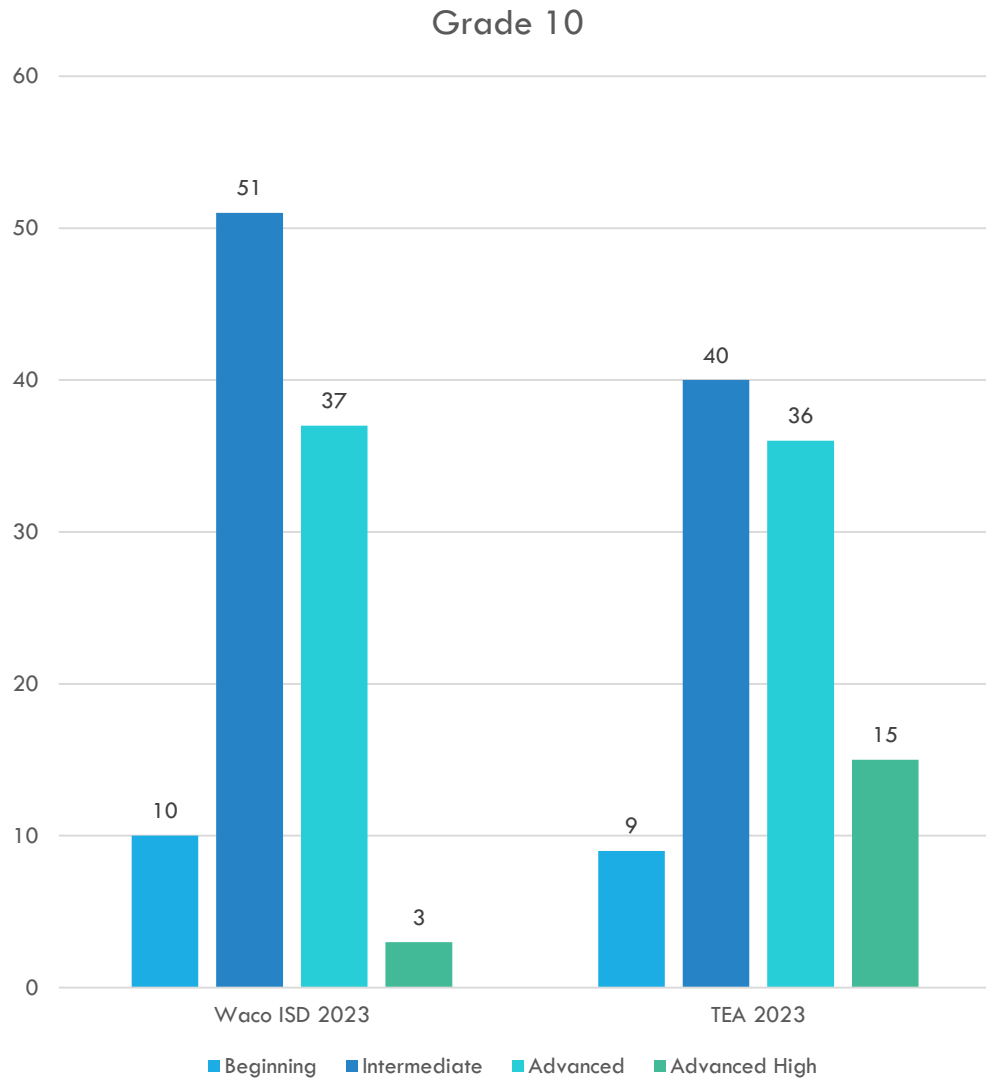


173

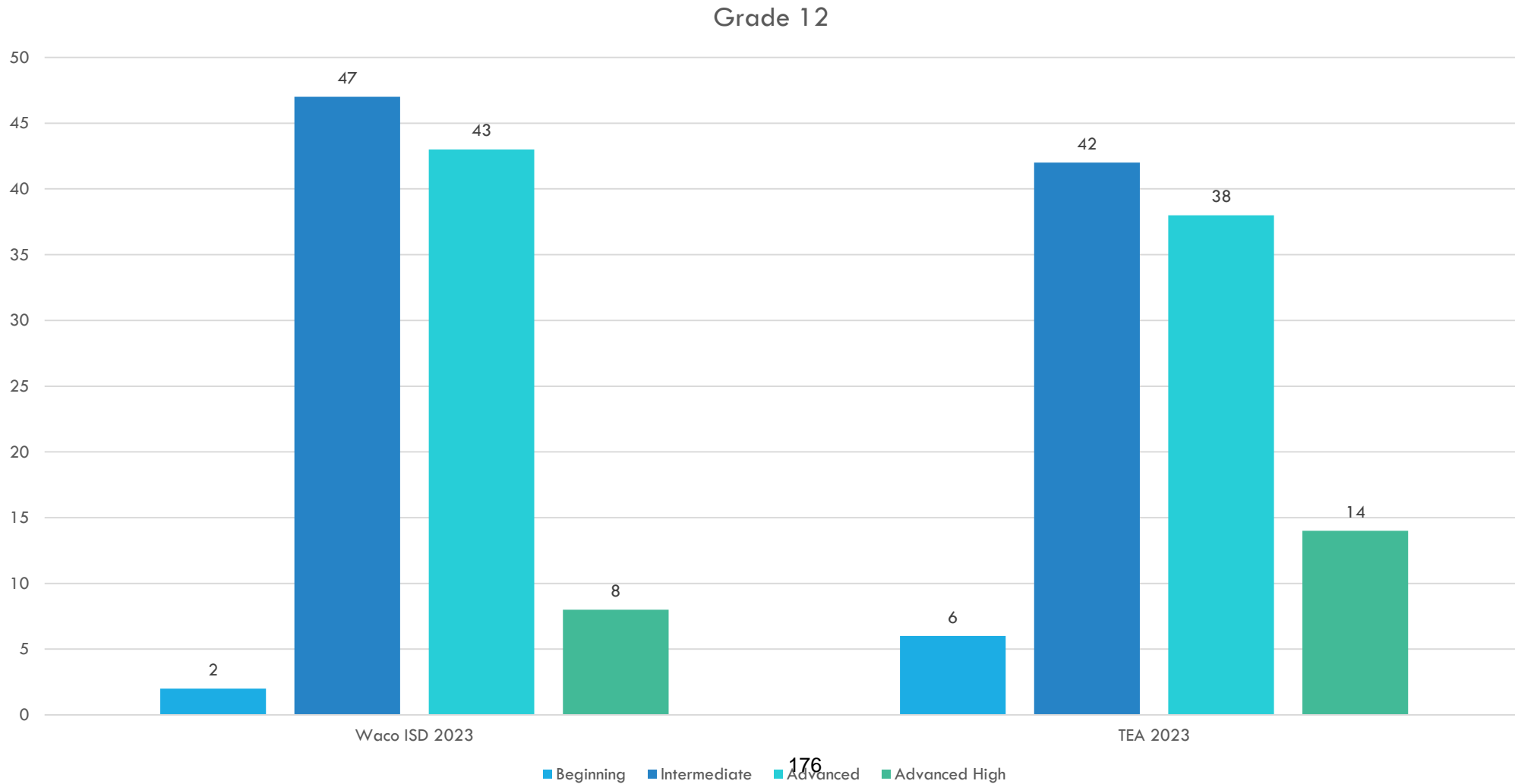
# TELPAS COMPOSITE SCORES: GRADE 8 AND GRADE 9

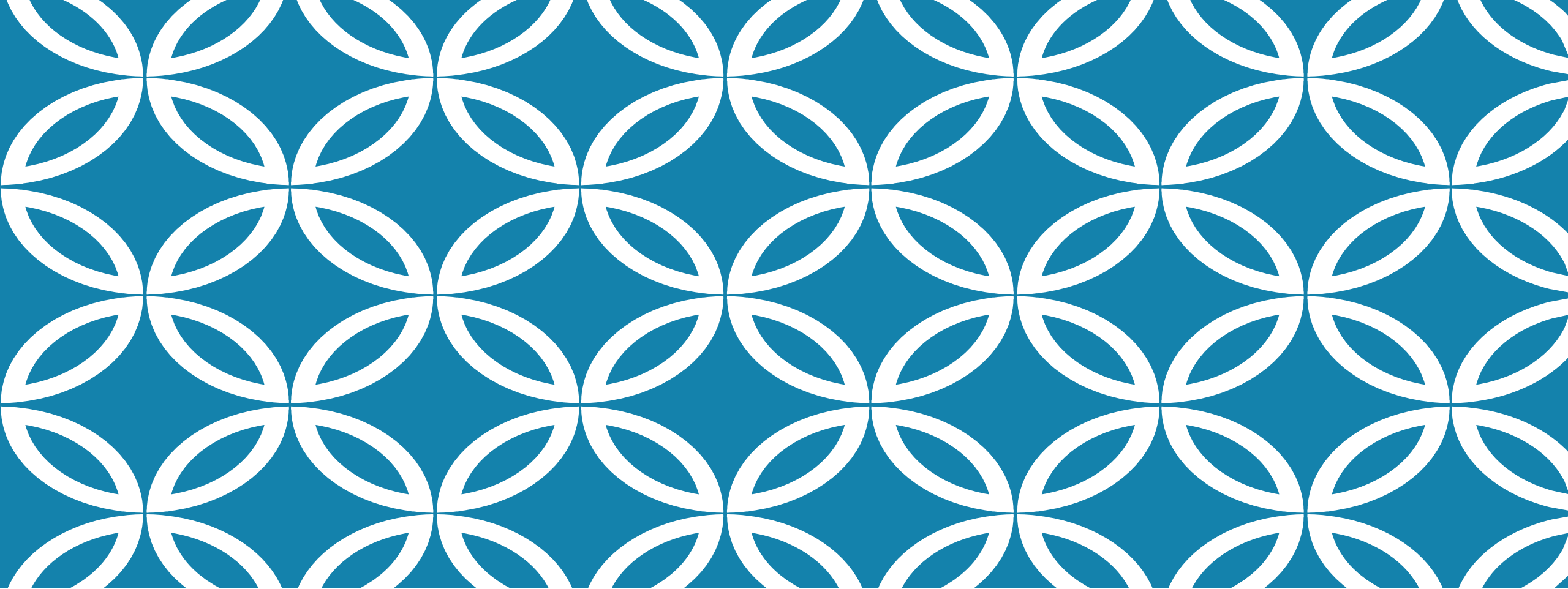


# TELPAS COMPOSITE SCORES: GRADE 10 AND GRADE 11



# TELPAS COMPOSITE SCORES: GRADE 12



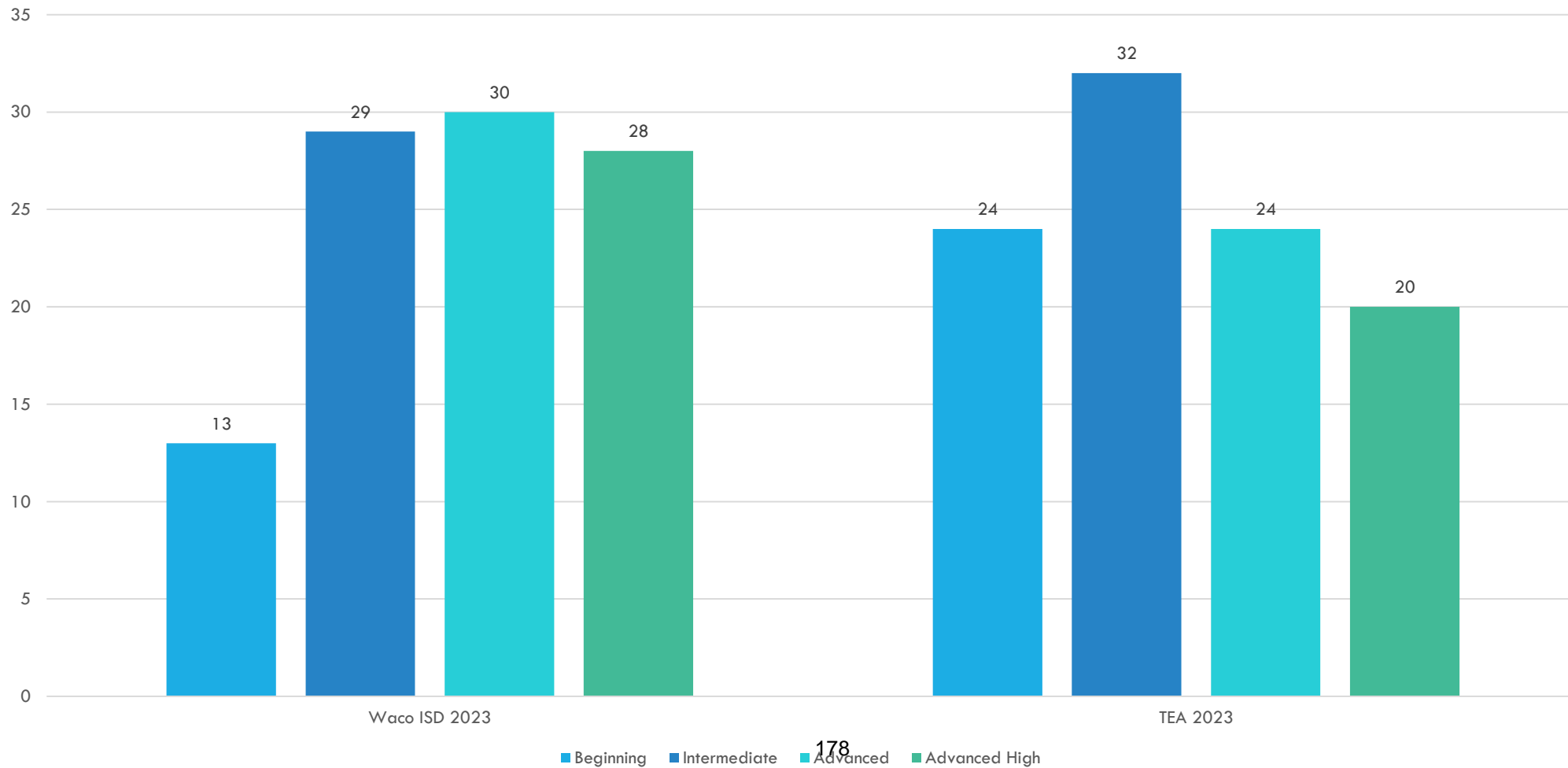


**TELPAS RESULTS:  
DOMAIN SCORES  
2022-2023 (GRADE CLUSTERS K-2 AND 3-12)**



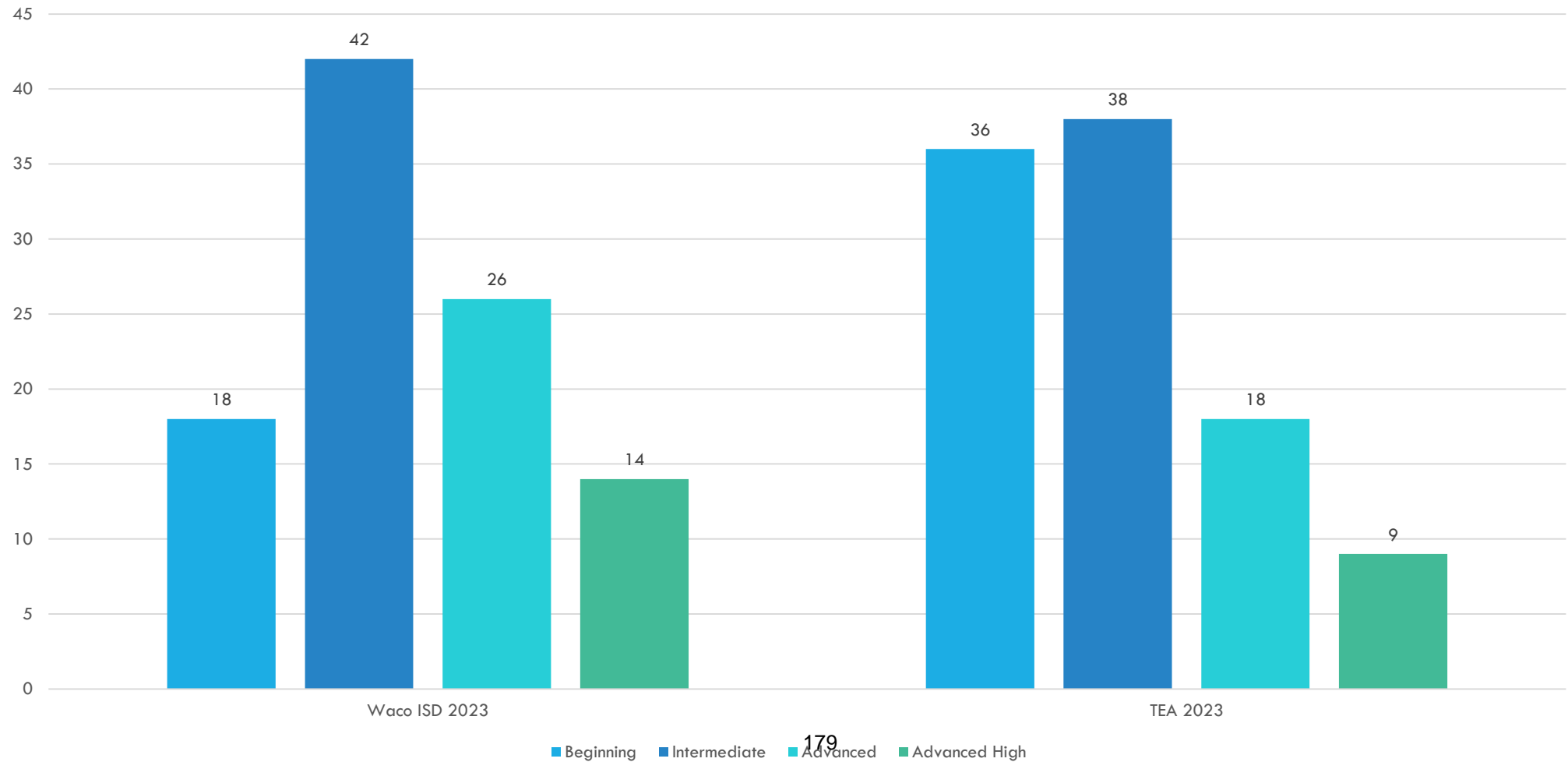
# TELPAS DOMAIN SCORES: GRADES K-2 LISTENING

Grades K-2



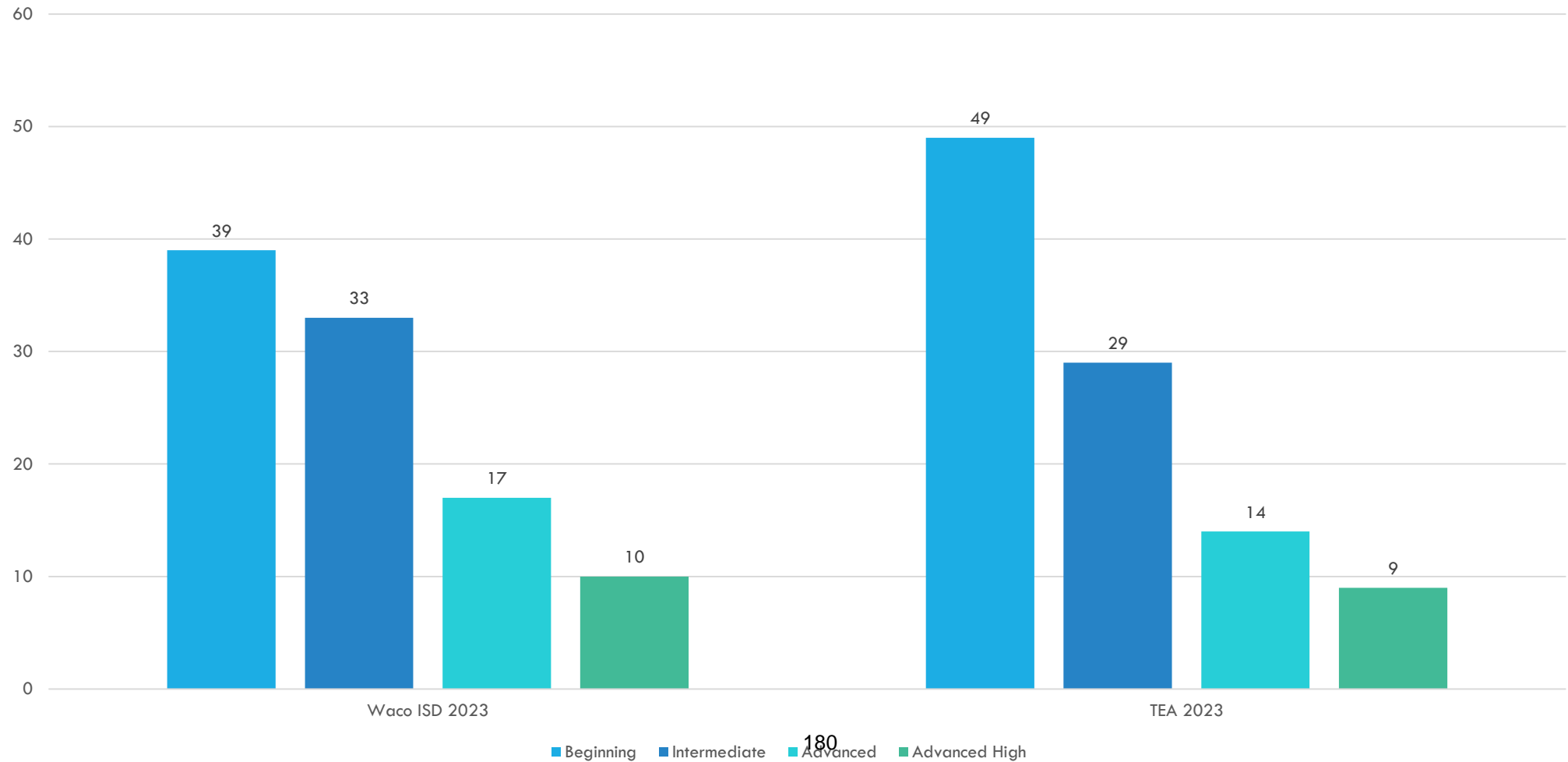
# TELPAS DOMAIN SCORES: GRADES K-2 SPEAKING

Grades K-2



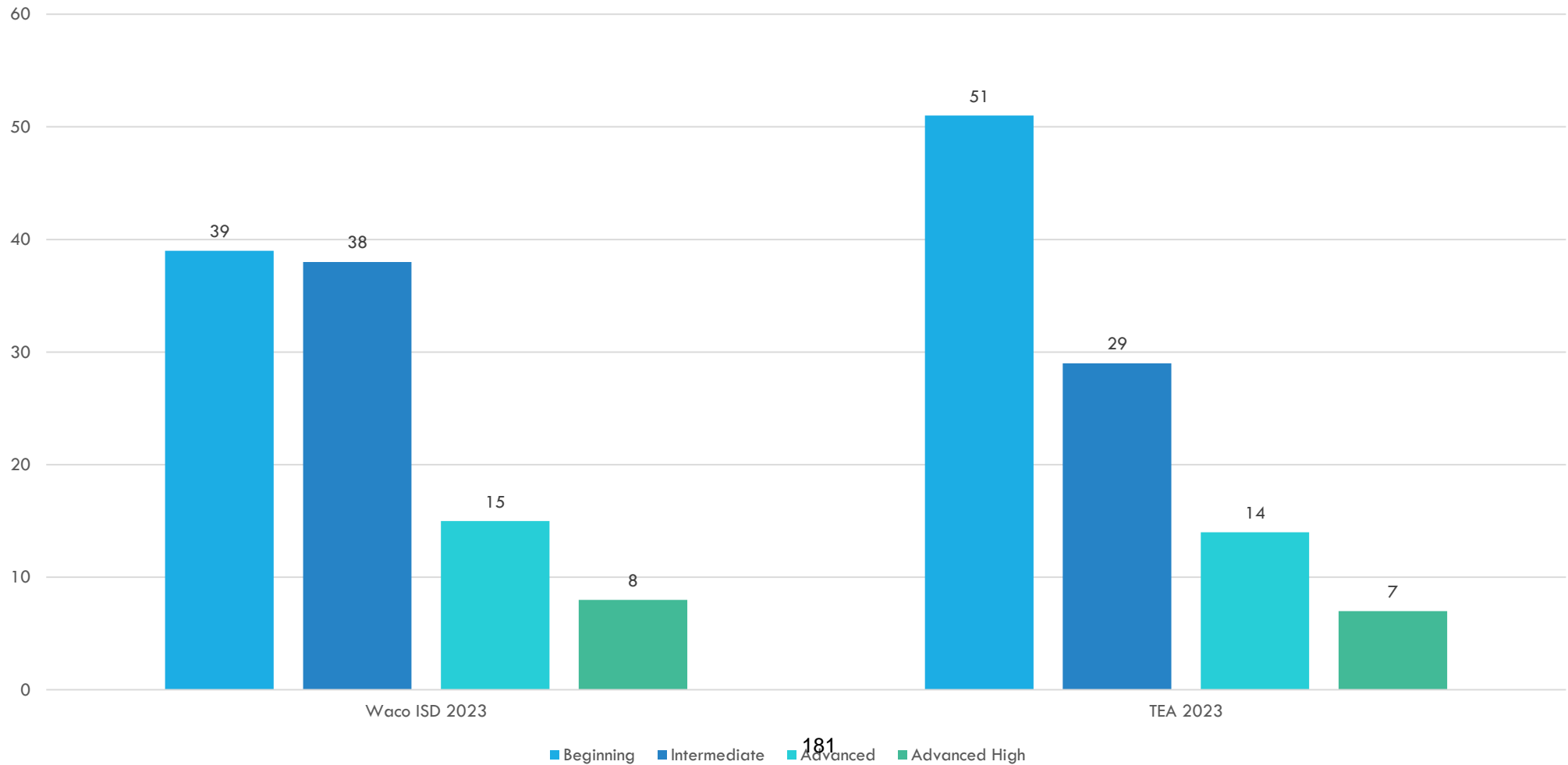
# TELPAS DOMAIN SCORES: GRADES K-2 READING

Grades K-2



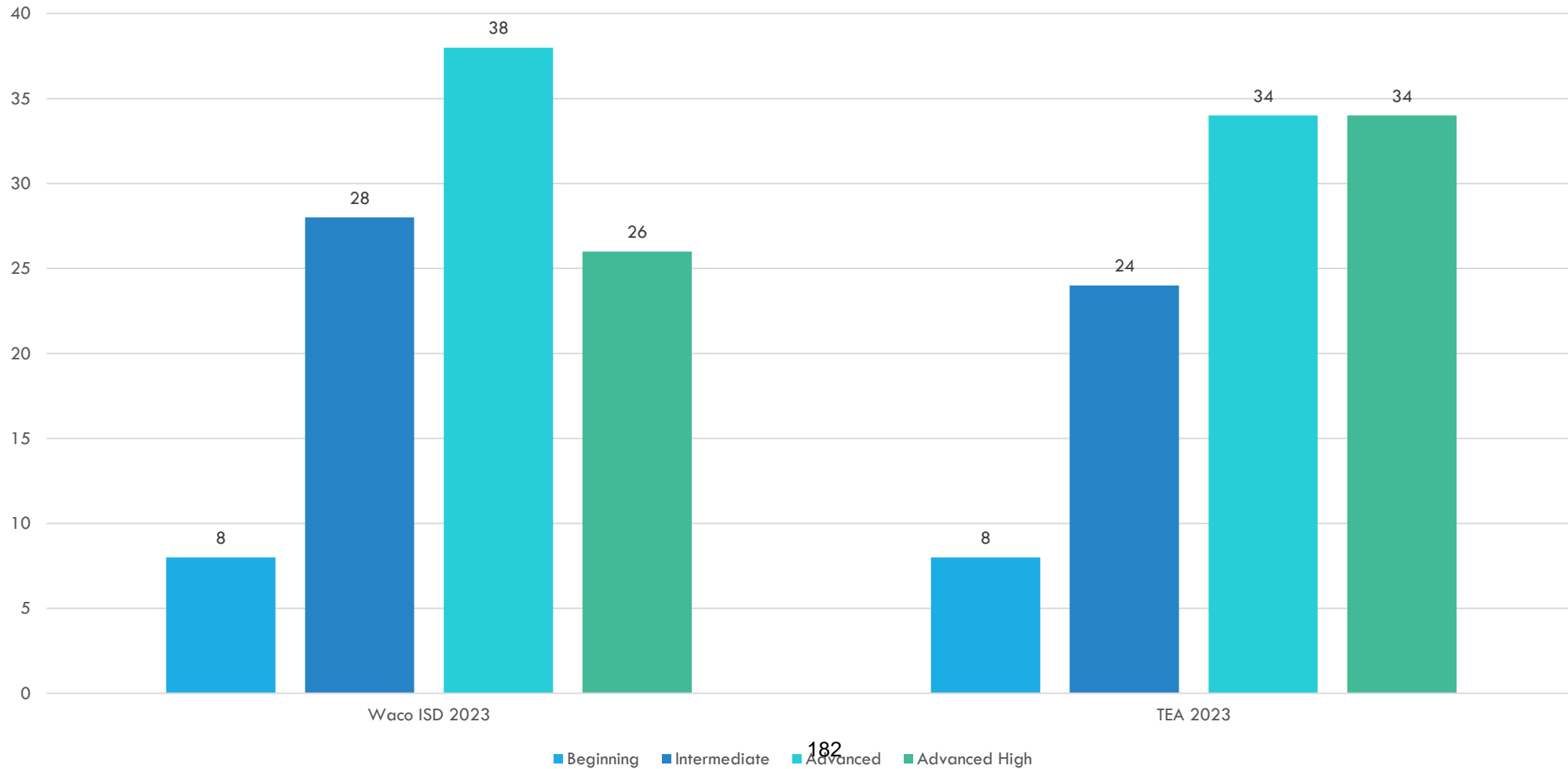
# TELPAS DOMAIN SCORES: GRADES K-2 WRITING

Grades K-2



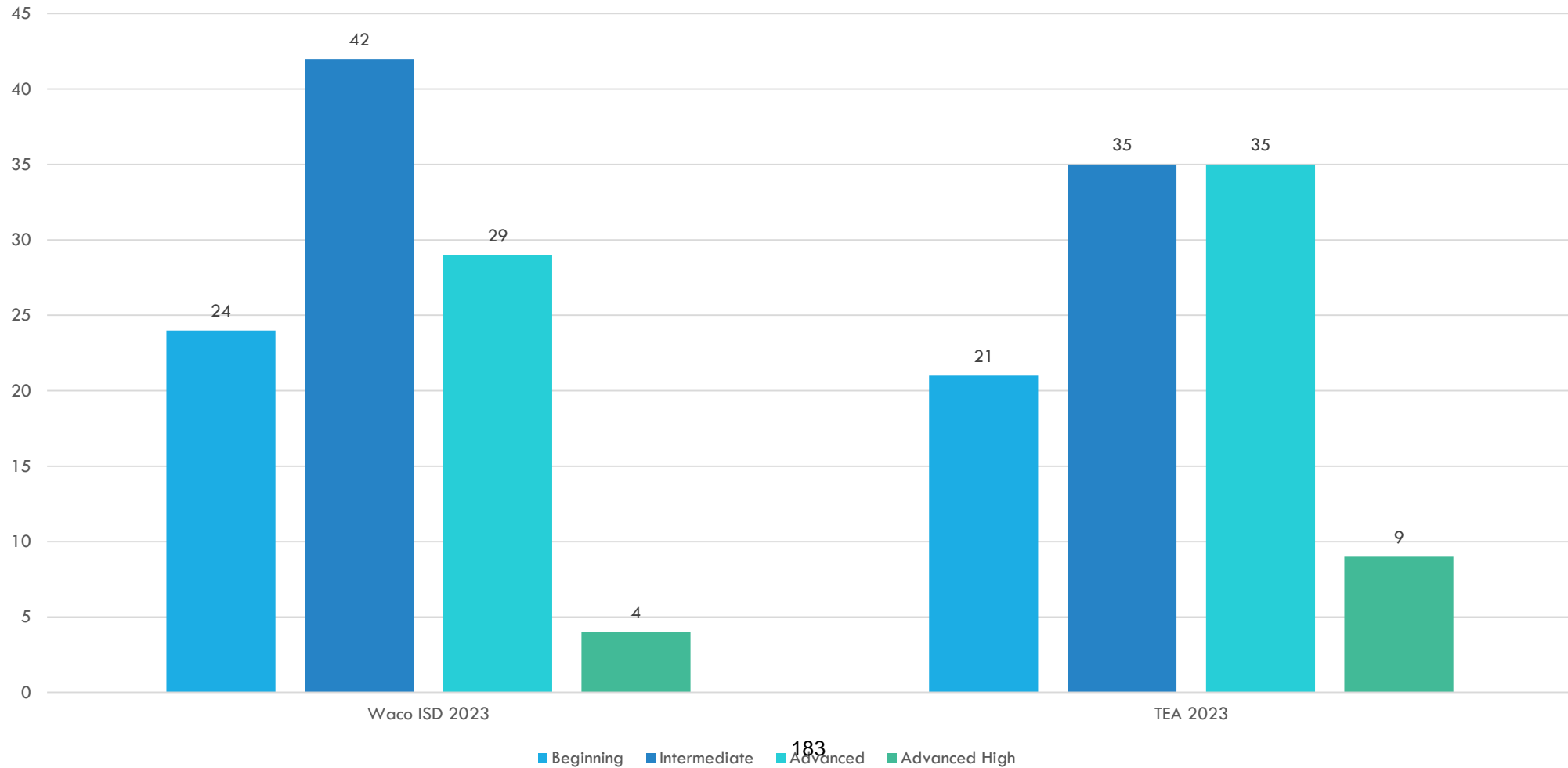
# TELPAS DOMAIN SCORES: GRADES K-2 LISTENING

Grades 3-12



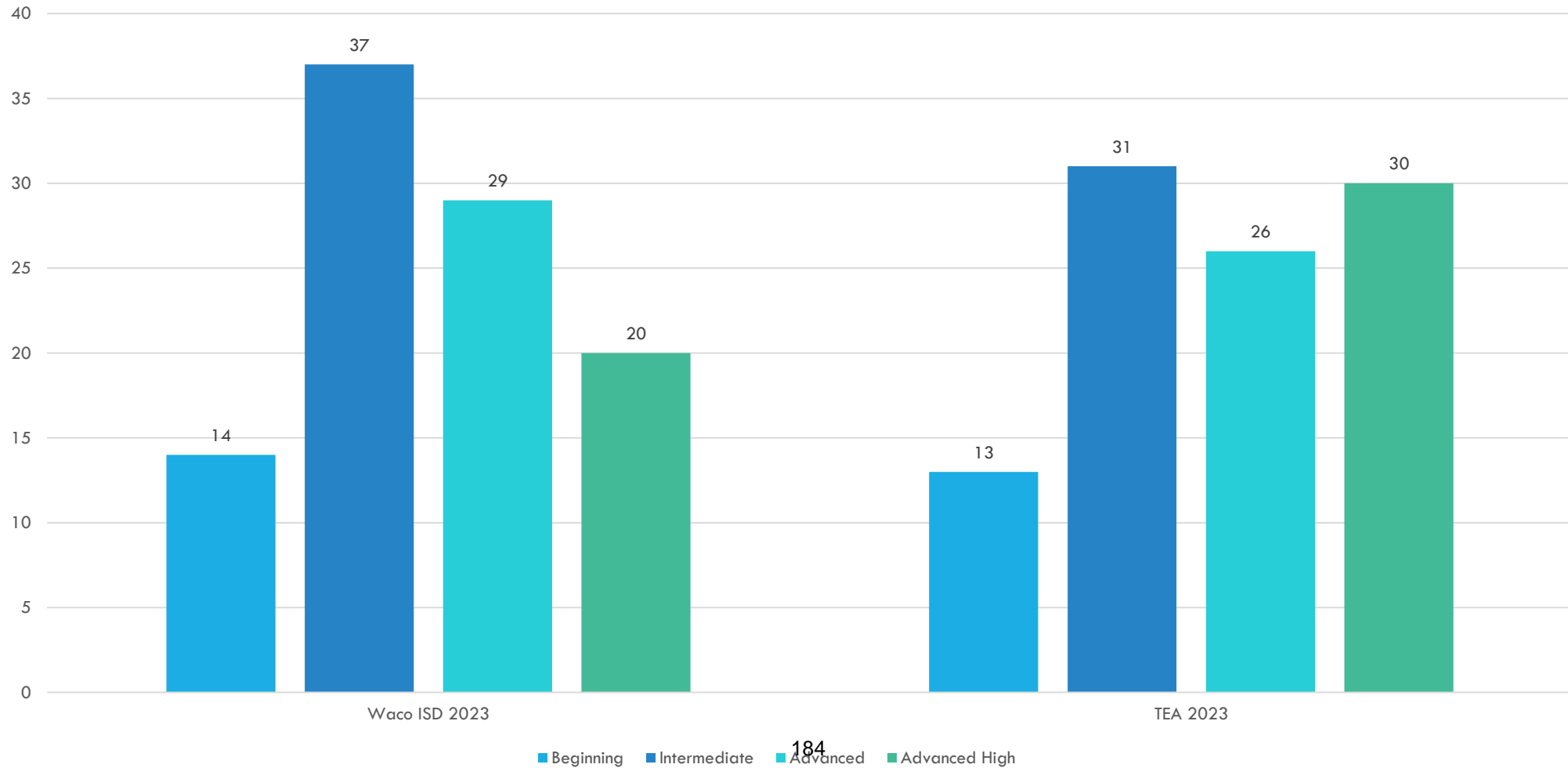
# TELPAS DOMAIN SCORES: GRADES K-2 SPEAKING

Grades 3-12



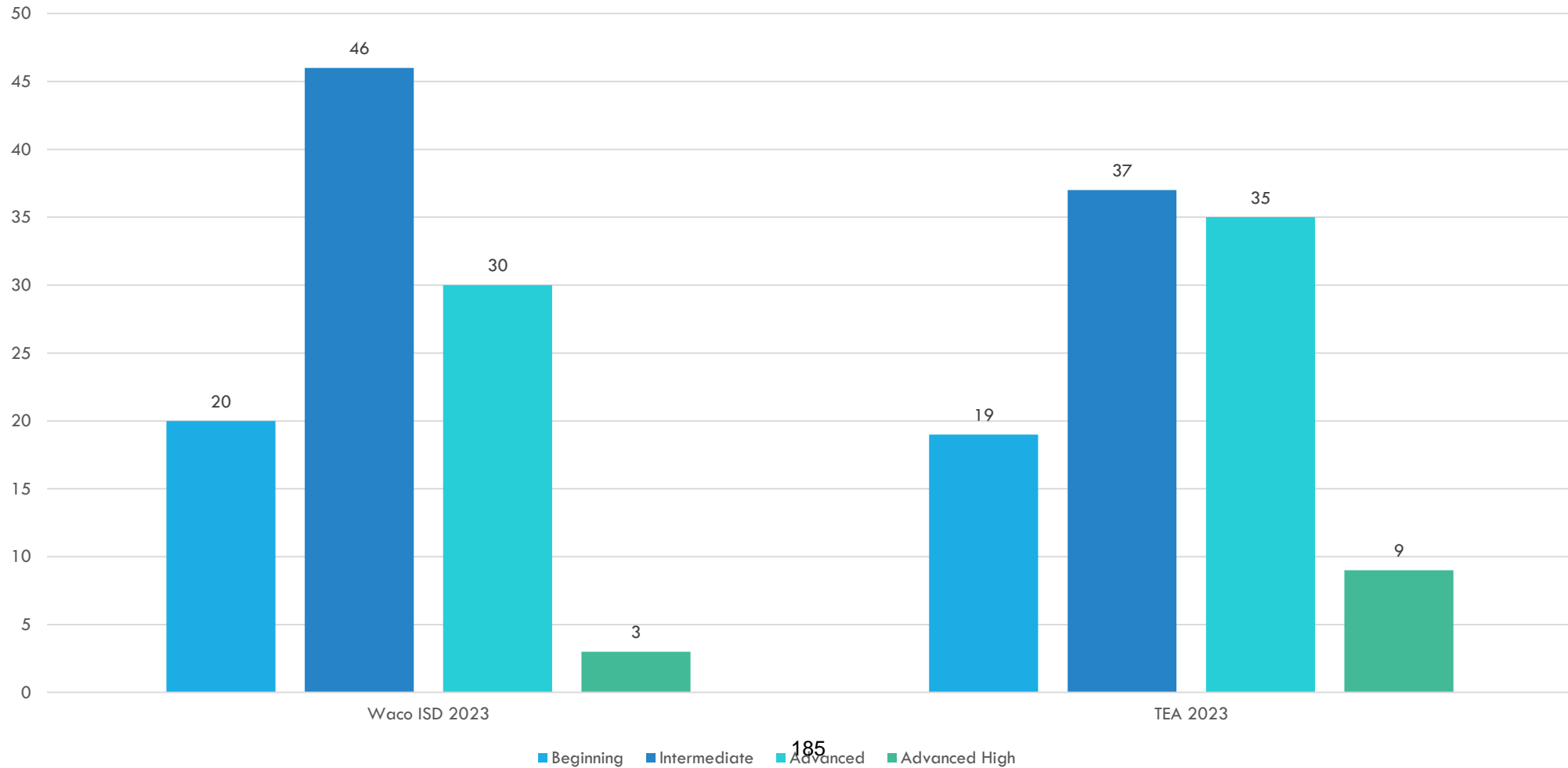
# TELPAS DOMAIN SCORES: GRADES K-2 READING

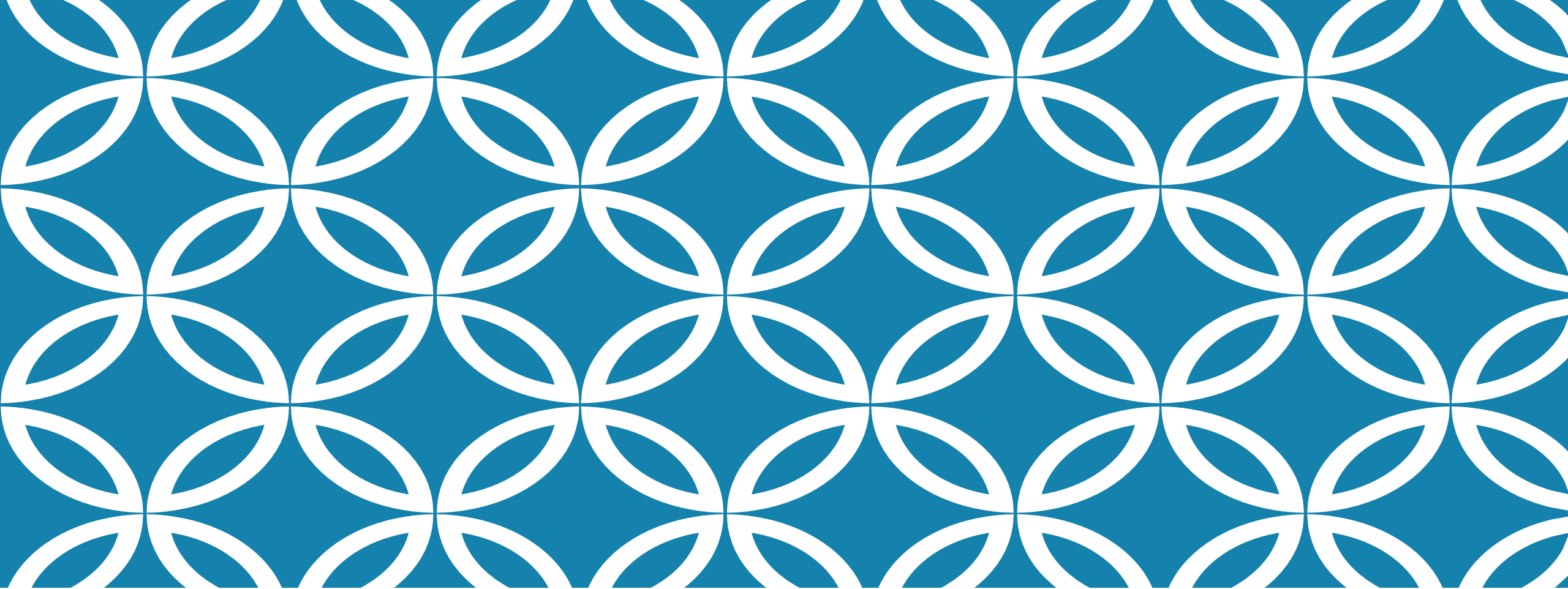
Grades 3-12



# TELPAS DOMAIN SCORES: GRADES K-2 WRITING

Grades 3-12





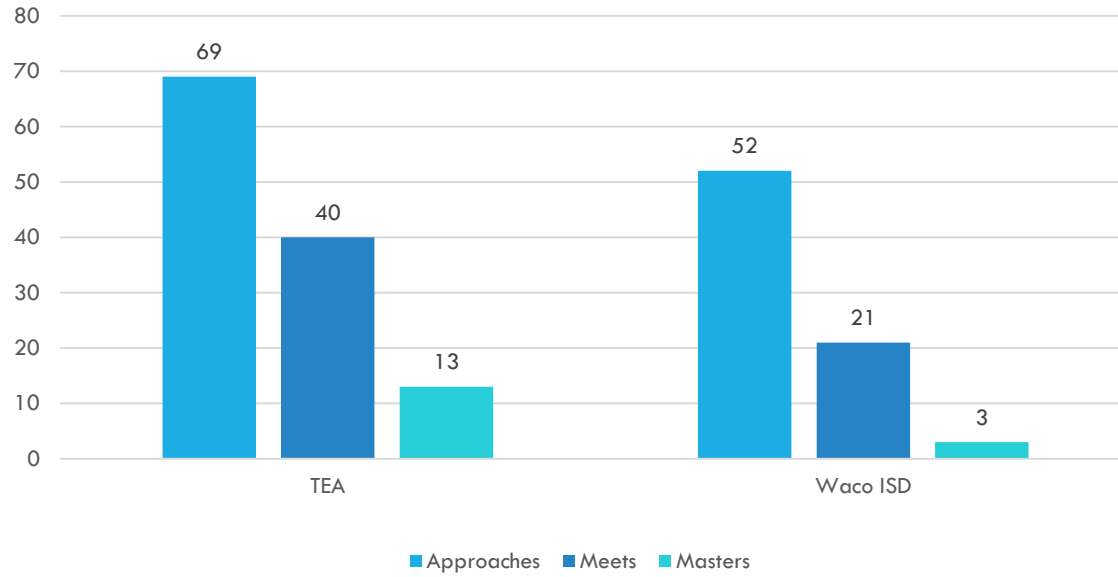
# STAAR ASSESSMENT RESULTS 2022-2023 (ALL GRADES)

186

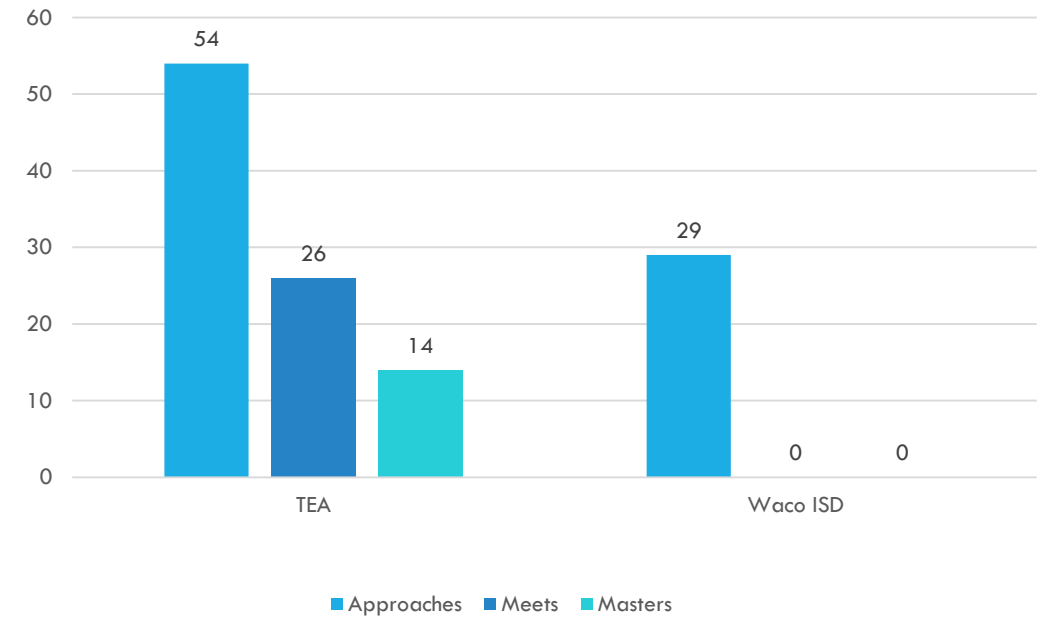


# STAAR READING GRADE 3 LEP AND MONITORED STUDENTS

STAAR Reading Grade 3

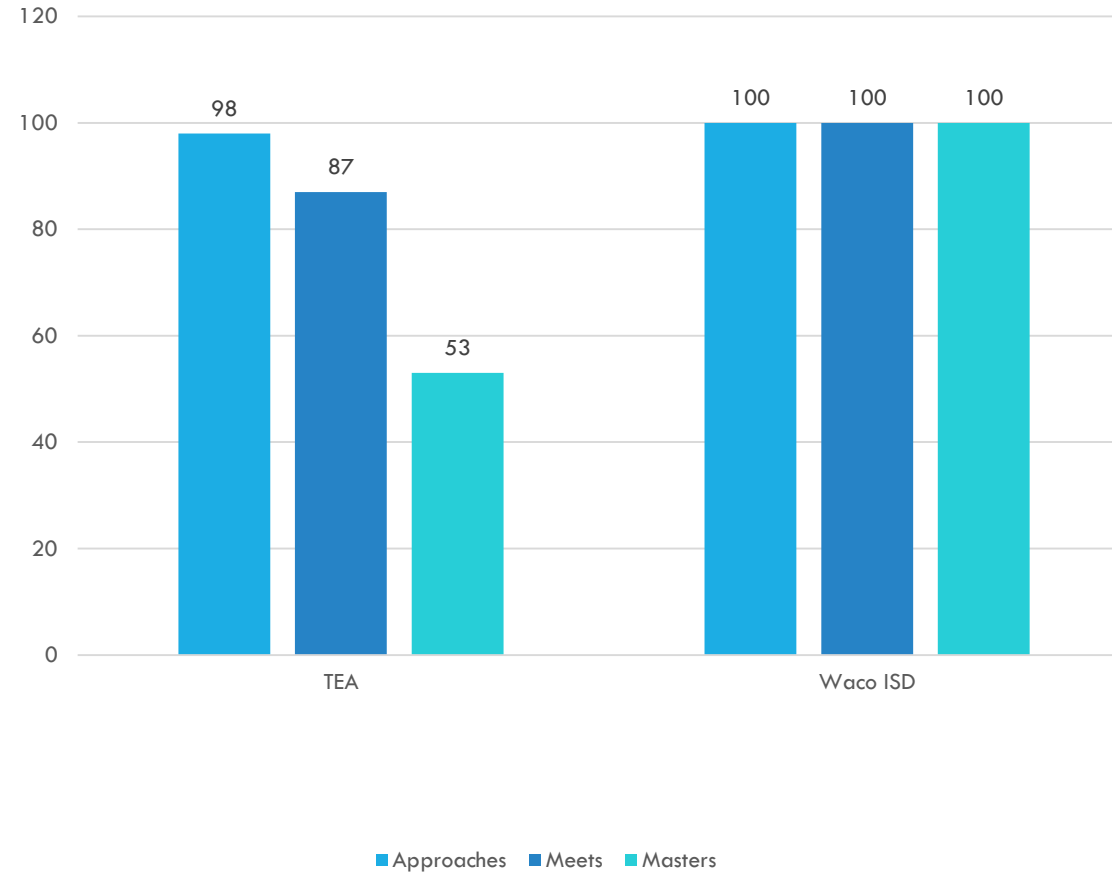


STAAR Reading Grade 3 (Spanish)



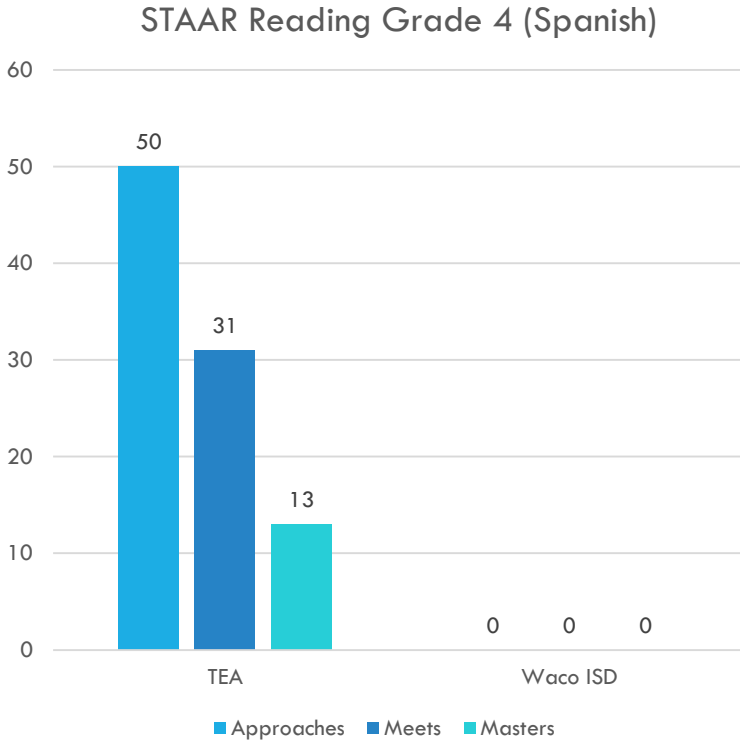
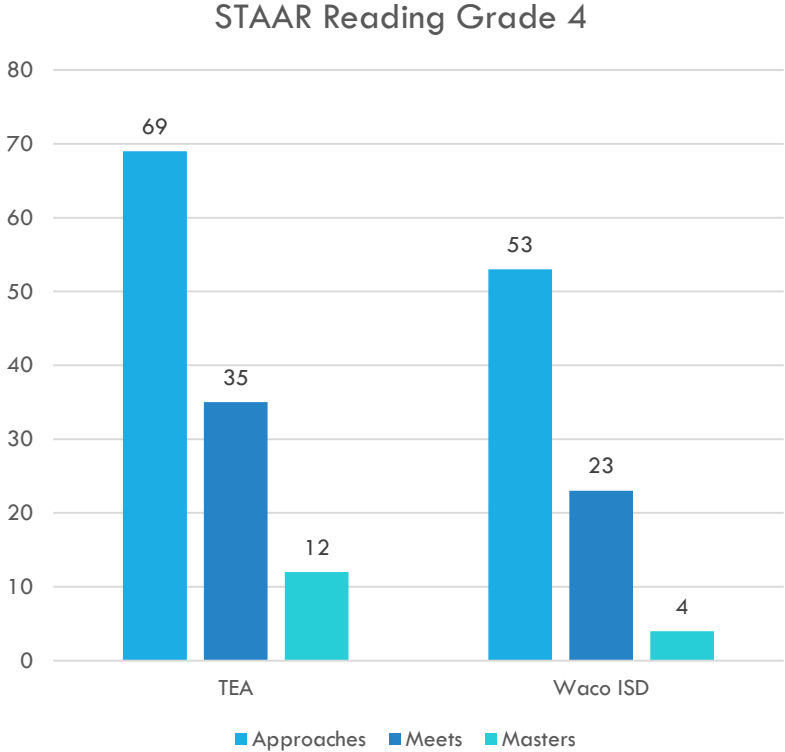
# STAAR READING GRADE 3 LEP AND MONITORED STUDENTS

STAAR Reading Grade 3 (Monitored Year 2)

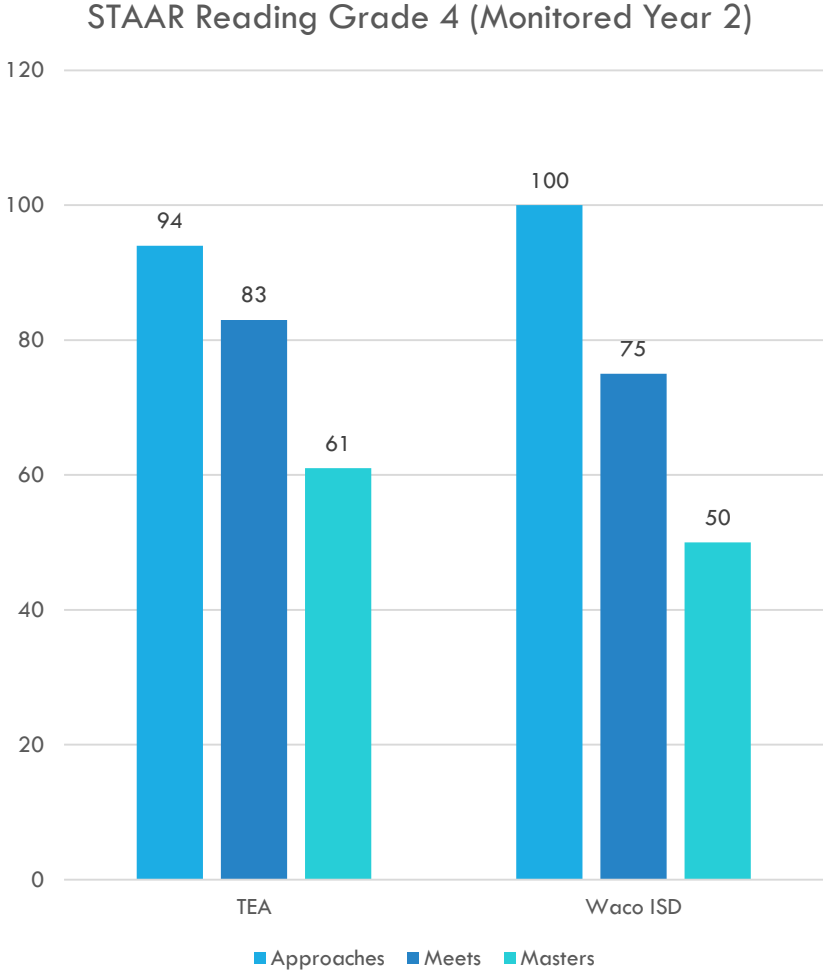


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# STAAR READING GRADE 4 LEP AND MONITORED STUDENTS

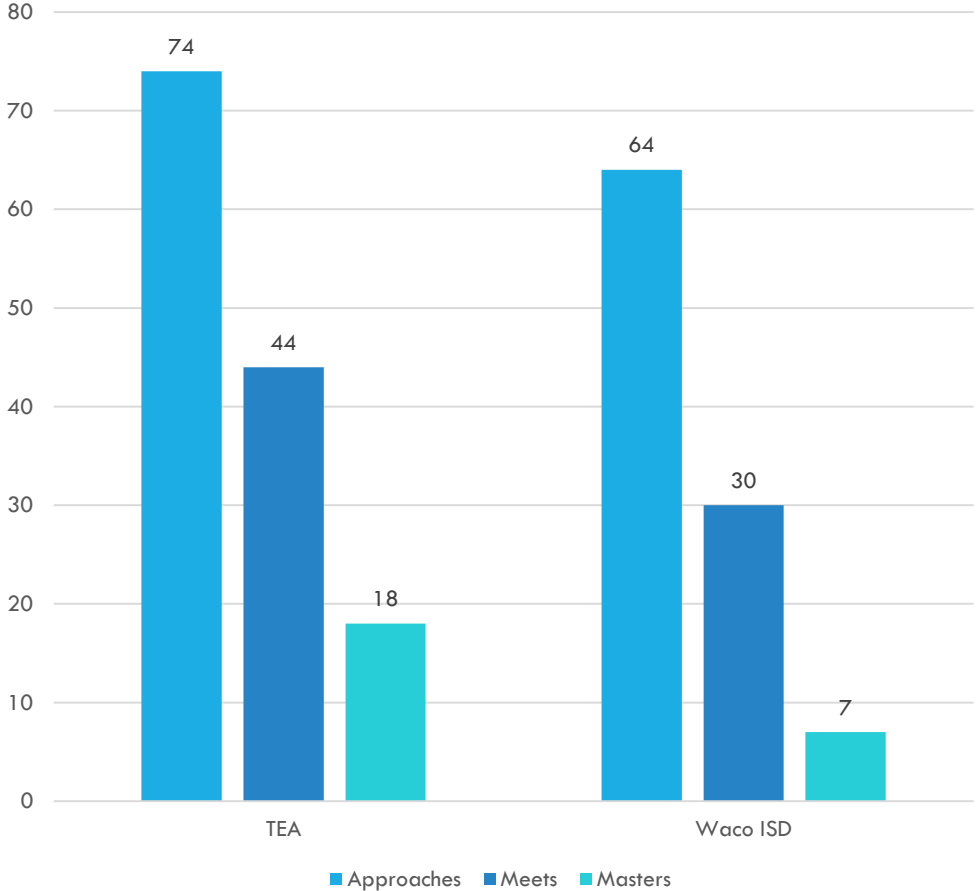


# STAAR READING GRADE 4 LEP AND MONITORED STUDENTS

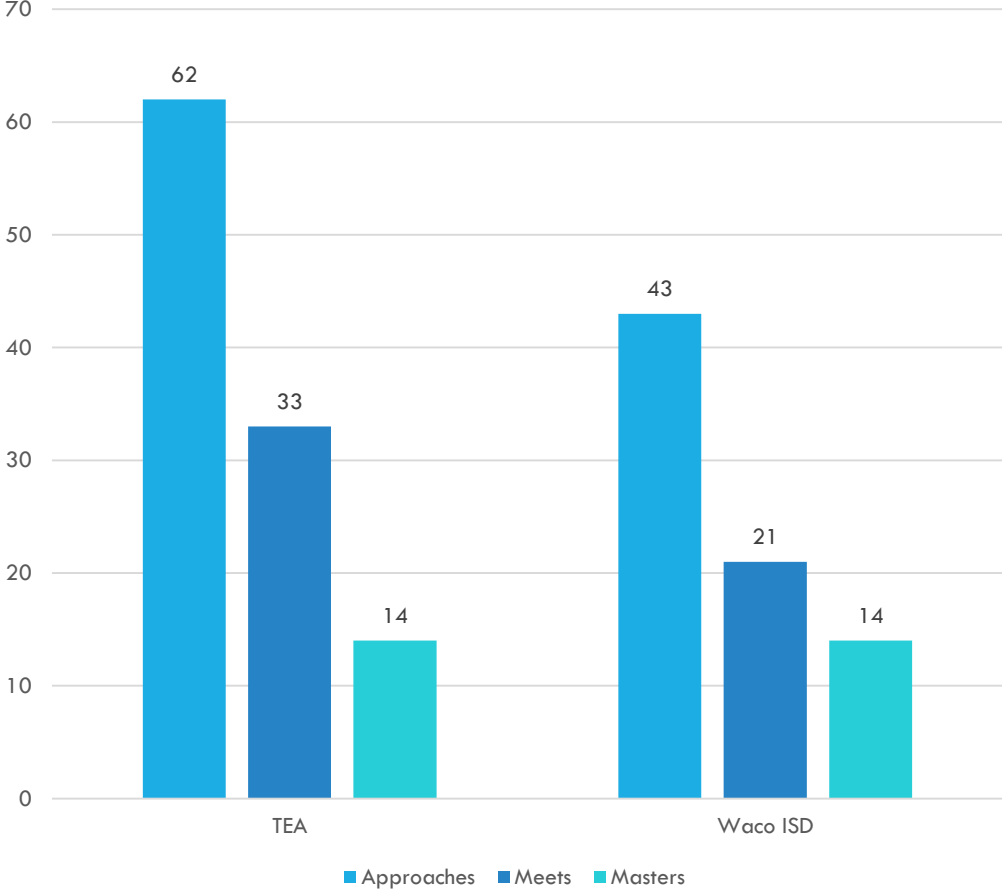


# STAAR READING GRADE 5 LEP AND MONITORED STUDENTS

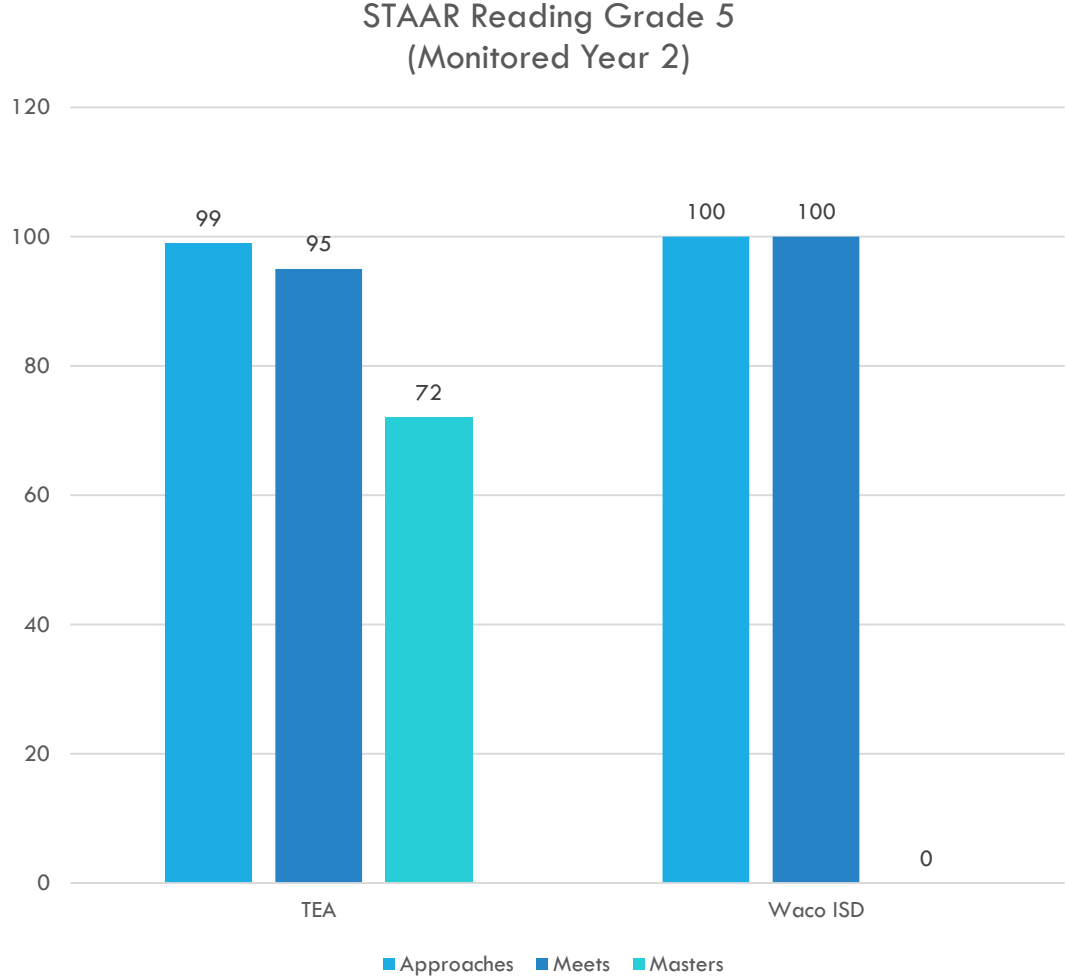
STAAR Reading Grade 5



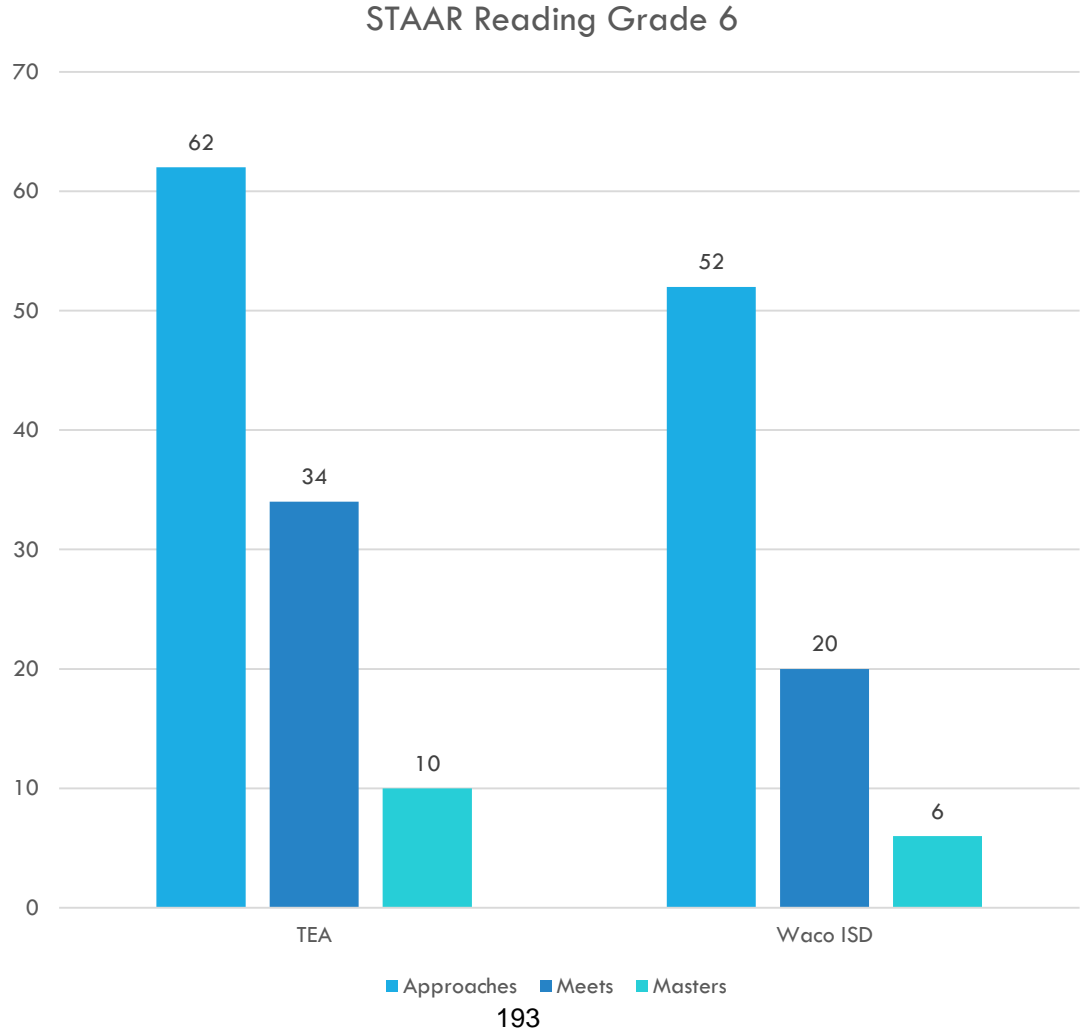
STAAR Reading Grade 5 (Spanish)



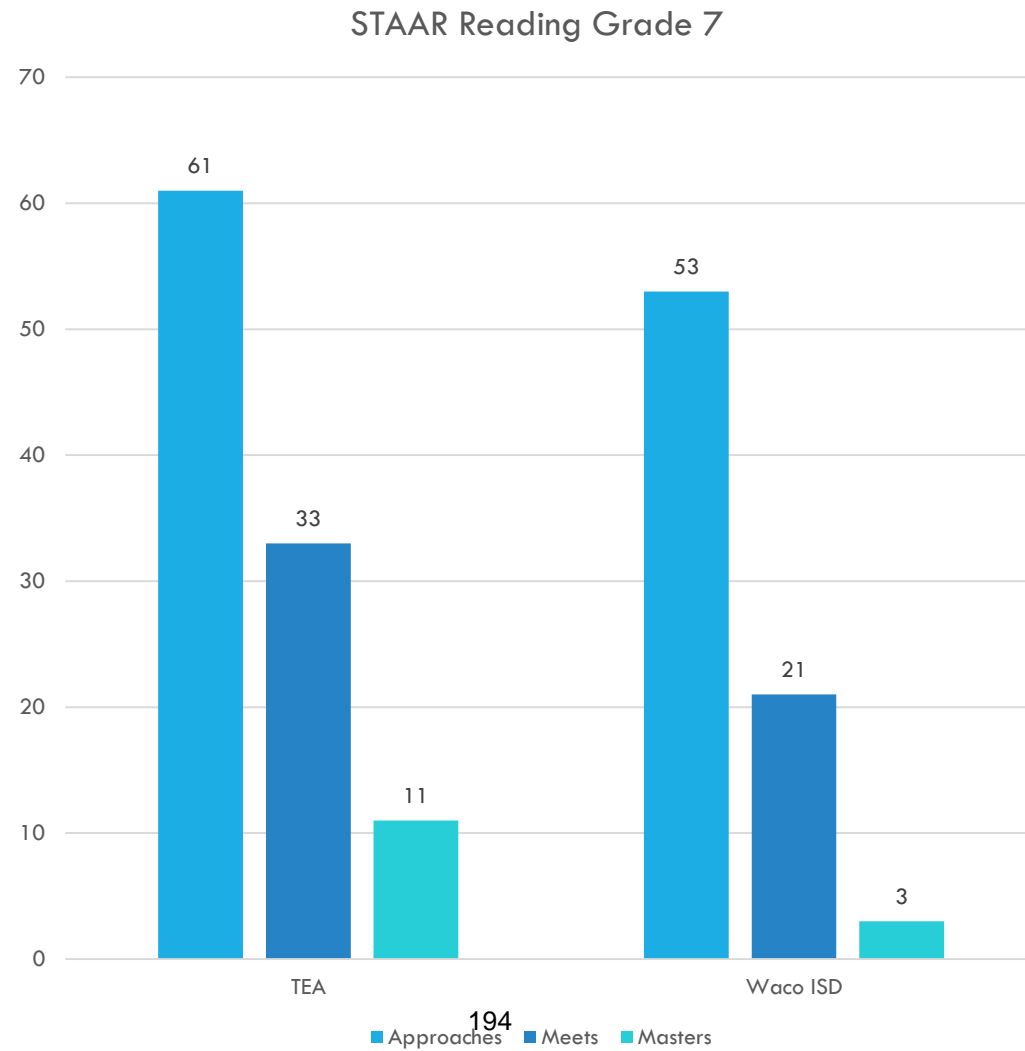
# STAAR READING GRADE 5 LEP AND MONITORED STUDENTS



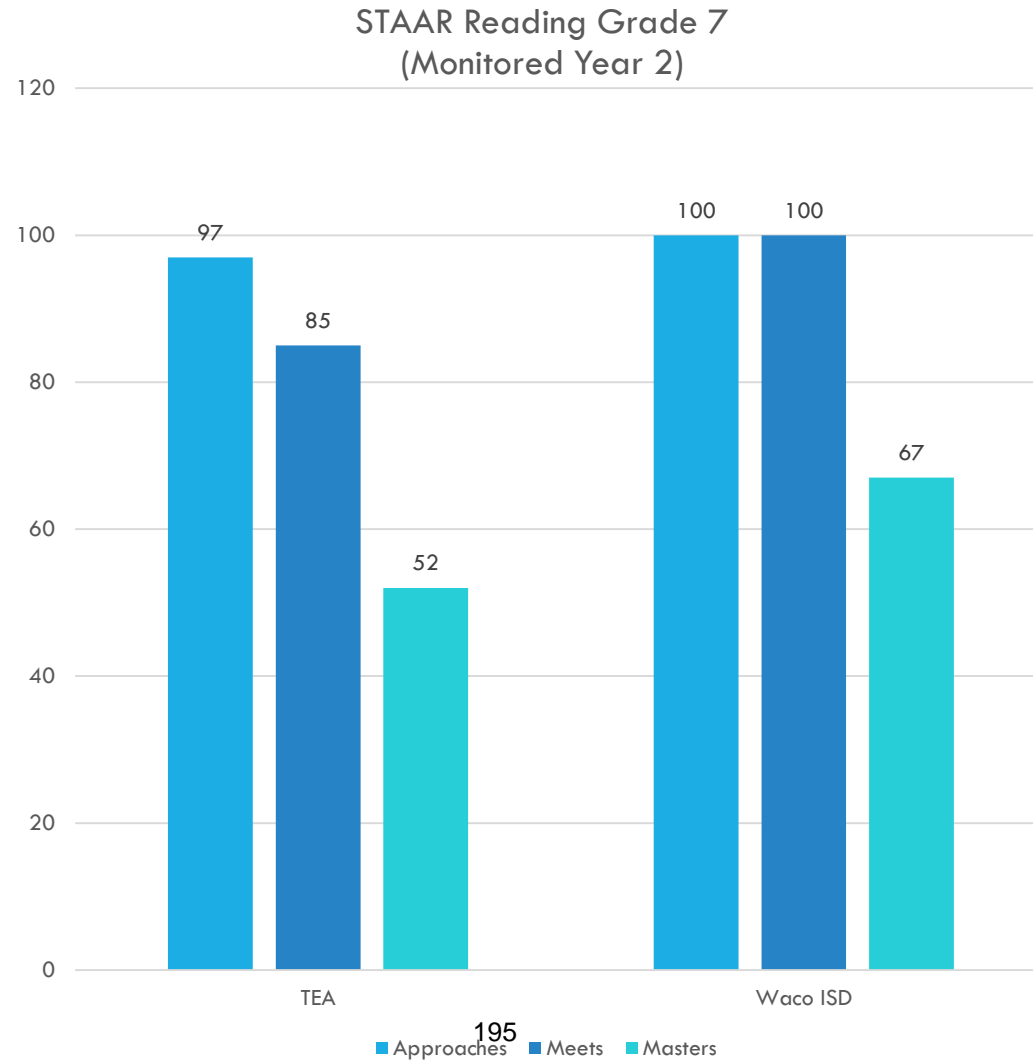
# STAAR READING GRADE 6 LEP AND MONITORED STUDENTS



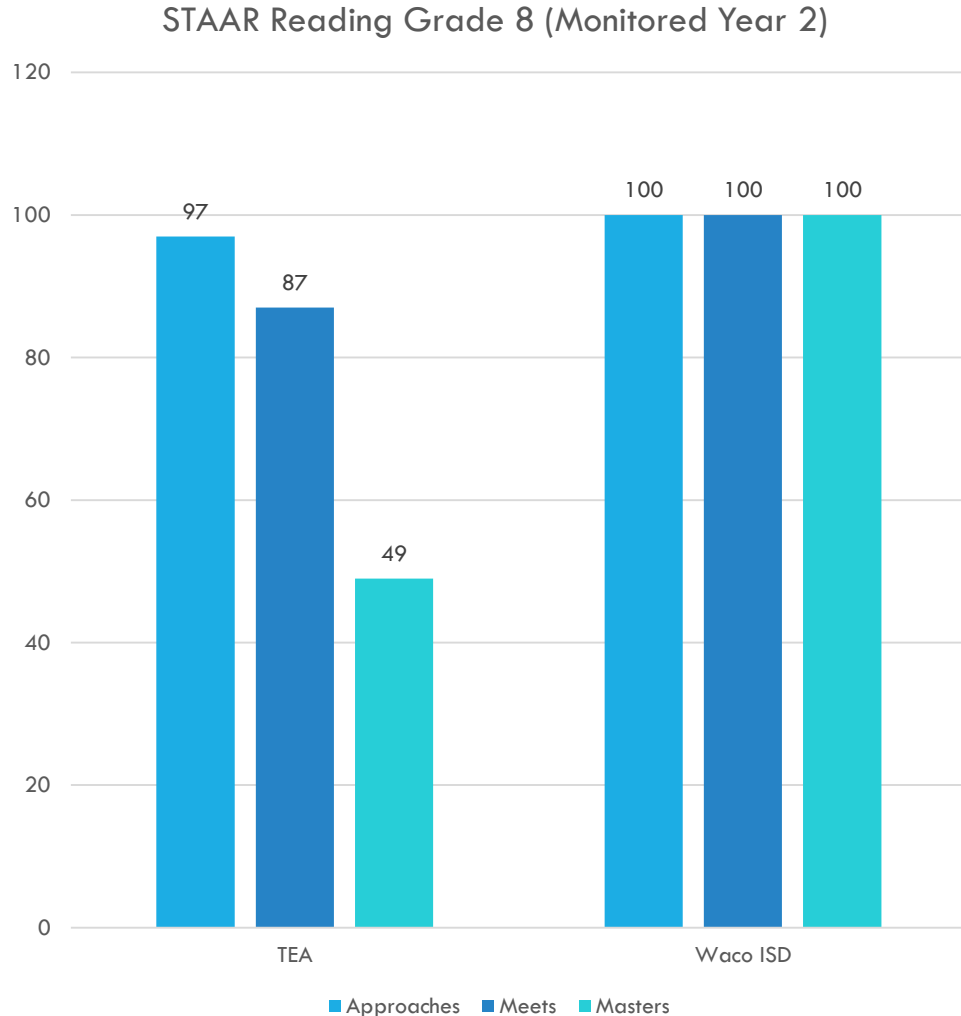
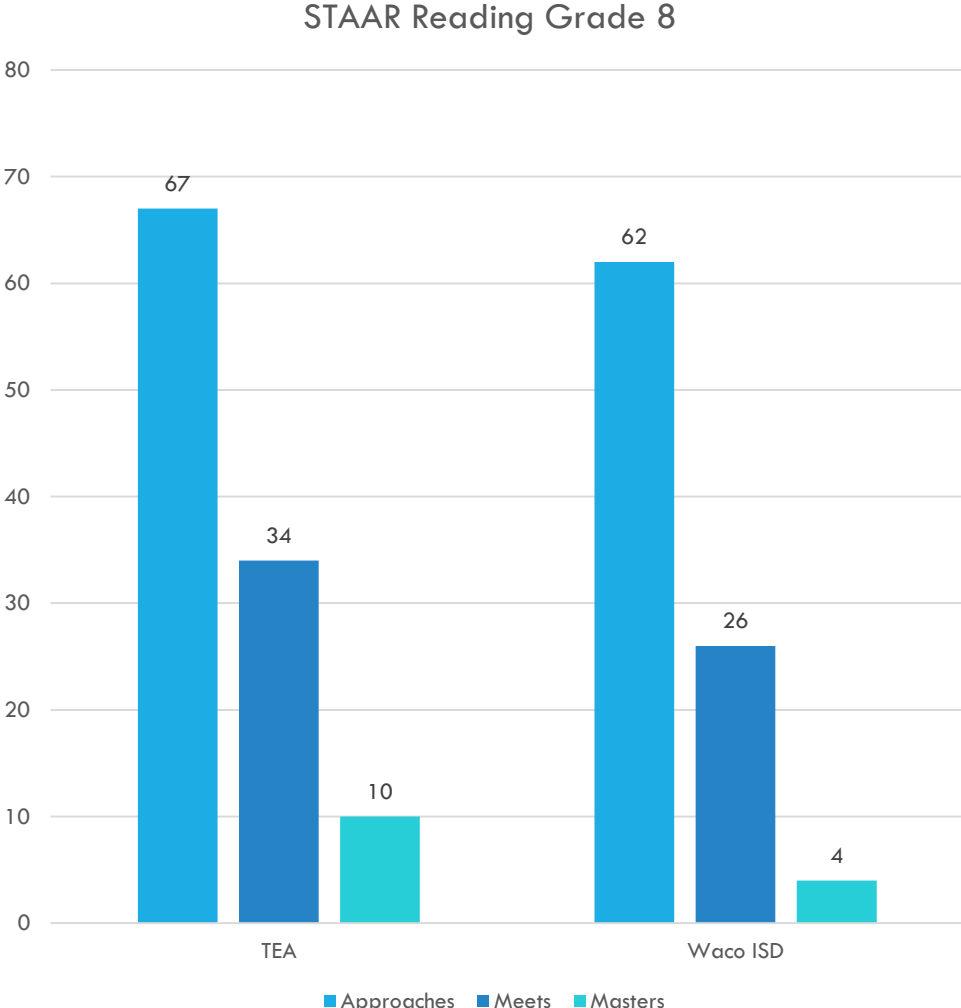
# STAAR READING GRADE 7 LEP AND MONITORED STUDENTS



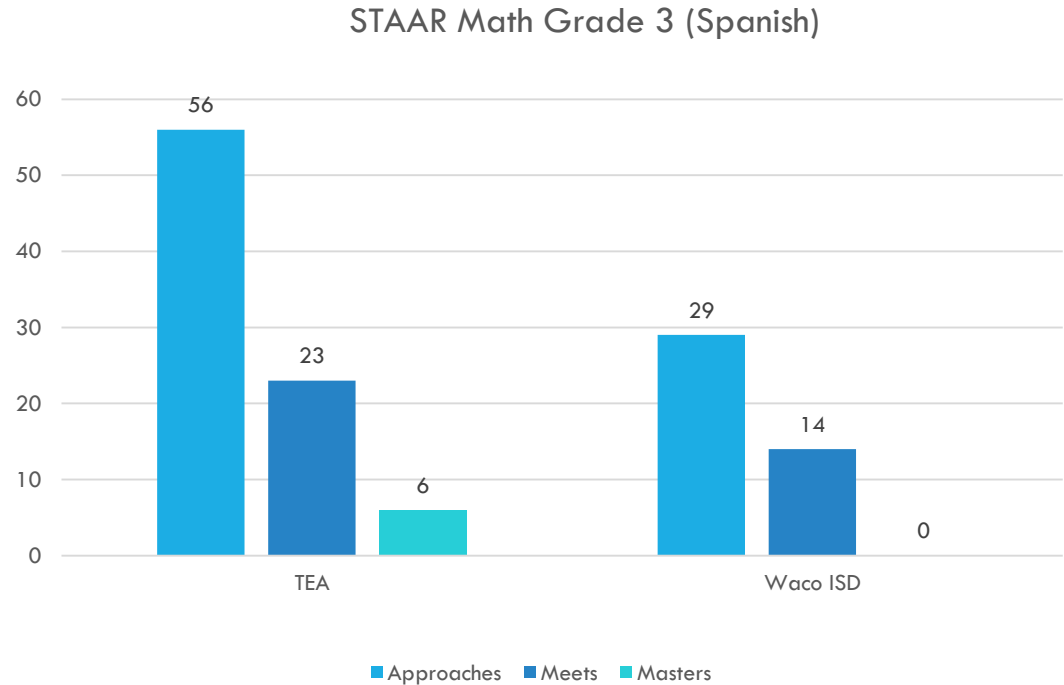
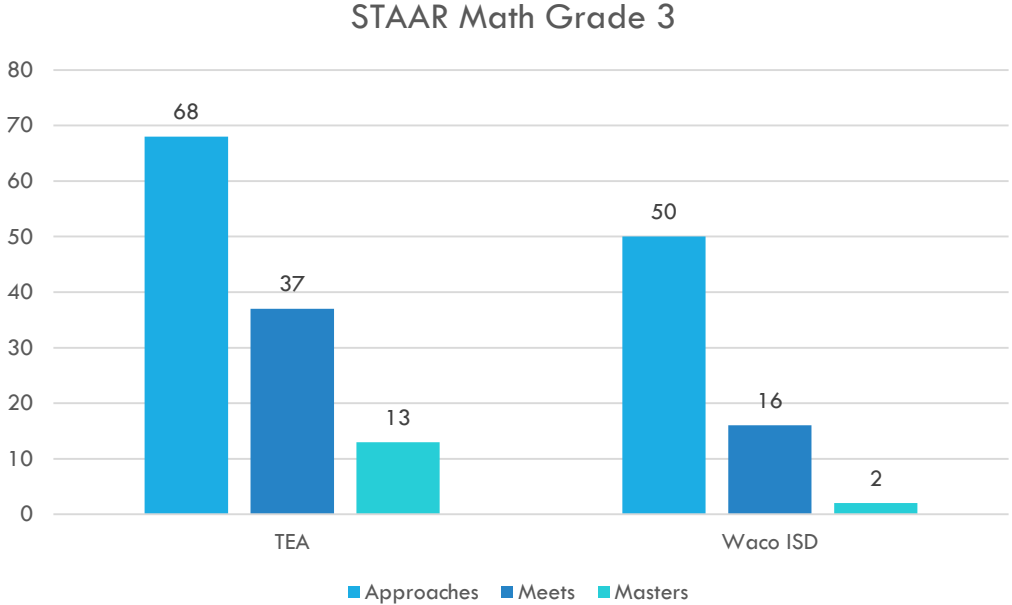
# STAAR READING GRADE 7 LEP AND MONITORED STUDENTS



# STAAR READING GRADE 8 LEP AND MONITORED STUDENTS

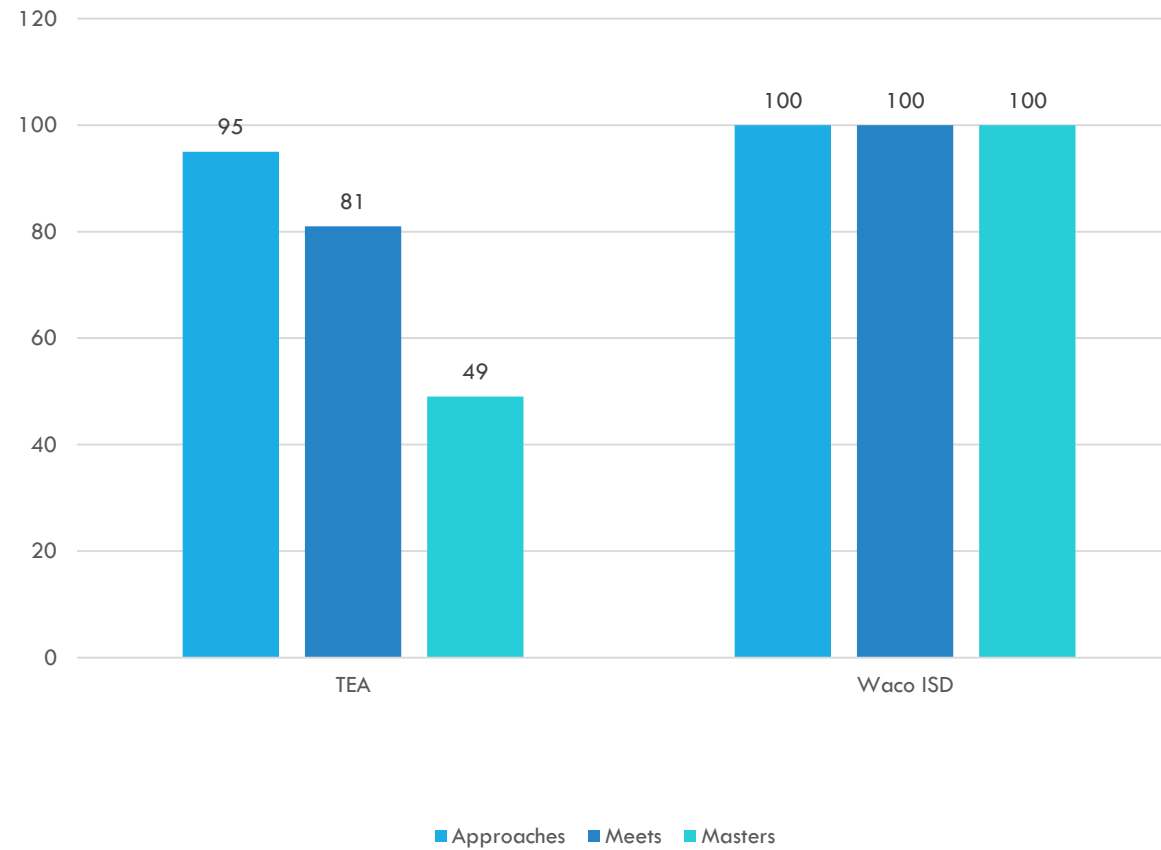


# STAAR MATH GRADE 3 LEP AND MONITORED STUDENTS



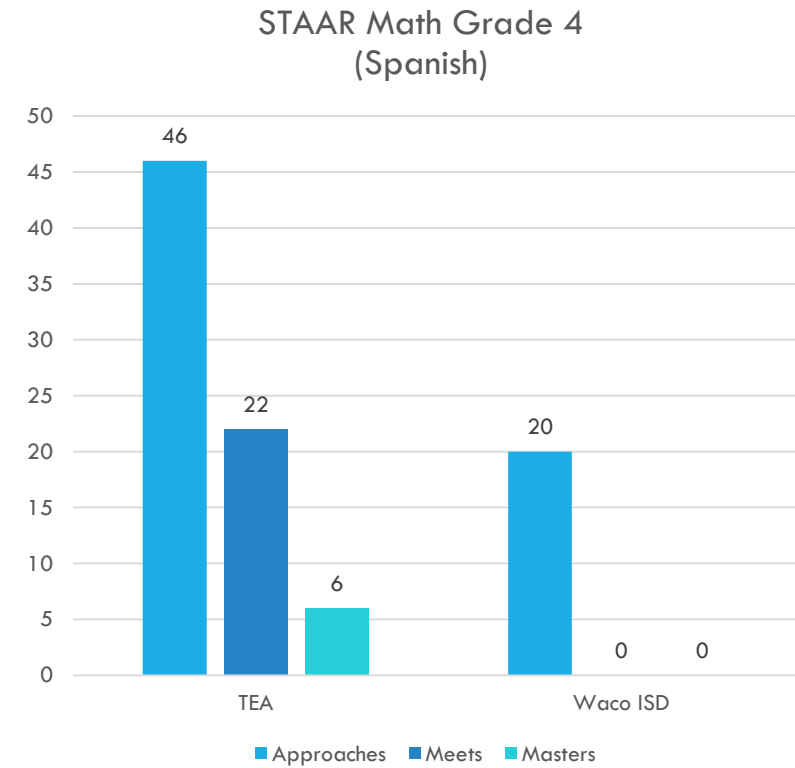
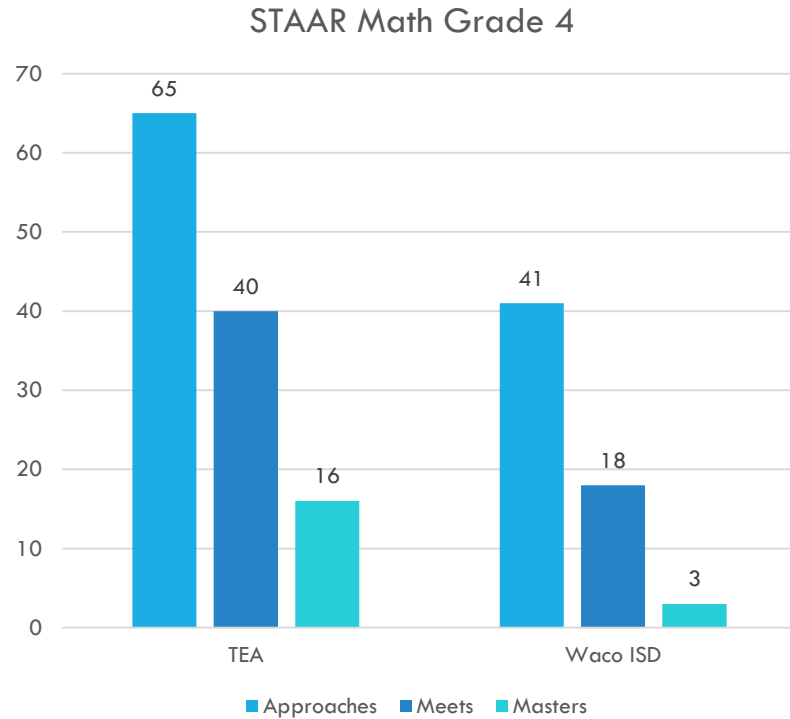
# STAAR MATH GRADE 3 LEP AND MONITORED STUDENTS

STAAR Math Grade 3 (Monitored Year 2)

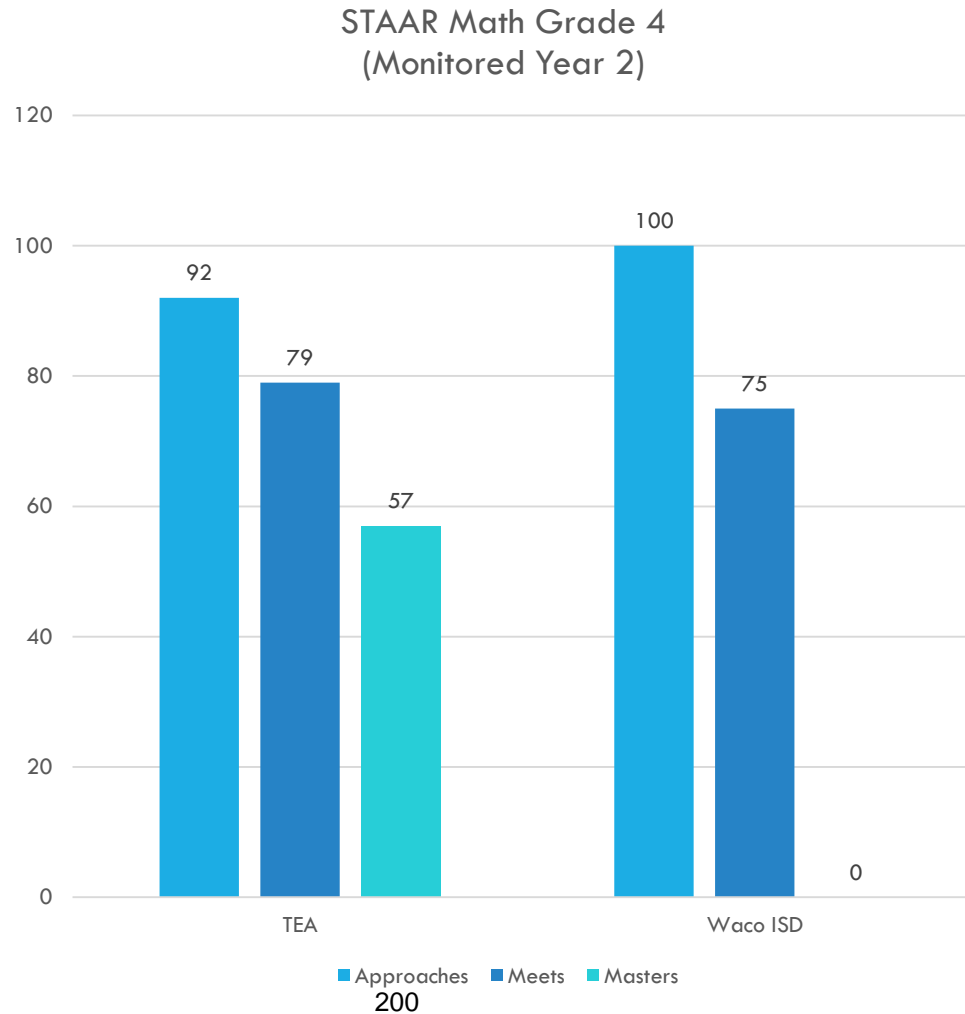


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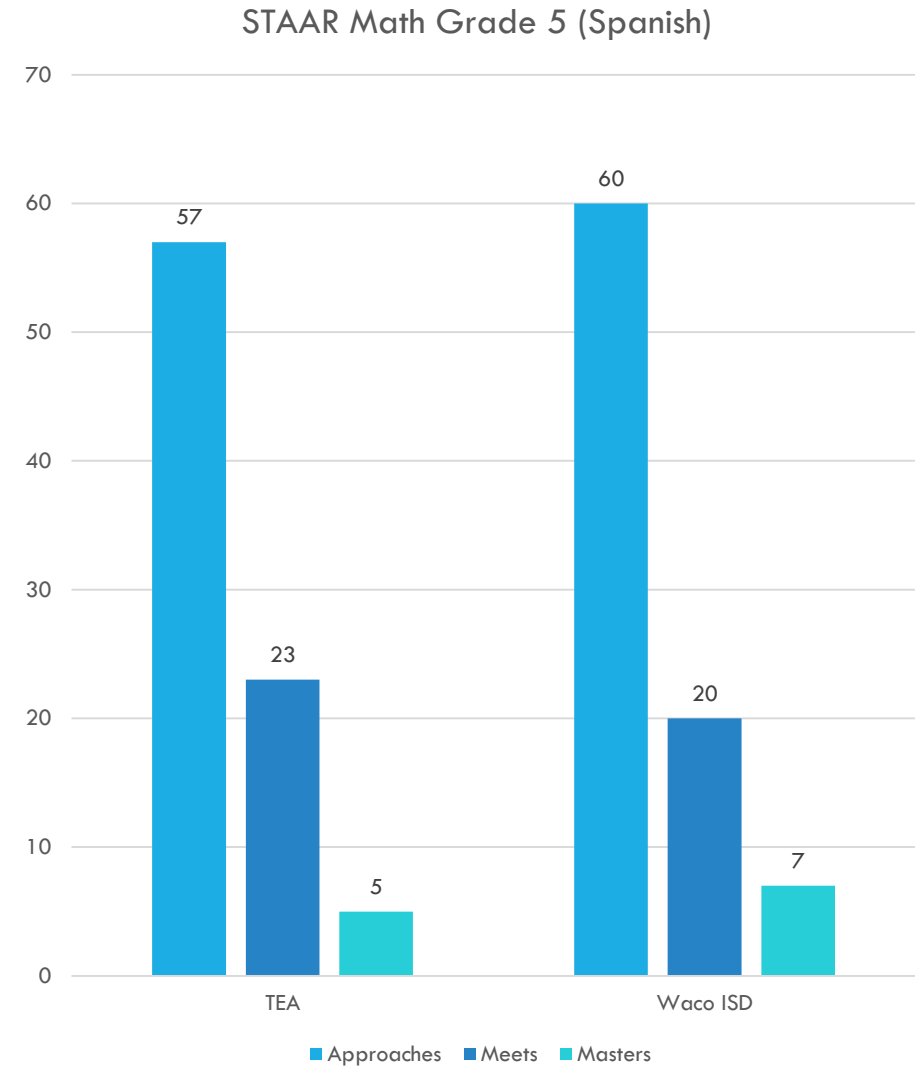
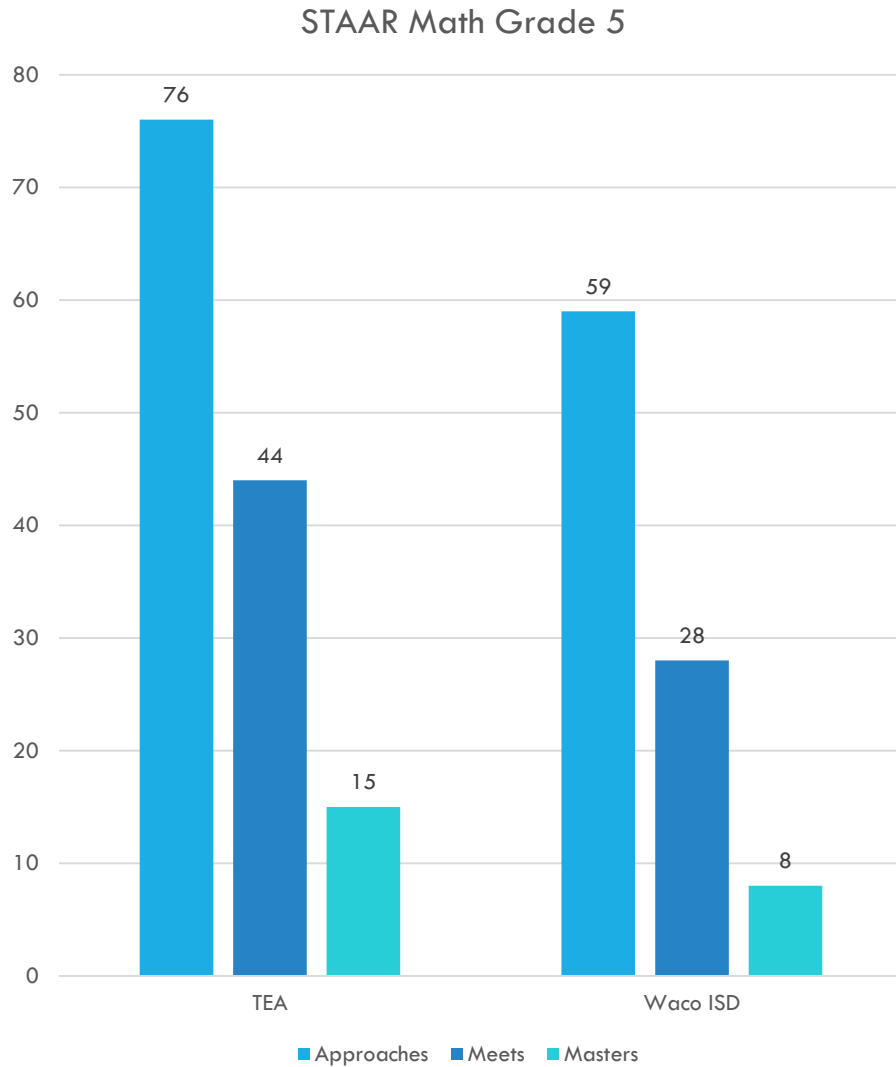
# STAAR MATH GRADE 4 LEP AND MONITORED STUDENTS



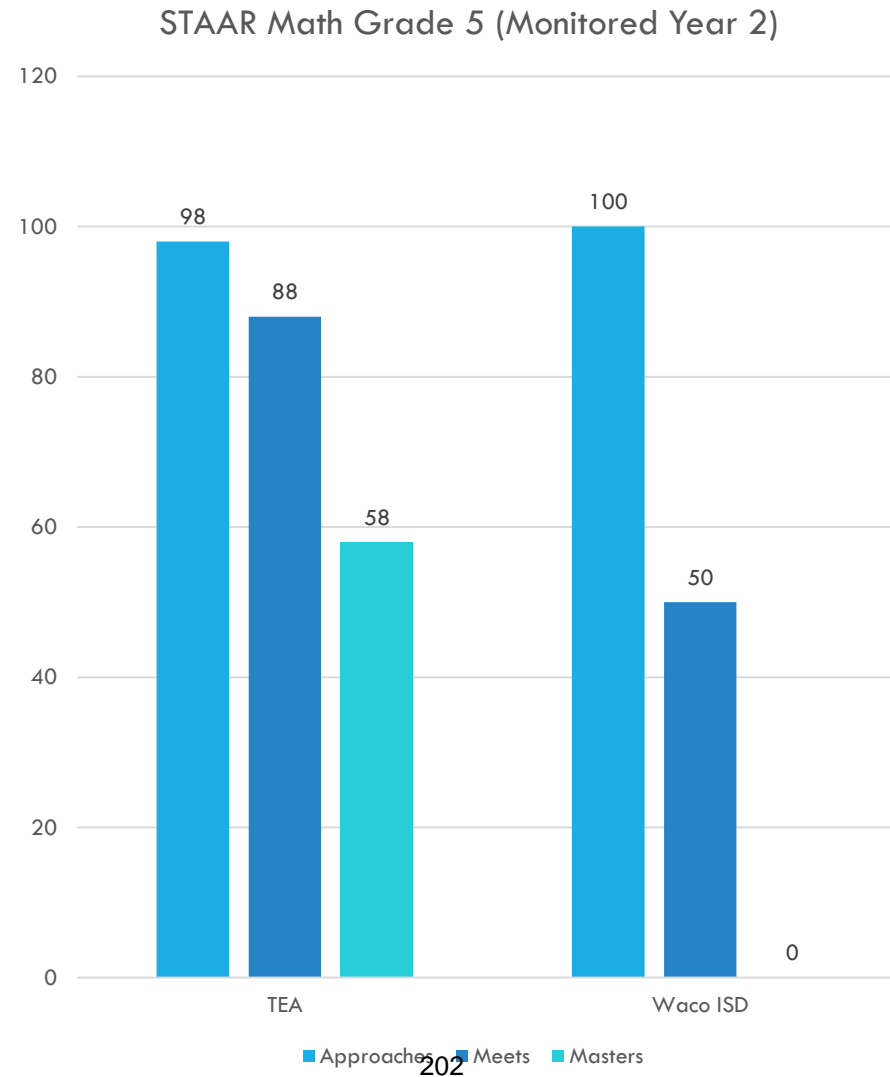
# STAAR MATH GRADE 4 LEP AND MONITORED STUDENTS



# STAAR MATH GRADE 5 LEP AND MONITORED STUDENTS

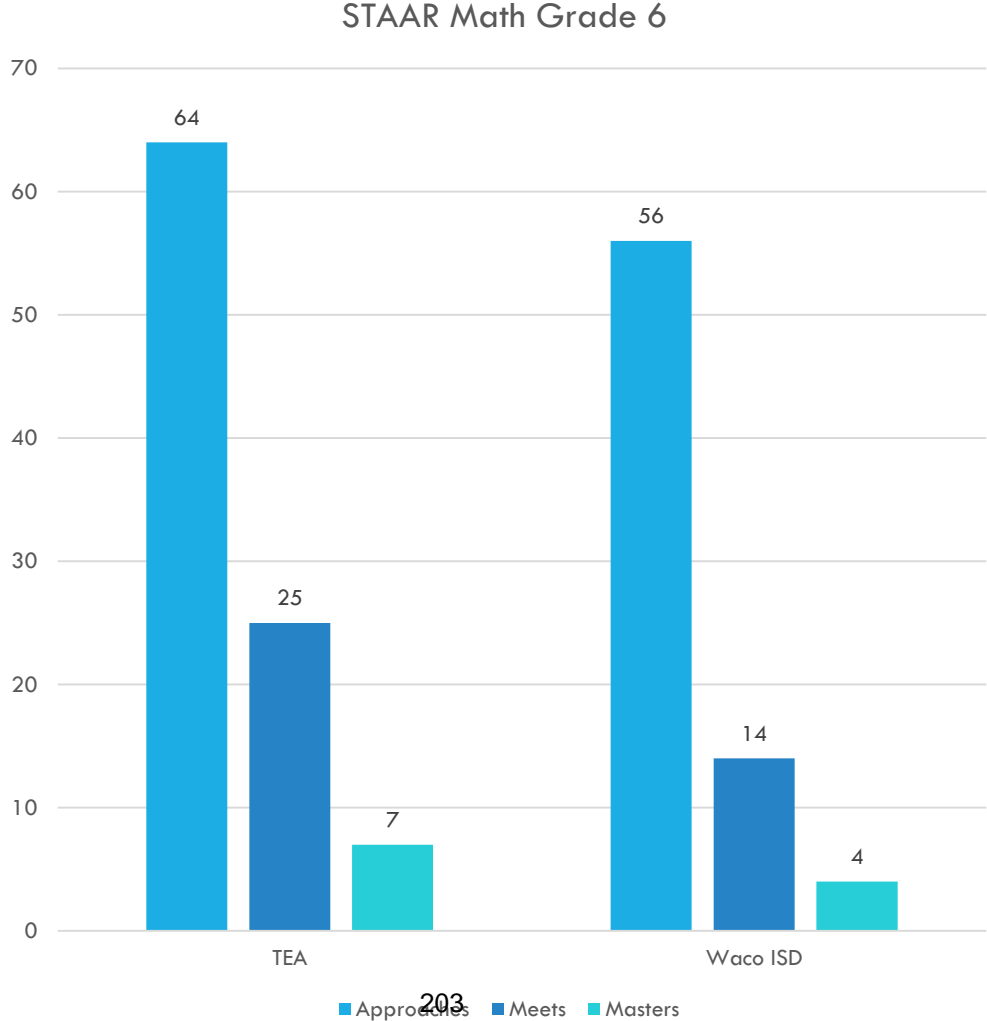


# STAAR MATH GRADE 5 LEP AND MONITORED STUDENTS

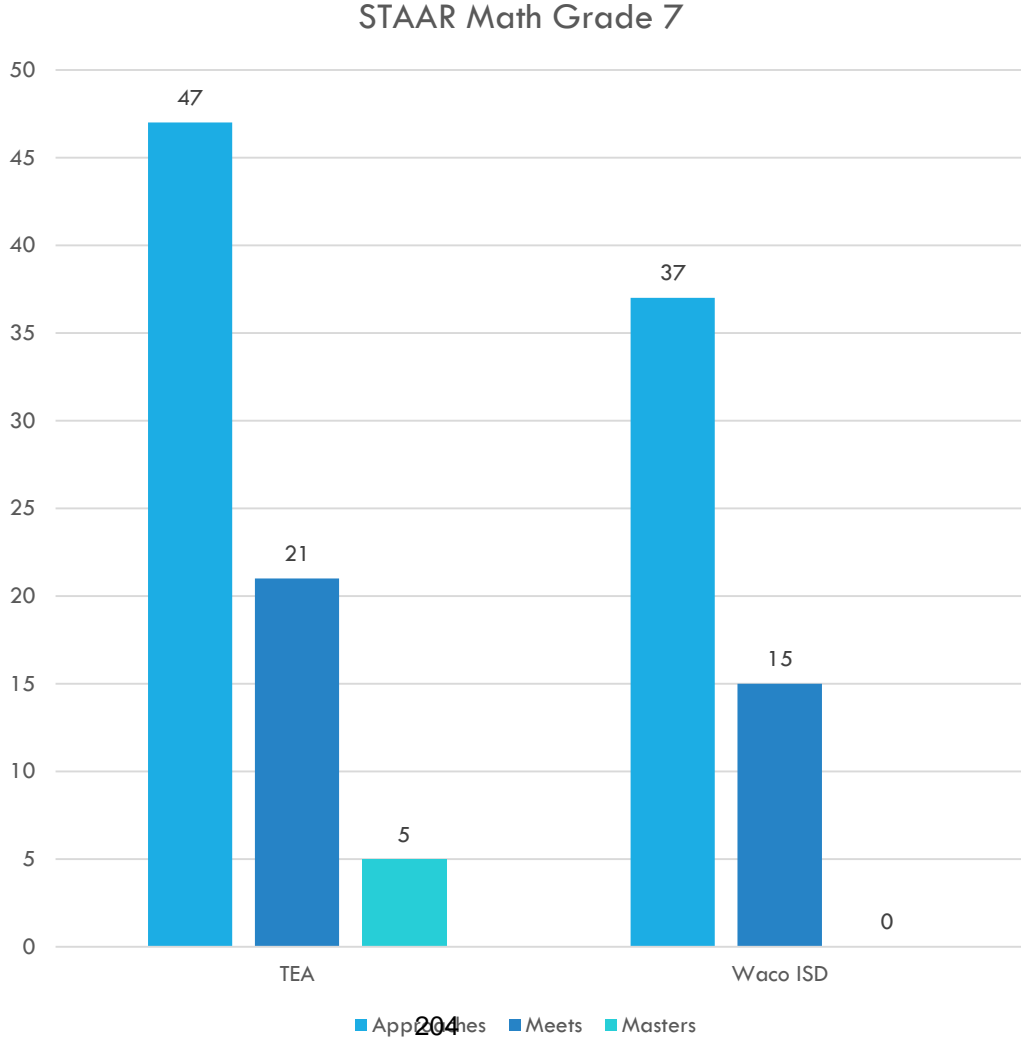


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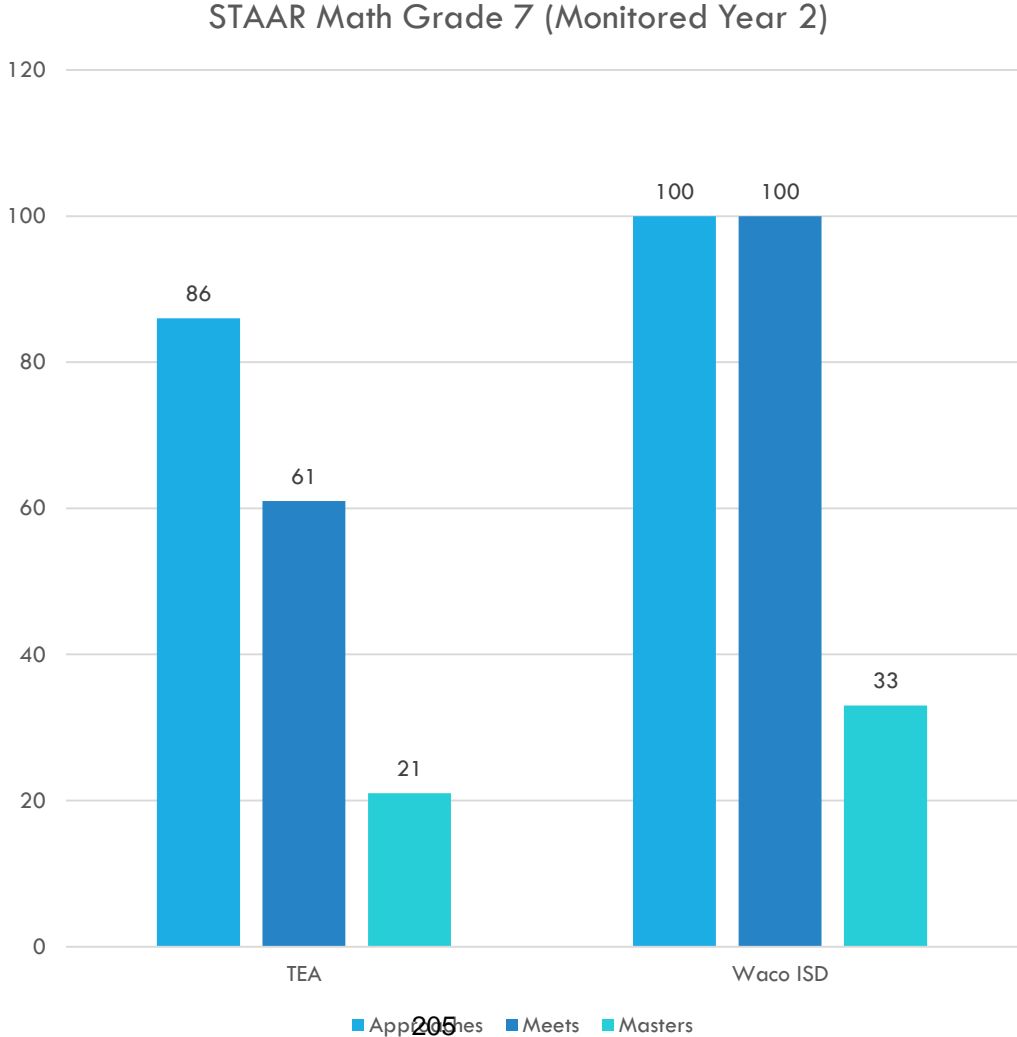
# STAAR MATH GRADE 6 LEP AND MONITORED STUDENTS



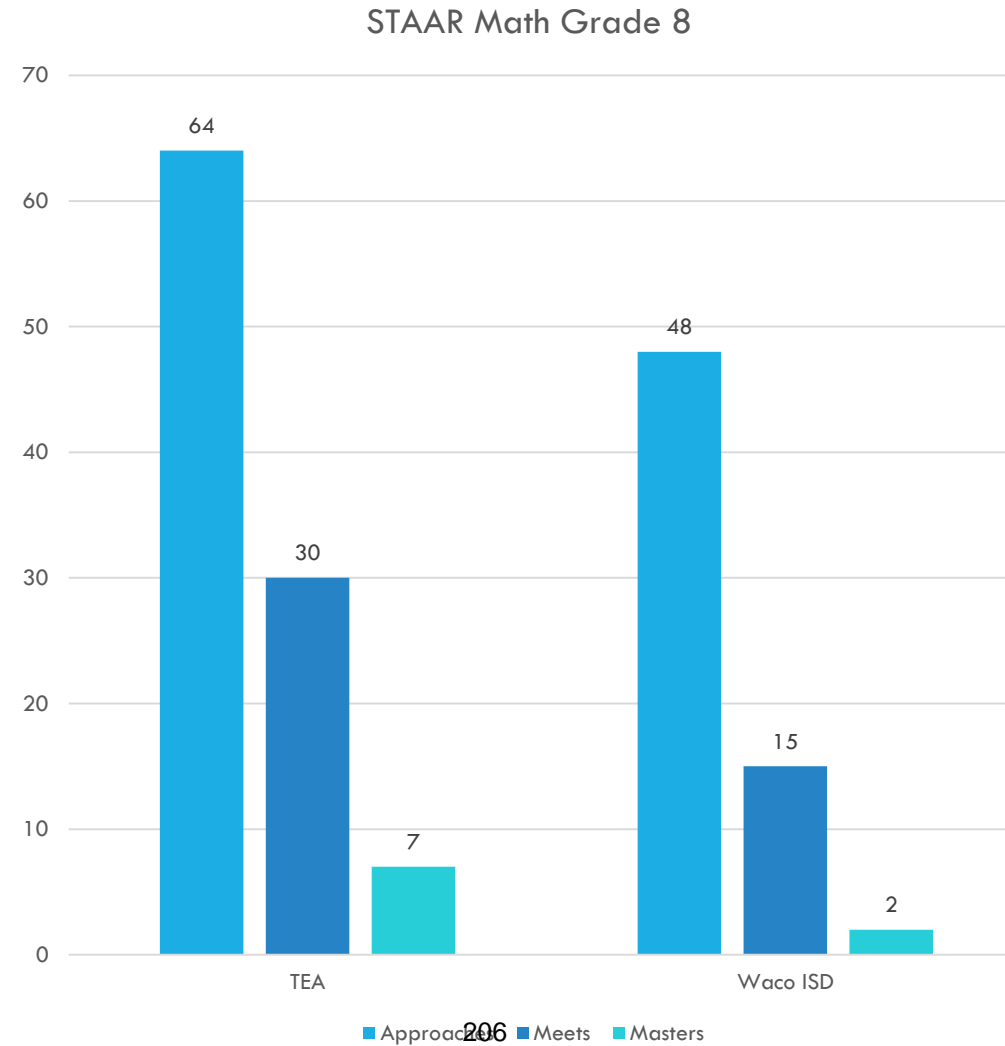
# STAAR MATH GRADE 7 LEP AND MONITORED STUDENTS



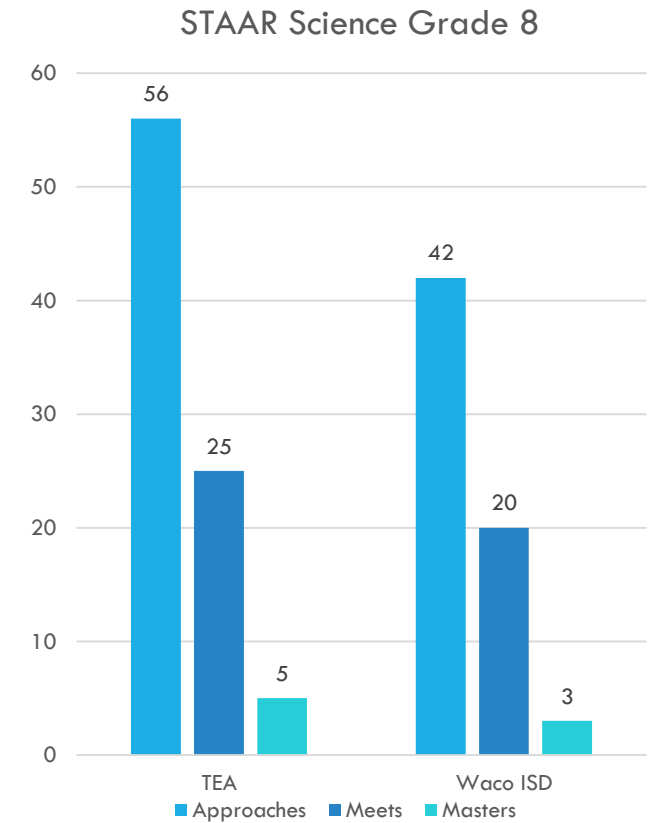
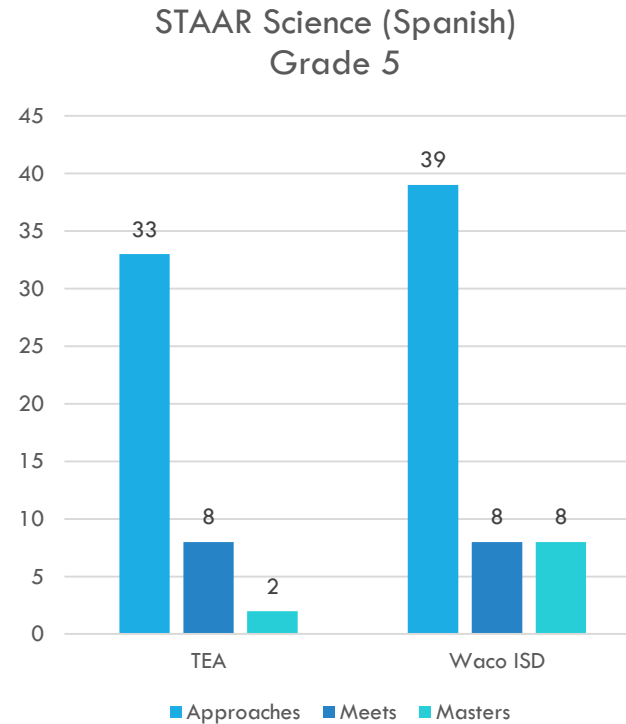
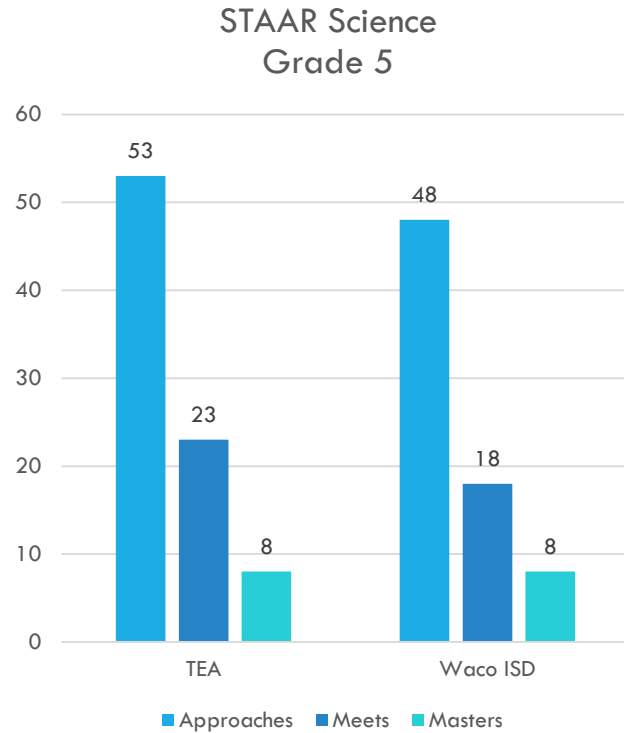
# STAAR MATH GRADE 7 LEP AND MONITORED STUDENTS



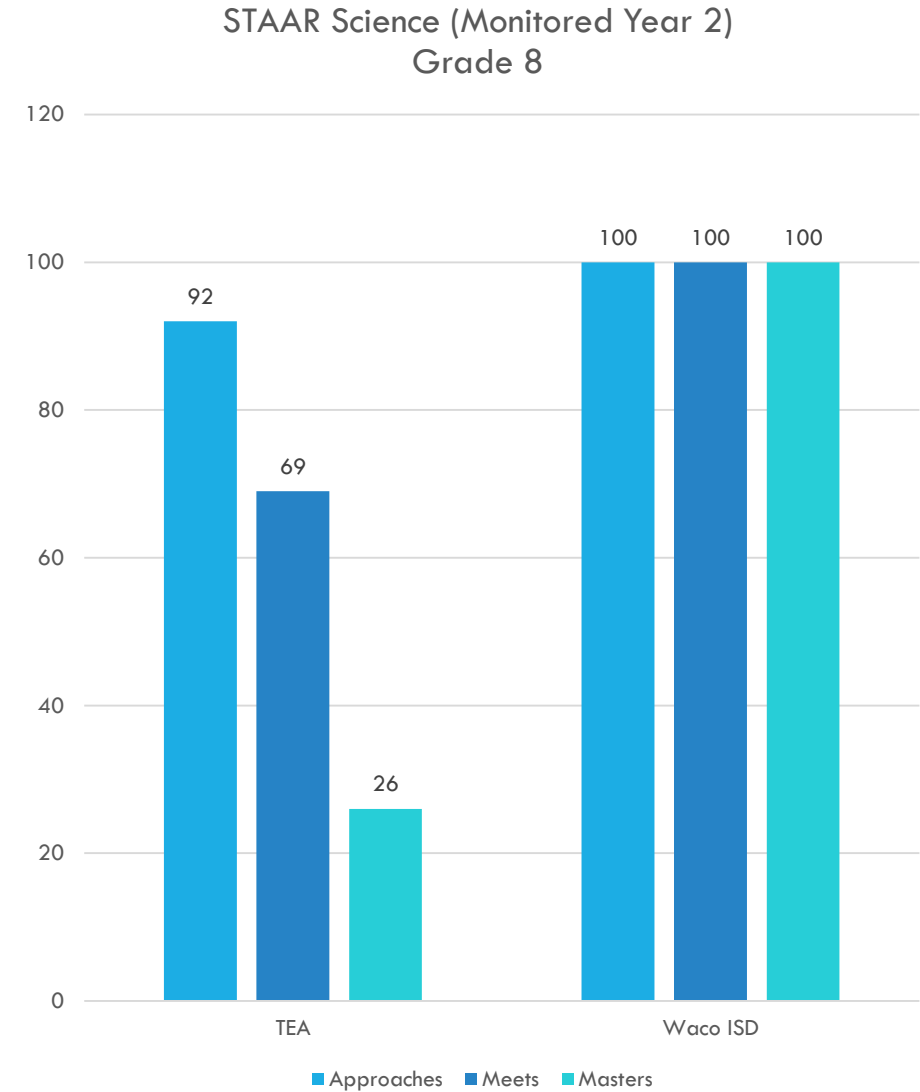
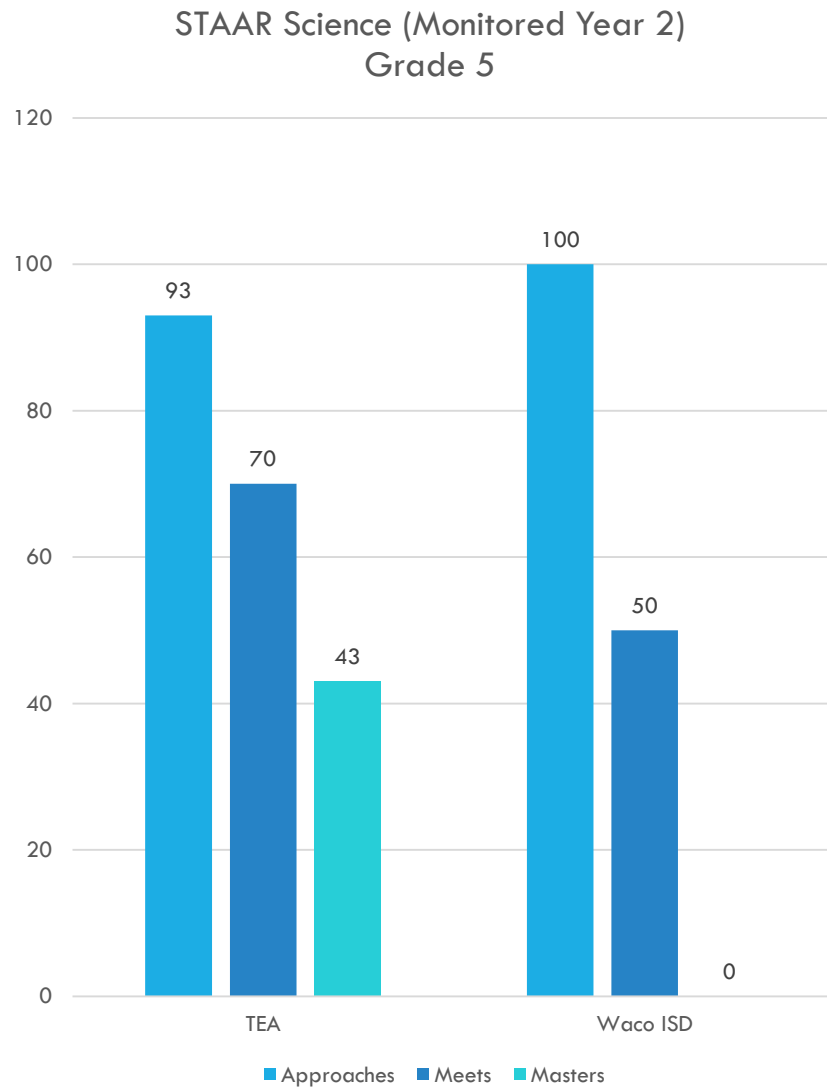
# STAAR MATH GRADE 8 LEP AND MONITORED STUDENTS



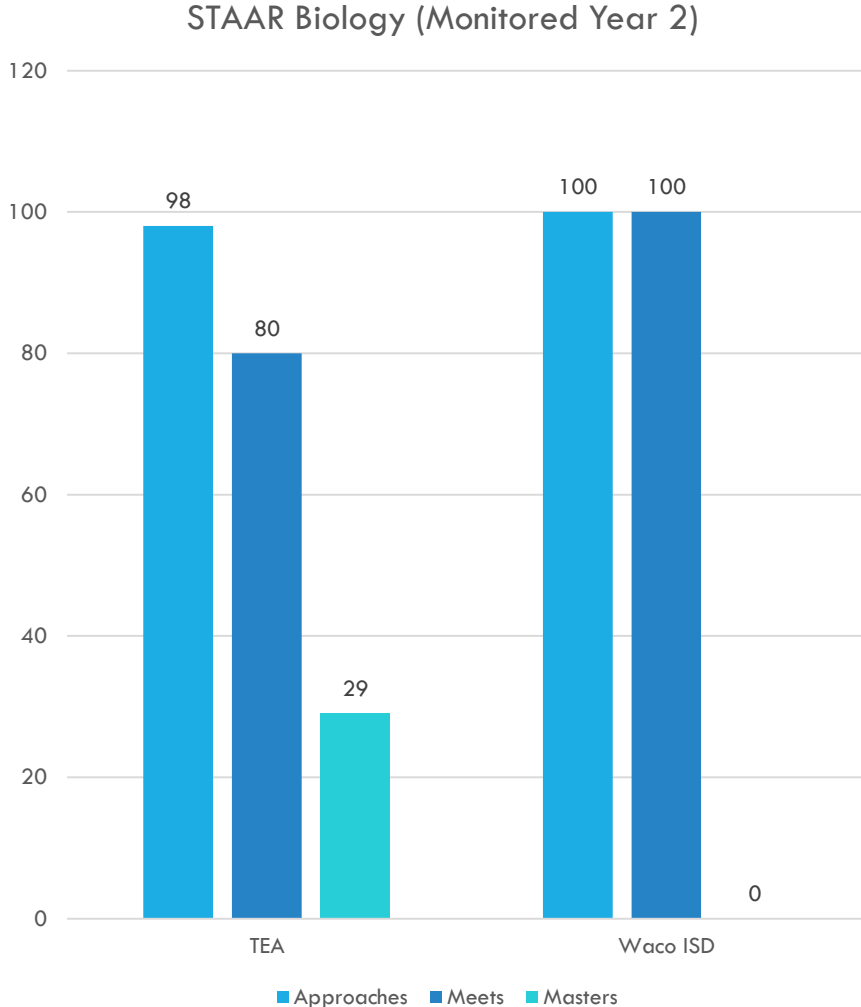
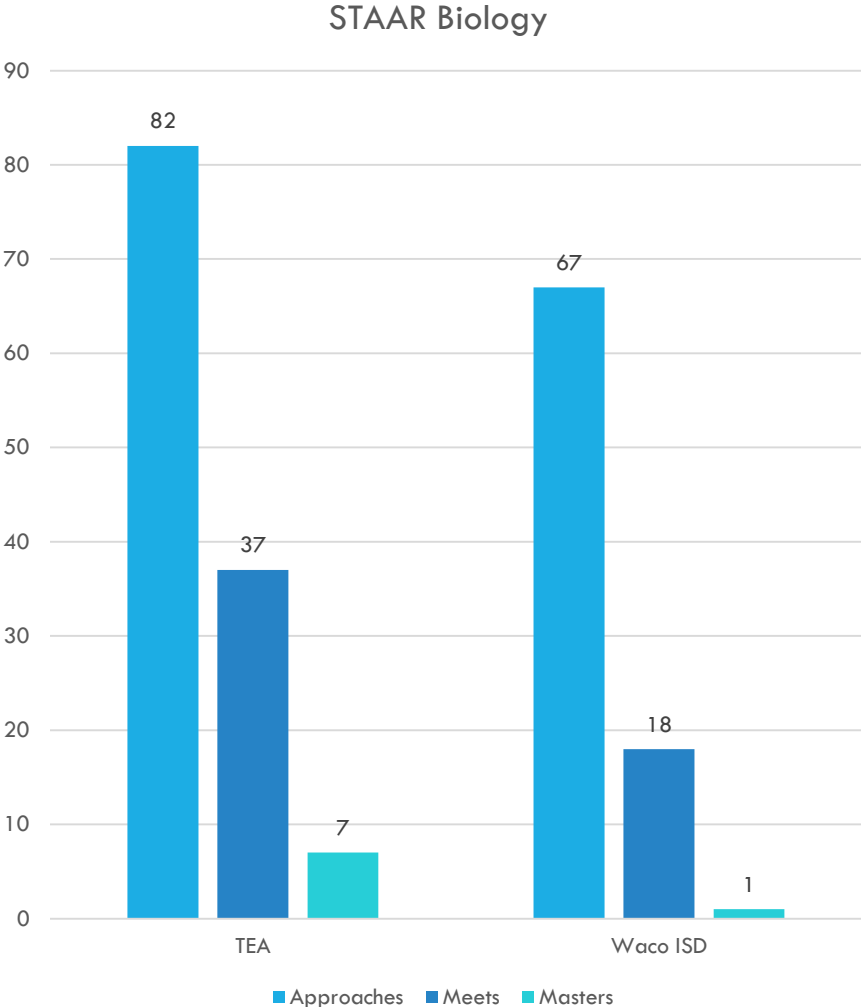
# STAAR SCIENCE GRADES 5 AND 8 LEP AND MONITORED STUDENTS



# STAAR SCIENCE GRADES 5 AND 8 LEP AND MONITORED STUDENTS

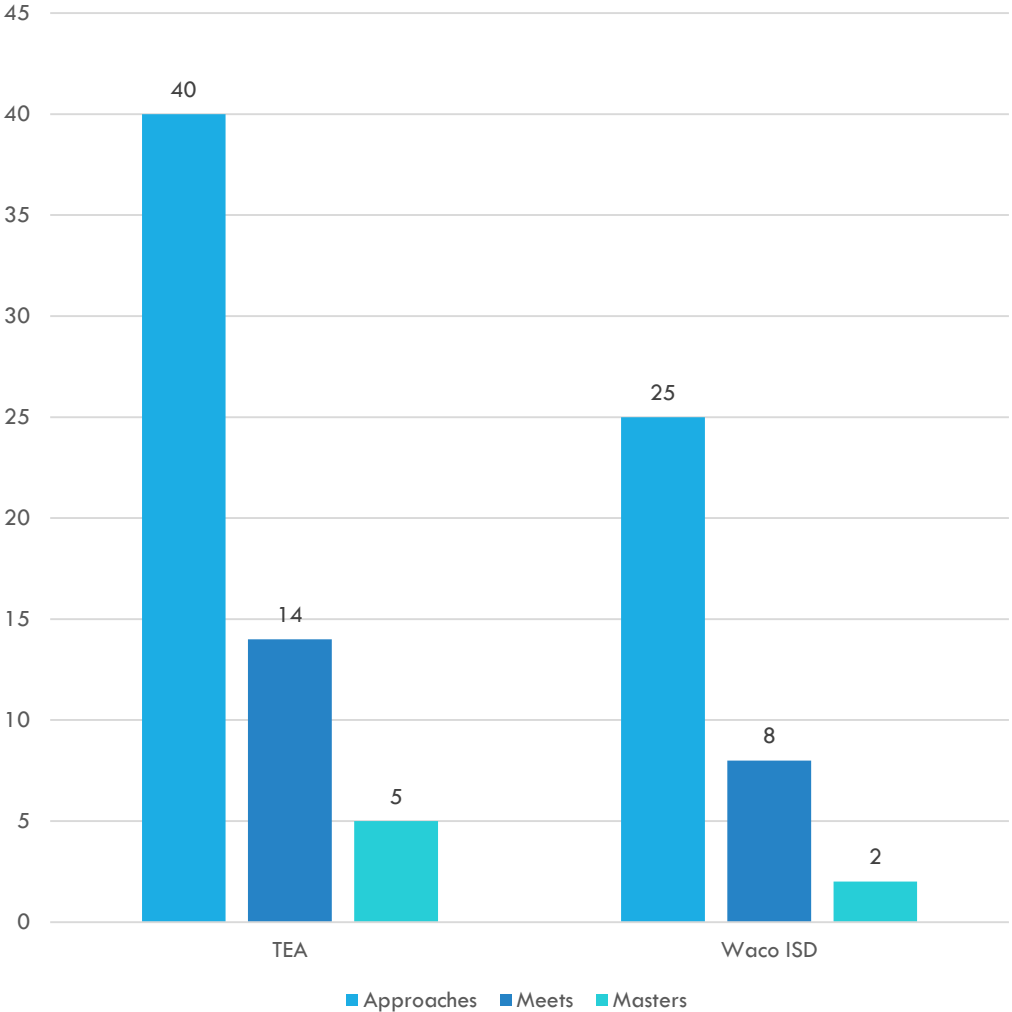


# STAAR BIOLOGY LEP AND MONITORED STUDENTS



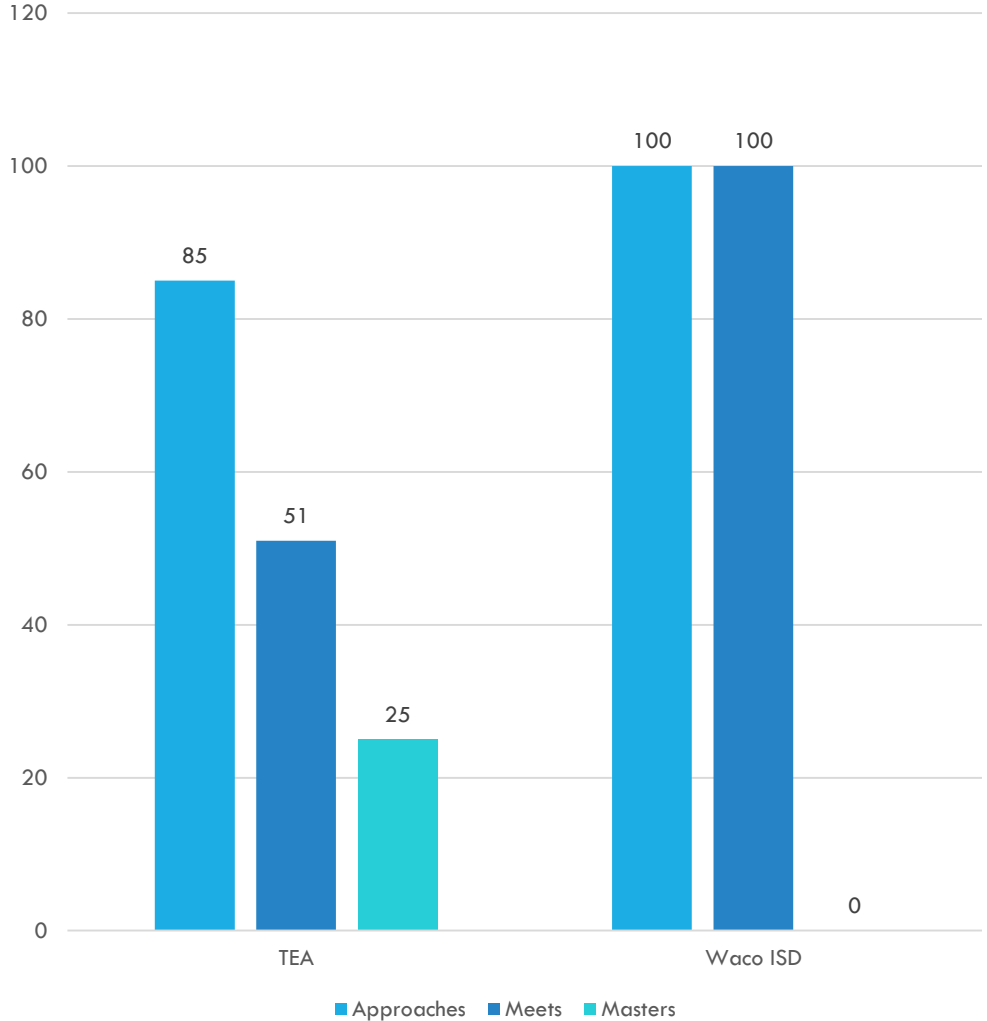
# STAAR SOCIAL STUDIES GRADE 8 LEP AND MONITORED STUDENTS

STAAR Social Studies Grade 8

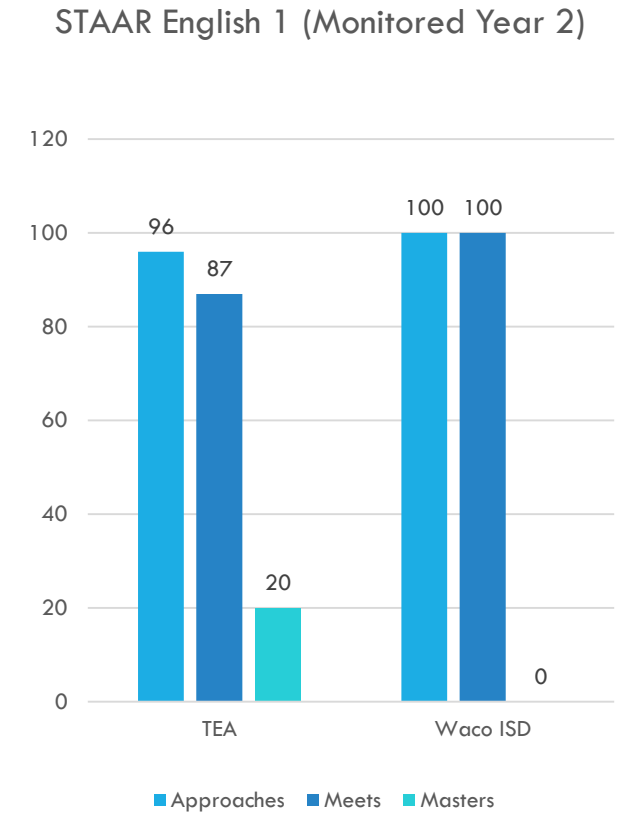
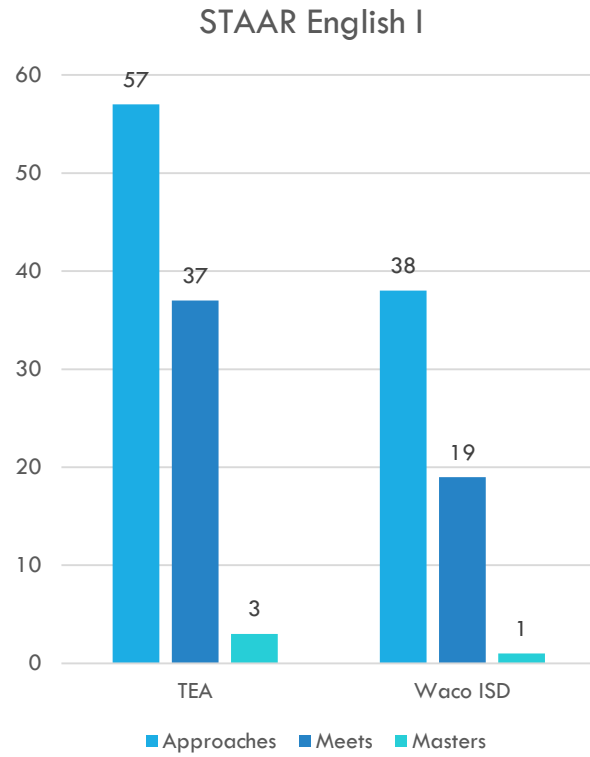


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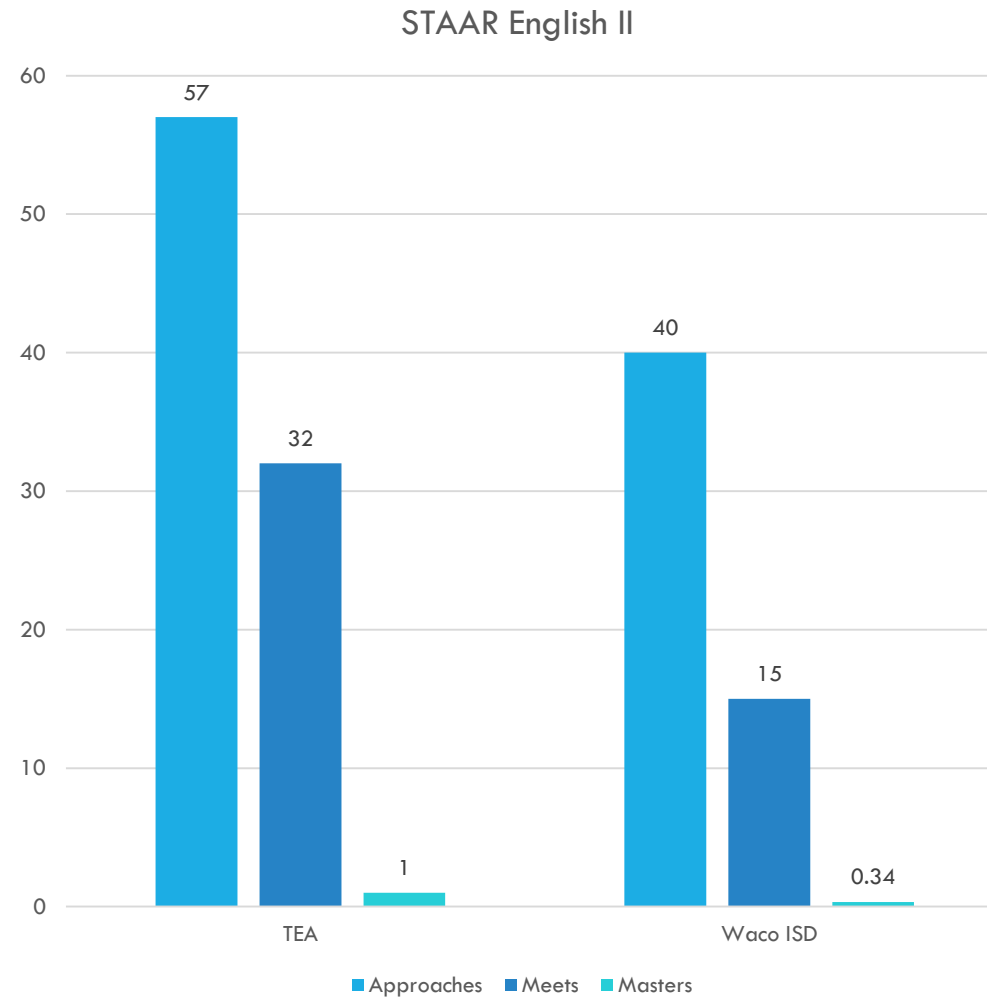
STAAR Social Studies Grade 8 (Monitored Year 2)



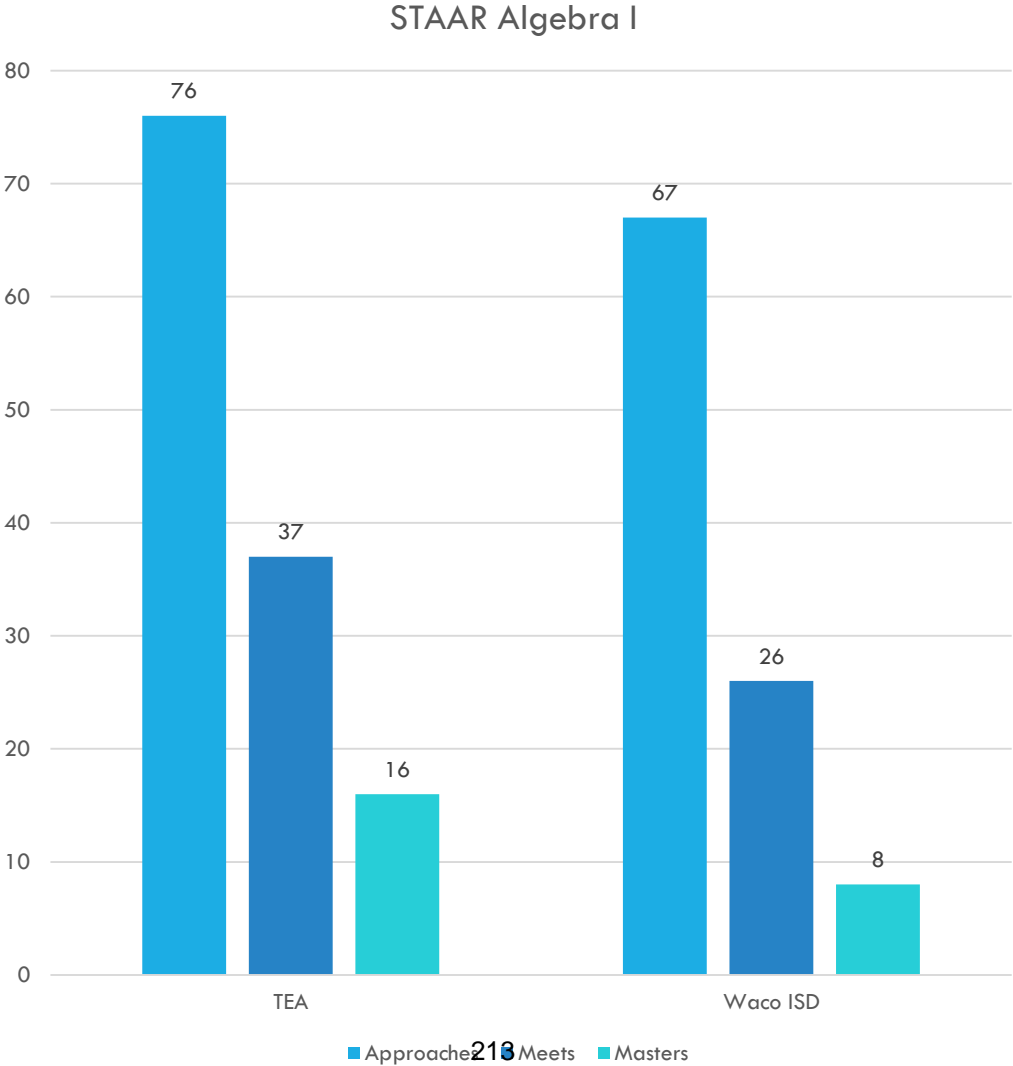
# STAAR ENGLISH I AND ENGLISH II LEP AND MONITORED STUDENTS



# STAAR ENGLISH I AND ENGLISH II LEP AND MONITORED STUDENTS

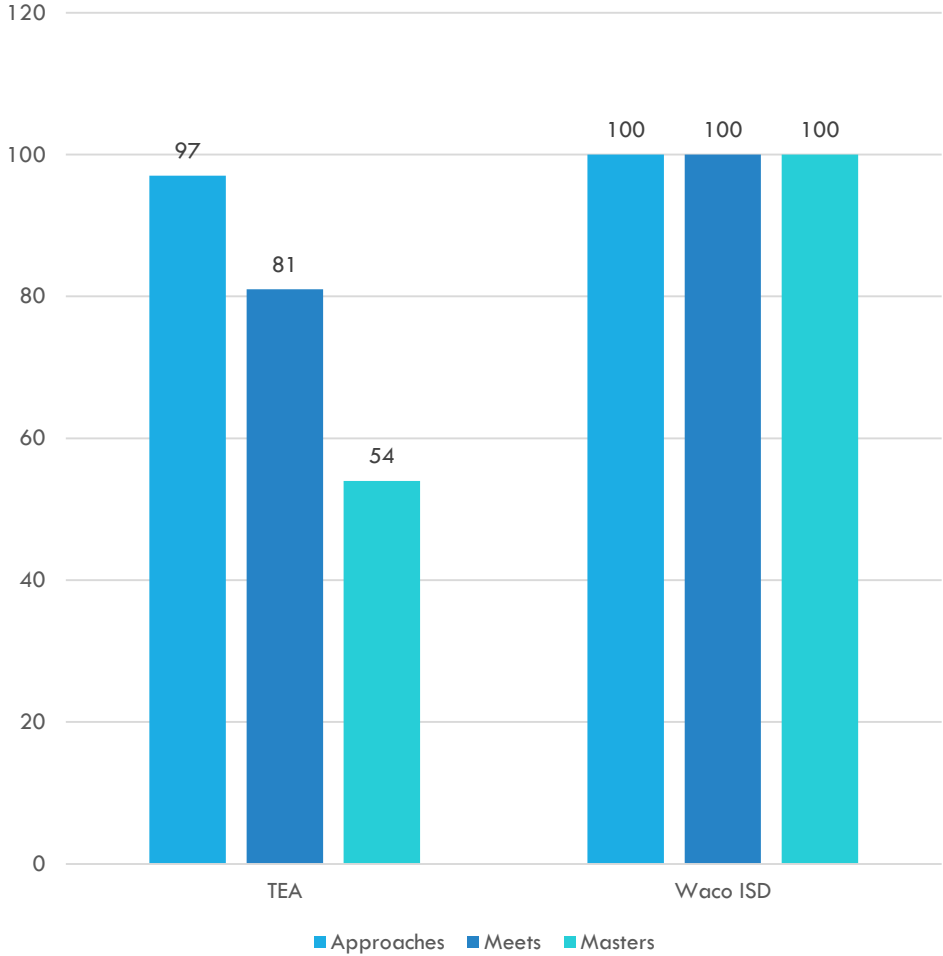


# STAAR ALGEBRA I LEP AND MONITORED STUDENTS

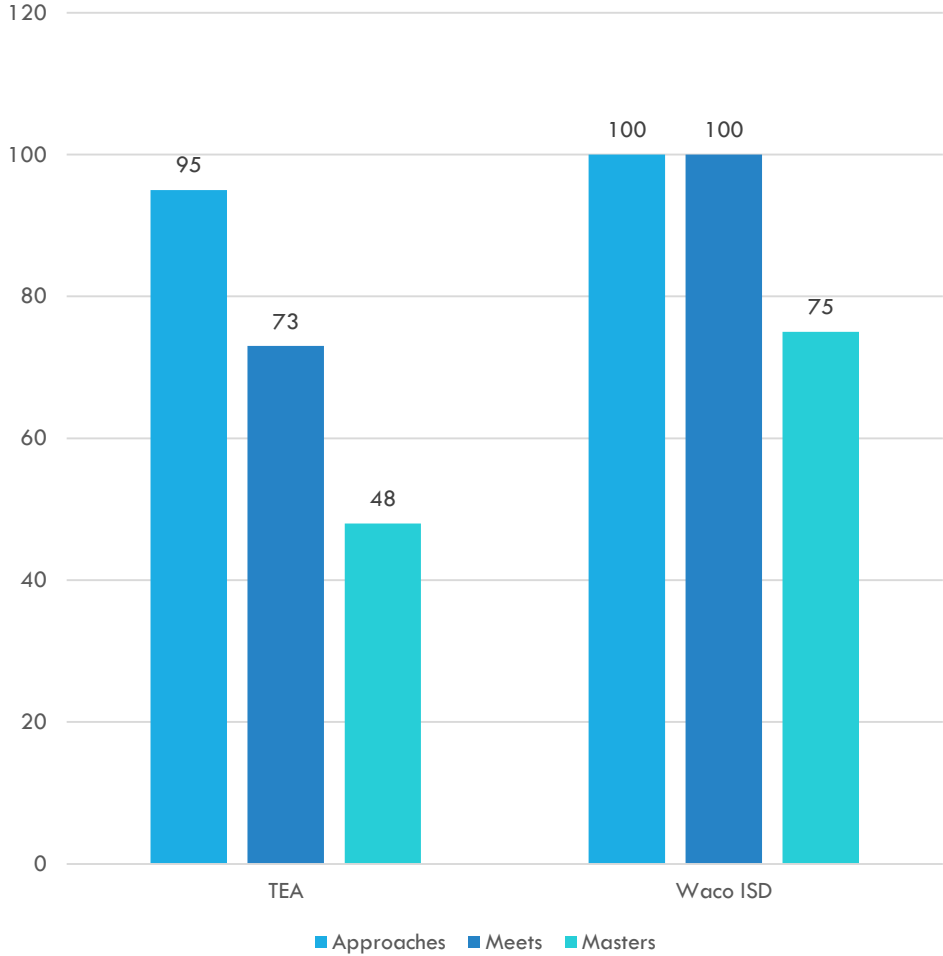


# STAAR ALGEBRA I LEP AND MONITORED STUDENTS

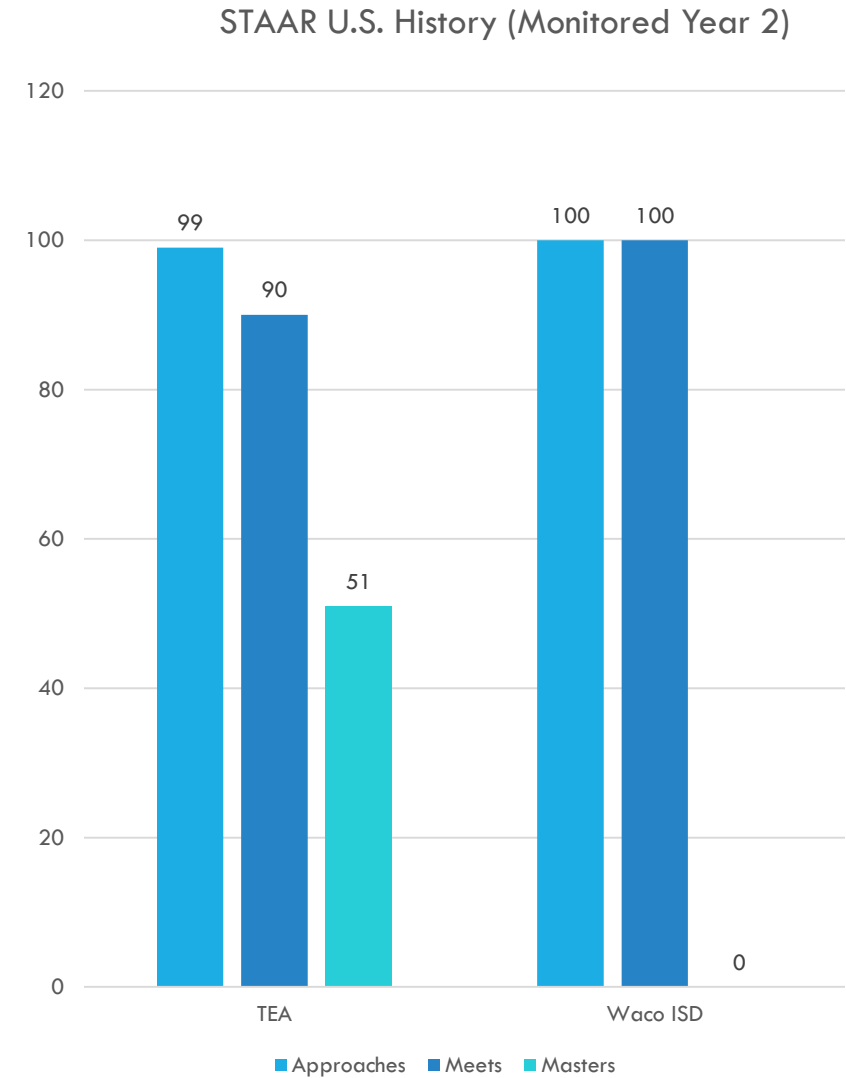
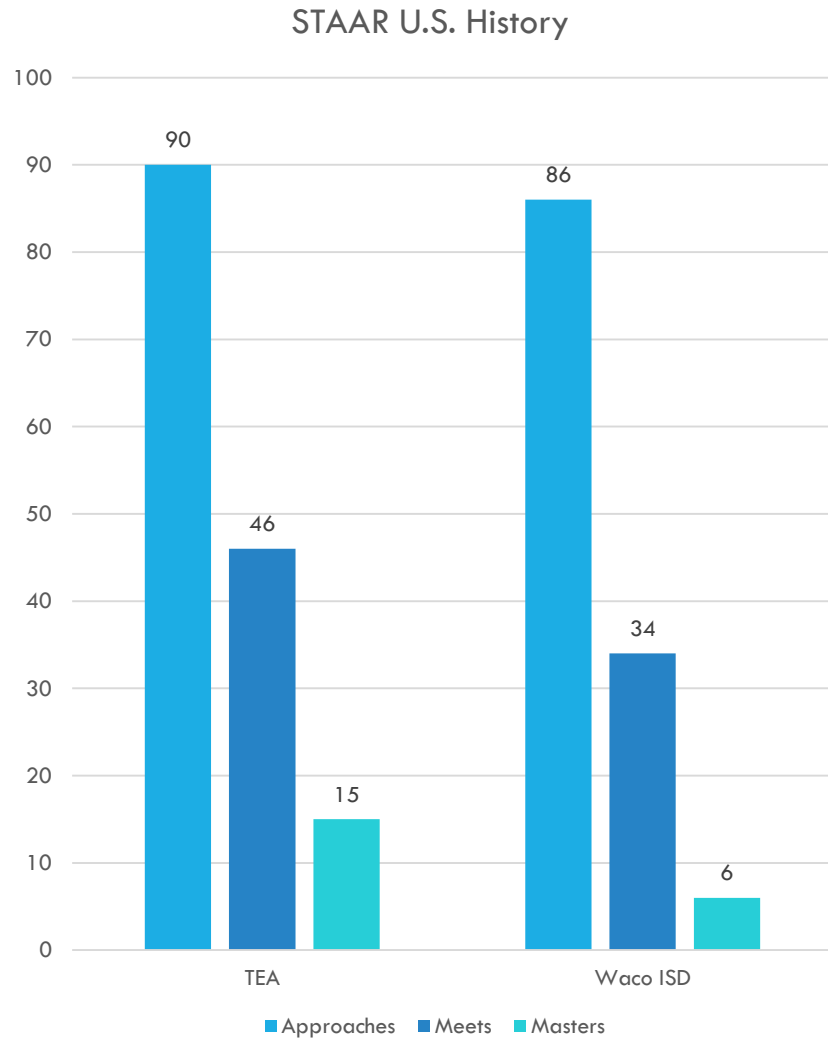
STAAR Algebra I (Monitored Year 1)



STAAR Algebra I (Monitored Year 2)



# STAAR U.S. HISTORY LEP AND MONITORED STUDENTS



# WHY IS ALL OF THIS SO IMPORTANT? WACO ISD'S DROPOUT RATE

An essential goal of the English Learners Department is to reduce the drop-out rate of Emergent Bilingual students. As a department we have put into place systems to specifically address our most at-risk secondary Emergent Bilingual students. We rejoice when we see Emergent Bilingual students walk across the stage and obtain their high school diploma despite facing significant barriers each day as they acquire a second language.

- 2017-2018: 8.1%
- 2018-2019: 5.7%
- 2019-2020: 2.5%
- 2020-2021: 3.1%

Source: Texas Academic Performance Report (TAPR)





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## BILINGUAL

*Because I speak Spanish  
I can listen to my grandmother's stories  
and say familia, madre, amor.*

*Because I speak English  
I can learn from my teacher  
and say I love school.*

*Because I am bilingual  
I can read libros and books,  
I have amigos and friends,  
I enjoy canciones and songs,  
juegos and games,  
and have twice as much fun.*

*And someday,  
because I speak two languages,  
I will be able to do twice as much,  
to help twice as many people  
and be twice as good in what I do.*

Alma Flor Ada

*On Behalf of Our English Learners Department Family, we want to express our Sincere gratitude to Dr. Susan Kincannon and our district's Board of Trustees. Thank you for making Biliteracy possible for our students and for helping all of our Emergent Bilingual students continue grow academically and linguistically!*

## Our English Learners Department Family



Grace Benson, Director of SL and Bilingual Education



Cris Leary  
Administrative Assistant



Yadira Burciaga  
Bilingual Assessor Specialist



Sandra Valencia  
Emergent Bilingual Testing Clerk



Cathleen Rooney  
Emergent Bilingual Coordinator



Carmen Diaz-Perez  
Coordinator of Bilingual Education



Milissa Johnson  
Emergent Bilingual Coordinator



Titus Moten  
Emergent Bilingual Tutor



Lynn Callentine  
Emergent Bilingual



Randy James  
ESL Strategist/Interventionist (High School)



Deneris Carrau-Martell  
Bilingual Instructional Tutor



Rebecca Rivera  
ESL Strategist/Interventionist



Julie Pena  
ESL Strategist/Interventionist



Maria "Mimi" Martinez  
Bilingual Instructional



Kade Hill  
Bilingual Instructional Tutor

**Waco Independent School District**  
**Board of Trustee Meeting Agenda Item**

**Date:** October 26, 2023

**Contact Person:** Sheryl Davis

**RE: Amendments to the 2023-2024 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 #005: Waco High School (Fund 199)***

This amendment will realign funds from instructional supplies and materials to extra-duty for security and monitoring 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:	\$ 5,700	Instruction
Use of Funds:	\$ 5,700	Security & Monitoring Services
Fund Balance Effect	<b>None</b>	

***Amendment #006 Brazos High School (Fund 199)***

This amendment will realign funds from instructional student awards to extra-duty pay for night school security costs. 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:	\$ 880	Instruction
Use of Funds:	\$ 880	Security & Monitoring Services
Fund Balance Effect	<b>None</b>	

***Amendment #007: Cesar Chavez Middle School (Fund 199)***

This amendment will realign funds from curriculum and instructional staff development travel to instructional supplies and fees for participation in 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:	\$ 810	Curriculum & Instructional Staff Development
Use of Funds:	\$ 810	Instruction
Fund Balance Effect	<b>None</b>	

**Amendment #008: Elementary Education (Fund 199)**

This amendment will realign funds from instructional supplies and instructional leadership reading materials to community services dues for the parents as teachers 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:	\$ 2,800	Instruction, Instructional Leadership
Use of Funds:	\$ 2,800	Community Services
Fund Balance Effect	<b>None</b>	

**Amendment #009: Student Services (Fund 199)**

This amendment will realign funds from instructional leadership travel to school leadership travel for two principals to attend an SEL conference. 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:	\$ 3,200	Instructional Leadership
Use of Funds:	\$ 3,200	School Leadership
Fund Balance Effect	<b>None</b>	

**Amendment #010: Districtwide Contingency Funds (Fund 199)**

This amendment will realign funds from instructional contingency to extra-curricular activities contingency to cover the cost of new basketball uniforms for G.W. Carver 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:	\$ 13,356	Instruction
Use of Funds:	\$ 13,356	Extra-curricular Activities
Fund Balance Effect	<b>None</b>	

**Amendment #011: Districtwide Costs (Fund 199)**

This amendment will realign funds from guidance, guidance and evaluation services salaries, increase Teacher Retirement On-behalf revenues and reduce the unassigned fund balance to cover salary costs in instructional resources and media services and curriculum and instructional staff development in order to meet comparability requirements at the District’s middle schools. 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:	\$ 215,876	Guidance, Counseling & Evaluation Services, Teacher Retirement On-behalf Revenue, Unassigned Fund Balance
Use of Funds:	\$ 215,876	Instructional Resources & Media Services, Curriculum & Instructional Staff Development
Fund Balance Effect	<b>Decrease</b>	

**Amendment #012: Waco ISD Police Department (Fund 199)**

This amendment will increase the budget for security and monitoring services miscellaneous contracted services to cover costs of off-duty police officers working at District campuses lacking full-time armed security. The amendment will reduce the unassigned fund balance. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

		<u>TEA Revenue/Function Description</u>
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Source of Funds:	\$ 170,000	Unassigned Fund Balance
Use of Funds:	\$ 170,000	Security & Monitoring Services
Fund Balance Effect		<b>Decrease</b>

***Amendment #013: Child Nutrition Services (Fund 240)***

This amendment will place budget from restricted fund balance to replace equipment and serving lines for child nutrition programs and comply with the Texas Department of Agriculture’s fund balance restrictions. 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:	\$ 2,317,537	Restricted Fund Balance – Federal Funds
Use of Funds:	\$ 2,317,537	Child Nutrition Services
Fund Balance Effect		<b>Decrease</b>

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

**Fiscal Implications:**

Budget amendments #011 and #012 decrease the General Fund unassigned fund balances by \$132,539 and \$170,000, respectively, for a total of \$302,539. Amendment #013 decreases the restricted fund balance in the Child Nutrition Fund by \$2,317,537. The remaining amendments will have no impact on the general fund unassigned 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 # 005**

CAMPUS OR DEPARTMENT: Waco High School

DATE: 10/26/2023

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	11	6399	00	002	11	000	Other general supplies & materials	88,030	66,692.88	(5,700)	82,330
199	52	6118	00	002	99	000	Extra-duty pay, teachers/other professional	-	-	4,829	4,829
199	52	6141	00	002	99	000	Social Security/Medicare	16	(2.26)	96	112
199	52	6143	00	002	99	000	Workers' compensation	4	(1.09)	47	51
199	52	6145	00	002	99	000	Unemployment compensation	2	1.61	3	5
199	52	6146	00	002	99	000	Teacher Retirement/TRS Care	114	81.19	725	839

REASON FOR REQUEST: Realign funds budgeted for instructional supplies and materials to security extra-duty pay to facilitate the monitoring of students arriving prior to the building opening each day.

Sterlin McGruder  
BUDGET ADMINISTRATOR /

  
Chief Financial Officer









**WACO INDEPENDENT SCHOOL DISTRICT  
AMENDMENT BUDGET FORM**

**AMENDMENT # 010**

**CAMPUS OR DEPARTMENT:** Districtwide Contingency Funds

**DATE:** 10/26/2023

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	36	6499	98	999	99	000	Miscellaneous Operating Costs-Contingency	46,500	46,500.00	13,356	59,856
199	11	6499	98	999	99	000	Miscellaneous Operating Costs-Contingency	100,000	100,000.00	(13,356)	86,644

**REASON FOR REQUEST:** Realign funds budgeted for instructional contingency to extra-curricular activities contingency to cover the cost of new basketball uniforms for Carver Middle School.

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BUDGET ADMINISTRATOR /

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Chief Financial Officer

**WACO INDEPENDENT SCHOOL DISTRICT  
AMENDMENT BUDGET FORM**

**AMENDMENT # 011**

**CAMPUS OR DEPARTMENT:** Districtwide Costs

**DATE:** 10/26/2023

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	12	6119	00	043	99	000	Salaries-Teachers/Other Professionals	-	-	58,000	58,000
199	12	6141	00	043	99	000	Social Security/Medicare	391	374.46	841	1,232
199	12	6142	00	043	99	000	Group Health & Life Insurance	4,656	4,656.00	500	5,156
199	12	6143	00	043	99	000	Workers' Compensation	76	75.33	164	240
199	12	6144	00	043	99	000	TRS On-Behalf	2,227	2,227.00	5,510	7,737
199	12	6145	00	043	99	000	Unemployment	27	26.62	58	85
199	12	6146	00	043	99	000	Teacher Retirement/TRS Care	715	706.03	2,848	3,563
199	12	6119	00	044	99	000	Salaries-Teachers/Other Professionals	-	-	61,044	61,044
199	12	6141	00	044	99	000	Social Security/Medicare	-	-	885	885
199	12	6142	00	044	99	000	Group Health & Life Insurance	-	-	4,656	4,656
199	12	6143	00	044	99	000	Workers' Compensation	-	-	172	172
199	12	6144	00	044	99	000	TRS On-Behalf	-	-	5,799	5,799
199	12	6145	00	044	99	000	Unemployment	-	-	61	61
199	12	6146	00	044	99	000	Teacher Retirement/TRS Care	-	-	3,310	3,310
199	13	6119	00	043	99	000	Salaries-Teachers/Other Professionals	57,321	44,909.12	63,264	120,585
199	13	6141	00	043	99	000	Social Security/Medicare	831	642.31	917	1,748
199	13	6142	00	043	99	000	Group Health & Life Insurance	4,656	4,199.02	4,656	9,312
199	13	6145	00	043	99	000	Unemployment	57	52.77	63	120
199	13	6146	00	043	99	000	Teacher Retirement/TRS Care	1,519	1,271.93	3,128	4,647
199	00	5831	00	000	00	000	Teacher Retirement On-behalf	(6,427,655)	(5,945,935.27)	(11,309)	(6,438,964)
199	31	6499	98	999	99	000	Miscellaneous Operating Costs-Contingency	85,607	85,607.00	(72,028)	13,579
199	00	3600	00	000	00	000	Unassigned Fund Balance		(50,030,074.00)	132,539	

**REASON FOR REQUEST:** Amend budget to cover position funding changes to meet comparability requirements at the District's middle schools. The amendment will decrease the unassigned fund balance by \$132,539 in order to fund the librarians at Cesar Chavez and Tennyson through the General Fund rather than ESSER III. This is consistent with the way the librarian at G. W. Carver is funded.

**BUDGET ADMINISTRATOR /** \_\_\_\_\_

  
Chief Financial Officer

**WACO INDEPENDENT SCHOOL DISTRICT  
AMENDMENT BUDGET FORM**

**AMENDMENT # 012**

CAMPUS OR DEPARTMENT: Waco ISD Police Department

DATE: 10/26/2023

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	52	6299	68	999	99	000	Miscellaneous contracted services	299,592	17,920.74	170,000	469,592
199	00	3600	00	000	00	000	Unassigned Fund Balance		(49,897,535.00)	170,000	170,000

REASON FOR REQUEST: Amend budget for security and monitoring miscellaneous contracted services to cover costs of off-duty police officers working at District campuses lacking full-time armed security. The amendment will decrease the unassigned fund balance by \$170,000.

BUDGET ADMINISTRATOR / \_\_\_\_\_

  
 Chief Financial Officer

**WACO INDEPENDENT SCHOOL DISTRICT  
AMENDMENT BUDGET FORM**

**AMENDMENT # 013**

**CAMPUS OR DEPARTMENT:** Child Nutrition Services Program (Fund 240)

**DATE:** 10/26/2023

BUDGET CODE							DESCRIPTION	A	B	C	D
FUND	FNC	OBJ	SO	ORG	PRG	LOPT		CURRENT APPROPRIATION	CURRENT ACCOUNT BALANCE	REQUESTED INCREASE (DECREASE)	AMENDED APPROPRIATION
240	35	6249	70	999	99	000	Other Contracted Maintenance & Repairs	-	101,700.55	40,000	40,000
240	35	6397	70	999	99	000	Equipment - Unit Cost <\$5000 - Tracked	-	175,171.86	231,500	231,500
240	35	6399	70	999	99	000	Other General Supplies & Materials	-	85,671.41	294,500	294,500
240	35	6631	70	999	99	000	Vehicles w Unit Cost \$5000+	-	103,026.60	65,000	65,000
240	35	6639	70	999	99	000	Equipment - Unit Cost <\$5000 - Tracked	-	295,134.02	1,686,537	1,686,537
240	00	3450	00	000	00	000	Restricted Fund Balance - Federal Funds			2,317,537	

**REASON FOR REQUEST:** Place budget from restricted fund balance to replace equipment and serving lines for child nutrition programs and comply with the Texas Department of Agriculture's fund balance restrictions.

Cliff Reece  
**BUDGET ADMINISTRATOR /**

  
Cheryl Davis  
Chief Financial Officer

**Waco Independent School District**

**Board of Trustee Meeting Agenda Item**

**Date:** October 26, 2023

**Contact Person:** M. Tish

**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 creating a list of vendors that can service the District. We received fourteen (14) responses during the past month. The recommended vendors will be added to our previously approved list of two hundred eighty-two (282) 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 fourteen (14) vendors for the Educational Consulting, Professional Development, and Other Student-Based Contracted Services bid, as presented.

**ALBerry Consulting**

Company Name: ALBerry Consulting, Inc.  
Street Address: 777 Preston St. 40F  
City, State, Zip: Houston, TX 77002  
Contact Name: Dr. Almitra Berry  
Contact Phone Number: 8328623779  
Contact Email Address: almitra@alberrync.com  
Category of Service Provided: Professional/Staff Development Training  
Target Audience: School and central office educators and leaders; Special sessions are conducted for school and central office administrators who oversee curriculum and instruction  
Description of Services: Author of several books and publications regarding evidence-based instructional practices for struggling and emergent bilingual learners; provide professional learning and capacity-building assistance for ELA, multilingual learners, and reading instruction  
Pricing: Single day on-site: \$8,000; weekly rate: \$23,500; fee for meetings, coaching, and facilitated discussions performed remotely: \$375 per hour; Custom live or recorded workshops are \$2,000 for up to two hours; Prerecorded, on-demand

**Authentic Institute of Montessori, Inc (Age of Montessori)**

Company Name: Authentic Institute of Montessori  
Street Address: 301 Evergreen Drive  
City, State, Zip: Bozeman, MT 59715  
Contact Name: Candace Babcock  
Contact Phone Number: 208-659-4089  
Contact Email Address: candace@aimmontessori.org  
Category of Service Provided: Professional/Staff Development Training  
Target Audience: Faculty and Staff at Waco Montessori School  
Description of Services: Live 6-hour interactive workshop/presentation on-site; Live 1-2 hour parent education event; custom online course platform will be created for faculty & staff giving access to Videos of Montessori Lessons presented by AIM Faculty; Seminar presentations by AIM Faculty on Montessori topics that relate to the presentation topic; Readings & written resources that relate to the presentation topic  
Pricing: The fee for the outlined services is \$2,250

### **Dr Tamara Hodges**

Company Name: Dr. Tamara  
Street Address: 4332 WESTCHESTER DR  
City, State, Zip: Waco, TX 76710  
Contact Name: Tamara Lynn Hodges  
Contact Phone Number: 254-715-7149  
Contact Email Address: tamara\_hodges@baylor.edu  
Category of Service Provided: Professional/Staff Development Training  
Target Audience: Staff at St Paul's  
Description of Services: Monthly training for teachers at St.  
Paul's Pricing: \$100.00/hour

### **Hermineh Moradi**

Company Name: Hermineh Moradi  
Street Address: 2297 Buster Chatham Rd  
City, State, Zip: Waco, TX 76705  
Contact Name: Hermineh Moradi  
Contact Phone Number: 818-913-8574  
Contact Email Address: hermineh.moradi@gmail.com  
Category of Service Provided: Other applicable service  
Target Audience: Students  
Description of Services: Eye examinations done for students in need of eye/vision care, referred from local schools  
Pricing: Independent contractor

### **Live Sturdy LLC**

Company Name: Live Sturdy LLC  
Street Address: 4015 Winding Way Road, SW  
City, State, Zip: Roanoke, VA 24018  
Contact Name: Keith A. McCurdy  
Contact Phone Number: 540-529-1738  
Contact Email Address: keith@livesturdy.com  
Category of Service Provided: Professional/Staff Development Training  
Target Audience: School Consult to include upper school student assembly, staff development, and parent forum  
Description of Services: Primary focus on professional development in student mental health, improving parent engagement, and providing curriculum and program support

Pricing: 1 School Consult: \$5000.00; 1 Student Session and Q&A Included, 1 Admin/Staff Session, and Q&A Included, 1 Parent Forum, and Q&A Included; Travel/Lodging (Rental car billed after visit)

### **Michael Guzman**

Company Name: Michael Guzman  
Street Address: 174 Balfour Dr.  
City, State, Zip: Fate, TX 75189  
Contact Name: Michael Guzman  
Contact Phone Number: 786-393-3699  
Contact Email Address: mikeguzman2284@gmail.com  
Category of Service Provided: Academic Educational Consultant  
Target Audience: Honor Band  
Description of Services: Conduct Honor Band  
Pricing: TBD

### **Morgan Garner**

Company Name: Morgan Garner  
Street Address: 66 Daughtrey Ave, Apt 214  
City, State, Zip: Waco, TX 76706  
Contact Name: Morgan Garner  
Contact Phone Number: 682-215-2414  
Contact Email Address: morgangarner01@yahoo.com  
Category of Service Provided: Academic Educational Consultant  
Target Audience: Highly Mobile Students in Waco ISD  
Description of Services: Case management and tutoring  
Pricing: \$26

### **Prime Time Mobile Gamerz LLC**

Company Name: Prime Time Mobile Gamerz LLC  
Street Address: 114 Indian Trails Rd  
City, State, Zip: Riesel, TX 76682  
Contact Name: James Fickens  
Contact Phone Number: 254-297-9284  
Contact Email Address: info@primetimemobilegamerz.com  
Category of Service Provided: Professional/Staff Development Training  
Target Audience: Teachers/Staff/Students  
Description of Services: Mobile Video Game Truck: Prime Time Mobile Gamerz has the very best in Mobile Video Game Truck, Laser Tag and much more  
Pricing: Game Truck Party - 2 Hours = \$345.00, up to 28 kids, more than 28 kids \$450.00 (Monday - Thursday); \$500.00 (Friday - Sunday); every additional hour is 100.00

### **Saul Malek**

Company Name: Saul Malek

Street Address: 2401 Bennett Ave, Apt 3330  
City, State, Zip: Dallas, TX 75206  
Contact Name: Saul Malek  
Contact Phone Number: 573-292-9478  
Contact Email Address: saul@saulmalek.com  
Category of Service Provided: Motivational or Professional Speaker  
Target Audience: 4th grade and up  
Description of Services: Speak to students about the risks of gambling at a level they can understand. As digital gambling grows in accessibility and social acceptance, educating students on risk and consequences is essential. Share testimony as a 25-year-old compulsive gambler in long term (over 4 years) recovery, coupled with research done on the topic. Employ a holistic view of discussing problem gambling-talks are not JUST about gambling. Discuss overcoming peer pressure, the need to feel like a "big shot," living a balanced life.  
Pricing: \$1750 per speech

### **Titan Tomes LLC**

Company Name: Titan Tomes LLC  
Street Address: 2938 Daybreak Drive  
City, State, Zip: Orlando, FL 32825  
Contact Name: Curtis Covington  
Contact Phone Number: 954-667-9861  
Contact Email Address: curtis@titantome.com  
Category of Service Provided: Educational Activity Provider for Students  
Target Audience: 3rd - 5th grade students  
Description of Services: Empower young authors by transforming their imaginative stories into professionally illustrated, published books; organization hosting a writing competition within schools; winning story is not only brought to life through professional illustrations on each page but is also published and made available for global readership on Amazon. The young author is celebrated and recognized through a photoshoot, showcasing their published work, and is presented with a beautifully bound hardcover edition of their book; a portion of the book sales is reinvested into participating schools, enhancing their literacy programs, and a copy of the published book is proudly displayed in the school library, serving as a beacon of inspiration for other students to dream big and embark on their own literary journeys  
Pricing: \$0.00

### **Toward the Real LLC dba Challenge Day**

Company Name: Toward the Real LLC dba Challenge Day  
Street Address: 230 Arroyo Road  
City, State, Zip: Lagunitas, CA 94938  
Contact Name: Laura Rosa  
Contact Phone Number: 510-767-0355  
Contact Email Address: office@challengeday.org  
Category of Service Provided: Presentations/ Performances for Staff or Students  
Target Audience: 7th - 12th grade students up to 100 per day

Description of Services: Experiential 6 1/2 hour program that guides 100 students and 25 adults through interactive activities that allow them to practice the tools that have proven to support connection, inclusivity and break down barriers

Pricing: cost is \$5000 per day plus the cost of travel

### **Tristen Collinsworth**

Company Name: Tristen Collinsworth

Street Address: 66 Daughtrey Ave, Apt 917

City, State, Zip: Waco, TX 76706

Contact Name: Tristen Collinsworth

Contact Phone Number: 209-777-0450

Contact Email Address: tristen@tristencollinsworth.com

Category of Service Provided: Academic Educational Consultant

Target Audience: Woodwind Tutoring & Coaching

Description of Services: Private & group instructor for woodwinds

Pricing: Variable, starting at \$20

### **U.S. Games (BSN Sports, Inc.)**

Company Name: US GAMES A DIVISION OF BSN SPORTS, LLC

Street Address: 14460 Varsity Brands Way

City, State, Zip: Farmers Branch, TX 75244

Contact Name: Ashley Vation

Contact Phone Number: 800-327-0484

Contact Email Address: USGAMESBID@USGAMES.COM

Category of Service Provided: Professional/Staff Development Training

Target Audience: K-12 Physical Education Teachers

Description of Services: Face-to-face professional developments for a maximum of 60 participants per trainer and up to 6 hours per day; Virtual professional developments hosted on WISD platform for one hour per topic with the maximum participants only limited by your hosting platform

Pricing: \$3450.00 for each trainer in a face-to-face professional development; \$925 per hour session for virtual professional development

**William H. Sadlier, Inc.**

Company Name: William H. Sadlier, Inc.  
Street Address: 25 Broadway  
City, State, Zip: New York, NY 10004  
Contact Name: Sharmilla Sinanan  
Contact Phone Number: 212-227-2120  
Contact Email Address: sadlierbids@sadlier.com  
Category of Service Provided: Professional/Staff Development Training  
Target Audience: We offer professional development for the products we publish.  
Description of Services: We are educational publishers in the areas of K-12 English Language Arts, Grammar, Vocabulary, Reading, and Mathematics; supply print and digital resources in English Language Arts, Math, and Vocabulary  
Pricing: Our catalog reflects a 25% discount for schools; For Professional Development: Enhanced Implementation/ In-Person \$2,250--\$3,250; Enhanced Implementation / Virtual /2-3 hr /\$1500 -- Basic Implementation /Virtual \$500--\$750; Getting Started/ Webinar --No

**Waco Independent School District**

**Board of Trustee Meeting Agenda Item**

**Date: October 26, 2023**

**Contact Person: M. Tish/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 creating a list of vendors that can provide supplies, equipment, and services for the Facilities and Maintenance and Custodial Departments. We have received one hundred-two (102) responses for this initial bid. We received submittals from four (4) additional vendors this past month that 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 Purchasing 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 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 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 four (4) additional new vendors for the Maintenance Supplies, Equipment, and Services bid, as presented.

RFP # 22-1229  
Maintenance Supplies, Equipment and Services  
Vendors for September 2023

<b>Responding Supplier</b>	<b>City</b>	<b>State</b>
City Tire and Battery	Waco	TX
JLM Contracting, LLC	Waco	TX
The Reynolds Company (D. Reynolds Co., LLC)	Fort Worth	TX
The Roof Co. Waco, LLC	Waco	TX
<b>Previously Awarded Vendors</b>	<b>City</b>	<b>State</b>
A&H Refrigeration Company, Inc.	Waco	TX
A-1 Banner & Sign Company, 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
Arrow Magnolia International, Inc.	Dallas	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
CCP Industries, Inc. (The Tranzonic Companies)	Richmond Heights	OH
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 Company	Waco	TX
Encore Fence	Temple	TX
Environmental Concerns, Inc.	Waco	TX

RFP # 22-1229  
Maintenance Supplies, Equipment and Services  
Vendors for September 2023

Previously Awarded Vendors	City	State
Epic Solar Control, LLC	McKinney	TX
Fairway Supply	Irving	TX
Firetrol Protection Systems (Heather Foster)	Austin	TX
Fissco Supply (Frigelar North America DBA Fissco Supply)	Dallas	TX
Fitzgerald Lawnscape Ltd.	Woodway	TX
Flip Lok, LLC	Houston	TX
Fort Worth Window Cleaning, Inc.	Haltom City	TX
Fred's Power Wash (Washer Power)	Waco	TX
Gene Ives Acoustic & Tile Company	Waco	TX
Global Industrial (Global Equipment Company, Inc.)	Buford	GA
Grones Environmental Services	Waco	TX
H. B. Blake Company	Hewitt	TX
HCS Inc. (MB Home Construction)	Waco	TX
Hill Country Paints (Wendy Hui Anderson)	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
Loop 340 Overhead Door (Sideline Enterprises, Inc.)	Waco	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 Company	Waco	TX
National Wholesale Supply Company	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
RBO Technologies, LLC	Waco	TX
Resco (E & O investments, LLC)	Hewitt	TX
Richards Equipment Company	Waco	TX
Ryberg Plumbing LLC	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 Company, Inc.	Waco	TX
Solar Supply	Waco	TX

RFP # 22-1229  
Maintenance Supplies, Equipment and Services  
Vendors for September 2023

Previously Awarded Vendors	City	State
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
UniFirst Corporation	Hewitt	TX
United Ag & Turf	Waco	TX
United Refrigeration, Inc.	Waco	TX
Virkim, Inc.	Hewitt	TX
Waco Lock and Key, LLC	Waco	TX
WESCO Chemicals, Inc.	Waxahachie	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: October 26, 2023**

**Contact Person: M. Tish**

**RE: Bid Award for Restaurant & Catering Services**

=====

**Background Information:**

Request for Proposal, RFP # 19-1150, Restaurant & Catering Services have been received for creating a list of vendors that can service the District in their Restaurant and Catering needs. We received two (2) additional responses since the last bid was awarded.

The two (2) new vendors, to be considered with the previously approved sixty-seven (67) vendors, are attached for your consideration.

In an effort to create inclusivity with our local Restaurant and Catering 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 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 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 vendors for the Restaurant & Catering Services bid, as presented.

## Restaurant and Catering Services

Vendors for October 2022

<b>New Responding Supplier</b>	<b>City</b>	<b>State</b>
Kings Chicken Wings	Waco	TX
Texas Roadhouse	Waco	TX
<b>Previously Awarded Vendors</b>	<b>City</b>	<b>State</b>
Andy's Frozen Custard (Andy's Texas #5, LLC)	Austin	TX
Apex Coffee Roasters	Waco	TX
Backyard Bar Stage and Grill	Waco	TX
Bigwards Smokehouse	Waco	TX
Blanek's Custom Catering by Big Daddy's (Joe Blanek)	Robinson	TX
Boardwalk on Elm	Waco	TX
Bush's Chicken	Waco	TX
Cafe Venture Catering and Fuddruckers	Lubbock	TX
Chaney Brothers Coffee Truck (Waco Coffee Company)	Waco	TX
Chick-fil-A at Baylor University (Sykora Family Enterprises)	Waco	TX
Chick-fil-A of Waco	Waco	TX
Chuy's Opco Inc.	Austin	TX
Coach's Smoke BBQ (Josey's BBA, Inc.)	Waco	TX
DoubleDave's Pizzaworks (Hearne Pizza LLC)	Waco	TX
Fazoli's (FazTex Restaurants, Inc.)	Austin	TX
Firehouse Subs (Brazos Valley Subs)	Waco	TX
Franklin Avenue Mac House (Cheddar Box, LLC)	Waco	TX
Freebirds World Burrito (TavistockFreebirds, LLC)	Waco	TX
Fuego Waco II, LLC	Waco	TX
Gelu Italian Ice (Waco Coffee Company, LLC)	Waco	TX
George's Restaurant & Catering (George's 1 LTD)	Waco	TX
Good'N Gone Cookie Jar	Waco	TX
Hecho en Waco	Waco	TX
Heritage Creamery (Heritage Creamery LLC)	Waco	TX
HTeaO (N2T LLC)	Amarillo	TX
Ichiban	Waco	TX
Jason's Deli (Deli Management, Inc.)	Waco	TX
Jeremiah's Italian Ice of Waco	Waco	TX
Jimmy Johns (Butts Largest Investment Group II, Inc)	Waco	TX
Jon Lillie's Steakhouse	Waco	TX
Kona Ice of Waco LLC (Tie Dye Interprises)	Waco	TX
Kurbside Coffee & Goods	Waco	TX
La Fiesta Restaurant (Wanda Patlis Inc)	Waco	TX
Little Caesars Pizza (Reno Ltd)	Hewitt	TX
Lula Jane's LLC	Waco	TX
McAlister's Deli (The Saxton Group)	Dallas	TX
Mo Cookies	Waco	TX
Newk's-1033-Waco-TX (Newk's Eatery)	Waco	TX
Nightlight Donuts & Coffee	Woodway	TX
Ninfas Mexican Restaurant (Texas rodco Waco)	Waco	TX
Panda Express, Inc	Waco	TX
Panera Bread	Waco	TX
Papa Bear	Waco	TX

RFP # 19-1150  
 Restaurant and Catering Services  
 Vendors for October 2022

Previously Awarded Vendors	City	State
Peter Piper Pizza (Pizza Properties Inc)	El Paso	TX
Po' Boy Place	Waco	TX
Pop's Lemonade Co	Waco	TX
Raising Canes (Raising Canes Restaurants, LLC)	Plano	TX
Revival Eastside Eatery	Waco	TX
Roni's Mac Bar	Waco	TX
Rosa's Café & Tortilla Factory	Waco	TX
Rosati's of Waco (Odling Pizza LLC)	Waco	TX
Shipleigh Do-Nuts (January Investments Inc.)	Waco	TX
Southern Roots Brewing (Southern Roots Taproom LLC)	Waco	TX
Subway (Benchmark Subs)	Waco	TX
Sweetness Desserts (Laura Summersett)	Waco	TX
Sweets by Rachel	Waco	TX
Talk More Meals	Waco	TX
The Olive Branch (Stewart Branch)	Waco	TX
Toaster Yolk Café	Waco	TX
Tony DeMaria's BBQ	Waco	TX
Travelin' Toms (CTX Coffee, LLC)	Waco	TX

**Waco Independent School District**

**Board of Trustee Meeting Agenda Item**

**Date: October 26, 2023**

**Contact Person: M. Tish**

**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 August 24, 2023:

**Pre-Existing Bid:**

- SAVVAS Learning Company, LLC (Gateway Education LLC) - \$297,353.17 – On-line textbooks for high school Social Studies 9<sup>th</sup>-12<sup>th</sup> grade, middle school Social Studies 6<sup>th</sup>-8<sup>th</sup> grade, and elementary Social Studies K-5<sup>th</sup> grade – Waco ISD Bid# 21-1200 – Instructional Materials
- SAVVAS Learning Company, LLC (Gateway Education LLC) - \$66,443.00 – On-line textbooks for high school Math – Waco ISD Bid# 21-1200 – Instructional Materials
- n2y, LLC - \$50,898.39 - On-line standards-based programs for special education students to increase communication, comprehension, and socialization skills; L3 Skills, Unique Learning System, News2you, SymbolStix PRIME/SymbolStix - Waco ISD Bid# 22-1219 - Special Education Supplies

**Purchasing Cooperative:**

- Southwest International Trucks, Inc. - \$118,943.26 - Purchase of 26' Dry Van International Diesel Truck for Custodial Department - Buyboard # 601-19 – Vehicles, Heavy Duty Trucks, Police Motorcycles, Parts, and Service Labor
- Association for Supervision and Curriculum Development (ASCD) - \$79,380.00 - Activate Software Subscription License Renewal: web-based professional development for campuses to access virtual professional development in leadership and support of students and teacher strategies – CTPA Killeen ISD RFP# 21-24-02-161, Professional Development Services

Other:

- Education Service Center Region 12 - \$65,656.50 – Annual districtwide contract for all campuses and district-level departments for Coordinated School Health Co-op, Counselor Cooperative, CTE Council Membership, Discovery Education, Eduphoria Suite, Enhanced Curriculum Co-op, Leadership Co-op, Migrant Shared Services Arrangement, Region 12 Job Posting Board, TEKS Bank, TEKS Resource System, TExGuide, TEKS Bank, TSDS/PEIMS Co-op – Shared Services Agreement
- Pilot Classroom Furniture for Kendrick ES - \$144,394.94
  - Total Office Solutions - \$46,614.00 – Pilot classroom furniture for Kendrick ES Grades 3rd-5th – Waco ISD Bid# 19-1141 – Local Retailer General Merchandise
  - Lakeshore Equipment Company (Lakeshore Learning Materials) - \$48,442.21 – Pilot classroom furniture for Kendrick ES for Pre-K and Grades 3rd-5th – Waco ISD Bid# 21-1200 Instructional Materials
  - Worthington Contract Furniture, L.P. - \$49,338.73 – Pilot classroom furniture for Kendrick ES Kindergarten and Grades 3<sup>rd</sup>-4<sup>th</sup> – Buyboard Bid# 667-22 Furniture for School, Office, Science, Library and Dormitory

**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:** October 26, 2023

**Contact Person:** Sheryl Davis

**RE: Independent Sources of Investment Officer Training**

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**Background Information:**

In accordance with the Public Funds Investment Act and Texas Government Code 2256.008, the investment officers of a local government shall:

(1) attend at least one training session from an independent source approved by the governing body of the local government or a designated investment committee advising the investment officer as provided for in the investment policy of the local government and containing at least ten hours of instruction relating to the treasurer’s or officer’s responsibilities under this subchapter within twelve months after taking office or assuming duties; and

(2) In addition to the requirements of Subsection (1), the treasurer, or the chief financial officer if the treasurer is not the chief financial officer, and the investment officer(s) of a school district shall attend an investment training session not less than once in a two-year period that begins on the first day of the school district’s fiscal year and consists of the two consecutive fiscal years after that date, and receive not less than eight hours of instruction relating to investment responsibilities under this subchapter from an independent source approved by the Board of Trustees of the school district, or by a designated investment committee advising the investment officer as provided for in the investment policy of the district.

The following independent sources of investment officer training have been or will be utilized by the District and are presented for Board consideration:

- Accredited Colleges & Universities within the State of Texas
- Broker/Dealers (Waco ISD Board approved)
- Government Finance Officers Association
- Government Treasurers’ Organization of Texas
- Local Government Investment Pools (Waco ISD Board approved)
- North Central Texas Council of Governments
- Texas Association of School Administrators (TASA)
- Texas Association of School Boards (TASB)
- Texas Association of School Business Officials (TASBO or TASBO affiliate)
- Texas State University, Center for Public Service
- Texas Education Agency/Regional Education Service Centers (TEA/ESCs)
- The University of North Texas, Center for Public Management

**Fiscal Implications:**

None

**Administrative Recommendation(s):**

The Administration recommends that the Board of Trustees approve the independent sources of investment officer training, as listed.

**Waco Independent School District**  
**Board of Trustee Meeting Agenda Item**

**Date: October 26, 2023**

**Contact Person: Sheryl Davis**

**RE: List of Qualified Brokers Authorized to Engage in Investment Transactions with the District and Local Banks for the Purchase of Certificates of Deposit**

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**Background Information:**

In accordance with the Public Funds Investment Act and Texas Government Code 2256.025, the governing body of an entity subject to this subchapter of the entity shall, at least annually, review, revise, and adopt a list of qualified brokers that are authorized to engage in investment transactions with the entity. As necessary, the administration requires the broker to provide audited financial statements, proof of National Association of Securities Dealers (NASD) certification, and proof of state registration. The following brokers/dealers are presented for the Board's consideration:

Securities Broker/Dealer	Location	Contact
<b>Financial Advisor:</b>		
RBC Capital Markets, LLC	San Antonio, TX	Robert (Dusty) Traylor
<b>Investments:</b>		
FHN Financial Municipal Advisors	Austin, TX	Buddy Saragusa
Hilltop Securities	Austin, TX	Ramon Gilbert
Investors Brokerage of Texas, Ltd.	Waco, TX	Randall Chenot
Landing Rock Group, LLC	Manhasset, NY	Kim Winslow
<b>Underwriting:</b>		
Baird Public Finance	San Antonio, TX	David Rastellini
BOK Financial Securities, Inc. (dba BOSC, Inc.)	Austin, TX	Joshua McLaughlin
Cabrera Capital Markets	Dallas, TX	Mario Carrasco
Estrada, Hinojosa & Co., Inc.	Dallas, TX	Tony Jaso
Oppenheimer & Co.	Dallas, TX	Daniel Roseveare
Piper Sandler Public Finance	Frisco, TX	Rick Reedy
Raymond James & Associates, Inc.	Dallas, TX	Jim Buie
Siebert Williams Shank & Co., LLC	Austin, TX	Nicole Conley
Stephens, Inc.	Dallas, TX	Brian Garcia
Stifel, Nicolaus & Company, Inc.	Austin, TX	Dane Kopinski
UMB Bank, N.A.	Dallas, TX	Madelyn Wallace
Investment Pool	Location	
<b>Investment Pools (previously approved by the Board):</b>		
LOGIC (JPMorgan Asset Management)	Dallas, TX	
Lonestar (First Public, LLC)	Austin, TX	
Texas CLASS (Public Trust Advisors, LLC)	Austin, TX	
Texas TERM & Texas Daily (PFM Fund Distributors, Inc.)	Austin, TX	
TexPool (Federated Hermes)	Houston, TX	
TexSTAR (Hilltop Securities)	Austin, TX	

The District also invests in a number of local government investment pools. These pools combine the cash of participating jurisdictions and invest the cash in securities allowed under the state’s laws regarding government investments. By pooling funds, participating governments benefit from economies of scale, full-time portfolio management, diversification, and liquidity. Pools in which Waco ISD participates include the following:

Investment Pool	Location
<b>Investment Pools (previously approved by the Board):</b>	
LOGIC (JPMorgan Asset Management)	Dallas, TX
Lonestar (First Public, LLC)	Austin, TX
Texas CLASS (Public Trust Advisors, LLC)	Austin, TX
Texas TERM & Texas Daily (PFM Fund Distributors, Inc.)	Austin, TX
TexPool (Federated Hermes)	Houston, TX
TexSTAR (Hilltop Securities)	Austin, TX

In addition to investing in certificate of deposit programs through CDARS and TexasTERM, the District invests with local banks. The following banks may be considered for the purchase of certificates of deposit and/or FDIC insured cash sweep accounts:

<b>Local Banks for Purchase of Certificates of Deposit and Insured Cash Sweep Accounts:</b>	
Alliance Bank of Central Texas	First National Bank of Central Texas
American Bank	First National Bank of McGregor
Bank of America	First National Bank of Texas
BBVA Compass Bank	Independent Bank
Central National Bank	JPMorgan Chase Bank
Citizens State Bank	National United Bank
Community Bank and Trust	Texas First State Bank
Extraco Banks (Depository)	Wells Fargo Bank
Fidelity Bank of Texas	

Approving the above lists does not require the District to invest any funds with these entities, but allows the District that option if it so chooses. Having this option available will assist the District in its efforts to obtain the best rate of return possible on District funds while maintaining liquidity and safety of principal.

**Fiscal Implications:**

None

**Administrative Recommendation(s):**

The Administration recommends the Board of Trustees approve the list of qualified brokers/dealers, including those for previously approved investment pools, authorized to engage in investment transactions with the District as well as the list of local banks for the purchase of certificates of deposit, as presented.

**Waco Independent School District**

**Board of Trustee Meeting Agenda Item**

**Date:** October 26, 2023

**Contact Person:** Sheryl Davis

**RE: Investment Policy and Strategies as Codified under Policy CDA (Local)  
- Other Revenues: Investments**

=====

**Background Information:**

In accordance with the Public Funds Investment Act and Texas Government Code 2256.005(e), the governing body of an investing entity shall review its investment policy and strategies not less than annually. The governing body shall adopt a written instrument by rule, order, ordinance or resolution stating that it has reviewed the investment policy and investment strategies and that the written instrument so adopted shall record any changes made to either the investment policy or investment strategies.

The District’s Investment policy and strategies as codified in Policy CDA (Local) – Other Revenues: Investments was last changed in conjunction with legislation enacted in the 86<sup>th</sup> Legislative Session. As a result of the legislation, the related local policy was changed to authorize the investment of bond proceeds and pledged revenue to the extent allowed by law but clarified that bond proceeds may not be invested in no-load mutual funds. Local policy was also revised to change terminology from “agency” funds to “custodial” funds to conform with Governmental Accounting Standards Board (GASB) Statement No. 84. Changes to both the legal and local policies were incorporated through TASB’s Update 114 and approved by the Board on November 14, 2019.

Legislation from the 88<sup>th</sup> regular Legislative Session, as well as the three called special sessions, has been reviewed and no changes to the local policy are indicated.

A copy of Policy CDA (LOCAL) is attached for your review.

**Fiscal Implications:**

None

**Administrative Recommendation(s):**

The Administration recommends the Board of Trustees approve the resolution to adopt Policy CDA (Local) – Other Revenues: Investments with no changes.

**RESOLUTION ADOPTING INVESTMENT POLICY CDA (LOCAL)  
OF THE WACO INDEPENDENT SCHOOL DISTRICT**

WHEREAS, Waco Independent School District (the “District”) has been legally created and operates pursuant to the general laws of the State of Texas applicable to independent school districts; and

WHEREAS, the Board of Trustees has convened on this date at a meeting open to the public and wishes to adopt an Investment Policy for the District, in the form attached herein as Exhibit “A”, pursuant to Chapter 2256, Texas Government Code, as amended from time to time.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF TRUSTEES OF THE WACO INDEPENDENT SCHOOL DISTRICT THAT:

Section 1: The Investment Policy, in the form attached hereto as Exhibit “A,” is hereby adopted as the investment policy for the District.

Section 2: The provisions of this Resolution shall be effective as of the date of adoption and shall remain in effect until modified by action of the Board of Trustees.

October 26, 2023

\_\_\_\_\_  
Stephanie Ybarra-Korteweg  
President, Board of Trustees

ATTEST:

\_\_\_\_\_  
Jeremy Davis  
Secretary, Board of Trustees

**Investment Authority**

The Superintendent or other person designated by Board resolution shall serve as the investment officer of the District and shall invest District funds as directed by the Board and in accordance with the District's written investment policy and generally accepted accounting procedures. All investment transactions except investment pool funds and mutual funds shall be settled on a delivery versus payment basis.

**Approved  
Investment  
Instruments**

From those investments authorized by law and described further in CDA(LEGAL) under Authorized Investments, the Board shall permit investment of District funds, including bond proceeds and pledged revenue to the extent allowed by law, in only the following investment types, consistent with the strategies and maturities defined in this policy:

1. Obligations of, or guaranteed by, governmental entities as permitted by Government Code 2256.009.
2. Certificates of deposit and share certificates as permitted by Government Code 2256.010.
3. Fully collateralized repurchase agreements permitted by Government Code 2256.011.
4. A securities lending program as permitted by Government Code 2256.0115.
5. Banker's acceptances as permitted by Government Code 2256.012.
6. Commercial paper as permitted by Government Code 2256.013.
7. No-load mutual funds, except for bond proceeds, and no-load money market mutual funds, as permitted by Government Code 2256.014.
8. A guaranteed investment contract as an investment vehicle for bond proceeds, provided it meets the criteria and eligibility requirements established by Government Code 2256.015.
9. Public funds investment pools as permitted by Government Code 2256.016.

**Safety**

The primary goal of the investment program is to ensure safety of principal, to maintain liquidity, and to maximize financial returns within current market conditions in accordance with this policy. Investments shall be made in a manner that ensures the preservation of capital in the overall portfolio, and offsets during a 12-month period any market price losses resulting from interest-rate fluctuations by income received from the balance of the portfolio. No indi-

vidual investment transaction shall be undertaken that jeopardizes the total capital position of the overall portfolio.

**Investment Management**

In accordance with Government Code 2256.005(b)(3), the quality and capability of investment management for District funds shall be in accordance with the standard of care, investment training, and other requirements set forth in Government Code Chapter 2256.

**Liquidity and Maturity**

Any internally created pool fund group of the District shall have a maximum dollar weighted maturity of 180 days. The maximum allowable stated maturity of any other individual investment owned by the District shall not exceed two years from the time of purchase. The Board may specifically authorize a longer maturity for a given investment, within legal limits.

The District's investment portfolio shall have sufficient liquidity to meet anticipated cash flow requirements.

**Diversity**

The investment portfolio shall be diversified in terms of investment instruments, maturity scheduling, and financial institutions to reduce risk of loss resulting from overconcentration of assets in a specific class of investments, specific maturity, or specific issuer.

**Monitoring Market Prices**

The investment officer shall monitor the investment portfolio and shall keep the Board informed of significant changes in the market value of the District's investment portfolio. Information sources may include financial/investment publications and electronic media, available software for tracking investments, depository banks, commercial or investment banks, financial advisers, and representatives/advisers of investment pools or money market funds. Monitoring shall be done monthly or more often as economic conditions warrant by using appropriate reports, indices, or benchmarks for the type of investment.

**Monitoring Rating Changes**

In accordance with Government Code 2256.005(b), the investment officer shall develop a procedure to monitor changes in investment ratings and to liquidate investments that do not maintain satisfactory ratings.

**Funds/Strategies**

Investments of the following fund categories shall be consistent with this policy and in accordance with the applicable strategy defined below. All strategies described below for the investment of a particular fund should be based on an understanding of the suitability of an investment to the financial requirements of the District and consider preservation and safety of principal, liquidity, marketability of an investment if the need arises to liquidate before maturity, diversification of the investment portfolio, and yield.

**Operating Funds**

The primary objective of investment strategies for operating funds is to ensure that anticipated cash flows are matched with adequate

OTHER REVENUES  
INVESTMENTS

CDA  
(LOCAL)

investment liquidity. Because the funds are pooled for investment purposes, the portfolio shall address the varying needs of all funds in the pooled fund group. The highest quality securities shall be chosen to ensure preservation of principal, liquidity, and ultimate marketability in the case of needed liquidity. The secondary objective is to create a portfolio structure that will experience minimal volatility during economic cycles. Diversification shall be addressed by using different local government investment pools and by purchasing quality short- to medium-term securities that will complement each other in a laddered maturity structure. A cash flow analysis of these funds shall be used to determine any funds available for longer term investments. Investments shall be made in accordance with this cash flow analysis.

**Custodial Funds** Investment strategies for custodial funds shall have as their primary objectives preservation and safety of principal, investment liquidity, and maturity sufficient to meet anticipated cash flow requirements.

**Debt Service Funds** Investment strategies for debt service funds shall have as their primary objective sufficient investment liquidity to timely meet debt service payment obligations in accordance with provisions in the bond documents. Maturities longer than one year are authorized provided legal limits are not exceeded.

**Capital Project Funds** Investment strategies for capital project funds shall have as their primary objective sufficient investment liquidity to timely meet capital project obligations. Maturities longer than one year are authorized provided legal limits are not exceeded.

**Enterprise Funds** Investment strategies for enterprise fund investments shall have as their primary objectives preservation and safety of principal, investment liquidity, and maturity sufficient to meet anticipated cash flow requirements.

**Safekeeping and Custody** The District shall retain clearly marked receipts providing proof of the District's ownership. The District may delegate, however, to an investment pool the authority to hold legal title as custodian of investments purchased with District funds by the investment pool.

**Sellers of Investments** Prior to handling investments on behalf of the District, a broker/dealer or a qualified representative of a business organization must submit required written documents in accordance with law. [See Sellers of Investments, CDA(LEGAL)]

Representatives of brokers/dealers shall be registered with the Texas State Securities Board and must have membership in the Securities Investor Protection Corporation (SIPC) and be in good standing with the Financial Industry Regulatory Authority (FINRA).

**Soliciting Bids for  
CDs**

In order to get the best return on its investments, the District may solicit bids for certificates of deposit in writing, by telephone, or electronically, or by a combination of these methods.

**Interest Rate Risk**

To reduce exposure to changes in interest rates that could adversely affect the value of investments, the District shall use final and weighted-average-maturity limits and diversification.

The District shall monitor interest rate risk using weighted average maturity and specific identification.

**Internal Controls**

A system of internal controls shall be established and documented in writing and must include specific procedures designating who has authority to withdraw funds. Also, they shall be designed to protect against losses of public funds arising from fraud, employee error, misrepresentation by third parties, unanticipated changes in financial markets, or imprudent actions by employees and officers of the District. Controls deemed most important shall include:

1. Separation of transaction authority from accounting and recordkeeping and electronic transfer of funds.
2. Avoidance of collusion.
3. Custodial safekeeping.
4. Clear delegation of authority.
5. Written confirmation of telephone transactions.
6. Documentation of dealer questionnaires, quotations and bids, evaluations, transactions, and rationale.
7. Avoidance of bearer-form securities.

These controls shall be reviewed by the District's independent auditing firm.

**Annual Review**

The Board shall review this investment policy and investment strategies not less than annually and shall document its review in writing, which shall include whether any changes were made to either the investment policy or investment strategies.

**Annual Audit**

In conjunction with the annual financial audit, the District shall perform a compliance audit of management controls on investments and adherence to the District's established investment policies.

**Waco Independent School District**  
**Board of Trustee Meeting Agenda Item**

**Date: October 26, 2023**

**Contact Person: Susan Kincannon**

**RE: Resolution to Cast Votes in the McLennan County Appraisal District Board of Directors Election**

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**Background Information:**

In compliance with Section 6.03 of the State Property Tax Code, the McLennan County Appraisal District's (MCAD) Chief Appraiser has calculated that the Waco Independent School District is entitled to cast a total of 950 votes in the election of the five-member Board of Directors of the MCAD.

Attached is a copy of the vote calculation, the ballot listing the names of the candidates who have been nominated by the various taxing entities, and the resolution to cast the vote.

The deadline to submit a ballot is December 14, 2023, except for Midway ISD and Waco ISD, the City of Waco, McLennan County and the McLennan Community College. These entities must determine its vote by a resolution adopted at the first or second open meeting of the governing body that is held after the date the chief appraiser delivers the ballot to the presiding officer of the governing body.

**Fiscal Implications:**

None.

**Administrative Recommendation(s):**

The Administration recommends that the Board of Trustees cast 835 votes for Keith Guillory with the remaining 115 votes cast for Mildred Watkins.

TAXING UNIT	Preceding YR Tax Levy 2022	PERCENT OF TOTAL LEVY	CALCULATED 2024 TERM VOTES
<b>SCHOOL DISTRICTS</b>			
AXTELL ISD	1,975,208.59	0.363180%	18
BOSQUEVILLE ISD	3,119,706.41	0.573618%	29
BRUCEVILLE-EDDY ISD	2,494,471.01	0.458656%	23
CHINA SPRING ISD	16,076,487.74	2.955971%	148
CONNALLY ISD	11,173,487.10	2.054460%	103
CRAWFORD ISD	3,525,821.27	0.648290%	32
GHOLSON ISD	768,384.94	0.141282%	7
HALLSBURG ISD	1,172,763.53	0.215635%	11
LA VEGA ISD	14,252,199.95	2.620541%	131
LORENA ISD	9,476,472.59	1.742432%	87
MART ISD	1,598,656.06	0.293944%	15
McGREGOR ISD	6,722,080.87	1.235984%	62
MIDWAY ISD	82,456,438.95	15.161202%	758
MOODY ISD	2,378,807.47	0.437389%	22
OGLESBY ISD	8,949.04	0.001645%	0
RIESEL ISD	5,082,609.73	0.934536%	47
ROBINSON ISD	12,015,671.53	2.209312%	110
VALLEY MILLS ISD	1,087,402.02	0.199940%	10
WACO ISD	103,321,188.69	18.997587%	950
WEST ISD	7,860,111.17	1.445233%	72
<b>COUNTY</b>			
McLENNAN COUNTY	89,442,490.77	16.445722%	822
McLENNAN COMMUNITY COLLEGE	34,746,939.79	6.388893%	319
<b>CITY</b>			
BELLMEAD, CITY OF	2,021,120.55	0.371622%	19
BEVERLY HILLS, CITY OF	675,264.58	0.124160%	6
BRUCEVILLE-EDDY, CITY OF	390,445.28	0.071791%	4
CRAWFORD, CITY OF	426,399.22	0.078402%	4
GHOLSON, CITY OF	35,324.74	0.006495%	0
GOLINDA, CITY OF	25,038.40	0.004604%	0
HALLSBURG, CITY OF	21,085.94	0.003877%	0
HEWITT, CITY OF	6,932,322.22	1.274641%	64
LACY-LAKEVIEW, CITY OF	1,508,925.48	0.277445%	14
LEROY, CITY OF	25,858.68	0.004755%	0
LORENA, CITY OF	902,190.56	0.165885%	8
MART, CITY OF	589,947.69	0.108473%	5
McGREGOR, CITY OF	3,266,198.91	0.600553%	30
MOODY, CITY OF	420,780.96	0.077369%	4
RIESEL, CITY OF	246,705.00	0.045361%	2
ROBINSON, CITY OF	5,954,461.12	1.094842%	55
VALLEY MILLS, CITY OF	10,674.79	0.001963%	0
WACO, CITY OF	101,604,918.03	18.682018%	934
WEST, CITY OF	1,412,741.45	0.259760%	13
WOODWAY, CITY OF	6,638,037.24	1.220531%	61
<b>TOTAL</b>	<b>543,864,790</b>	<b>100%</b>	<b>5,000</b>

## OFFICIAL BALLOT

SELECTION OF FIVE (5) MEMBERS FOR THE BOARD OF DIRECTORS  
OF THE McLENNAN CENTRAL APPRAISAL DISTRICT

ENTER THE NUMBER OF VOTES, IN THE SQUARE(S) ADJACENT TO THE NAME OF THE CANDIDATE(S), INDICATING THE NUMBER OF VOTES YOU WISH TO CAST FOR EACH CANDIDATE. YOU MAY CAST ALL OF YOUR ALLOTTED VOTES FOR ONE CANDIDATE OR DISTRIBUTE THEM AMONGST ANY NUMBER OF CANDIDATES. PLEASE VERIFY THAT THE TOTAL NUMBER OF VOTES CAST MATCH THE ENTITLED NUMBER OF VOTES ALLOWED FOR YOUR TAXING UNIT, WHICH IS LISTED ON THE SPREADSHEET INCLUDED IN THE DELIVERY METHOD OF THIS BALLOT. BALLOTS SUBMITTED IN WHICH THE NUMBER OF VOTES CAST EXCEEDS THE NUMBER OF ENTITLED VOTES, CANNOT BE COUNTED.

<u>NUMBER OF VOTES</u>	<u>NOMINEE</u>
	<b>Michael Baker</b>
	<b>Travis Gibson</b>
	<b>Jonathan Green</b>
<b>835</b>	<b>Keith Guillory</b>
	<b>Jim Holmes</b>
	<b>Dwain Moss</b>
	<b>Ben Perry</b>
<b>115</b>	<b>Mildred Watkins</b>

**BALLOT AND RESOLUTION MUST BE RETURNED TO  
JOE DON BOBBITT, CHIEF APPRAISER, BEFORE DECEMBER 15, 2023. BALLOTS RECEIVED OR  
POSTMARKED AFTER DECEMBER 14, 2023, CANNOT BE COUNTED**

except entities that are entitled to cast at least 5% of the total votes (Midway ISD, Waco ISD, McLennan County, MCC, City of Waco) must determine its vote by resolution adopted at the first or second open meeting of the governing body that is held after the date the chief appraiser delivers the ballot to the presiding officer of the governing body.

**Waco Independent School District**

**RESOLUTION OF VOTES CAST TO ELECT DIRECTORS FOR THE MCLENNAN  
COUNTY APPRAISAL DISTRICT FOR THE YEARS 2023-2024**

WHEREAS, Section 6.03 (k) of the Texas Property Tax Code, requires that each taxing unit entitled to vote cast their vote by Resolution and submit results of that vote to the Chief Appraiser of the McLennan County Appraisal District by December 14, 2023.

THEREFORE, the Waco Independent School District Board of Trustees submits the attached Official Ballot, as issued by the Chief Appraiser, stating the vote for candidates for the election of the Board of Directors for the McLennan County Appraisal District for 2023-2024.

ACTION TAKEN this 26<sup>th</sup> day of October 2023, in the Regular School Board Meeting of the Waco Independent School District, as authorized under Section 6.03 of the Texas Property Tax Code, for the purpose of casting votes to elect the Board of Directors of the McLennan County Appraisal District.

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Stephanie Korteweg, Board President

ATTEST:

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Jeremy Davis, Secretary

**Waco Independent School District**

***Board of Trustee Meeting Agenda***

**Date:** October 26, 2023

**Contact Person:** Dr. Josie Gutierrez

**RE: Amendment to the District of Innovation Plan**

=====

**Background Information:**

HB 1842 was passed during the 84<sup>th</sup> Texas Legislative Session in 2015 to provide Texas public school districts the option to be designated as a District of Innovation (DOI). The DOI allows traditional independent school districts exemptions from most of the state laws that are not applicable to open enrollment charter schools in Texas. These laws could include: site-based decision making, uniform school start dates, minimum minutes of instruction, class size and student/teacher ratios, 90 percent attendance rules, student discipline provisions, teacher certification/contracts, teacher benefits, and teacher/principal appraisal systems.

The first Waco ISD District of Innovation plan was approved by the Board of Trustees on March 16, 2017. The current Waco ISD DOI plan was renewed at the end of the 2021-2022 school year. As set forth in Chapter 12A and Texas Education Agency (TEA) rules, a DOI plan can remain in effect for up to five years. During this five year period, a DOI plan may be amended.

In an effort to address the teacher shortage, the Administration is pursuing innovative approaches to support paraprofessionals to become degreed and certified teachers. In the spring of 2023, the Quality District Advisory Committee (QDAC) was presented with information regarding an innovative program to assist paraprofessionals with an attainable pathway to become teachers. During the presentation, QDAC members reviewed and provided input regarding amendments to the DOI, Section 6: Teacher Instructional Assignments. Proposed amendments would allow the district to pursue programs to address the teacher shortage.

During the September 21, 2023, Regular meeting, the Para2Teacher Program was presented. The presentation included details about the innovative pathways to support paraprofessionals to become degreed and certified to teach. In order to implement this program, the district the current DOI will need to be amended, specifically Section 6: Teacher Instructional Assignments. The current DOI plan is attached to this document and provides the proposed changes.

Amendment procedures have been followed in accordance with the Commissioner’s Rules. The procedures that have been completed to date are provided below.

- The Quality District Advisory Committee held a public meeting on May 8, 2023, to decide whether to recommend the amended DOI to the Board of Trustees. The QDAC voted unanimously to amend Section 6: Teacher Instructional

Assignments. (The rationale and amended section was reviewed and discussed at the March 20, 2024, QDAC meeting.)

Additional actions that are required for renewal include:

- The Board of Trustees approve the amended DOI plan by an affirmative vote of two-thirds of the membership of the board.
- The District notifies the Commissioner of the amended plan along with a list of approved TEC exemptions.
- The District will ensure a copy of the DOI is posted on the District's website.
- The District will provide TEA with a link to the current innovation plan no later than the 15<sup>th</sup> day after the date on which the Board of Trustees finalizes the amendment.

**Fiscal Implications:**

None

**Administrative Recommendations:**

Administration recommends that the Board of Trustees approve the amended District of Innovation plan as presented.

## DISTRICT OF INNOVATION PLAN

Approved by the Waco ISD Board of Trustees on May 19, 2022.

### **1. School Calendar**

Statutory Citation: Texas Education Code (TEC) Section 25.0811 (First Day of Instruction) and TEC Section 25.0812 (Last Day of School)

WISD will be exempt from the first day of instruction requirements listed in TEC 25.0811 and the last day of instruction requirements listed in TEC 25.0812.

WISD will develop and seek board approval of a localized school calendar which best meets the needs of the Waco Independent School District's students, parents, staff, and community. The WISD calendar development process will be localized with central administration assisting the WISD Quality District Advisory Committee (QDAC) in the development of one or more school year calendars. The calendars will then be submitted to the district staff and community for a vote and the calendar with the most votes will be presented to the Board of Trustees for their review and consideration for approval. Final calendar approval including when the WISD school year starts and ends will be made by the locally elected WISD Board of Trustees.

#### Rationale

- Provides flexibility to customize the WISD school calendar and change the TEC mandated first and last days of the school year if needed.
- DISTRICT GOAL: Number of required teaching days and student minutes per day do not change.
- EXAMPLE: If WISD teachers requested beginning the school year two days earlier so faculty could have a day at the end of each six weeks for entering grades/parent conferences/work days, the calendar could be adapted.
- Administration and QDAC would develop multiple district calendars, and District Staff would vote on one to submit to the Board of Trustees for approval.

### **2. Minutes of Instruction and Length of the Instructional Day**

Statutory Citation: TEC Sec. 25.081 (Operation of Schools – 75,600 minutes of instruction) TEC 25.0811 (First Day of Instruction) and TEC 25.083 (School Day Interruptions).

WISD will meet or exceed the 75,600 minutes of instruction (including intermissions and recesses) as required in TEC Sec. 25.081. In addition, WISD will continue to meet or exceed the Texas Education Agency Student Attendance Accounting Handbook Subsection 5.5 CTE (Contact-Hour) attendance codes V1, V2, V3, V4, V5, or V6.

The district will be exempt from the requirements regarding the first day of school (TEC 25.081) and school day interruptions (TEC 25.083).

The exemption will provide local campuses greater flexibility on the length of the instructional day, the first day of school, and school day interruptions. WISD will be able to customize student schedules as needed in order to best meet the needs of students while ensuring that the 75,600 minutes of instruction are completed.

## Rationale

- Provides flexibility on the length of the instructional day, the first day of school, and school day interruptions.
- DISTRICT GOAL: Not an attempt to lengthen or shorten days.
- EXAMPLE: Allows WISD to let half days count as long as TEC total minutes of instruction (75,600) is met for the year.
- Conference Periods and Duty-Free Lunch: Teachers will continue to have at least 450 minutes of planning time within each two-week period in increments of not less than 45 minutes within the instructional day (TEC Sec. 21.04). Teachers will continue to have duty free lunch (TEC Sec. 21.405)

### **3. Class Size Ratio**

Statutory Citation: TEC Sec. 25.112 (Class Size Ratios) and TEC 25.111 (Student/Teacher Ratios)

WISD will continue to meet the TEC 25.112 required 22 to 1 class size ratio for Kindergarten through fourth grades during the first six weeks (30 instructional days) of the school year. WISD will be exempt from requirements of TEC 25.112 and TEC 25.111 after the first six weeks of instruction. WISD central administrators will work with the campus principal and the teacher(s) to determine if a class exceeding 22 to 1 should be divided or allowed to exceed the TEC limit. The exemption would allow WISD flexibility and not require the district to seek class size waivers from the Texas Education Agency. WISD will continue to utilize locally developed class size staffing guidelines for kindergarten through grade four classes. Parental notification as required in TEC 15.113 will continue to be provided by WISD.

## Rationale

- (Applicable only after the first six weeks of classes) WISD would like the flexibility in K through 4th grades to increase class sizes from 22 to 1. WISD staffing guidelines for classes which exceed 22 to 1 will continue to be followed. The district will continue to work diligently to keep class sizes at 22 to 1 and a teacher may be added at any time during the school year if the Superintendent determines it to be in the best interest of the students.
- Students could ONLY be added with the approval of BOTH the principal and the teacher whose class has exceeded the 22 to 1 ratio.
- The WISD Board will receive during their monthly open meeting a report listing any K through 4th grade classes which have exceeded the 22 to 1 ratio.
- Parents with students in a class which exceed the 22 to 1 ratio will continue to be notified in writing by the campus.
- DISTRICT GOAL: This is NOT an increase in class size across the board.
- EXAMPLE: In the 5th six-week period, a new student moves to a campus that has four 4th grade teachers and 22 students in each class. Current TEC guidelines and administrative requirements would require one of the classes be split into two smaller classes, or a waiver be requested.

### **4. Minimum Attendance for Class Credit or Final Grade**

Statutory Citation: TEC Sec. 25.092 (Minimum Attendance for Class Credit or Final Grade)

WISD will be exempt from the restriction that seat time (90 percent attendance) must be met in order for a student to receive class credit or a final grade as required in TEC Sec. 25.092. In order to be eligible

to meet the exemption, a student must maintain a grade of 80 or greater in the course. The teacher of record and campus principal must approve an individual student's exemption from the TEC Sec. 25.092 attendance requirements.

It is noted that WISD's exemption is not a substantive exemption from compulsory attendance or UIL rules. In addition, teachers will continue to fully assign or determine grades in accordance with TEC Sec. 28.0214 (Finality of Grade) and 28.0216 (District Grading Policy).

#### Rationale

- Currently all students are limited in the number of days they may miss for school related activities.
- Class work missed by the student will have to be made up and all grades for the course will be determined by the student's teacher.
- The exemption provides opportunities for WISD students with less than 90 percent attendance and a class grade average of 80 or greater to receive credit for a course upon approval.

### **5. Absences for College/University Visits**

Statutory Citation: TEC Sec. 25.087 (b-2) (Excused Absences for Higher Education Visits)

WISD will be exempt from the higher education student two-day excused absence limit listed in TEC Sec. 25.087 (b-2).

WISD will establish the number of days that a student may receive an excused absence while visiting an institution of higher education. The current limit of two days does not allow time for a student to travel to an out-of-state or some in-state institutions. WISD high school principals, counselors, and central staff will propose a policy change to the Board for their consideration for approval. (Board Policy FEA Local)

#### Rationale

- Currently students are allowed to miss only two days for college visits, limiting how many campuses they can visit.
- DISTRICT GOAL: Allow more than two, but only with administrator approval, and the Board of Trustees would have to approve a policy change.

### **6. Teacher Instructional Assignment(s)**

Statutory Citation: TEC Sec. 21.003

~~WISD will continue to employ and have State Board for Educator Certification (SBEC) certified teaching staff. In the case that an appropriately certified teacher cannot be found, the district will be exempt from the requirements of TEC Sec. 21.003, which limit WISD's ability to assign staff to meet local needs. Except in CTE Classes, if the teacher remains in the position for more than one school year, the teacher will be required to obtain the appropriate certification. WISD teachers will have the option of applying to WISD and/or their campus principal to teach certain courses in which they may have college hours and expertise. Examples of some of the exemptions include:~~

- ~~Allow a teacher who is certified to teach through grade 6 to teach courses in grades seven and/or eight.~~
- ~~Allow a teacher certified to teach elementary reading be the reading teacher of record for middle and/or high school students.~~
- ~~Allow a teacher certified in middle school or high school mathematics to teach elementary grades such as fourth and or fifth.~~
- ~~Allow a teacher to teach one or two classes out of field in an area or areas that the teacher has college coursework and expertise.~~
- ~~Allow for greater flexibility in determining appropriate CTE experience in order to teach a CTE course.~~

~~WISD will continue to provide parent notification when their student has a teacher providing instruction under the exemption as required by TEC 21.057.<sup>1</sup>~~

#### Rationale

- ~~DISTRICT GOAL: Provides WISD latitude in providing opportunities for teachers certified in certain subjects and grade levels the ability to teach in more areas, including:~~
  - ~~Elementary reading specialists who teach reading on secondary campuses;~~
  - ~~6th grade middle school teachers who teach 7th and 8th grade classes;~~
  - ~~Middle and high school math teachers who teach in elementary schools;~~
  - ~~Teachers who fill gaps in one or two classes outside their certification area at the high school level;~~
  - ~~Technical instructors at the high school level.~~
  - ~~WISD teachers will have the opportunity to apply within the district or on their own campus to teach certain courses in which they have college hours and expertise.~~
  - ~~Parents with students in a class that has a teacher utilizing the exemption will be notified in writing by the campus~~

Statutory Citation: [TEC §21.003\(a\)](#) [TEC §21.053](#), [TEC §21.055](#), [TEC §21.057](#)

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<sup>1</sup> ~~Bilingual/ESL and Special Education teachers must continue to be SBEC certified.~~

The district will maintain its current expectations for employee certification and will make every attempt to hire individuals with appropriate certifications for the position in question. However, where that is not reasonably possible, the district will have the flexibility to hire individuals who are knowledgeable in the area and equipped to effectively perform the duties of the position in question. Waco ISD would like the ability to locally certify teachers in areas of high demand, to better meet the educational needs of our students. These areas would include, but are not limited to CTE, bilingual education, and languages other than English. Teachers with industry certifications and native speakers with qualified experience could be eligible to teach a course through a local teaching certification. This process will allow more flexibility in our scheduling, and provide more options for our students in class offerings leading to industry recognized certifications.

#### Rationale

- **TEC §21.003(a)** states that a person may not be employed as a teacher by a school district unless the person holds an appropriate certificate or permit issued by the appropriate state agency. In the event a district cannot locate a certified teacher for a position or a teacher is teaching a subject outside of their certification, the district must request emergency certification from the Texas Education Agency and/or State Board of Educator Certification. This system is burdensome and does not take into account the unique financial and/or instructional needs of the district.
- **TEC §21.053** requires a teacher to present his or her certificate to the District before their employment contract will be binding, and prohibits the District from paying an educator for a teacher if the educator does not hold a valid certificate at the time.
- **TEC §21.055** states that if a teacher is not certified, the district may issue a teaching permit to employ the individual. This process requires notice to the Commissioner and its usefulness is extremely limited. Additionally, the language of this section could be construed to prohibit the employment of a teacher without a teaching certificate or a school district teaching permit obtained under this section.
- Additionally, Waco ISD will notify parents if a locally certified teacher is employed for their child's class.
- An employee working under a District Teaching Permit (local certification) will not receive a contract, but will work on an at-will basis.

### **7. New Teacher Probationary Contracts**

Statutory Citation: TEC Sec. 21.102 (Probationary Contracts)

WISD will be exempt from the TEC Sec. 21.102 (b) and (c) beginning in January 2017. WISD will extend the maximum number of years that a teacher may be extended a probationary contract to:

- For a first-year teacher with zero years of experience, the district may extend the one-year probationary contract for a maximum period of five years. (Allows up to five one-year probationary contracts from the current statute which allows for a maximum of three years.)
- For an experienced teacher who is new to WISD, the district may extend the one-year probationary contract for a maximum period of three years. (Changes to up to three one-year probationary contracts from the current statute which allows for a maximum of one year.)

The WISD exemption will allow the district greater flexibility to determine if a new teacher will be effective in the classroom. A teacher may be offered a term contract or employment not extended earlier

with administrative recommendation and board approval. The exemption is for teachers hired after January 1, 2017 and does not apply to staff members hired before this date.

#### Rationale

- Waco ISD would like to extend probationary contracts for first-year teachers up to five years and for experienced new teachers up to three years and base the term length on performance.
- DISTRICT GOAL: With challenges the District faces, this allows teachers more time to develop professionally before a long-term decision on their employment is determined.

### **8. Student Attendance – Truancy Prevention Measures (TPM)**

Statutory Citation: TEC Sec. 25.0915 (TPM)

Waco ISD will allow each campus site-based committee to determine the appropriate official attendance time/period for their campus. Each campus site-based committee will review attendance data and make an attendance time/period recommendation to the administration for WISD Board approval. WISD will utilize Texas Education Agency Student Attendance Accounting Handbook Section 3.6.2.2 along with 19 TAC 129.21(h) (3) and 19 TAC 129.21 (h). For student attendance funding eligibility, the district will utilize Texas Education Agency Student Attendance Accounting Handbook Section 3.2.2 referred to as the “two-through-four-hour rule.”

Waco ISD’s at-risk students are often in school, but may be late and tardy to class. Several factors may account for their tardiness to school, which include but are not limited to:

- Assisting their younger siblings to get ready for school.
- Walking their siblings to their school and then walking to their campus.
- Limited options for private transportation to school if they missed the school bus.
- Homeless or living in different locations during the week.

Many times, the students are listed as absent due to their missing the WISD designated attendance period. The absences accumulate and may place the student in jeopardy of failing and/or truancy. In order to meet the local needs of WISD at-risk students, the district will develop guidelines for the minimum number of minutes a student must be in attendance during the day to be counted present. The official Average Daily Attendance (ADA) time/period will be determined by each campus site-based committee and approved by the WISD Board. The attendance exemption will provide one TPM measure to assist the district’s students.

#### Rationale

- WISD is asking to be exempt from documenting attendance across the District only at 9:30 a.m., and instead allow campus site-based committees to determine the appropriate attendance time/period.
- DISTRICT GOAL: Without this exemption, a student who arrived for class at 9:45 a.m. and completes the rest of the school day would be counted absent. With this proposed exemption, the student would be credited for attending school that day provided they were in attendance for at least 4 hours.
- Campuses would still have their own guidelines for tardiness.

### **9. Student Discipline**

Statutory Citation: TEC Sec. 37.0012

Currently, Senate Bill 107 requires the designation of a campus behavior coordinator on each campus. This designee is responsible for maintaining student discipline and the implementation of Chapter 37, Subchapter A.

Waco ISD will be exempt from TEC Sec. 37.0012 related to the designation of a (singular) campus behavior coordinator for each campus. WISD utilizes a multi-administrator team process for student discipline which includes the campus principal and assistant principal(s). WISD will designate all campus administrative personnel assigned to a campus as the behavior coordinator for their campus.

#### Rationale

- WISD is asking for an exemption from the TEC guidelines that require one person to sign all discipline paperwork on a campus.
- WISD will continue to follow Texas Education Code Chapter 37 for student discipline procedures including a teacher's right to remove a student from class (TEC Sec. 37.002).
- DISTRICT GOAL: Allows administrators to be part of a discipline team, and the responsibility for paperwork would depend on the administrator's assigned grade level and their relationship with the student and family.

#### DISTRICT OF INNOVATION SUMMARY

Exemptions are NOT locked in for five years. They can be evaluated each year and amendments can be made with QDAC and Board approval.

**Waco Independent School District**

**Board of Trustee Meeting Agenda Item**

**Date:** October 26, 2023

**Contact Person:** Gloria Barrera

**RE: Approval of District Facility Rental Terms and Rates**

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**Background Information:**

The Texas Education Code Section 45.033 and Board Policy GKD (Local) provide authority for the Board of Trustees to set rental terms and rates for district facilities.

As part of the District Improvement Plan, the Facilities Department has researched and determined the best on-line program to support use of Waco ISD facilities for school use and for use by the public. The District selected the Brightly software system, which is a part of the updated work order system we implemented recently. Use of this automated system will improve communication with district staff as well as the public that desires to use our facilities. Integral to the set-up process is the update of hourly rates and district requirements.

Roger Perez, Energy Manager for Waco ISD, worked with every user group in the district to confirm updated rental rates and any proposed changes in process or requirements. The attached document describes the new on-line system. All the information and forms that are included will be shown online. The process has the capability to be entirely paperless.

The Brightly system also has an option for facility renters to pay via credit card online. With approval of the Facility Rental Terms and Rates, we will begin working with the Business Office and Chief of Technology to implement the on-line payment process. The Brightly system will also provide a great deal of data to the district about who is using our facilities and will assist us with recovering actual expenses for uses for which the district is not allowed to charge a fee by applicable law (e.g., polling places).

**Fiscal Implications**

The approval of the Facility Rental Terms and Rates will assist the District in recovering operational costs related to rentals.

**Administrative Recommendation(s):**

Approve the revised Facility Rental Terms and Rates as provided.

# WACO ISD



# FACILITIES RENTAL GUIDELINES

**AUGUST 2023**

# WACO INDEPENDENT SCHOOL DISTRICT FACILITIES USAGE GUIDELINES

## **WACO ISD RENTAL POLICY**

The Waco Independent School District allows limited use of District facilities by outside organizations/groups. However, such use of District facilities shall not be permitted when it interferes with the educational program of any scheduled campus or District activities, including facility maintenance and/or repair projects.

Waco ISD is a tax-supported nonprofit organization established to serve the students and youth residing within the boundaries of the District. The District may, therefore, differentiate among various categories of organizations/groups (such as youth groups, community groups, nonprofit organizations, for-profit organizations and civic groups) in establishing the length of time that a facility may be used or the fee(s) charged. All organizations/groups with the same category shall be offered fair and equal access to District facilities. Any misrepresentations by an organization and/or individual, abuse of any District property, and violation of state, local law or federal and/or any violation of any District policy, rule or regulation may result in: 1) the immediate termination of the contract; 2) the requirement to immediately vacate the premises; and/or 3) the denial of the organization's and/or individual's request for future use of the premises.

All requests must be submitted via the Waco ISD Event Manager. All requests will be considered according to these guidelines. The administration reserves the right to deviate when necessary to achieve the overall purpose of the guidelines.

## **FACILITIES:**

District facilities include, but are not limited to, campuses, athletic facilities, buildings housing support personnel, and the Performing Arts Centers (PAC). Charges for facilities and Performing Arts Centers (PAC) are listed below by user group designation.

## **PRIORITY**

The Board of Trustees has approved the following priorities for using school district facilities:

- Priority 1: Approved school activities, public elections, and other government activities – No fees or insurance required.*
- Priority 2: Organized “Local” non-profit community, educational development religious groups.*
- Priority 3: Organized “Local” cultural groups.*
- Prioroty 4: Groups with special arrangements with the Board of Trustees or administration.*

Any use of Waco ISD property must have prior approval if not otherwise addressed in the Facilities Rental Guidelines.

1. A completed Event Manager Facility Rental Request On-line Form, Permit to Use Public School Facilities form, proof of acceptable liability insurance with WISD named as an additional insured and policy holder, and nonprofit certificates for verification of rate category must be on file prior to scheduling the rental of any facility.
2. Fees for damages will be assessed and may result in loss of further use of the District's facilities.
3. The renter will be assessed a rental fee from the time the facility is opened until it is closed or vacated. A WISD employee will be required at all times.
4. Opening/closing of building facility will be arranged by WISD. This includes Monday through Friday and weekends.
5. School-related groups requiring a building director or custodian(s) on the weekends will be assessed a fee according to the Facility Rental Fee Schedule. There is no charge for school functions.
6. The use of kitchens are not allowed unless for school use and authorized by Child Nutrition Services.

### **INSURANCE:**

Prior to approval and use of the facility, users in **Group 2** and **Group 3** will furnish proof of liability coverage for the event(s). This coverage should consist of an original Certificate of Insurance with Waco ISD named as an Additional Insured and Certificate Holder with a minimum of \$1,000,000 per occurrence and \$1,000,000 general annual aggregate. Coverage provided by such policy or rider must apply to the death or injury of any person and the damage to property that results, directly or indirectly, from the intentional or negligent act or omission of user's officers, agents, employees, guests, or invitees during the use or occupancy of district premises. Such insurance shall be with an insurance company or companies authorized to do business in Texas, under policy or policies acceptable to the use. The user must provide the District with a certificate of insurance attesting the existence of a policy or policies providing coverage required. **If** a policy contains deductible provisions, user shall be responsible for payment of the deductible amount for any claim(s).

All policies shall contain an endorsement stating that the insurance company shall not terminate the policy or change any coverage therein prior to the policy expiration date without notifying the District, by registered mail, at least 30 days prior to such termination.

### **GENERAL RULES**

#### ***All users of school district facilities shall:***

- Groups or individuals wanting to rent WISD facilities must obtain and complete the on-line Event Manager Facilities Usage Guidelines from the WISD website, [www.wacoisd.org](http://www.wacoisd.org) under Event Manager or the link under Departments/Energy/Facilities & Maintenance/Facilities
- Ensure that permission to use the facility or any portion thereof shall not be transferred to a third party.

- Ensure that all District facilities are left neat and in orderly condition ready for the next school day.
- Provide the following documentation before a rental agreement is prepared:
  - a. The completed Permit to Use Public School Facilities form signed.
  - b. A current insurance certificate.
  - c. A copy of the 501(c) 3 status if requesting nonprofit status.
- It is the sole responsibility of the renter to provide these documents. No reminders will be issued.
- Provide full payment 10 days prior to the event. Provide any changes to the signed contract no later than one week in advance. Rental amounts will not be decreased after the fact if the facility is not used for the contracted time.
- Be assessed the rental fee from the time the facility is opened until it is closed or vacated.
- Availability will be determined by calendar reservations on website **“first-come, first-served”** basis with approval by Campus Principal and Energy Manager.
- Ensure that prior approval is received before signs, banners and/or decorations are erected and that immediately after the event the group take down all decorations. Decorations may not deface school property. The use of open flames, such as candles, is strictly prohibited.
- Ensure that all children be supervised at all times and remain in the assigned area. There should be one (1) adult per twenty (20) or fewer children at the event.
- All school facilities will be not be rented on school holidays or the weekend immediately preceding or following those designated holidays. Long—term rentals and public and private athletic competitions may be exempt from this guideline.
- Ensure that no fixtures, equipment or furniture shall be removed from any building or rearranged between rooms except with prior approval from the Campus Principal and the Energy Manager.
- Permission from the Chief Officer of Facilities and Operation must be obtained prior to the event if food and drink are to be consumed Food and drink are allowed only in designated areas and must be removed after the event.
- Prohibit the possession and use of tobacco products in District buildings and/or on school property.
- Ensure that alcoholic beverages or drugs in any form are not brought into the buildings or on school grounds in accordance with the Texas State Laws and Drug Free Schools policy.

## **Rental Notes:**

- Waco ISD competition fields will have varied rates based upon the type of event, number of participants and spectators.
- The custodian or other identified staff will evaluate the condition of each rented facility on a daily basis. Any damage to or unacceptable condition of the facility will be reported to the Rental Facilitator. After the rental period, a follow up inspection will be completed on the rented facility.
- Certain areas, such as laboratories, shops and offices, shall not be available for public use.
- Certain equipment, such as audio-visual equipment and instructional materials, shall not be available for non-school use.
- All applicable fire and safety regulations of the Board of Trustees, the City of Waco, and the State of Texas must be followed at all times. Open flames, fireworks, live animals, etc. are not allowed on WISD property.
- Only authorized employees of the District shall be permitted to have keys to District facilities.

## **USER GROUP DESIGNATION**

### **Group 1:**

#### ***SCHOOL-RELATED NONPROFIT ORGANIZATIONS AND GOVERNMENTAL AGENCIES:***

*Booster Clubs, PTA, PTO, Student/Teacher Groups, Waco Foundation, Communities in Schools, WISD Alumni Groups, Scouting Organizations, and other similar organizations will be permitted the use of facilities without charge on days when school is in session unless the request time is outside of the regular energy use and custodial coverage hours. Group 2 rates will apply for all other times. All other policies and procedures will be enforced. Special Olympics will only pay WISD costs and Facility rental fee will be waived.*

District facility usage fees and insurance are waived for Group 1 for education-related activities approved by the District. However, *personnel and equipment usage fees may apply for all events that require additional personnel or other resources*. Efforts should be made to schedule activities during normal custodial hours. The Superintendent of Schools or their or designee will determine building use and applicable fees.

### **Group 2:**

#### ***NONPROFIT YOUTH and COMMUNITY ORGANIZATIONS***

*Nonprofit youth groups may be permitted to rent facilities at the Group 2 rate if they provide proof of 501(c)3 status. Note: These groups may be permitted use of the facilities at no charge unless the request time is outside of the regular energy use and custodial coverage hours. District facility fees at the Group 2 rate will apply at all other times. District insurance requirements will also apply.*

**Organizations** (non-exhaustive)

**Youth Groups:**

- YMCA
- Boy Scouts
- Girl Scouts
- Camp Fire Girls
- Boys and Girls Clubs
- And similar organizations

**Community Groups:**

- Rotary Club
- Lions Club
- Religious Groups
- Homeowners Associations within the District that charge assessment fees
- Texas School District & UIL Events not Hosted by WISD
- McLennan Community College
- Texas State Technical College
- Baylor University
- Neighborhood associations
- Adult community groups
- Churches

**Group 3:**

**FOR-PROFIT ORGANIZATIONS**

*For-profit organization and businesses may rent facilities at the established Group 3 rates plus other associated fees.*

**GOVERNMENTAL AGENCIES AND MUNICIPALITIES:**

Governmental agencies and municipalities will be permitted the use of facilities without charge. All other policies and procedures will be enforced.

**\*\*\*ATHLETIC FIELDS/GYMS\*\*\***

All requests for access to secondary school fields and gyms are handled through the athletic department and must be approved by the Complex Director after submitting an application through the on-line Event Manager Program located on the Waco ISD website.

The District has the authority to limit access to facilities. The use of all athletic game fields, gyms, field houses, or tennis courts is restricted and may not conflict with school or individual athletic seasons.

All facilities are subject to closure to the public for maintenance. Outdoor facilities, including playgrounds, may be closed in the event of repeated vandalism

Middle and High School practice fields are intended for the sole use of WISD. All middle school tracks are available to the community for use after school. Open spaces at elementary schools are available for community use while school is not in session or otherwise used for school related purposes. The Waco ISD assumes no liability if the fields are used.

**\*\*\*\*PERFORMING ARTS CENTER (PAC)\*\*\*\***

If requesting access to the PAC at Waco High or University High, click this link into the reservation system.

**PERFORMING GROUPS:**

The District reserves the right to negotiate the frequency of use and the usage fees based upon anticipated box office proceeds. Building usage fees may be waived for events that provide cultural enrichment opportunities for the community and for which an admission fee is not charged; however, personnel and equipment fees as illustrated on Facility Rental Fee Schedule sheet and insurance requirements noted below will apply at all times.

**PARKING LOTS:**

Parking lot access is reserved for organizations renting Waco ISD facilities.

**LONG-TERM USE:**

The repeated rental of school facilities shall be limited to a maximum of twelve (12) months from the date of the initial rental contract.

**FOR PROFIT GROUPS**

WISD policy GKD (Local) does not permit individuals or for-profit organizations to use its facilities for financial gain. According to IRS rules for tax exempt government bonds, use or rental of facilities for private business use is limited. All requests will be examined for compatibility with our district policy and compliance with IRS rules. A \$100.00 deposit is requested upon reserving the PAC.

**SECURITY**

The District requires the use of security personnel for certain types of rentals, through the Waco ISD Police Department. The cost will be calculated using the current overtime rates. **Custodians are not considered security personnel.**

**SCHEDULING:**

Facility Use Request forms on-line must be submitted at least ten (10) calendar days prior to the scheduled event to ensure availability, full heating or cooling, custodial services, and specific requirements.

**CANCELLATION:**

Cancellation must be received in writing not less than 72 hours prior to the event. Failure to provide timely notice of cancellation will result in a 20% penalty.

***Cancellation of insurance also cancels the rental contract until proof of insurance can be provided to the District.***

**List of what is available for Rental with the Performance Arts Center**

Stage lighting, Microphones (handheld wireless & wired), Soundboard Operator, Lightboard Operator, Projector/Projection Screen, Music Stands, Acoustic Shells, & Ushers.



# Waco ISD Facility Rental Fee Chart

RENTAL AREA	Group 1 School-Related Non-Profit	Group 2 Non-Profit	Group 3 For-Profit
<b>ELEMENTARY</b>			
Parking Lot	\$0	\$35	\$35
Cafeteria	\$0	\$85	\$100
Gym	\$0	\$85	\$100
Library	\$0	\$75	\$85
Classroom	\$0	\$35	\$35
<b>MIDDLE SCHOOL</b>			
Parking Lot	\$0	\$45	\$45
Cafeteria	\$0	\$100	\$110
Gym - practice	\$0	\$100	\$110
Library	\$0	\$75	\$85
Classroom	\$0	\$35	\$45
<b>HIGH SCHOOL</b>			
Parking Lot	\$0	\$45	\$55
Cafeteria	\$0	\$100	\$110
Library	\$0	\$85	\$95
Classroom	\$0	\$45	\$65
PAC	\$0	\$150 (3 hr. min.)	\$175(3 hr. min.)
Custodian	\$40	\$40	\$40
Supervisor	\$40	\$40	\$40
(1) Grounds Personal	\$35	\$35	\$35
Technical Support	\$30	\$30	\$30
Security Officer	\$45	\$45	\$45
Police Officer	\$60	\$60	\$60

**Prices indicate hourly rates -  
3 hour minimum**

Prices vary based on facility use for athletic competitions involving other school districts and are generally not rented to the public.

Note: The fee schedule reflects **the hourly rental (unless noted as 3hr. min)** of the facility and includes the cost of electricity, heat and air conditioning. Costs not included in the fee schedule, but may be required, are for custodial, supervisions, technical support, security and other miscellaneous expenses incurred by the District as specified in rental agreement. Total cost of a facility rental will be calculated on the Facility Rental Request form.



## Athletic Venue Fee Chart

After applying on-line through Event Manager, all requests for access to secondary school fields and gyms are handled through the athletic department and must be approved by the Sports Complex Director.

Venue	Cost	Security Required	Officials Required
<b><u>Football Athletic Complex</u></b>			
6A-5A-4A (Relay Included)	\$4,000 + 20% Total Gate/\$15,000 Capacity	Yes	Yes
3A-2A-1A (Replay Included)	\$3,500 + 20% Total Gate/\$15,000 Capacity	Yes	Yes
Practice W/Lights	\$200 Per Hour	No	No
Practice W/O Lights	\$100 Per Hour	No	No
<b><u>Athletic Complex</u></b>			
Stadium Event (3 Hour Min.)	\$200 Per Hour	Yes	No
Parking Lot Event (3 Hour Min.)	\$100 Per Hour	Yes	No
Soccer Athletic Complex	\$1200 (1 Game) & \$1400 (Double Header)	Yes	Yes
Softball/Baseball Turf Field	\$900 (1 Game) & \$1100 (Double Header)	Yes	Yes
Baseball/Softball Grass Field	\$900 (1 Game) & \$1100 (Double Header)	Yes	Yes
Baseball/Softball Practice	\$100 Per Hour	No	No
<b><u>Paul Tyson Field</u></b>			
	\$2500 + 20% - Total Gate/\$15,000 2000 bleacher Capacity (No Lockers)	Yes	Yes
<b><u>University High Stadium</u></b>			
	\$800 (One Game) & \$1100 (Double Header)	Yes	Yes
<b><u>All Gyms</u></b>			
Basketball/Volleyball Game	\$800 (1 Game) & \$1100 (Double Hitter)	Yes	Yes
Practice (3 Hour Min.)	\$100 Per Hour	No	No
Event (3 Hour Min.)	\$200 Per Hour	Yes	No
<b><u>Tennis Courts</u></b>			
Waco High & University High	\$50 Per Hour/Per Court (No Lights)	No	No
<b><u>All Tournaments</u></b>			
Gyms and Fields	Negotiable – Call Complex Manager	Yes	Yes
<b><u>UHS/Paul Tyson Tracks</u></b>			
Meets	\$100 Per Hour	Yes	No
Practice	\$50 Per Hour	Yes	No
<b>*Waco ISD retains all Concession Rights</b>			



The following pages will be accessed via the Facility Rental website.

## Facility Rental And Reservations

If you are interested in utilizing a Waco ISD facility for an event, please first review our [Facilities Rental Packet](#) carefully. Please consider all terms and conditions prior to placing a request a facility, and contact us with any questions.

**All organizations must be "created" in the online system annually. Returning users may utilize their existing login to create a new "organization" on the profile. This allows organizations to submit updated insurance documents for review and update contact information.**

### How Renting Works

- Follow complete instructions on our [User Guide](#).
- Create an online account in the [reservation system](#).
- Create an organization within the reservation system, attaching valid certificate of insurance. Organizations must be created each school year and will be de-activated over the summer. If the organization exists, users may "join" it on their profile.
- Once approved, place an event request.
- Receive email confirming or denying the request.

### Key Points Regarding WISD Rentals

- Waco ISD events will be prioritized at all Waco ISD facilities. Decisions of Waco ISD staff are final.
- Only authorized representatives of approved organizations in good standing will be granted access to reserve facilities.
- Pre-payment is required, though additional invoices may be issued after events.
- Review payment details prior to placing event requests. **Once an event has been approved, cancellation fees will be charged for cancelled events.**
- Facilities may be reserved **12 Months** in advance of the event. If you intend to rent on a continuous/weekly basis, you will need to begin a long-term lease agreement.
- Rentals are "space only" rentals and do not include microphones, projectors, PA's/sound systems, or other equipment, with the exception of auditorium rentals, in which additional fees can be paid for limited equipment and personnel.
- All rentals are limited to non-school hours. On elementary campuses, spaces are not available until 6:45 due to after-care schedules. Rentals occur Monday-Saturday only except for in the case of long-term lease agreements.
- All rentals are approved at both the campus and district level. Any campus conflict may cause a reservation request to be denied, even if the space appeared to be available on the online portal.
- Waco ISD Employees must utilize the Community Site for any non-ISD organization rentals.

If you have any questions concerning these procedures, contact Roger Perez (Energy Manager) email at [roger.perez@wacoisd.org](mailto:roger.perez@wacoisd.org)

(The pages below will be a link from the “[User Guide](#)” and will be formatted for on-line use. The purpose of this page is to share the content prior to it going live.)

## Reserving Spaces in Waco ISD

### A guide to get you started and keep you going.

*Click on the underlined blue text to navigate to the instructions listed, or go to the website provided in parentheses.*

**ONE:** Make sure Waco ISD is the right space for you. Get to know the terms & conditions of using Waco ISD spaces (<https://www.wacoisd.org/departments/facility-use-rental/reservations>)

**TWO:** Set up an account, or verify an existing account.

- Brand-new users must set up an account (<http://bit.ly/evmsignup>) to access the online reservation system.
- Existing users can log in and may need to verify their accounts (<http://bit.ly/evmlogin>).

**THREE:** Create or join an organization and submit a certificate of insurance. You must be a member of an approved organization within the online system to reserve spaces. NOTE THAT ALL ORGANIZATIONS ARE CREATED ANNUALLY. You must create an organization each school year.

- CREATE an Organization in the online reservation system. Please note that before we can approve a new organization, the certificate of insurance must be attached to the request.
- You do not have to join the organization after you create it - you are automatically a member.
- If someone else from the organization has already created it in the system during that school year, you may add yourself as a member. We will contact the creator of the organization to authorize your membership.

**FOUR:** Now you can see availability and request a reservation (<http://bit.ly/requevm>).

**FIVE:** Once your event is approved you will pay for your event (<https://bit.ly/WISDinvoice>)

**SIX:** You can access and view the status of your events at any time (<https://bit.ly/EvMEvent>)

**SEVEN: DO NOT CHANGE OR CANCEL AN EVENT AFTER SUBMISSION.**

If you need to make changes after requesting an event, please contact Roger Perez (Energy Manager) at 254-752-3497. For questions and assistance, contact Roger Perez at [roger.perez@wacoisd.org](mailto:roger.perez@wacoisd.org) or for athletic rentals (fields, Middle & High school gyms), contact Edwin Trochim at [edwin.trochim@wacoisd.org](mailto:edwin.trochim@wacoisd.org).



## WACO INDEPENDENT SCHOOL DISTRICT Facility Rental Cost Sheet

Name of Group \_\_\_\_\_

Contact Person \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Facility Requested \_\_\_\_\_

Date Requested \_\_\_\_\_ Time: from \_\_\_\_\_ to \_\_\_\_\_

Activity Planned \_\_\_\_\_

**Cost Estimate of Facility Use  
(Prices Determined Using the Waco ISD Rental Fee Schedule)**

	WISD Services Required	Number of Hours	Cost per Hour	Total cost
1	Facility Cost			
2	Custodians			
3	Supervision			
4	Security			
5	Grounds Personal			
6	Miscellaneous			
7	Other			
<b>Total Cost for Facility Rental</b>				

**All information listed above is true and correct to the best of my knowledge. The Lessee accepts responsibility for payment of ALL costs involved, to make full payment ten (10) days prior to the event, to be responsible for any and all claims which arise from this event, and to hold Waco Independent School District harmless in any personal liability claims which may arise from this event. Lessee also assumes full responsibility for the conduct of any and all persons using the facility during rental. Waco ISD will invoice Lessee for any time facility is used beyond contracted time in one hour increments.**

\_\_\_\_\_  
Group Representative Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Superintendent or designee

\_\_\_\_\_  
Date



## Waco Independent School District Permit to Use Public School Facilities

CONTACT INFORMATION	<b>Organization</b>		<b>Is your group non-profit?</b> <input type="checkbox"/> YES <input type="checkbox"/> NO <small>If yes, please provide determination letter from the IRS confirming 501-C3 non-profit status</small>		<b>Today's Date</b>		
	<b>Contact</b>			<b>Phone Number</b>			
	<b>Address</b>		<b>City</b>		<b>State</b>		<b>Zip Code</b>
	<b>Email Address</b>				<b>Fax Number</b>		

EVENT INFORMATION	<b>Event Description</b>				<b>Anticipated Number of Participants and/or Attendees</b>	
	<b>Facility/Campus</b>			<b>Room/Area</b>		
	<b>Event Date(s)</b>			<b>Start Time(s)</b>		<b>End Time(s)</b>
	<b>Additional Request/Requirements</b>					
	<b>Security Requested?</b>			<b>Lighting Required?</b>		<b>On-site staff Required</b> Custodian    Yes No Supervisor    Yes No Security    Yes No Cafeteria    Yes No

**RENTAL AGREEMENT**

THE UNDERSIGNED REPRESENTATIVE AND THE ORGANIZATION WHICH HE/SHE REPRESENTS, HEREBY AGREE AND UNDERTAKE TO SAVE AND HOLD BLAMELESS THE WACO INDEPENDENT SCHOOL DISTRICT FROM ANY AND ALL CLAIMS FOR DAMAGES, PERSONAL AND OTHERWISE, THAT MAY ARISE OUT OF THE USE OF THE PROPERTY WHETHER BY A MEMBER OF HIS/HER ORGANIZATION OR BY OTHER PERSONS USING OR ENJOYING SAID PROPERTY, AND WITHOUT REGARD TO WHETHER THE DAMAGE, PERSONAL OR OTHERWISE, IS BROUGHT ABOUT OR CAUSED BY NEGLIGENCE, WHETHER ON THE PART OF THE REPRESENTATIVE, ORGANIZATION, THE WACO INDEPENDENT SCHOOL DISTRICT OR ALL THREE. SCHOOL PROPERTY WILL NOT BE REMOVED FROM THE PREMISES. THE FACILITIES SHALL NOT BE USED WHERE THE PURPOSE IS IN CONFLICT WITH THE AIMS AND OBJECTIVES OF THE PUBLIC SCHOOL SYSTEM; NOR SHALL THE PROPERTY BE USED FOR UN-AMERICAN, SACRILEGIOUS OR CONTROVERSIAL PURPOSES, ALL NATIONAL AND STATE LAWS, LOCAL ORDINANCES AND RULES OF THE POLICE AND FIRE DEPARTMENTS AND THE SCHOOL DISTRICT SHALL BE OBEYED. THE REPRESENTATIVE AND ORGANIZATION WILL BE RESPONSIBLE FOR AND AGREES TO PAY FOR DAMAGES DONE AS A RESULT OF THE EVENT. THE REPRESENTATIVE WILL ENSURE THAT ALL FURNISHINGS ARE ARRANGED IN THE WAY IT WAS FOUND BEFORE THE EVENT. ALL LEAFLETS, BROCHURES, AND MATERIALS MUST BE REMOVED FROM THE PREMISES UPON COMPLETION OF THE EVENT. THE USE OF ALCOHOLIC BEVERAGES OR TOBACCO PRODUCTS IS PROHIBITED ON ALL WACO SCHOOL DISTRICT PROPERTY. THE REPRESENTATIVE AND ORGANIZATION (LESSEE) HEREBY INDEMNIFIES AND HOLDS WACO INDEPENDENT SCHOOL DISTRICT (LESSOR) AND ITS AGENTS AND EMPLOYEES HARMLESS FROM ALL CLAIMS AND ANY COSTS, INCLUDING ATTORNEY'S FEES RELATED THERETO, MADE BY ANY PERSON ARISING OUT OF LESSEE'S USE AND OPERATION OF THE DISTRICT'S FACILITIES. LESSEE SHALL CARRY COMPREHENSIVE PUBLIC LIABILITY INSURANCE WITH A POLICY LIMIT OF AT LEAST THE MINIMUM CALLED FOR IN THE Building Rental Procedures. SUCH INSURANCE SHALL BE CARRIED WITH A FINANCIALLY SOUND CARRIER AND SHALL NAME THE WACO INDEPENDENT SCHOOL DISTRICT AS AN ADDITIONAL INSURED. THE WACO INDEPENDENT SCHOOL DISTRICT SHALL BE FURNISHED WITH A CERTIFICATE OF INSURANCE REQUIRING AT LEAST TEN (10) DAYS PRIOR WRITTEN NOTICE TO THE DISTRICT OF THE CANCELLATION OF SUCH INSURANCE. APPLICANTS HEREBY AGREE TO ALL CONDITIONS MENTIONED IN THIS AGREEMENT AND THE ATTACHED REGULATIONS.

\_\_\_\_\_  
AUTHORIZED REPRESENTATIVE: APPLICANT ORGANIZATION

\_\_\_\_\_  
AUTHORIZED REPRESENTATIVE: WACO ISD

Complete form and submit with all other documents to Facilities & Operation Department ten (10) days prior to the event.

## Rental Facilitator Process

### Before Agreement

- Confirm dates and availability
- Verify all documents required
- Complete Permit to Use Public School Facilities
- Perform Pre-Inspection of Facility

### After Agreement

- Coordinate with campus staff prior to each event
  - Space
  - Special conditions
  - HVAC
  - Custodial
  - Security
  - Access to facility
- Confirm with custodian the condition of space after event
  - Perform Post-Inspection of Facility

**Waco Independent School District**  
**Board of Trustees Meeting Agenda**

**Date:** October 26, 2023

**Contact Person:** Dr. Daniel Lopez

**RE: Review, Discuss and Take Appropriate Action Regarding an Applicant for Employment Related to a District Administrator**

=====

**Background Information:**

According to policy DC (LOCAL), the Board retains final authority for employment of all contracted personnel regarding an applicant for employment who is related to a District administrator within the second degree by blood or marriage, as defined in this policy, shall disclose the nature of the relationship during the application process. The District shall employ such an applicant only with Board approval. For purposes of this policy, relatives within the second degree by blood or marriage shall be defined as: spouse, parent, parent-in-law, child, son-in-law, daughter-in-law, sibling, brother-in-law, or sister-in-law.

Jon Lozano is the son of Isabel Lozano, Principal at Kendrick Elementary School, and is being recommended for Coordinator - Facilities and Maintenance.

**Fiscal Implications:**

Salary is included in the fiscal year budget.

**Administrative Recommendation(s):**

Approve contract recommendation as presented.

**Waco Independent School District**

***Board of Trustee Meeting Agenda***

**Date:** October 26, 2023

**Contact Person:** Susan Kincannon

**RE: Approve the 2023-2024 District and Campus Improvement Plans**

=====

**Background Information:**

In accordance with state and local policy as outlined in Policy BQ, the Board shall ensure that a District Improvement Plan is developed, evaluated, and revised annually for the purpose of improving the performance of all students. In addition, Policy BQ requires that a campus-level committee shall develop, review, and revise its campus improvement plan annually for the purpose of improving student performance for all student populations.

The Waco ISD District Improvement Plan was developed in collaboration with district leaders and teams across all programs and departments. District level leaders have partnered with campus principals to ensure that campus improvement plans are aligned to the District Improvement Plan and meet policy requirements. All plans have been designed to serve as a guide for the work that will be done to improve student achievement for all student populations in Waco ISD.

Campus improvement plans can be accessed through the “extras” link on BoardBook and/or at [wacoisd.org/CIP2023](http://wacoisd.org/CIP2023).

**Fiscal Implications:**

Goals, objectives and activities drive the annual budgeting process.

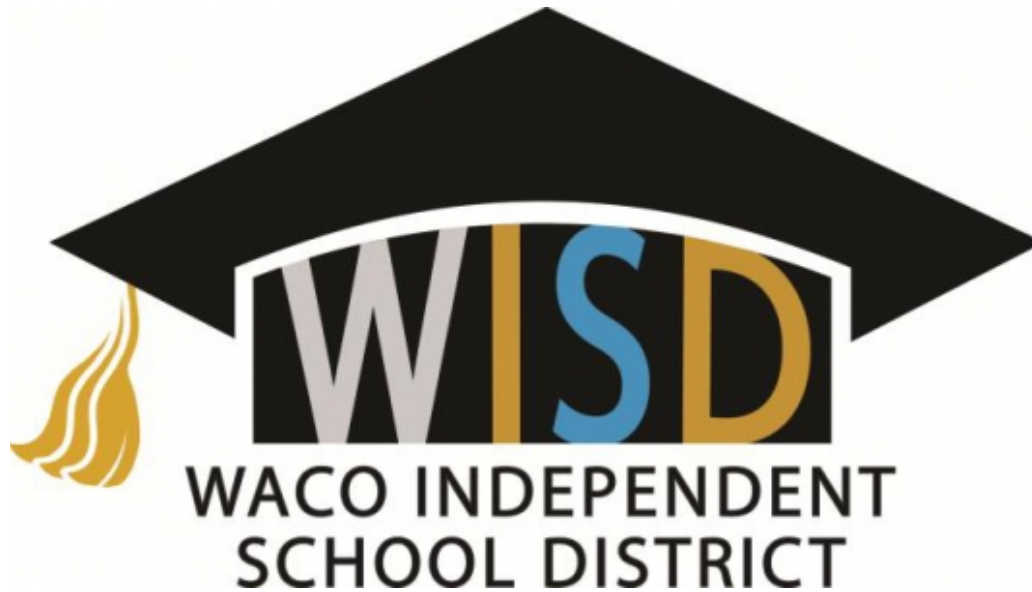
**Administrative Recommendations:**

Approve the District Improvement Plan and Campus Improvement Plans as presented.

# Waco Independent School District

## District Improvement Plan

2023-2024



# Mission Statement

The mission of Waco ISD is to provide an educational foundation that empowers and values all.

## Vision

The vision of Waco ISD is to grow students and staff to create a better future for all.

## Core Beliefs

We believe that all students shall reach their full potential.

We believe that race, ethnicity, gender, or socio-economic status should not result in achievement gaps.

We believe that all students should graduate ready for college, workforce, or the military.

We believe that parent and community involvement is fundamental to student success.

We believe a high quality teacher in every classroom is critical to student success.

# Comprehensive Needs Assessment

## Demographics

### Demographics Summary

Waco ISD serves the community of Waco, Texas, in McLennan County. Waco ISD has 24 campuses including 15 elementary schools, 3 middle schools, 2 comprehensive 5A high schools, 1 credit recovery high school, 1 disciplinary alternative school, and 2 CTE based academy programs (Greater Waco Advanced Health Care Academy, Greater Waco Advanced Manufacturing Academy). Additionally, there is a P-TECH program focused on an education program called the Future Educators Academy. Two elementary schools are magnet schools and one middle school has a district GT program option. Three elementary schools and one middle school are a part of an in-district charter system known as Transformation Waco.

As of the fall 2022 snapshot, Waco ISD has a total of 13,824 students enrolled. This represents a drop in enrollment of 262 students from the prior year. The distribution of demographics groups and grade levels remained within less than 1% from the prior year. Based on state and district data, student demographics are as follow:

Ethnicity (2022 Fall PEIMS)	Count	Percent
American Indian/ Alaskan Native	21	0.15
Asian	38	0.27
Black/ African American	3,826	27.7
Hispanic	8,438	61
Native Hawaiian - Pacific Islander	4	0.03
White	1,160	8.4
Two or More Races	337	2.44
Gender		

Ethnicity (2022 Fall PEIMS)	Count	Percent
Male	7,102	51.4
Female	6,722	48.6

School Population (2022 PEIMS)	Count	Percent
Early Education Grade	44	0.32
Pre-Kindergarten Grade	811	5.9
Kindergarten	1,005	7.3
1st Grade	1,071	7.8
2nd Grade	1,078	7.8
3rd Grade	1,071	7.8
4th Grade	1,018	7.4
5th Grade	1,035	7.5
6th Grade	951	6.9
7th Grade	945	6.8
8th Grade	943	6.8
9th Grade	1,350	9.8
10th Grade	964	7
11th Grade	813	5.9
12th Grade	725	5.2

**Participation in Special Programs (Based on PEIMS 2022 Snapshot) include:**

Special Program Participation	Count	Percent
Special Education	1,840	13.3
Gifted and Talented	1,409	10.2
Students in the Bilingual Program	916	6.6
Students in the ESL Program	2,039	14.8
English Language Learners	3,235	23.4
Free/Reduced Meals/Economically Disadvantaged	12,395	89.7
At-Risk	10,521	76.1
Section 504	1,084	7.8

Despite a drop in overall enrollment, a 2% increase was seen in Special Education and Emergent Bilingual. There was a 1% gain in GT participation. These increases are due to focused work on identifying and coding students in these areas.

CTE Enrollment Type	Count	Percent of CTE	Count	Percent of CTE
Participant	1,988	42.1	1,380	30.2
Explorer	1,531	32.4	1,696	37.1
Concentrator	938	19.9	1,165	25.5
Completer	412	8.7	492	10.8

CTE Enrollment Type	Count	Percent of CTE	Count	Percent of CTE
TOTAL CTE Enrollment	4,725		4,570	

CTE program enrollment has changed and is now based upon how many courses and the types of courses taken. Waco ISD has seen an increase in the percent of students who have taken 3 or more courses which include high level courses with industry based certifications connected to them. The decrease in student CTE enrollment was seen in grade 8 due to a change in courses taken.

For the district, the annual dropout rate for 9-12 graders has been above the state average. This has caused a continued focus on the needs of high school students, offerings and opportunities as well and campus procedures. For the 2022 annual dropout rate, Waco ISD saw a decrease in the percent of dropouts from 4.7% to 3.1%. Simultaneously, the district's graduation rate has remained stable from 85% to 84.7%. This stability can be seen in the individual campus graduation rates. For the class of 2022, Waco HS has 83.6% and University HS has an 88.7% graduation rate. District graduation rates for Special Education remained at 80% and for Homeless students there was an increase of 5%.

Year	Waco ISD annual dropout rate	Change	State annual dropout rate	Change
2017-18	5.4%	-0.5%	1.9%	0%
2018-19	3.8%	-1.6%	1.4%	-0.5%
2019-20	2.5%	-1.3%	1.2%	-0.2%
2020-21	4.7%	+2.2%	1.8%	+0.6%
2021-22	3.1%	-1.6%	Not available yet	

Brazos HS has a state graduation rate of 97%. This drastic increase from 58.5% is in part to the new accountability system which allots bonus points for the graduation of students who were previously dropouts. These students would be in cohorts earlier than 2019. The federal calculation is at 52% for the 4-year rate and 34.5% for the 6-year rate which looks to have them labeled as Comprehensive for school improvement for the 4th year.

The percentage of students who qualify for free or reduced-priced meals in Waco ISD in 2022-2023 was 89.66%, which continues to be higher than the state average of approximately 60%. This was the fifth year that there was not a significant increase for Waco ISD.

The teacher turnover rate for 2021-2022 was 23.3% which is an increase of 5% and 5% above the state's rate. The state's rate increased by 3% from 2020-2021 to 2021-2022.

Attendance rates for the 2021-2022 school year increased from 87.5% to an estimated 90.77% Every campus, with the exception of Wiley, saw increases in attendance. The largest attendance issues were seen at secondary campuses, which impacts credit accrual rates. The implementation of a night school program at University HS and Waco HS created an option for students whose attendance was an issue for varying reasons. This program uses a different TEA approved method of calculating attendance and funding. This program saw an average of 45-50 students at each campus throughout the year. Both campuses will begin their third year in this program.

CAMPUS	2023	2022	Difference
<b>Elementary</b>			
Alta Vista Elementary	93.97	92.68	1.29
Bells Hill Elementary	94.14	92.53	1.61
Brook Avenue Elementary	93.57	93.29	0.28
Cedar Ridge Elementary	92.52	92.04	0.48
Crestview Elementary	91.92	90.92	1
Dean Highland Elementary	93.04	92.09	0.95
Hillcrest PDS	95.3	93.63	1.67
J H Hines Elementary	91.95	89.12	2.83
Kendrick Elementary	93.86	92.81	1.05
Lake Air Montessori	95.27	93.37	1.9
Mountainview Elementary	93.83	92.16	1.67
Parkdale Elementary	93.63	92.03	1.6
Provident Heights Elementary	93.91	92.15	1.76
South Waco Elementary	92.26	90.52	1.74
West Avenue Elementary	93.73	91.69	2.04
295			

CAMPUS	2023	2022	Difference
<b>Middle School</b>			
Cesar Chavez Middle	91.02	87.94	3.08
G W Carver Middle	86	84.28	1.72
Indian Spring Middle	89.2	88.24	0.96
Tennyson Middle	92.29	89.61	2.68
<b>High School</b>			
University High	87.95	82.71	5.24
Waco High	84.66	81.92	2.74
<b>Specialty</b>			
Brazos High Credit Recovery	67.6	61.25	6.35
Wiley Opportunity Center	75.16	77.86	-2.7
McLennan County Challenge	79.89	78.85	1.04
<b>District Totals</b>	90.77	88.33	2.44

The number of disciplinary incidents has fluctuated over the last few years. For 2021-2022, there were 8,506 students reported with at least one incident. For 2022-2023 this was down to 8,211 students. In comparing the number of incidents, for 2022-2023 there were 11,104 incidents which is a decrease from 11,575 in 2021-2022. There continues to be a disproportionate number of students in certain groups for incidents and DAEP placements. For example, students who are African American are 28% of the school population but are 66% of DAEP placements. Hispanic students are 66% of the overall population but they are 40% of DAEP placements.

For this last year, incident reports were 20.4% of the student overall population. Of the 2,886 students for the 2021-2022 school year, approximately 2,000 were from grades 6-12, 48% are African American and 45% are Hispanic and 6% are White. This reflects a disproportionality for African American students, as they are only 28% of the student enrollment. Another disproportionality exists within gender, 62% of the students were male.

### Demographics Strengths

An important strength in Waco ISD's demographics is the stability in the ethnicity, economic disadvantaged and gender makeup. This stability allows us to see the increases in program participation clearly and not influenced by the overall composition of the district. While schools may see mobility at the campus level, the district overall has had a consistent demographic makeup. Special education saw an increase of 2.2% in student participation. Students in the Bilingual program

overall increased by 2.2% and the percent in ESL programs increased by 1.8%. For Emergent Bilingual students, the stability in enrollment reflects a strength because it can help build long-term systems. There is now stability in the data for At-Risk students with a decrease of less than 1%. At-Risk supports can help decrease mitigating factors that contribute to a student being At-Risk such as grades, retention and test scores. Stronger systems for identification have helped campuses meet the needs of students more accurately. Waco ISD's class of 2021 At-Risk students had a graduation rate of 62.6%, which was greater than the state rate of 43.4%. For the class of 2022, this is at 79.6%.

Participation in CTE programs has always been a strength for Waco ISD. This was seen when CCMR included CTE course completions as a measure of career readiness. In 2020-2021, a rate of 77.7% of graduates leaving with a coherent sequence completed, Waco ISD was far ahead of the state rate of 58.5%. With the change of definition of Completers, Waco ISD still continues to be above the state's measure of 27.6% with 51.9%. With the recent changes in rules for CTE and Industry Based Certifications, the alignment of coursework and tests ensured no negative effect from the change in CCMR criteria.

Another emerging trend is that the dropout rate is decreasing, attendance is increasing while at the same time graduation and CCMR rates are increasing. This means that the district is keeping more students engaged and helping them achieve their diploma with maximum opportunities.

# Student Learning

## Student Learning Summary

Progress on achievement measures was reviewed across a number of domains for all student groups and examining a number of assessment types including, but not limited to STAAR, district assessments, PSAT, SAT, ACT, etc. Graduation rate and College, Career and Military Readiness (CCMR) data was also reviewed. A summary of findings is below.

## Accountability

In late September 2023, Waco ISD will be evaluated for accountability for the first time using an updated A-F state system. The district was rated as a C (79) in 2021. This rating will not be comparable to the one that will be assigned for the 2022-23 school year since TEA has redesigned the tests and changed its methodologies for calculating data in system domains.

*Accountability Ratings pending*

## STAAR Achievement

In 2023, there were various changes to the STAAR exams including Performance Level expectations and the format of the exams, which now include 37 or more questions of varying types including constructed responses. The test was also administered 100% online for the first time. Even with these changes, Waco ISD had an increase or maintained student achievement levels.

RLA Exam	Approaches 2022	Approaches 2023	Difference
3rd	53%	54%	+1
4th	63%	58%	-5
5th	66%	67%	+1
6th	49%	54%	+5
7th	60%	57%	-3
8th	72%	69%	-3

RLA Exam	Approaches 2022	Approaches 2023	Difference
Eng I	39%	54%	+15
Eng II	54%	58%	+4

Math Exam	Approaches 2022	Approaches 2023	Difference
3rd	42%	48%	+6
4th	45%	40%	-5
5th	60%	61%	+1
6th	52%	54%	+2
7th	37%	42%	+5
8th	49%	53%	+4
Algebra I	65%	70%	+5

## Growth and Goal Setting

In the 2022 accountability system, “growth” was defined as an increase in scale score. Waco ISD saw growth for 74% of all students grades 4-English 2 for Reading and 65% of students grew in Math. In the new system, the proposal is to have students move up Performance Levels to show growth. With this new methodology, the district will see 50% of students grow in Math and 51% in RLA.

	# of tests	# of students who made "growth"	% of students making growth by Level increase	% of students who went from failing on 2023 STAAR to passing 2023	% of students who maintained PL from 2022 to 2023
<b>MATH</b>					
4th	745	294	39%	6%	15%
5th	782	514	66%	23%	14%
6th	606	207	34%	7%	17%
7th	603	212	35%	5%	15%
8th	509	331	65%	29%	10%
Algebra	454	307	68%	24%	16%
ALL MATH	3699	1865	50%	15%	14%
4th grade Reading	747	278	37%	11%	15%
5th	782	436	56%	11%	12%
6th	374	111	30%	4%	7%
7th	356	199	56%	13%	13%
8th	317	169	53%	10%	11%
Eng I	811	417	51%	3%	12%
Eng II	941	596	63%	22%	11%
ALL RLA	4328	2206	51%	11%	12%

Overall the performance of the middle school and elementary in the area of growth (relative to STAAR) was what helped the campuses to increase their performance. This growth was systematically tracked and instructional supports were implemented to help students at every level. These supports included:

- the use of Action Coaching with campus instructional leaders
- the use of the Data Driven Instruction process with instructional leaders
- the implementation of SIT teachers at all campuses for math and reading with consistent measures of data to be able to compare and track
- the use of Reading Recovery at some campuses
- the implementation of a dual language pilot project at one elementary campus
- the Opportunity Culture program at campuses
- the bolstering of teacher leaders and instructional specialist knowledge in curriculum coaching
- the use of universal screeners [CIRCLE, TxKEA, Renaissance 360, Reading Plus, etc.] and the STAAR interim assessments to be able to have steady

measures on student progress especially for highly mobile students

Use of the screener data and other measures need more continued focus in the secondary level in RLA and Math. They currently use TCA and classroom data for PLC work. Inconsistent participation and teacher indifference to Renaissance, Reading Plus and STAAR interim assessments affected the overall performance of the high school campuses.

### Other High School Measures

Over the past two years, high school measures have had varying results. The graduation rate has increased for University HS and Waco HS. Brazos HS has lagged behind in traditional measures, but the new methodology for accountability gives them credit for students if they are: graduates, recovered dropouts who graduate and continuers (students who enroll the next year). With the continued growth in graduation for the class of 2022, all three campuses experienced increases in the amounts of students who were scored as Career, College and Military Ready (CCMR).

	4 year federal rate (2022) - Domain 3		4 year state rate (2022) - Domain 1 option		5 year (2021) - Domain 1 option	6 year (2020) - Domain 1 option	
	Number of students in cohort	Graduation Rate %	Number of students in cohort	Graduation Rate %	Graduation Rate %	Graduation Rate %	Annual Dropout Rate (21-22)
Waco ISD	996	79.5	913	84.7	88.1%	88.8%	3.1 (-1.6%)
Waco HS	478	81.4	463	83.6	90.4%	89.7%	3.3 (-1.5%)
University HS	388	86.6	379	88.7	94.4%	94%	2.7(-0.8%)

	4 year federal rate (2022) - Domain 3		4 year state rate (2022) - Domain 1 option		5 year (2021) - Domain 1 option	6 year (2020) - Domain 1 option	
Brazos HS	127	52	68	100 (this is combination of all students regardless of cohort that graduated or remained enrolled)	100 (this is combination of all students regardless of cohort that graduated or remained enrolled)	78.3 (this is combination of all students regardless of cohort that graduated or remained enrolled)	17.6 (16%)

In reviewing the data on Brazos High School from the time it was renamed from STARS HS, there is a trend of declining enrollment and STAAR testing performance over the past 6 school years. Simultaneously, there has been a trend overall of staffing increases. In the new accountability, BHS will be reviewed on their rate of retesters passing as a form of growth. This is projected to be 34% of retesters.

Enrollment		Staff	Attendance	STAAR	Participation	Pass Rate Eng 1 and 2	Pass Rate Math
2012-13	137	10.4	71.1	2012-13	95	56	26
2013-14	142	10.5	70	2013-14	94	33	52
2014-15	179	9	55.4	2014-15	77	30	32
2015-16	234	11.7	59	2015-16	66	18	18
2016-17	184	15.6	68.4	2016-17	66	31	43
2017-18	200	23.7	70.6	2017-18	76	60	69
2018-19	176	22.3	72.4	2018-19	73	21	61
2019-20	173	24.7	79.9	2019-20	N/A	N/A	N/A
2020-21	152	18.5	44.5	2020-21	56	42	14

Enrollment	Staff	Attendance	STAAR	Participation	Pass Rate Eng 1 and 2	Pass Rate Math	
2021-22	105	19.6	67.6	2021-22	95	32	40
2022-23	86	21		2022-23 (Projection)	95+	13	17

The 4-year federal graduation rate is an indicator that has Brazos HS receiving the status of “Comprehensive” for federal accountability. With a 4 year rate of 52%, this will be the 4th year in a row that BHS will receive this designation. This label is separate from the state ratings and accountability labels.

Accountability	Brazos High School
2012-13	Met Alt Standard
2013-14	Met Alt Standard
2014-15	Met Alt Standard
2015-16	Improvement Required
2016-17	Met Alt Standard
2017-18	Met Alt Standard
2017-18	F (Alt Standard)
2019-20	Not Rated: State of Disaster
2020-21	Not Rated: State of Disaster
2021-22	Not Rated - Score F

There is an increase in the CCMR for the 2022 graduates. A six year analysis shows that the overall increase is 12% and only 3% off of the pre-pandemic year of 2019.

CCMR Performance Over Time (State Rate Calculation - no application of Cap in 2023)						
Accountability Year	2018	2019	2020*	2021	2022	2023
# of CCMR Points	336.5	490.0	620.0	433	405	465
# Graduates	695	839	900	920	856	849
% Met CCMR	48	58	69	47	47	55

Waco ISD saw increases in the areas of: meeting TSI criteria (in both reading and math), industry based certifications, Special Education students who received an

advanced diploma. TSI criteria can be achieved via SAT, ACT or taking the College Prep course. This area increased overall by 6% and saw increases of 4% ELA on SAT and 8-9% increases in College Prep course participation. For Special Education, it has been a focus on strengthening student plans and discussions to maximize their diploma options via a growth mindset. This year, TEA analyzed the achievement of an industry based certification by shortening the list of options. This did not impact Waco ISD as the methodology of CTE is to have students take course based IBCs. The indicators of Associate Degree while in HS and IEP participation saw changes of 1%, which is a typical trend.

The indicators of Dual Credit and AP test performance saw decreases in both participation (20 less for AP and 45) and achievement. This will be a specific focus for 2023-2024 to improve student performance in these areas. Tighter criteria and a change in GPA calculations has shifted Dual Credit participation.

# District Processes & Programs

## District Processes & Programs Summary

During the 2022-2023 school year, the district had ten new campus leaders, with seven being new to Waco ISD. With this turnover, it was essential to continue implementing systems with fidelity across the district. Over the last school year, with district support, campus leaders continued to improve the implementation of systems to support lesson planning, MTSS, data-driven instruction, action coaching, and observation and feedback. Campus leaders were asked to consistently use data to guide their decisions and responses to student learning and teacher growth. Campuses continued to perfect the system of interventions and support to ensure students received targeted intervention at the correct level. This included using data from progress monitoring, taught curriculum assessments, interim assessments, and formative assessments to guide the decisions made for teaching and learning. With the pending changes of the STAAR Redesign by the state, it was important to ensure that district assessments supported the transition to the new testing formats. District-level assessments were updated to include new test question types. The continuous practice of analyzing student results using the data-driven instructional model allowed for data from all assessments to focus on student growth and how targeted intervention could be used to support student learning. With the help of district-level leadership, each campus set goals for student growth and implemented plans to address student learning gaps. Principals also received leadership coaching to support how they worked to grow their teachers to impact student achievement positively.

## Culture and Vision

In the spring of 2020, district and campus leaders began reviewing and building a mission and vision for Waco ISD. Two themes emerged. First, there was limited institutional knowledge of the current statements. Second, there was a consensus that developing new vision and mission statements for Waco ISD would be appropriate. From this work, Waco ISD's mission was determined to be to provide an educational foundation that empowers and values all. The vision of Waco ISD is to grow students and staff to create a better future for all. District and campus leaders worked collaboratively in the fall 2020 leadership retreat to bring to life the new mission and vision by using the Design Thinking process to focus on the idea of building a culture of belonging in Waco ISD.

In the fall of 2021, Waco ISD was selected to participate in Holdsworth's leadership development program. During the first year of participation, a leadership definition was developed and communicated to all staff at back-to-school meetings with all employees. This definition includes competencies and descriptors connected to three focus areas - leading from the heart, leading for results, and leading with character.

The district has continued to focus on the refinement of the leadership definition and has made communicating a key part of messaging in both 2022-2023 and 2023-2024, reinforcing that the competencies and descriptors of the leadership definition are key to the district fulfilling its mission and vision

## Leadership Development

According to the Texas Academic Performance Reports (TAPR) from 2020-2021 and 2021-2021, Waco ISD campus leaders had an average of 5-6 years of experience. For both data points, almost all of the years match the average years of experience as leaders in Waco ISD. This illustrates that many leaders are newer to the campus leadership role. This makes mentorship and support critical; therefore, continuing district-wide leadership development is a need.

Principal meetings have continued to focus on developing a culture of collaboration. A focus on creating a district leadership definition to support leadership development began in the fall of 2021 through the work with the Holdsworth Center. Ongoing leadership training in 2022-2023 focused on active listening, change management, instructional leadership, and responding to data effectively. Supporting district processes and training included Action Coaching, Data Driven Instruction, Lesson Planning, support, and training through the University of Virginia Darden School of Business. As implementation continued, support around effective systems for observation and feedback, lesson planning processes, and teacher support remained a priority. Without these essential systems, new learning would be difficult to implement. Principal PLCs and Calibration Walks continued as a method to support principals in analyzing data across systems on their campus. The Learning Walks were identified as a need to support high-quality feedback for teachers aligned around common expectations across the district. The need for this was determined after analyzing walkthrough data and the need to support new campus leaders in this area. The work around these systems should continue in 2023-2024 to carry the work forward with returning principals and implement the work with new principals and assistant principals. Nine campuses will also participate in the Effective Schools Framework (ESF) Grant work, which requires them to engage in an ESF evaluation to support the development of a Targeted Improvement Plan for each campus. This will further identify levers that may need additional support. The University of Virginia Darden School of Business and Relay Graduate School of Education will also provide support around these systems for these campuses.

In 2021-2022, the district identified the need to develop a leadership pipeline. To this end, Waco ISD applied to the Leadership Collaborative through the Holdsworth Center for Leadership Development and was selected as one of 14 districts to participate in learning centered on creating a principal pipeline. Through this work, a leadership definition was developed. The district identified that there was a need to codify the beliefs about leadership in the district. The leadership definition filled a need to define leadership competencies and descriptors, which will be used across Waco ISD to build leadership capacity for campus leaders and all systems and departments in the district. This work addressed the need for consistency and developing a common language around leadership. The leadership definition will continue to be rolled out with the Leadership Task Force's help as we align our practices to the look-fors that accompany each competency of the leadership definitions.

## Quality Teaching and Learning

Waco ISD continues to focus on developing a strong Tier 1 curriculum concentrating on planning, instruction, and alignment. The district curriculum is revised using knowledge derived from STAAR data, changes to state testing, student learning data, and teacher feedback. With the change to testing formats and the accountability framework, the data from STAAR indicated that we need to focus on raising student achievement levels in STAAR Domain I. Students must also show more significant gains in growth to meet new measures in STAAR Domain II. Data from Renaissance 360, CIRCLE, TxKEA, Benchmark Assessment System, Reading Plus, district Taught Curriculum Assessments (TCA), and the TEA Interim Assessments supported curriculum revisions.

A system for building lessons began in the 2019-2020 school year but was disrupted in the spring of 2020 with COVID-19 requiring emergency measures for teaching and learning virtually in place. Throughout the 2020-2021 school year, administrators and teachers were trained and coached on developing richer lesson plans to support teacher skills and student learning improvements. This protocol will continue to be followed. Although the work with lesson planning and data-driven instruction was somewhat interrupted by the pandemic, the work continued and never stopped. This put the district in a much better place entering the 2021-2022 school year. Heading into the 2023-2024 school year, leaders were trained on PLC+ through Corwin. Implementing this system for PLCs will support teacher clarity, lesson development and response to student learning, and teachers' collective efficacy. Through this process, each campus created a team of Activators that will lead the work. This focus will help campuses focus efforts around lesson planning, alignment, reteach plans, and feedback focused on teaching and learning. Leadership coaching provided by district principal supervisors will continue to support coaching principals in developing our teachers' capacity in lesson design and delivery. The need to continue focusing on implementing data-driven instruction to effectively respond to data with fidelity will also remain a focus. Heading into the 2023-2024 school year, this district has two first-year principals and 16 new assistant principals. Because of this, there is a continued need to continue to focus in these areas. Campus leaders will need continued support and training from principal supervisors, and teachers will need ongoing support and development from campus leadership teams.

Curriculum development has been an ongoing process. For the past four years, WISD Curriculum Coordinators have been guided by the Assistant Superintendent of Curriculum and Instruction and the Executive Director for Curriculum and Professional Development to implement a specific process for building curriculum documents and resource connections. The district continues to have a turnover rate higher than the state average. Feedback indicated that teachers needed help to align resources and lesson objectives when planning. To support teachers in this area, and because 51% of our teachers have 0-5 years of experience, the need to provide more direction through our curriculum documents was identified. During curriculum revisions, required lessons for each unit were included with the accompanying aligned resources. Supplemental lessons that are optional were also identified. This direction will provide further guidance and support for lesson development and promote alignment across the district. Although additional work is needed, the district coordinators invited teachers to help revise and write curriculum documents. The development of Taught Curriculum Assessments and Exemplars continues to be a work in progress; however, these additions will fill a need to support teachers and instructional specialists with planning and will provide needed support for the new teachers in the district. This work will continue to improve curriculum, planning, instruction, and assessment processes.

Literacy continues to be a focus in Waco ISD. In 2023, 64% of students scored approaches or above on STAAR Reading, which means that 36% of students did not pass STAAR Reading. It is worth noting that the STAAR testing format changed in 2023, as did how student accountability measures. These changes had a significant impact on the perceived growth of our students. Although students showed growth according to 2022 accountability standards, the changes to accountability measures, not shared by TEA until August 2023, camouflaged student progress.

Since STAAR begins at grade 3, there is a need for stronger early literacy Tier 1 instruction. In 2019-2020, Waco ISD began implementing the HB3 required training and coaching for elementary teachers on literacy through the Reading Academies and support for ESC Region 12. District-level leadership also identified a need to strengthen measures for RTI/MTSS structures district-wide to help provide predictable structures across the district to combat student mobility. In addition, a three-year plan for literacy professional development was created to address the need to provide teachers with high-quality professional development focused on literacy. The district also identified the need for additional student intervention and teacher instructional support. Each campus continues to implement a structured system for MTSS that includes extra intervention teachers, integration of Reading Recovery across campuses, and systems to meet the requirements of HB 4545, now HB1416, across the campuses. Data from 2023 showed that students made growth in reading; however, there is a clear need to continue these systems of support and professional development and work to strengthen the instructional and intervention frameworks and resources and to monitor implementation to ensure that systems are being implemented effectively and with fidelity to support improved student achievement.

In addition to literacy, math instructional support and professional development have also been identified as instructional needs. Since math skills build upon each other year after year, when skills are missed, there are tremendous gaps in student understanding of mathematical concepts. The changes in STAAR testing format and accountability measures also apply to math. In 2023, 53% of students scored approaches or better on STAAR math assessments. This means that 47% of students in Waco ISD who took a STAAR assessment did not pass. As stated in the previous section about literacy, test difficulty, and how the new test was graded also changed. Heading into the 2023-2024 school year, a new math problem-solving curriculum is being implemented. The curriculum was revised to support these changes, and an aligned professional development system for math is being implemented. The district will also partner with ESC Region 12 to send teachers from three campuses to the newly revised Math Academies. ESC Region 12 will support the cost and compensation of teachers for this training.

The district continues to recover from the pandemic in the area of credit recovery for secondary students. The district identified a tremendous need to offer flexible systems to help students recover credits. Lack of credit acquisition affects graduation rates, dropout rates, and participation in other learning areas, such as CTE pathways. Students with a credit deficit may have to forgo taking these classes to focus on recovering their lost credits. During the 2021-2022 school year, the district implemented a Flexible School Day program on all high school campuses to help students who needed an alternative to the traditional school day to meet their needs and also to help them reach graduation. That program is continued for 2023-2024 with funding being provided through federal COVID relief grants which will expire in September 2024.

Additionally, cohort meetings continue to track students and identify the need for early intervention to prevent further loss of credits. If these systems are

implemented effectively, students will recover missing credits, which will open up more flexibility with scheduling so that students may reengage with CTE and dual credit classes and, in general, stay on track to graduate. District support and training is a continued need for counselors and campus leadership teams to increase effective monitoring and scheduling of students and cohorts. In addition, communication with parents must improve to ensure a comprehensive partnership between campuses and parents, resulting in increased student success.

# Perceptions

## Perceptions Summary

Typically, Waco ISD conducts annual surveys of students, parents, and staff. No survey was given in the 2022-2023 school year. However, As a part of the district's ongoing efforts to focus on equity, an equity assessment was conducted with One World Approach during the 2022-2023 school year. **The initial goals were to evaluate, identify, and address inequities throughout the district that hinder equitable outcomes for Waco ISD students and families. The One World approach incorporated the voices of the community to understand and lead changes that will positively impact the community.**

Many Waco personnel and community members identified the supportive and solid foundation the district has created in schools. The diversity of Waco ISD was hailed as a positive benefit. Many recommended leveraging that diversity to benefit the students, family, and community. In addition, a common refrain was how supportive the district leadership has been of the staff. The team also heard that the leadership understands the importance of the social and emotional states of the staff. Especially in the wake of COVID and the learning disruptions, SEL for the staff is paramount in helping students adjust to traditional schooling.

One World Consulting utilized three processes to support quality recommendations for Waco ISD: data disaggregation, focus groups and interviews, and TOT equity training.

1. Data Disaggregation: The team at One World collected various data points from Waco ISD. Data was collected over several years to include baseline data from before 2020 and the years after the learning disruption caused by COVID. This data allowed the team to understand the students' current and historical outcomes. The initial data analysis was shared with the CORE assessment team to aid their small group council meeting discussions.
2. Focus Groups and Interviews: The team at One World also conducted ten focus groups and interviews to understand the perspectives of Waco ISD community members. Waco ISD leaders, community members, and Waco ISD faculty and staff in varying capacities participated in a well-rounded and represented population for the focus groups and interviews. All participants have been anonymized throughout this report and appendices.
3. Trainer-of-Trainer (TOT) Model: Part of the equity assessment included training a CORE group of facilitators within the district. The training conducted was done using a trainer-of-trainer (TOT) model. The team at One World shared with Waco ISD all the agendas, protocols, tools, and materials used and recreated the training with the small council groups. The purpose of the TOT was twofold:(1) to support the process in the district beyond the scope of the initial contract, and (2) to support a deep understanding of equity with the small council groups to aid in better understanding and a more holistic view of the data for possible recommendations.

## EQUITABLE LEARNING ENVIRONMENTS

The data show that the African American and Special Education subpopulation's STAAR passing and graduation rates are significantly below those of other students. In addition, the white subpopulation has a significantly higher dropout rate than all other students and subpopulations. The data also indicates that a low percentage of AP course enrollees are taking the AP exam. African American students are enrolling and passing AP tests at a disproportionately low rate. Economically disadvantaged students comprise 90% of the district but only 67% of testers. Waco ISD Bilingual and ESL students score lower than students around the state and our region. The retention rate is highest among high school students, and pre-kindergarten readiness testing outperformed the state. Many of the participants in the focus groups shared that the district is actively building systems to ensure the academic rigor and progress of Waco ISD students.

The small group councils identified a few areas for targeted growth opportunities. The council addressed the lack of equity in academic areas like PreAp/Ap and dual credit courses. In addition, another theme reiterated in the focus groups and small group council was the need for additional professional training related to culturally responsive, relevant, and authentic teaching and learning. Due to the district's diversity, this was coupled with other factors that could affect the learning environment, like student behavior and students' SEL needs.

- Retention in PreAP/AP courses.
- A lack of universal PK to prepare students for the school setting early.
- Student transfers to surrounding districts.
- Social/peer support for at-promise students.
- Supports and structures that equitably address classroom makeup for subpopulations including: GT, Sped, ESL, and behavior.

The small council group was dedicated to ensuring students' curriculum was rigorous, relevant, accelerated, and enriching. Recommendations included:

1. Ensure PreAP/AP teachers follow Springboard and College Board.
2. Measure recruitment and retention of students in PreAP/AP courses by race and SES to move towards parity and create a specific plan for additional support before exiting a student from PreAP/AP courses. Consider requiring and adding funding support for PreAP/AP students to take the AP exam.
3. Refine academic advising processes that eliminate entry barriers and grow AP and Dual Credit programming that serves all student subpopulations equitably. This process should include opportunities to broaden the understanding of the characteristics of gifted students regardless of their ability levels or economic background.
4. Create a mentorship pipeline between the upper and lower grades to encourage diverse student interest in academic and social programming.
5. Continue night school and add transportation to support students who may not have access to transportation.
6. Provide an ongoing strategic onboarding process for alternatively certified teachers and offer professional development training opportunities that would provide tools to address student behaviors that disrupt the learning environment.

## TEACHER SUPPORT

Professional development for teachers is an important part of supporting teacher growth before they enter the classroom and during their tenure as staff. Participants identified a need for additional professional training in various areas to support the academic and social-emotional needs of students in Waco ISD. PD should be comprehensive and chosen to meet the needs of individual staff members.

The small group council identified specific growth opportunities. Discipline and professional training were addressed in the focus groups and through the data. While behavior and discipline issues are not unique to schools and classrooms, the participants believe that these factors hinder students' academic pursuits. The following areas were identified as opportunities for growth:

- Disruptive student behaviors.
- Recruiting and retaining new teaching staff

Recommendations included consideration of the following:

1. Increase opportunities for targeted professional training in trauma-informed practices, student dysregulation, and best practices for disruptive students.
2. Invest in ensuring the safety of staff and students on the various campuses to see a decrease in referrals annually by 5–10%.

3. Use funding to create a mentor program with greater support for new-to profession teachers that ties a stipend to specific objectives met.

## FAMILY AND COMMUNITY INVOLVEMENT

During quantitative and qualitative investigations, the theme of increased community involvement throughout the district, especially in underserved communities, appeared frequently. Many identified diversity and community support as one of the major strengths of the district. For instance, one participant stated, "I think it's a tremendous strength. So we have a very supportive community, supportive of our school, supportive of our students and families from, at least from the work that we do. And, diversity is a, it's a plus." However, more intentional practices can further increase support and involvement to build upon that identified strength.

After looking at the data, the members of the small group council concurred that family and community involvement is an opportunity for district growth. Specifically, they identified parents and families feeling either not involved in the education process or feeling intimidated by the school or district. Some barriers identified by the focus groups that speak to the need to focus on parental and community involvement are:

- Language barriers.
- Passive relationship-building.
- Time constraints.
- Limited community presence.

The small group council members identified the same perspectives among the community. The following recommendations were made:

1. Intentionally reach out to and be a presence in underserved community areas. Plan to increase community involvement in low-participating communities by 10% each year based on local school activities or district committees.
2. Identify or utilize potential funding sources to communicate district opportunities and provide resources that encourage and support involvement in local school activities or district committees.
3. Create incentives or reduce barriers for at-risk students to participate in school-related activities.
4. Increase student participation in extracurriculars or school-based clubs/groups by 8% in each high school by the 2024/2025 school year.
5. Begin tracking participation in school-related activities to measure increase short- and long-term involvement.
6. Seek support from community organizations (e.g., churches) in underserved communities to offer programming and resources for families.

## IDENTITY MYTHS

The level of devotion that each member of the CORE Assessment group has for the students, families, staff, and alumni of Waco ISD is impressive. However, there are stigmas about certain Waco schools and areas that need to be eradicated. The small groups and the focus groups identified some barriers to appreciating the unique strengths of each campus. The focus groups identified leadership as a strength of the district. This strength can be levied into a succinct message for the community about how leaders not only support staff, but they want to become an exemplary district for supporting all students and excelling those students with greater needs.

The councils identified a few areas that need specific attention to improve perceptions of the district and all its campuses:

- WISD district and campus messaging.
- Stakeholder relationships.
- Parental exposure to middle and high school campus programs before student's transition.

The focus groups also articulated the barriers, stigmas, and perceived stereotypes about certain campuses in the district. Recommendations include intentionally sharing the strengths of each of the campuses and feeder patterns within the district and to build a sense of pride and connection among district alumni. Specifically:

1. Highlight district data and celebrate areas where WISD met or outperformed regional and state comparison districts.
2. Build connection and alumni pride through publicized district and/or community events, where alumni continue to engage and inspire current students.
3. Create flagship enrichment opportunities and partnerships in under-resourced areas to recruit, retain, and accelerate learning for all.
4. Implement upper- to lower-graders mentoring program, which can set early expectations and motivation for graduation, college, career, and military opportunities.

### CULTURAL REPRESENTATIONS

It will be important to ensure that each student and family can see themselves and connect to the curriculum, as well as build authentic relationships with staff that understand the culture of the community.

Participants shared a need for greater consistency of cultural representation within the district. Specifically, participants addressed how students see themselves represented in the curriculum and programming. The following areas for growth were identified:

1. Intentional focus on representing and celebrating the diversity in the district.
2. Staff diversity.
3. Lack of authentic cultural and historical references in the curriculum.

While diversity has been lauded as a strength in the district, participants still recommend that diversity is at the forefront of district decisions. The importance of mirroring that diversity with staff and through programming will help build a greater community throughout the district. Recommendations include:

1. Leverage recruiting efforts to maintain a diverse teaching population.
2. Highlight and represent Black and Hispanic/Latinx populations through programming and celebrations within campuses and the district.
3. Recruit from Historically Black Colleges and Universities (HBCU).
4. Ongoing cultural proficiency and inclusiveness training for all employees that promotes high expectations for all students.
5. Offer the African American studies course to first-year students.

## SOCIAL EMOTIONAL LEARNING/TRAUMA-INFORMED CARE

Following the pandemic, there has been an increased need for social-emotional and supportive care for students, faculty, and staff. The disruption to the learning environment and the turmoil of quarantine created a need for leaders to be more attuned to the relationships in the community. SEL and relationships were mentioned as a strength in the district that can yield student benefits in the community and academically.

The small group council believes that building relationships and supporting social emotional learning can be done through academic and extracurricular activities. This growth opportunity will support other facets of the school and community, such as behavior and academics. Recommendations included:

- Mental health support for staff.
- Social and emotional instruction for students.
- Student self-regulation skills.
- Academic activities that are fun and engaging.
- Opportunities for engagement in extracurricular activities.
- Strong peer-to-peer and peer-to-trusted adult relationships as a protective factor.
- Low awareness of the impact of stressors, traumatic experiences, and increased responsibilities may have on the ability of students to have fun, connect, and engage in school.
- Understanding and addressing the impact of COVID isolation on the social development of secondary students.

Recommendations include:

1. Intentionally share how Waco ISD provides a continuum of support and ongoing mental health and emotional support for all district staff, students, and families.
2. Track and measure students entering tiered levels of support and how often they move tiers or exit services.
3. Provide training for each teacher on trauma-informed practices to increase competence—track, and measure office referrals to support additional training for teachers.
4. Highlight access to Care Solace during new orientation for middle and high school students and their families. Ensure that counselors utilize the referral process to Care Solace to facilitate student access to a trusted adult and support.
5. Offer and track middle school clubs and organizations to support a sense of belonging and resiliency for students.
6. Make available a list of resources to campus representatives (i.e. counselors) that can be shared quickly with families (i.e., If \_\_\_\_, then we have \_\_\_\_ resources, etc).

### **Teacher Survey 2022-2023**

**The teacher survey given in the fall of 2022 included questions related to various social emotional factors in their work. These included questions on how they felt about colleagues, school climate and school leaders. This data illustrates just one perspective as it does not include all staff and cannot be compared to any student or parent data. It also does not include Transformation Waco teachers.**

**This survey reflected an increase in each area. Other points to include:**

- 96% of teachers shared that their work matters to them with 61% of this group noting that it matters a "tremendous amount" and 94% said their work is highly meaningful
- 75% said they frequently or almost always felt safe at work
- 56% felt their colleagues showed quite a bit of respect and 19% felt they got a tremendous amount of respect
- 53% overall felt they mattered to others at their school with 70% feeling they are engaged at work and 79% noted they were excited at work
- 59% felt a strong sense of belonging at their campus
- 61% noted that the tone set by school leaders was quite positive or even extremely positive, this was an increase of 6% from the prior year

When it comes to questions about interacting with students,

- 80% felt it would be easy to interact with students of varying backgrounds in their classroom with 75% also noting that they would be comfortable intervening when students from different backgrounds struggled to get along
- 66% noted that when the issue of diversity arises in class they could easily think of strategies to address the situation
- only 39% believed that students are enthusiastic about being in school with another 35% noting they believe students are somewhat enthusiastic; however, 55% felt confident they could engage a student who was typically not motivated
- 52% felt the relationships between teachers and students were quite respectful with another 29% believing they were somewhat respectful
- 79% felt they could support student growth and development including areas of social awareness, self-management, and self-efficacy

# Goals





**Goal 1:** Engage families and the community to support student achievement and enhance district goals.

**Performance Objective 1:** Engage with parents, community members, staff, students, and business partners and recognize those who support and/or exemplify the district's mission.

**Evaluation Data Sources:** Records of Engagement Activities, Community Newsletters, Social Media Engagement, Board Special Recognitions

Strategy 1 Details	Formative Reviews		
<b>Strategy 1:</b> Use the results from the Spring 2023 communications survey to create and implement a district communications plan. <b>Strategy's Expected Result/Impact:</b> Improved communications with all key stakeholders <b>Staff Responsible for Monitoring:</b> Exec. Director of Communications	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<b>Strategy 2:</b> Continue to focus on improving the district's brand including the development of a new logo for Waco ISD. <b>Strategy's Expected Result/Impact:</b> Pride in the district's logo and brand <b>Staff Responsible for Monitoring:</b> Chief of Staff, Exec. Director of Communications	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<b>Strategy 3:</b> Communicate the district's key priorities for 2023-2024 including but not limited to the ongoing focus on literacy, social-emotional learning, school safety, and employee engagement and development. <b>Strategy's Expected Result/Impact:</b> Increased knowledge of district focus areas <b>Staff Responsible for Monitoring:</b> Exec. Director of Communications	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<b>Strategy 4:</b> Engage students, parents, community organizations, and governmental entities in the implementation of the long-range facilities plan. Host a dedication event for the new G. W. Carver campus, Topping Out celebration for Waco HS and Tennyson MS and groundbreaking events for Kendrick and South Waco elementary schools. <b>Strategy's Expected Result/Impact:</b> Parent and community involvement in the development and celebration of bond project progress <b>Staff Responsible for Monitoring:</b> Supt., Exec. Director of Communications	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Appoint a Waco High School Historical Advisory Committee to provide input for special features to be included in the new campus to honor the history and legacy of Richfield High School, Jefferson Moore High School, and Waco High School.</p> <p><b>Strategy's Expected Result/Impact:</b> Special features inside the school identify the rich history and legacy of the school</p> <p><b>Staff Responsible for Monitoring:</b> Supt., Chief of Staff</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 6 Details	Formative Reviews		
<p><b>Strategy 6:</b> Create and distribute a monthly all staff newsletter from the Superintendent's Office.</p> <p><b>Strategy's Expected Result/Impact:</b> Newsletter provides timely information to staff</p> <p><b>Staff Responsible for Monitoring:</b> Supt., Chief of Staff, Exec. Director of Communications</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 7 Details	Formative Reviews		
<p><b>Strategy 7:</b> Continue to incorporate student voice at the campus and district level through the Superintendent's Student Advisory Committee.</p> <p><b>Strategy's Expected Result/Impact:</b> Provides students a chance to share their experiences and voice their opinions, staff gain insights into best ways to engage with students</p> <p><b>Staff Responsible for Monitoring:</b> Chief of Staff</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 8 Details	Formative Reviews		
<p><b>Strategy 8:</b> Continue monthly newsletter to share district information with key community members and post on district website for parents and others to view.</p> <p><b>Strategy's Expected Result/Impact:</b> Newsletter provides timely information to parents and community stakeholders</p> <p><b>Staff Responsible for Monitoring:</b> Supt., Exec. Director Communications</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 9 Details	Formative Reviews		
<p><b>Strategy 9:</b> Continue to produce the "Classroom Close-Ups" video series to highlight instruction and campus/district programs with an emphasis on leading from the heart and leading for results.</p> <p><b>Strategy's Expected Result/Impact:</b> Quality classroom instruction and district programs promoted, increased parent confidence</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director Communications</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 10 Details	Formative Reviews		
<p><b>Strategy 10:</b> Celebrate students, staff, and community partners through special recognitions at monthly board meetings.</p> <p><b>Strategy's Expected Result/Impact:</b> School partners and key stakeholders recognized</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Communications</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>





Strategy 11 Details	Formative Reviews		
<b>Strategy 11:</b> Actively participate in the City of Waco's visioning process for downtown planning. <b>Strategy's Expected Result/Impact:</b> Input and alignment of district downtown facilities with the City of Waco's vision for the future of the downtown area <b>Staff Responsible for Monitoring:</b> Supt.	Formative		
	Jan	May	May
<div style="display: flex; justify-content: space-around; align-items: center;"> <span> No Progress</span> <span> Accomplished</span> <span> Continue/Modify</span> <span> Discontinue</span> </div>			

**Goal 1:** Engage families and the community to support student achievement and enhance district goals.

**Performance Objective 2:** Increase opportunities for family engagement.

**Evaluation Data Sources:** Sign-In Sheets, Parent Involvement Survey, Data





Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Design and implement parental involvement activities to support increased reading achievement. Three district level parent literacy nights will be hosted by district Reading Recovery teachers (June 2023, September 2023, and February 2024).</p> <p><b>Strategy's Expected Result/Impact:</b> Increased knowledge and skills for parents in supporting literacy development at home, increased student achievement in reading</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction</p> <p><b>Funding Sources:</b> Books, literacy bags - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Expand district-wide family engagement activities to cultivate authentic relationships and produce positive academic, social and emotional results for students.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased family engagement in support of students and making connections between families and community resources</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support, Exec. Director of Student Support, Director of Intervention/State and Federal Programs</p> <p><b>Funding Sources:</b> Family Fest - Title I Parent Involvement, PREK round up - Title 1</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Explore and design a district family engagement model and focus on having more formalized parent engagement groups at campuses.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased parent engagement opportunities at campuses</p> <p><b>Staff Responsible for Monitoring:</b> Deputy Supt.</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Continue the Parents as Teachers Program to support parental involvement in the development of early childhood students.</p> <p><b>Strategy's Expected Result/Impact:</b> Higher achievement for students</p> <p><b>Staff Responsible for Monitoring:</b> Director of Early Childhood Education</p> <p><b>Funding Sources:</b> Parents as Educators - Title I Parent Involvement</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Provide a Saturday Diversion Educational Program for parents and students as a part of the district's comprehensive plan for supporting students. Parents and students will learn about the importance of attendance and ways to self-regulate behaviors.</p> <p><b>Strategy's Expected Result/Impact:</b> Lower disciplinary referral rates and dropout rates long with increased attendance rates</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support, Exec. Director of Student Services</p> <p><b>Funding Sources:</b> Saturday Program - American Rescue Plan (ARP/ESSER III)</p>	Formative		
	Jan	May	May
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  No Progress         </div> <div style="text-align: center;">  Accomplished         </div> <div style="text-align: center;">  Continue/Modify         </div> <div style="text-align: center;">  Discontinue         </div> </div>			

**Goal 2:** Recruit, develop, and retain highly qualified teachers and staff to increase the percentage of teachers with more than five years of experience and decrease the turnover rate.

**Performance Objective 1:** Analyze human resources systems and processes to support teacher recruitment, induction, and retention.

**Evaluation Data Sources:** Teacher Turnover Rate, Empathy Exit Interviews, Staff Satisfaction Surveys, Onboarding Survey

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Use data from the annual Panorama Climate Survey, stay interviews, and empathy exit interviews to identify strategies to support a positive working environment for employees.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved teacher retention, increased percent of employees reporting a positive work environment on the district's annual employee satisfaction survey</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Human Resources</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Work closely with the Technology Department and vendors to resolve outstanding technical issues regarding digital process systems within the Human Resources department.</p> <p><b>Strategy's Expected Result/Impact:</b> Efficient and accurate processing of human resources information</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Human Resources</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Continue an annual compensation study using the Texas Association of School Board (TASB) to ensure competitive salaries for all district positions.</p> <p><b>Strategy's Expected Result/Impact:</b> Salaries stay within market range, increased retention rates</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Human Resources</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Strengthen current hiring processes to onboard more high quality candidates through efficient pre-screening/screening structures, interviewing protocols and final review checks.</p> <p><b>Strategy's Expected Result/Impact:</b> Hiring processes ensure that hiring managers can efficiently screen viable candidates, use rigorous interviewing tools, and recommend quality candidates in a timely manner</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Human Resources</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			





**Goal 2:** Recruit, develop, and retain highly qualified teachers and staff to increase the percentage of teachers with more than five years of experience and decrease the turnover rate.

**Performance Objective 2:** Implement innovative solutions and strategies for teacher recruitment, induction and retention.

**Evaluation Data Sources:** Teacher Turnover Rate, Number of Teachers Recruited, Teacher Satisfaction Surveys

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Implement a Para2Teacher bachelor's degree pathway program beginning in the spring of 2024. Participants will begin college coursework in the fall of 2024.</p> <p><b>Strategy's Expected Result/Impact:</b> Develop pipeline of paraprofessionals to become classroom teachers</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Human Resources, Exec. Director of Human Resources, Director of Opportunity Culture</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Launch Cohort 2 Opportunity Culture schools (Cesar Chavez Middle, Lake Air Montessori Magnet, Mountainview Elementary, South Waco Elementary, West Avenue Elementary) while continuing to refine the model in Cohort 1 campuses (Crestview Elementary, Dean Highland Elementary, Kendrick Elementary, Parkdale Elementary, Provident Heights Elementary) who began participating in the 2021-2022 school year. Student residents working in these classrooms will be invited to teach for the district.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student achievement, increased number of certified teachers, improved teacher leadership pathways</p> <p><b>Staff Responsible for Monitoring:</b> Deputy Supt., Director of Opportunity Culture, Exec. Director of Professional Development</p> <p><b>Funding Sources:</b> Teacher residents/Reach Associate/ MCL stipends - Title 1, PDS mentors - Title II, Part A (TPTR)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Continue to implement and refine the Teacher Incentive Allotment (TIA) to support the effective implementation of a strategic compensation system.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased teacher retention, improved student outcomes</p> <p><b>Staff Responsible for Monitoring:</b> Deputy Supt., Director of Strategic Evaluation Systems</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Identify and implement strategies for developing ongoing relationships with high school students in the Future Educators Academy, nurturing and mentoring them from an associate degree upon graduation to the completion of a bachelor's degree.</p> <p><b>Strategy's Expected Result/Impact:</b> Students in Future Educators Academy return to teach for Waco ISD upon graduation from college (first graduates expected to teach in the fall of 2028)</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Human Resources, Director of Opportunity Culture, Director of CTE</p> <p><b>Funding Sources:</b> Dean of Ptech, Ptech Teacher Salaries - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Continue the use of ESSER funds to implement a multi-year retention bonus plan and provide targeted sign-on and retention bonuses for teachers and other hard to fill positions.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved teacher retention rates, decreased number of emergency certified teachers, reduction in turnover for hard to fill positions</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Human Resources</p> <p><b>Funding Sources:</b> Retention incentive funding - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 6 Details	Formative Reviews		
<p><b>Strategy 6:</b> Identify remaining ESSER III funds nearing the closeout of grant funding and make recommendations for August 2024 bonuses to support increased retention for the 2024-2025 school year.</p> <p><b>Strategy's Expected Result/Impact:</b> Decreased turnover rates in targeted positions for 2024-2025</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Human Resources</p> <p><b>Funding Sources:</b> Retention incentive funding - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 7 Details	Formative Reviews		
<p><b>Strategy 7:</b> Continue the New Teacher Induction Model to provide meaningful and differentiated support for new teachers.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved teacher induction processes, increased teacher retention</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Professional Development, Coordinator of New Teacher Mentoring Program, Asst. Supt. of Human Resources</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 8 Details	Formative Reviews		
<p><b>Strategy 8:</b> Continue to partner with Ascension Providence to provide a Licensed Professional Counselor (LPC) to address staff mental health and well-being.</p> <p><b>Strategy's Expected Result/Impact:</b> Decreased staff absenteeism, increased staff morale as reported on surveys</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support, Exec. Director of Student Support</p> <p><b>Funding Sources:</b> Salary for LPC - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 9 Details	Formative Reviews		
<p><b>Strategy 9:</b> Refine digital recruitment strategies including the use of social media and the district's website.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved recruitment of hard-to-fill positions including classroom teachers, bilingual educators, substitutes, and support staff</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Human Resources, Exec. Director of Human Resources, Director of Human Resources</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 2:** Recruit, develop, and retain highly qualified teachers and staff to increase the percentage of teachers with more than five years of experience and decrease the turnover rate.

**Performance Objective 3:** Develop and implement a professional development plan to support increased student achievement.

**Evaluation Data Sources:** Professional Development Plan, Sign-In Sheets, Session Survey Results, Increased Knowledge and Skills of Effective Instructional Strategies, T-TESS Results

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Expand the district's focus of elementary literacy professional development to deepen teacher knowledge and skills in effective writing instruction.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved growth measures on progress monitoring data and STAAR Results</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development</p> <p><b>Funding Sources:</b> Warren Instructional Network training - Title II, Part A (TPTR), Warren Instruction Network, Reading Plus PD, - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Train new leaders on Data-Driven Instruction (DDI) and provide ongoing support to ensure district curriculum coordinators, instructional specialists, and campus leaders have the knowledge and skills to implement effective DDI.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved lesson planning for Tier 1 instruction, reteach plans, and intervention</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development</p> <p><b>Funding Sources:</b> Instructional Coaches and Instructional Specialist - Title 1, Region 12 TEXguide - Title 1, Iready - Title 1</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Continue to train on observation and feedback coaching to onboard new leaders to increase the effectiveness of observation and feedback and focus on strengthening knowledge and skills of all principals, assistant principals, instructional specialists, and district leaders.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved teaching proficiency and student outcomes</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development</p> <p><b>Funding Sources:</b> District Leadership Capacity Building Training - Title II, Part A (TPTR)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Require campus leaders to train and coach staff on lesson planning and other instructional processes and protocols to meet the needs of new and existing staff.</p> <p><b>Strategy's Expected Result/Impact:</b> Aligned lesson plans that include effective objectives, aligned formative checks, and reteach plans to support consistent instruction and improved student growth and achievement</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Continue to provide job-embedded, practice-based professional development based on campus needs to support district initiatives. Use the district's coaching framework to train campus leaders on how to identify ways to support teachers through high leverage action steps.</p> <p><b>Strategy's Expected Result/Impact:</b> Real-time learning and application of new skills to support the implementation of high-leverage action steps to support teacher growth and increased student achievement</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Professional Development</p> <p><b>Funding Sources:</b> Curriculum Coop with Region 12 - Title II, Part A (TPTR), Discovery Education - Title II, Part A (TPTR)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 6 Details	Formative Reviews		
<p><b>Strategy 6:</b> Use feedback data to develop a 2024 summer professional development plan. The plan will provide differentiated opportunities for teachers based on experience level and need.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased teacher knowledge and skills of instructional practices to improve student engagement</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development</p> <p><b>Funding Sources:</b> Professional Development Coordinator - Title II, Part A (TPTR), ASCD - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 7 Details	Formative Reviews		
<p><b>Strategy 7:</b> Ensure 100% of K-3 teachers and principals complete Reading Academies, as outlined in HB 3 by the 86th Texas Legislature.</p> <p><b>Strategy's Expected Result/Impact:</b> Teachers and principals have increased knowledge and skills in the science of reading instruction</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Elementary Education</p> <p><b>Funding Sources:</b> Registration cost of Reading Academy - State Compensatory Education</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 8 Details	Formative Reviews		
<p><b>Strategy 8:</b> Provide training to academic intervention teachers to support the implementation of small group instruction in literacy and mathematics.</p> <p><b>Strategy's Expected Result/Impact:</b> Systemized interventions implemented for small group remediation</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction</p> <p><b>Funding Sources:</b> LLI, Reading Plus, - American Rescue Plan (ARP/ESSER III), Do The Math - State Compensatory Education, Iready - Title 1</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 9 Details	Formative Reviews		
<p><b>Strategy 9:</b> Ensure professional development and support is provided for campus paraprofessionals to improve effectiveness of academic and behavioral strategies.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased knowledge and skills of campus paraprofessionals, resulting in system effectiveness</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Professional Development, Asst. Supt. of Student Services and Support</p> <p><b>Funding Sources:</b> Emergent Tree - Title IV</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 10 Details	Formative Reviews		
<p><b>Strategy 10:</b> Monitor and offer feedback of the use of web-based, flexible professional development offerings to respond to problems of practice. Teachers will have access to ASCD training materials.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased use of flexible, real-time professional development</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Dir. of Curriculum and Professional Development, Executive Dir. of Secondary Curriculum and Instruction</p> <p><b>Funding Sources:</b> ASCD - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 11 Details	Formative Reviews		
<p><b>Strategy 11:</b> Support campuses in developing differentiated professional development plans for 2024 using vetted professional development resources and based on student achievement data and teacher evaluation data.</p> <p><b>Strategy's Expected Result/Impact:</b> Differentiated professional development for teachers based on identified needs that results in increased teacher capacity and student achievement</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Dir. of Curriculum and Professional Development, Exec. Dir. of Secondary Curriculum and Instruction</p> <p><b>Funding Sources:</b> Curriculum Coop Region 12 - Title II, Part A (TPTR), Discovery Education - Title II, Part A (TPTR), ASCD - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>



No Progress



Accomplished



Continue/Modify







Discontinue

**Goal 3:** Ensure a guaranteed and viable curriculum, customized to the needs of the district.

**Performance Objective 1:** Continue to refine the district's scope and sequence curriculum documents.





**Evaluation Data Sources:** Curriculum Documents for Core Content Areas, STAAR Data, SAT/ACT Results

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Implement refined scope and sequence curriculum documents and unit assessments for world languages, government, economics, and college prep math. Implement newly written IPC and grade 6 science curriculum and develop Pre-AP grade 7 math curriculum. The IPC and grade 6 science curriculum will include Defined Learning project-based learning resources and lessons.</p> <p><b>Strategy's Expected Result/Impact:</b> New documents implemented in classrooms</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education, Core Content Coordinators</p> <p><b>Funding Sources:</b> TEKS resource system, Lead4forward Guide Resources - Title II, Part A (TPTR)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Implement the revised phonics and word study component of the Reading Language Arts scope and sequence curriculum documents to align with the state curriculum. The curriculum incorporate explicit phonics instruction from HMH adopted materials.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student ability for on-grade level literacy proficiency</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Elementary Education, Core Content Coordinators</p> <p><b>Funding Sources:</b> Extra duty pay - Title 1</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Continue convening groups of content and grade level teachers to provide feedback and revise curriculum documents that include clear guidance for planning resources with targeted formative assessments.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved mastery teaching and student learning across schools and increased depth of core content knowledge for curriculum writers</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Directors of Elementary and Secondary Education, Core Content Coordinators</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 3:** Ensure a guaranteed and viable curriculum, customized to the needs of the district.

**Performance Objective 2:** Evaluate and revise the district's assessment program to measure the effectiveness of curriculum and instructional delivery.

**Evaluation Data Sources:** Local Assessment Data, STAAR Assessments





Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Continue to develop and refine common unit assessments for use in the DDI process to ensure equity across campuses and to evaluate learning and guide instructional adjustments.</p> <p><b>Strategy's Expected Result/Impact:</b> Schedule of common assessments to include the number of assessments, timeline for administration of each assessment, and leverage areas for each assessment</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Directors of Elementary and Secondary Education</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Continue to use TEA interim assessments to identify areas of instructional focus and interventions at each school.</p> <p><b>Strategy's Expected Result/Impact:</b> Greater alignment to the state testing system and achievement predictability</p> <p><b>Staff Responsible for Monitoring:</b> Director of Accountability Systems and Data Analysis</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Continue to provide support to campus leadership teams to use data to determine instructional adjustments and targeted interventions for students in need of additional support.</p> <p><b>Strategy's Expected Result/Impact:</b> Student achievement data drives campus and/or student specific interventions</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Director of Accountability Systems and Data Analysis</p> <p><b>Funding Sources:</b> Renaissance - State Compensatory Education, Eduphoria, ead4ward Accountability Connect - Title II, Part A (TPTR)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Refine beginning of year and end of year assessments for all content areas and grade levels.</p> <p><b>Strategy's Expected Result/Impact:</b> Assessments effectively project student achievement and growth</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Directors of Elementary and Secondary Education</p> <p><b>Funding Sources:</b> Renaissance - State Compensatory Education, Reading Plus - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 3:** Ensure a guaranteed and viable curriculum, customized to the needs of the district.

**Performance Objective 3:** Review, refine, and clearly communicate the district's literacy program including resources, data collection techniques, and interventions.

**Evaluation Data Sources:** Student Achievement on Literacy Assessments, STAAR Achievement Data, Board-Adopted Plans and Goals for Early Childhood Literacy and Math Proficiency

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Use Lead Teachers to provide district-wide Reading Recovery programming including professional learning on guided reading to improve literacy for at-risk students. Continue to use one SIT teacher per campus as Reading Recovery teacher leaders to provide support for intensive reading intervention.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased teacher capacity to support intensive reading instruction for struggling students, increased student achievement</p> <p><b>Staff Responsible for Monitoring:</b> Director of Interventions/State and Federal Programs</p> <p><b>Funding Sources:</b> TWU tuition/materials/RR teacher salaries - American Rescue Plan (ARP/ESSER III), RR Teachers salaries - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Implement year four of the district's elementary professional development plan for literacy and make adjustments based on determined gaps. Year three will focus on building knowledge of the Shared Reading resource, writer's workshop, and application of strategies to support word study and transition to HMH Phonics.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased teacher knowledge and skills of effective literacy instruction</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director Curriculum and Professional Development, Exec. Director Elementary Education</p> <p><b>Funding Sources:</b> Warren Instructional Network - Title II, Part A (TPTR)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Implement year three of the professional development plan for effective literacy instruction for middle school teachers. Year three will focus on critical reading strategies and response to reading through writing. Teachers will use these strategies for small group instruction time during the reading block.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased teacher knowledge and skills of effective literacy instruction for middle school RLA</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development</p> <p><b>Funding Sources:</b> Warren Instruction Network, Reading materials - Title II, Part A (TPTR)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Continue implementation of the professional development plan for effective literacy instruction for high school using Warren Instructional Network, ESC 12, and Dr. Kylee Beers for implementation support. Continue year two focus on critical reading strategies and response to reading through writing.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased teacher knowledge and skills of effective literacy instruction for high school Reading Language Arts</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development</p> <p><b>Funding Sources:</b> Warren Instructional Network PD, Kylee Beers PD - Title II, Part A (TPTR)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Use established model literacy cohort classrooms at every K-12 campus as a lab site for teaching literacy strategies for teachers, followed by coaching for effective implementation of learning.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased teacher and knowledge and skills of effective literacy instruction</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director Elementary Education, Exec. Director Secondary Education</p> <p><b>Funding Sources:</b> Professional development contracted services - Title 1</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 6 Details	Formative Reviews		
<p><b>Strategy 6:</b> Provide training to secondary teachers on the effective use of ESSER funded classroom libraries to support learning and reading fluency.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student achievement</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 3:** Ensure a guaranteed and viable curriculum, customized to the needs of the district.





**Performance Objective 4:** Develop, implement, and clearly communicate the district's program for math instruction.

**High Priority**

**HB3 Goal**

**Evaluation Data Sources:** Professional development plans, improved Tier 1 planning and instruction for math, math assessment data





Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Collaborate with ESC Region 12 and math consultants to train teachers to implement a comprehensive framework for math workshop focused on building mathematical fluency and daily problem solving across all elementary campuses.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased proficiency in lesson planning for tier 1 instruction, response to data, and increased student performance in math</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development, and Exec. Director of Elementary Education</p> <p><b>Funding Sources:</b> Cost of PD for math training - American Rescue Plan (ARP/ESSER III), Cost of PD for math training - Title II, Part A (TPTR)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Develop and implement elementary math cohorts for grades K-2 and 3-5 to serve as model classrooms to build capacity for math instruction.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased teacher knowledge and skills in math instruction and student achievement in math</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development, Exec. Director of Elementary Education</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Provide campus level job-embedded math professional development through ESC Region 12 to support campus teachers with planning, data analysis and professional learning.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased teacher knowledge and skills in math instruction and student achievement in math</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development, Exec. Director of Elementary Education</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Develop and implement a professional development plan for secondary math teachers focused on teacher clarity, ensuring that they have a deep understanding of state standards.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased proficiency in lesson planning for tier 1 instruction, response to data, and increased student performance in math</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development, Exec. Director of Secondary Education</p>	Formative		
	Jan	May	May
<div style="display: flex; justify-content: space-around; align-items: center;"> <span> No Progress</span> <span> Accomplished</span> <span> Continue/Modify</span> <span> Discontinue</span> </div>			

**Goal 3:** Ensure a guaranteed and viable curriculum, customized to the needs of the district.

**Performance Objective 5:** Continue to refine district and campus processes for course selections, scheduling, and sequencing to ensure fidelity with attendance accounting, consistency, and clear communication to students and families.





**Evaluation Data Sources:** Audit of Transcripts, PEIMS Attendance Accounting Data, Master Schedules

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Partner with MCC to monitor student performance and attendance in dual credit courses.  <b>Strategy's Expected Result/Impact:</b> Increased attendance, passing rates, and retention of students in dual credit courses at MCC  <b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Continue training for secondary counselors, including academic advising, structure and choices for advanced academic courses, transcript process for incoming students, and separation of class rank calculations from academic advising.  <b>Strategy's Expected Result/Impact:</b> Accurate transcripts and four-year graduation plans resulting in students graduating with expected cohort  <b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education, Director of Accountability Systems and Data Analysis</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Continue to refine and revise course planning guide, ensuring alignment to EIC (LOCAL) and implement Cardonex to build a more efficient master schedule.  <b>Strategy's Expected Result/Impact:</b> Student-driven, efficient, and accurate master schedules  <b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 3:** Ensure a guaranteed and viable curriculum, customized to the needs of the district.

**Performance Objective 6:** Identify and implement strategies to strengthen the World Languages program and curriculum.

**Evaluation Data Sources:** Course Alignment in Secondary Planning Guide, Student Achievement Data





Strategy 1 Details	Formative Reviews		
<b>Strategy 1:</b> Implement refined scope and sequence curriculum documents and unit assessments for World Languages I and II, and begin building curriculum resources for level III. <b>Strategy's Expected Result/Impact:</b> Increased program consistency, student achievement <b>Staff Responsible for Monitoring:</b> Exec. Director of Secondary Curriculum	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<b>Strategy 2:</b> Implement a framework to identify middle school students for appropriate placement in high school World Languages courses, providing opportunities for Spanish speakers to advance. <b>Strategy's Expected Result/Impact:</b> Properly placed students in World Language courses to increase the number of students taking advanced-level courses and overall student success <b>Staff Responsible for Monitoring:</b> Exec. Director of Secondary Curriculum	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<b>Strategy 3:</b> Continue to refine and implement a professional development plan for World Languages teachers. <b>Strategy's Expected Result/Impact:</b> Increased teacher capacity and student achievement in World Languages courses <b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 3:** Ensure a guaranteed and viable curriculum, customized to the needs of the district.

**Performance Objective 7:** Coordinate district instructional improvement efforts with Transformation Zone campuses.

**Evaluation Data Sources:** STAAR Achievement Data, Grant Evaluation

Strategy 1 Details	Formative Reviews		
<b>Strategy 1:</b> Determine next steps for Transformation Waco campuses with the expiration of the in-district charter contract in June 2024. <b>Strategy's Expected Result/Impact:</b> Decisions made and communicated regarding the operation of campuses for 2024-2025` <b>Staff Responsible for Monitoring:</b> Board of Trustees, Supt., Deputy Supt.	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<b>Strategy 2:</b> Conduct site visits at Transformation Zone schools as required as an authorizer of an in-district charter. <b>Strategy's Expected Result/Impact:</b> Gauge the overall progress schools are making towards performance goals <b>Staff Responsible for Monitoring:</b> Deputy Supt.	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<b>Strategy 3:</b> Monitor the progress towards Transformation Zone's established performance targets. <b>Strategy's Expected Result/Impact:</b> Gauge the overall progress schools are making towards performance targets <b>Staff Responsible for Monitoring:</b> Deputy Supt.	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<b>Strategy 4:</b> Conduct regular meetings between Transformation Zone and district leadership. <b>Strategy's Expected Result/Impact:</b> Improved communication and strengthen partnership <b>Staff Responsible for Monitoring:</b> CEO of Transformation Zone, Deputy Supt.	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 5 Details	Formative Reviews		
<b>Strategy 5:</b> Conduct required annual evaluation of the Transformation Zone. <b>Strategy's Expected Result/Impact:</b> Evaluation meets requirements of contract <b>Staff Responsible for Monitoring:</b> Board of Trustees, Supt., Deputy Supt.	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>





Strategy 6 Details	Formative Reviews		
<p><b>Strategy 6:</b> Include Transformation Zone leaders in principal meetings, assistant principal meetings, and all professional development sessions.</p> <p><b>Strategy's Expected Result/Impact:</b> Instructional efforts aligned to extent possible to ensure equity of instruction to address student mobility</p> <p><b>Staff Responsible for Monitoring:</b> Supt., CEO of Transformation Zone, Deputy Supt.</p>	Formative		
	Jan	May	May
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  No Progress         </div> <div style="text-align: center;">  Accomplished         </div> <div style="text-align: center;">  Continue/Modify         </div> <div style="text-align: center;">  Discontinue         </div> </div>			

**Goal 4:** Develop and implement plans, systems and processes to support improved campus A-F ratings, focusing on removing labels (Targeted Support, Comprehensive) and ensuring academic success for students.

**Performance Objective 1:** Meet TEA requirements for schools labeled as Additional Targeted Improvement and/or Comprehensive.

**Evaluation Data Sources:** A-F Ratings, Federal Accountability Indicators, Targeted Improvement Plans Submitted to TEA, Record of School Improvement Grant Activities

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Attend Effective School Training prior to developing intervention plans for 2023-2024.  <b>Strategy's Expected Result/Impact:</b> Quality Targeted Improvement Plans submitted to TEA and the data required to measure the strategy  <b>Staff Responsible for Monitoring:</b> Exec. Director of Elementary Education</p>	Formative		
	Jan	May	May
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Participate in required activities with ESC Region 12, designated capacity builders, and TEA to document work as prioritized in Targeted Improvement Plans.  <b>Strategy's Expected Result/Impact:</b> Plans implemented with fidelity, documentation in place to support Effective Schools Framework  <b>Staff Responsible for Monitoring:</b> Exec. Director of Elementary Education</p>	Formative		
	Jan	May	May
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Plan, submit, and implement required School Improvement Grant activities.  <b>Strategy's Expected Result/Impact:</b> Grant activities increase student achievement  <b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development, Exec. Director of Elementary and Secondary Education</p>	Formative		
	Jan	May	May
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Provide continued training for Data Driven Instruction (DDI) to systematically inform the response to data, lesson planning, reteach plans, and interventions.  <b>Strategy's Expected Result/Impact:</b> Creation of systems and processes around DDI to be used in data meetings and creation of cycles for coaching of campus leaders, specialist and district curriculum coordinators  <b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development</p>	Formative		
	Jan	May	May





Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Continue to provide Action Coaching training with campus leaders to increase the use of effective observation and feedback cycles to support and improve instruction.</p> <p><b>Strategy's Expected Result/Impact:</b> Creation of systems and processes around observation and feedback to include documentation, teacher action steps, and data tracking</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development</p>	Formative		
	Jan	May	May
<div style="display: flex; justify-content: space-around; align-items: center;"> <span> No Progress</span> <span> Accomplished</span> <span> Continue/Modify</span> <span> Discontinue</span> </div>			

**Goal 4:** Develop and implement plans, systems and processes to support improved campus A-F ratings, focusing on removing labels (Targeted Support, Comprehensive) and ensuring academic success for students.

**Performance Objective 2:** Increase the knowledge and skills of administrators, teachers, and professional staff in understanding the changes to the state and federal accountability systems.

**Evaluation Data Sources:** Increased Student Achievement on STAAR and Domain Indicators including CCMR





Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Train district and campus leaders to understand and develop systems to monitor progress in academic achievement, growth, and CCMR domains for state and federal accountability systems and clarify any misconceptions when final system criteria is released by the state in the fall of 2023.</p> <p><b>Strategy's Expected Result/Impact:</b> District and campus leaders have clear understanding of accountability system, allowing them to identify areas of focus to improve and areas to leverage improvement in student achievement</p> <p><b>Staff Responsible for Monitoring:</b> Director of Accountability Systems and Data Analysis</p> <p><b>Funding Sources:</b> Lead4ward accountability connect - Title II, Part A (TPTR)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Develop district protocols for each campus to monitor student progress according to 2023-2024 state accountability requirements and have principals assign Growth Tracker point person on campus.</p> <p><b>Strategy's Expected Result/Impact:</b> Use of data to develop interventions for applicable students, updated growth tracker demonstrates progress</p> <p><b>Staff Responsible for Monitoring:</b> Director of Accountability Systems and Data Analysis</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Provide technical assistance at each campus to develop increased knowledge of state and federal accountability systems and set student achievement goals.</p> <p><b>Strategy's Expected Result/Impact:</b> Increase in STAAR, graduation and CCMR rates, decrease in dropout rate</p> <p><b>Staff Responsible for Monitoring:</b> Director of Accountability Systems and Data Analysis</p> <p><b>Results Driven Accountability</b></p> <p><b>Funding Sources:</b> Lead4ward accountability connect - Title II, Part A (TPTR)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Conduct review of data to identify instructional leverage points and verify all state and federal accountability coding and supports are accurate.</p> <p><b>Strategy's Expected Result/Impact:</b> Student data coded and mined for state and federal accountability will be an accurate account of student achievement</p> <p><b>Staff Responsible for Monitoring:</b> Director of Accountability Systems and Data Analysis, District Testing Coordinator</p> <p><b>Results Driven Accountability</b></p> <p><b>Funding Sources:</b> Lead4ward Accountability - Title II, Part A (TPTR)</p>	Formative		
	Jan	May	May
<div style="display: flex; justify-content: space-around; align-items: center;"> <span> No Progress</span> <span> Accomplished</span> <span> Continue/Modify</span> <span> Discontinue</span> </div>			

**Goal 4:** Develop and implement plans, systems and processes to support improved campus A-F ratings, focusing on removing labels (Targeted Support, Comprehensive) and ensuring academic success for students.

**Performance Objective 3:** Develop strategies to evaluate, monitor, and improve the College, Career, and Military Readiness (CCMR) graduate indicators.

**Evaluation Data Sources:** TSI Scores, ACT/SAT Scores, Advanced Placement Scores, Data on Number of Students Earning National Certifications, Dual Credit Course Completion Rates, Military Enlistment Data, Board-Adopted Plans and Goals for CCMR

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Continue to ensure that CTE students earn an industry-based certification and complete an aligned program of study according to new accountability guidelines.</p> <p><b>Strategy's Expected Result/Impact:</b> Accurate coding for students meeting CCMR through dual credit or advanced courses</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education, Director of Accountability Systems and Data Analysis, Director of CTE</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Review and refine board-adopted plans and goals for CCMR.</p> <p><b>Strategy's Expected Result/Impact:</b> Feedback received from board, plan and goals adopted, compliance with HB 3</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Director of Accountability Systems and Data Analysis</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Implement a TSI testing plan focused on systemizing district testing practices and timelines across campuses and facilitate teacher understanding of TSI data.</p> <p><b>Strategy's Expected Result/Impact:</b> Testing processes administered according to College Board guidelines, consistent and accurate TSI testing, and more students tested at the appropriate time</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education, Director of Accountability Systems and Data Analysis</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Continue to facilitate registration and attendance at the AVID Summer Institute, ensuring that staff are trained in order to implement the AVID program with fidelity.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased number of AVID students identified college and/or career ready</p> <p><b>Staff Responsible for Monitoring:</b> Director of Advanced Academics</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			





**Goal 5:** Coordinate the entire instructional program, including federal resources, to support increased student achievement for all student groups.

**Performance Objective 1:** Develop a plan to transition credit recovery/dropout prevention services provided at Brazos High School to Waco High School and University High School for the 2024-2025 school year.

**High Priority**

**Evaluation Data Sources:** Increased ADA through the use of the Optional Flexible School Day Program, Graduation Rates, Credit Completion Rates, Attendance, STAAR Data, Dropout Rate, CCMR Data

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Establish a committee to evaluate current credit recovery/dropout prevention strategies and collaborate on the development of a strategy to provide services at the district's comprehensive high schools in 2024-2025.</p> <p><b>Strategy's Expected Result/Impact:</b> Plan developed with input and ready for implementation in the fall of 2024</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education, Director of Accountability Systems and Data Analysis</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Determine budget for program locations including staffing, materials and professional development.</p> <p><b>Strategy's Expected Result/Impact:</b> New credit recovery/dropout prevention programs and services launch in the fall of 2024</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education, Director of Accountability Systems and Data Analysis</p> <p><b>Results Driven Accountability</b></p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Establish program guidelines and protocols for identified credit recovery/dropout prevention program and services including enrollment process, scheduling, assessment, and roles/responsibilities.</p> <p><b>Strategy's Expected Result/Impact:</b> Program handbook and clear expectations for staff, students and parents</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education, Director of Accountability Systems and Data Analysis</p> <p><b>Results Driven Accountability</b></p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Meet with Brazos High School students and parents to develop individual transition plans.</p> <p><b>Strategy's Expected Result/Impact:</b> Graduation Rates, Course Completion</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education, Director of Accountability Systems and Data Analysis</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Consult with the Texas Education Agency (TEA) to determine procedures and timeline for closing Brazos High School.</p> <p><b>Strategy's Expected Result/Impact:</b> Clear timeline for closure and transition to planned credit recovery/dropout prevention strategies, TEA approval of campus closure</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education, Director of Accountability Systems and Data Analysis, Chief Financial Officer</p> <p><b>Results Driven Accountability</b></p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 6 Details	Formative Reviews		
<p><b>Strategy 6:</b> Follow new legislative requirement to publicize data regarding dropout recovery programs.</p> <p><b>Strategy's Expected Result/Impact:</b> Meet state guidelines for reporting</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education, Director of Accountability Systems and Data Analysis</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			





**Goal 5:** Coordinate the entire instructional program, including federal resources, to support increased student achievement for all student groups.

**Performance Objective 2:** Improve the district's four-year graduation rate through the development and implementation of research-based dropout prevention strategies.

**Evaluation Data Sources:** Disaggregated Dropout Rates by Campus and District, STAAR End-of-Course Exam Results, Attendance Records

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Select and provide training on the use of an electronic data collection analysis system/dashboard to ensure that appropriate identification of students not meeting all graduation requirements including but not limited to endorsements, CCMR and course credits in accordance with district and state policy.</p> <p><b>Strategy's Expected Result/Impact:</b> Data analyzed frequently to identify student needs, students graduate having met all requirements</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education, Director of Accountability Systems and Data Analysis</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Continue the use of ESSER funding to provide a high school Optional Flexible School Day program with evening options for comprehensive high schools and multiple time options for Brazos High School.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased graduation rate and decreased dropout rate</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Secondary Education</p> <p><b>Funding Sources:</b> Extra duty pay to pay Night School Teachers - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Expand Diploma 101 training for counselors to improve decision making to guide student course selection. Counselors will use scenario based experiences to gain insight and facilitate graduate plan development.</p> <p><b>Strategy's Expected Result/Impact:</b> Students meet graduation requirements, increased knowledge and skills for effective advising by school counselors</p> <p><b>Staff Responsible for Monitoring:</b> Director of Accountability Systems and Data Analysis</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Continue to monitor attendance, grades credits, and intervention strategies by coordinating with various departments (SPED, Homeless, ELL, etc.) through six-week cohort meetings to create personalized plans.</p> <p><b>Strategy's Expected Result/Impact:</b> Decreased number of students falling behind in meeting graduation requirements</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Secondary Education, Director of Accountability Systems and Data Analysis</p> <p><b>Results Driven Accountability</b></p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Monitor and support implementation of the three-week cohort meeting on campuses to ensure personalized plans are created for students who are off track for graduation requirements.</p> <p><b>Strategy's Expected Result/Impact:</b> Decreased number of students falling behind in graduation requirements</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Secondary Education, Director of Accountability Systems and Data Analysis</p> <p><b>Results Driven Accountability</b></p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 6 Details	Formative Reviews		
<p><b>Strategy 6:</b> Continue to evaluate knowledge and skills of ESL teachers and campus administrators to inform professional development and curriculum planning, including instructional resources.</p> <p><b>Strategy's Expected Result/Impact:</b> Develop plans to increase teacher and leader knowledge and skills of effective instructional strategies to support Bilingual/ESL students</p> <p><b>Staff Responsible for Monitoring:</b> Director of Bilingual/ESL</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 7 Details	Formative Reviews		
<p><b>Strategy 7:</b> Continue supporting the transition of students from 5th to 6th grade and 8th to 9th grade.</p> <p><b>Strategy's Expected Result/Impact:</b> Address patterns and issues related to poor academic progress and dropout prevention</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Secondary Education</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 8 Details	Formative Reviews		
<p><b>Strategy 8:</b> Implement parent and teacher conferences at all levels at least twice per year to engage families with student goal setting and academic support.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student achievement and decreased dropout rate</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Secondary Education, Exec. Director of Elementary Education</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 9 Details	Formative Reviews		
<p><b>Strategy 9:</b> Continue to partner with McLennan County Community College (MCC) to provide structures and support for dual credit students including but not limited to Friday tutorials and counseling. Students will be required to attend in person to the extent possible.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased passing rates for dual credit, student achievement and success, decreased dropout rate</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Secondary Education, Director of Advanced Academics</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 10 Details	Formative Reviews		
<p><b>Strategy 10:</b> Continue the use of a Homeless Population Specialist to provide case management and services to secondary homeless and unaccompanied youth including ongoing monitoring of previously coded homeless students.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student engagement and attendance of homeless students; sustained stability for students emerging from a history of homelessness</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Student Support</p> <p><b>Results Driven Accountability</b></p> <p><b>Funding Sources:</b> Homeless Specialist - American Rescue Plan (ARP/ESSER III), Homeless Specialist - Title 1</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 11 Details	Formative Reviews		
<p><b>Strategy 11:</b> Continue to evaluate and enhance wrap around services provided to students at-risk of dropping out of school to determine which services have the greatest impact. Determine where gaps exist and plan for improved support.</p> <p><b>Strategy's Expected Result/Impact:</b> Students receive services to support overall well-being</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support</p> <p><b>Funding Sources:</b> Klaras/MHMR, Care Solace - Title IV</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 12 Details	Formative Reviews		
<p><b>Strategy 12:</b> Continue special education participation in secondary cohort and "bridge" meetings to monitor the academic achievement, attendance and the emotional/behavioral needs of special education students, and ensuring a smooth transition from one grade level span to the next.</p> <p><b>Strategy's Expected Result/Impact:</b> Decreased dropout rates of special education students, increased student achievement</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Special Education</p> <p><b>Results Driven Accountability</b></p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 13 Details	Formative Reviews		
<p><b>Strategy 13:</b> Continue the use of a Mobile Outreach Program to provide weekly outreach services to secondary students and parents experiencing homelessness. Collaborate with school and other departments to determine intervention strategies.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student engagement, increased attendance rates</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Student Support</p> <p><b>Funding Sources:</b> Mobile Outreach Program Coordinator - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<div style="display: flex; justify-content: space-around; align-items: center;"> <span> No Progress</span> <span> Accomplished</span> <span> Continue/Modify</span> <span> Discontinue</span> </div>			


**Goal 5:** Coordinate the entire instructional program, including federal resources, to support increased student achievement for all student groups.


**Performance Objective 3:** Systematize processes, procedures, and instructional services for Special Education students to ensure state and federal compliance and increased student achievement.


**Evaluation Data Sources:** Special Education Manual, Student Achievement Data, Improved Special Education Compliance

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Continue to partner with the curriculum department to train campus and district special education leaders to support special education teachers on T-TESS Domains 2.2 and 3.1. Conduct learning walks at all campuses and use data to identify instructional needs and provide support for individual teachers.</p> <p><b>Strategy's Expected Result/Impact:</b> Support special education teachers and campus leaders in the areas of instructional planning, knowledge of students and student learning, content knowledge and expertise, learning environment, data driven practices, and professional practices and responsibilities</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Special Education</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Conduct campus based PLC meetings with special education teachers to ensure curriculum alignment and effective planning practices. Provide framework for teachers to maximize effective instruction during special education instructional minutes.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student achievement and performance ratings on local and state assessments</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Special Education</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Continue to provide training and coaching to campus administrators and staff to support the implementation of Emergent Tree's Solid Root's program to address Tier III behavioral and social-emotional needs of students in Social Adaptive and Interpersonal Learning (SAIL) classrooms.</p> <p><b>Strategy's Expected Result/Impact:</b> Support administrators, teachers and paraprofessionals in the implementation of Solid Roots to decrease inappropriate student behaviors</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Special Education</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Analyze endorsements for special education students, CCMR, and graduation rate data for areas in need of improvement. Establish goals to ensure that special education students are challenged, have clear pathways and graduate from high school.</p> <p><b>Strategy's Expected Result/Impact:</b> Special education students graduate at highest levels with a clear path post secondary</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

**Staff Responsible for Monitoring:** Asst. Supt. of Curriculum and Instruction, Exec. Director of Special Education, Director of Accountability Systems and Data Analysis

 No Progress

 Accomplished





 Continue/Modify

 Discontinue

**Goal 5:** Coordinate the entire instructional program, including federal resources, to support increased student achievement for all student groups.

**Performance Objective 4:** Systematize processes, procedures, and instructional services for students in Bilingual/ESL to ensure state and federal compliance and increased student achievement.





**Evaluation Data Sources:** TELPAS Results, STAAR Data, Dropout Rates, Bilingual/ESL Teacher Certifications

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Continue to scale the one-way dual language program at Dean Highland, Alta Vista, Crestview, Provident Heights, Bell's Hill, Cedar Ridge, Kendrick, and LAMM for students in grades PK-5 for students whose first language is Spanish.</p> <p><b>Strategy's Expected Result/Impact:</b> Students will become proficient in Spanish and English, becoming bi-literate</p> <p><b>Staff Responsible for Monitoring:</b> Director of Bilingual/ESL</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Continue training with the Dual Language Institute (Gomez and Gomez), and ESC 12 to provide additional training for teachers and administrators on best practices for increasing English language proficiency, especially for dual language immersion.</p> <p><b>Strategy's Expected Result/Impact:</b> Effective instructional strategies and program structures result in increased student achievement</p> <p><b>Staff Responsible for Monitoring:</b> Director of Bilingual/ESL</p> <p><b>Funding Sources:</b> Professional Development provided by Dr. Morales from Seidlitz Education - Title III</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Monitor second year implementation of the ESL I and ESL II reading courses for juniors and seniors. These courses will serve students in need of intervention support for literacy.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student achievement and language proficiency</p> <p><b>Staff Responsible for Monitoring:</b> Director Bilingual/ESL</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Continue mentoring activities for Bilingual/ESL students and use feedback and connections from the English Learners Advisory Council.</p> <p><b>Strategy's Expected Result/Impact:</b> Mentors provide valuable information to students on topics such as how to gain citizenship and local resources, connecting students to others with similar backgrounds</p> <p><b>Staff Responsible for Monitoring:</b> Director of Bilingual/ESL</p> <p><b>Funding Sources:</b> Resources and materials for English Learners Advisory Council Meetings - Title III</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 5:** Coordinate the entire instructional program, including federal resources, to support increased student achievement for all student groups.

**Performance Objective 5:** Systematize processes, procedures, and instructional services for Dyslexia and Section 504 to ensure state and federal compliance and increased student achievement.

**Evaluation Data Sources:** Number of Students Served, Student Achievement Data, Compliance with State and Federal Guidelines

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Continue to use the district's lead dyslexia teacher to monitor and coach the implementation of the Multi-sensory Teaching Approach (MTA) curriculum with a focus on dysgraphia and dyslexia.</p> <p><b>Strategy's Expected Result/Impact:</b> Equitable instruction and fidelity of implementation across all campuses</p> <p><b>Staff Responsible for Monitoring:</b> Director of Intervention/State and Federal Programs</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Use the district's bilingual dyslexia specialist to increase the awareness of the bilingual, dyslexic student and assist in providing appropriate evaluations and supporting services.</p> <p><b>Strategy's Expected Result/Impact:</b> Bilingual, dyslexic students are identified and provided appropriate instruction</p> <p><b>Staff Responsible for Monitoring:</b> Director of Intervention/State and Federal Programs</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Use TEA's final report from the district's April 2023 cyclical review that included a monitoring visit to identify and implement strategies for program improvement.</p> <p><b>Strategy's Expected Result/Impact:</b> Improve district's dyslexia program to increase awareness for dyslexia and related disorders</p> <p><b>Staff Responsible for Monitoring:</b> Director of Intervention/State and Federal Programs</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			





**Goal 5:** Coordinate the entire instructional program, including federal resources, to support increased student achievement for all student groups.

**Performance Objective 6:** Monitor and refine the Response to Intervention (RtI) plan to support increased student achievement.

**Evaluation Data Sources:** STAAR Data, Graduation Rates, Dropout Rates, Targeted Intervention Plans in Branching Minds, Local Progress Monitoring Measures

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Continue to implement and refine the "What I Need When I Need It" (WIN) at the secondary level to provide a structured time within the master schedule for interventions and literacy support. Students will receive direct support for 20-30 minutes four days per week focusing on STAAR, TSI, and SAT prep. Day five will focus on delivering the social-emotional learning curriculum.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student achievement</p> <p><b>Staff Responsible for Monitoring:</b> Director of Intervention/State and Federal Programs</p> <p><b>Funding Sources:</b> Branching Minds - Title 1, Reading Plus - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Continue the use of Renaissance as the district's universal screener for mathematics (through 10th grade), reading (through 8th grade), and Reading Plus for high school reading. Implement protocols for data analysis and action plans with fidelity.</p> <p><b>Strategy's Expected Result/Impact:</b> Establish a base line of student achievement data to determine student progress and growth toward STAAR and measure growth over time</p> <p><b>Staff Responsible for Monitoring:</b> Director of Accountability Systems and Data Analysis, Director of Intervention/State and Federal Programs</p> <p><b>Funding Sources:</b> Renaissance - Title 1, Reading Plus - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Continue to use federal ESSER funding to provide additional staffing and instructional resources to support Tier II and Tier III interventions.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased support for students in need of interventions</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. Curriculum and Instruction, Director of Intervention/State and Federal Programs</p> <p><b>Funding Sources:</b> District-wide personnel, supplies &amp; material for intervention classrooms, furniture for intervention for seating - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

<p style="text-align: center;"><b>Strategy 4 Details</b></p> <p><b>Strategy 4:</b> Continue to provide training for Tier 3 intervention programs. Monthly PLCs will be conducted with SIT teachers to ensure expectations are being met and to address instructional needs.</p> <p><b>Strategy's Expected Result/Impact:</b> Intervention programs implemented with fidelity, increased student achievement</p> <p><b>Staff Responsible for Monitoring:</b> Director of Student Support, Intervention and Grant Management</p> <p><b>Funding Sources:</b> Warren Instructional Network/LLI Training/Do the Math Training/Neuhaus training - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative Reviews</b>		
<p><b>Strategy 5:</b> Host a mini-conference to provide explicit training for SIT, Dyslexia and Reading Recovery teachers.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased knowledge and services for instructional interventions</p> <p><b>Staff Responsible for Monitoring:</b> Director of Interventions/State and Federal Programs</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<p style="text-align: center;"><b>Strategy 6 Details</b></p> <p><b>Strategy 6:</b> Use local progress monitoring assessments to analyze student achievement data to determine the impact of interventions.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student achievement</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Director of Interventions/State and Federal Programs</p> <p><b>Funding Sources:</b> Lead4Ward Subscription for the District from Eduphoria - Title II, Part A (TPTR), Renaissance - State Compensatory Education, Iready - Title 1</p>	<b>Formative Reviews</b>		
<p><b>Strategy 7:</b> Continue to calibrate on the selection criteria for students to be served in interventions.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student achievement, clear RTI systems implemented with fidelity</p> <p><b>Staff Responsible for Monitoring:</b> Director of Intervention/State and Federal Programs</p> <p><b>Funding Sources:</b> Branching Minds - State Compensatory Education, Reading Plus - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<p style="text-align: center;"><b>Strategy 8 Details</b></p> <p><b>Strategy 8:</b> Implement Saturday School, extended school year, and after school interventions for students who are at risk of failing or losing academic credit due to failing grades/state assessment or truancy and attend conferences or training for additional information for research-based interventions for classrooms and funding that is available for RTI.</p> <p><b>Strategy's Expected Result/Impact:</b> Recovery of academic credits</p> <p><b>Staff Responsible for Monitoring:</b> Director of Intervention/State and Federal Programs</p> <p><b>Funding Sources:</b> Summer School Staff Salaries - Title 1, After school / Saturday School Accelerated Instruction - American Rescue Plan (ARP/ESSER III), Edmentum- credit recovery curriculum - State Compensatory Education</p>	<b>Formative Reviews</b>		
	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 9 Details	Formative Reviews		
<p><b>Strategy 9:</b> Meet House Bill 1416 compliance regarding the accelerated instruction requirement for students who failed STAAR. Document instructional time in Branching Minds.</p> <p><b>Strategy's Expected Result/Impact:</b> Meet TEA compliance, increased student achievement</p> <p><b>Staff Responsible for Monitoring:</b> Director of Interventions/State and Federal Programs</p> <p><b>Funding Sources:</b> Branching Minds - State Compensatory Education</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 5:** Coordinate the entire instructional program, including federal resources, to support increased student achievement for all student groups.

**Performance Objective 7:** Improve district library services PK-12.

**Evaluation Data Sources:** Federal ESSER Budget Records, Number of Library Books by Campus, Circulation Rates, Satisfaction Surveys, Student Achievement Data in Reading

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Build a strong campus culture of reading through structured activities to emphasize reading such as participation in book clubs, strategically placing books in identified locations on the campus, bulletin boards, reading contests and promotions, and "what I am currently reading" tags on desks.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased focus on reading at the campus</p> <p><b>Staff Responsible for Monitoring:</b> Coordinator of Library Services</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Develop a structured Read Aloud program in campus libraries to ensure students are learning about authors and different kinds of books.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased levels of literacy, good reading modeled for students</p> <p><b>Staff Responsible for Monitoring:</b> Coordinator of Library Services</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Build time into the library schedule for readers' advisory.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased rapport between librarian and the student to support students' ability to find engaging books that instill a habit of life-long reading</p> <p><b>Staff Responsible for Monitoring:</b> Coordinator of Library Services</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Continue the use of ESSER III funding to staff campus libraries in 2023-2024.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved library services, increased circulation rates, systemic systems and processes implemented across the district</p> <p><b>Staff Responsible for Monitoring:</b> Supt., Asst. Supt. Curriculum and Instruction, Chief Technology Officer, Coordinator of Library Services</p> <p><b>Funding Sources:</b> Updated library books &amp; additional seating - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Use federal stimulus funds to continue to add books to campus libraries.</p> <p><b>Strategy's Expected Result/Impact:</b> Improve the equity and age of books across campuses, increased circulation rates, increased student achievement</p> <p><b>Staff Responsible for Monitoring:</b> Supt., Asst. Supt. Curriculum and Instruction, Chief Technology Officer, Coordinator of Library Services</p> <p><b>Funding Sources:</b> new library books - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 6 Details	Formative Reviews		
<p><b>Strategy 6:</b> Develop a future budgeting strategy for equitable book replacements and ongoing campus collection development.</p> <p><b>Strategy's Expected Result/Impact:</b> Updated and equitable library collections</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. Curriculum and Instruction, Chief Financial Officer</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 7 Details	Formative Reviews		
<p><b>Strategy 7:</b> Communicate available library resources to teachers and students. Use Myon, Destiny, Sora, state digital resources and print resources.</p> <p><b>Strategy's Expected Result/Impact:</b> Students and teachers receive access to materials to enhance curriculum and the general reading experience</p> <p><b>Staff Responsible for Monitoring:</b> Coordinator of Library Services</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 8 Details	Formative Reviews		
<p><b>Strategy 8:</b> Provide library staff with training and resources to enhance literacy programs throughout the district. Send staff and campus administrators to the Texas Library Association conference and other professional learning opportunities with available funds.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved library climate and environment to support increased library usage and student literacy</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. Curriculum and Instruction, Coordinator of Library Services</p> <p><b>Funding Sources:</b> furniture - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 9 Details	Formative Reviews		
<p><b>Strategy 9:</b> Continue to explore opportunities to partner with the City of Waco to enhance library services including accessing e-books and other resources, promotion of special library events, and scheduled collaboration between district and City of Waco librarians.</p> <p><b>Strategy's Expected Result/Impact:</b> Shared resources and collaboration are used to enhance library services and promote reading for students PK-12</p> <p><b>Staff Responsible for Monitoring:</b> Supt., Asst. Supt. Curriculum and Instruction, Chief of Technology, Coordinator of Library Services</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

 No Progress
  Accomplished
  Continue/Modify
  Discontinue


**Goal 5:** Coordinate the entire instructional program, including federal resources, to support increased student achievement for all student groups.

**Performance Objective 8:** Ensure students are aware of and have an understanding of opportunities afforded them through CTE courses of study.

**Evaluation Data Sources:** Number of Certifications Earned, CCMR Data, Number of Students Participating in CTE Programs, Budget Reports

Strategy 1 Details	Formative Reviews		
<b>Strategy 1:</b> Explore external evaluation providers to conduct a review of the district's CTE programming. <b>Strategy's Expected Result/Impact:</b> Improved programming to meet workforce needs <b>Staff Responsible for Monitoring:</b> Director of CTE	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<b>Strategy 2:</b> Identify and implement strategies to enhance opportunities for students wanting to enter the field of nursing through partnerships with McLennan Community College for dual credit hours and/or partnerships with local hospitals for clinical experiences. <b>Strategy's Expected Result/Impact:</b> Students have informed and efficient pathways to a career in nursing and other health-related fields <b>Staff Responsible for Monitoring:</b> Director of CTE	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<b>Strategy 3:</b> Continue to collaborate with McLennan Community College's University Center to refine the implementation of programs of study including the Future Educators Academy and the Future Heroes Academy. <b>Strategy's Expected Result/Impact:</b> Increase in local workforce development for local graduates <b>Staff Responsible for Monitoring:</b> Director of CTE, Exec. Director of Secondary Education	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<b>Strategy 4:</b> Develop partnerships with local businesses to support students in certification pathways and meet local workforce needs. <b>Strategy's Expected Result/Impact:</b> Increased certifications, internships, and local employment opportunities <b>Staff Responsible for Monitoring:</b> Director of CTE	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 5 Details	Formative Reviews		
<b>Strategy 5:</b> Monitor and ensure that students are completing a sequence of courses within a program of study and achieving a workforce certification. <b>Strategy's Expected Result/Impact:</b> Increase in number of certifications achieved in programs of study <b>Staff Responsible for Monitoring:</b> Director of CTE	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 6 Details	Formative Reviews		
<b>Strategy 6:</b> Continue to brand, market, and communicate the value of workforce certifications. <b>Strategy's Expected Result/Impact:</b> Workforce certification pursuit and achievement will increase over prior year <b>Staff Responsible for Monitoring:</b> Director of CTE	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 7 Details	Formative Reviews		
<b>Strategy 7:</b> Continue to review CTE middle school offerings and their alignment to programs of study in conjunction with future dual credit pathways to support specialized programs at each campus. <b>Strategy's Expected Result/Impact:</b> Students understand and identify their preferred programs of study early to continue through high school <b>Staff Responsible for Monitoring:</b> Director of CTE	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 8 Details	Formative Reviews		
<b>Strategy 8:</b> Continue to review and refine transition activities for incoming ninth graders through orientation events, tours, scheduling assistance, etc. <b>Strategy's Expected Result/Impact:</b> Students identify a program of study and complete a sequence of courses as a part of a four-year plan <b>Staff Responsible for Monitoring:</b> Director of CTE	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 9 Details	Formative Reviews		
<b>Strategy 9:</b> Continue focusing on literacy strategies to improve vocabulary, reading fluency, and comprehension in order to increase CTE certification passing rates. <b>Strategy's Expected Result/Impact:</b> Increase in CTE certifications <b>Staff Responsible for Monitoring:</b> Director of CTE	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 10 Details	Formative Reviews		
<b>Strategy 10:</b> Continue to offer students opportunities to participate in community service projects through CTE programs of study. <b>Strategy's Expected Result/Impact:</b> Increased co-curricular opportunities that can improve opportunities for employment and scholarships beyond high school <b>Staff Responsible for Monitoring:</b> Director of CTE	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

 No Progress    
  Accomplished    
  Continue/Modify    
  Discontinue

**Goal 5:** Coordinate the entire instructional program, including federal resources, to support increased student achievement for all student groups.

**Performance Objective 9:** Increase achievement for advanced learners.

**Evaluation Data Sources:** ACT/SAT Achievement Data, STAAR Masters Level Data, Number of Students Recognized at Special Events

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Pilot College Board's African American Studies course at the high school level with interested students. The first Advanced Placement (AP) exam will be administered by the College Board in Spring 2024.</p> <p><b>Strategy's Expected Result/Impact:</b> Students offered new opportunity, AP credits earned and transferable to university programs</p> <p><b>Staff Responsible for Monitoring:</b> Director of Advanced Academics</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Refine the implementation of the Springboard program and use the integrated scope and sequence curriculum documents to guide instruction. Train new teachers at all middle schools who teach pre-advanced classes.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased rigor of program and participation leading to achievement of students on STAAR and PSAT</p> <p><b>Staff Responsible for Monitoring:</b> Director of Advanced Academics</p> <p><b>Funding Sources:</b> Spring board/College Board - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Work with World Languages teachers, counselors and secondary curriculum staff to increase participation in AP Spanish and in the number of students taking the College Board assessment. Review World Language pathways from K through 12.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased participation in AP testing and number of Spanish speakers who participate in advanced courses</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Secondary Education, Director of Advanced Academics</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Develop parent involvement activities that support knowledge of opportunities and pathways for advanced/high achieving students.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased knowledge of choices and future opportunities for advanced learners</p> <p><b>Staff Responsible for Monitoring:</b> Director of Advanced Academics</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>





<b>Strategy 5 Details</b>	<b>Formative Reviews</b>		
<b>Strategy 5:</b> Review achievement of advanced students, evaluate teacher strengths, and implement rigorous strategies in collaboration with campuses for ensuring that students meet the Masters level on STAAR and demonstrate growth annually. <b>Strategy's Expected Result/Impact:</b> Identified advanced students are achieving at the highest levels <b>Staff Responsible for Monitoring:</b> Director of Advanced Academics, Director of Accountability Systems and Data Analysis	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<b>Strategy 6 Details</b>	<b>Formative Reviews</b>		
<b>Strategy 6:</b> Require that all teachers who teach Pre-Advanced and Advanced Placement courses have attended College Board Advanced Placement Summer Institutes and other targeted professional development. Develop teacher recognition program to recognize teachers with high student achievement. <b>Strategy's Expected Result/Impact:</b> Increased Advanced Placement scores, Advanced Placement teacher retention <b>Staff Responsible for Monitoring:</b> Exec. Director of Secondary Education, Director of Advanced Academics	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<b>Strategy 7 Details</b>	<b>Formative Reviews</b>		
<b>Strategy 7:</b> Continue to implement college readiness testing for all students (i.e. TSIA 2, PSAT 8/9, PSAT 10/11 NMSQT, and SAT) and other advanced testing options as well as extending the testing opportunity to others with a desire or aptitude for taking the test. <b>Strategy's Expected Result/Impact:</b> Increased number of students taking college readiness exams and increased performance <b>Staff Responsible for Monitoring:</b> Director Advanced Academics	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<b>Strategy 8 Details</b>	<b>Formative Reviews</b>		
<b>Strategy 8:</b> Develop strategies to strengthen the Superintendent's Scholars program for academically high-performing students in grades 5-12 based on previous STAAR and college readiness data. <b>Strategy's Expected Result/Impact:</b> Increased student interest in advanced academic courses and preparation for NMSQT, increased student achievement on college readiness exams <b>Staff Responsible for Monitoring:</b> Director of Advanced Academics	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<b>Strategy 9 Details</b>	<b>Formative Reviews</b>		
<b>Strategy 9:</b> Design and implement a Principal's Scholars recognition ceremony for 4th and 5th grade and Junior Scholars ceremony for 6th and 7th grade. Continue to implement the Superintendent's Scholars award ceremony for 8th, 9th, 10th and 11th graders. <b>Strategy's Expected Result/Impact:</b> Increased awareness of opportunities for high-achieving students, increased numbers taking college entrance exams <b>Staff Responsible for Monitoring:</b> Director Advanced Academics	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

<b>Strategy 10 Details</b>	<b>Formative Reviews</b>		
<b>Strategy 10:</b> Plan webinars and in-person college panels with top tier universities such as Stanford and Harvard for students identified as Superintendent Scholars. <b>Strategy's Expected Result/Impact:</b> Increased student and parent awareness regarding significance of college entrance exams and opportunities available to high achievers <b>Staff Responsible for Monitoring:</b> Director of Advanced Academics	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<b>Strategy 11 Details</b>	<b>Formative Reviews</b>		
<b>Strategy 11:</b> Continue to include recognition for high achievement on the PSAT and SAT at the Academic Achievers event. <b>Strategy's Expected Result/Impact:</b> Students begin to focus on college entrance exam preparation in addition to GPA <b>Staff Responsible for Monitoring:</b> Director of Advanced Academics  <b>Funding Sources:</b> Superintendent Scholars - Title IV	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<b>Strategy 12 Details</b>	<b>Formative Reviews</b>		
<b>Strategy 12:</b> Develop and build capacity of the AVID site teams to ensure that AVID strategy implementation is tracked, data is gathered, and campus program goals are met. <b>Strategy's Expected Result/Impact:</b> Increased campus ownership for AVID program, improved fidelity of implementation, increased student achievement <b>Staff Responsible for Monitoring:</b> Director of Advanced Academics	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<b>Strategy 13 Details</b>	<b>Formative Reviews</b>		
<b>Strategy 13:</b> Collaborate with CCMR Coordinators to offer in-person college visit opportunities to state, HBCUs, and private universities for students. <b>Strategy's Expected Result/Impact:</b> Increased student awareness of post-secondary opportunities <b>Staff Responsible for Monitoring:</b> Director of Advanced Academics	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<b>Strategy 14 Details</b>	<b>Formative Reviews</b>		
<b>Strategy 14:</b> Implement and support PBL units into 6th grade science and monitor outcomes. <b>Strategy's Expected Result/Impact:</b> Increased student engagement, increased student achievement <b>Staff Responsible for Monitoring:</b> Director of Advanced Academics	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<b>Strategy 15 Details</b>	<b>Formative Reviews</b>		
<b>Strategy 15:</b> Continue training and implementation of the NuMinds research curriculum and monitor implementation. <b>Strategy's Expected Result/Impact:</b> Improved student engagement and research activities <b>Staff Responsible for Monitoring:</b> Director of Advanced Academics	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

**Goal 5:** Coordinate the entire instructional program, including federal resources, to support increased student achievement for all student groups.

**Performance Objective 10:** Continue to systematize processes, procedures, and instructional services for students identified as Gifted and Talented to ensure state and federal compliance and increased student achievement.





**Evaluation Data Sources:** Project GT, STAAR Masters Level Data, Number of Students Identified

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Continue to build capacity among the GT Enrichment teachers to provide data driven instruction, TEKS/skills-standards based enrichment, and differentiation support.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved GT student achievement, increased campus GT support</p> <p><b>Staff Responsible for Monitoring:</b> Director of Advanced Academics, Advanced Academics Coordinator</p>	Formative		
	Jan	May	May
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  No Progress         </div> <div style="text-align: center;">  Accomplished         </div> <div style="text-align: center;">  Continue/Modify         </div> <div style="text-align: center;">  Discontinue         </div> </div>			

**Goal 6:** Create and sustain safe and supportive learning environments.

**Performance Objective 1:** Implement strategies that affirm the district's commitment to racial equity.

**Evaluation Data Sources:** Professional Development descriptions, Conference Registrations, Meeting Minutes

Strategy 1 Details	Formative Reviews		
<b>Strategy 1:</b> Review equity assessment results, report findings, and determine next steps. <b>Strategy's Expected Result/Impact:</b> Identification and correction of system inequities impacting student engagement and performance <b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<b>Strategy 2:</b> Expand the district's Committee on Race Equity (CORE) to explore strategies for identifying and addressing system inequities. <b>Strategy's Expected Result/Impact:</b> Greater participation in the identification of system inequities as identified in the equity assessment <b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 6:** Create and sustain safe and supportive learning environments.





**Performance Objective 2:** Implement strategies to support the safety and well-being of students and staff.

**Evaluation Data Sources:** Training Sign-In Sheets, Number and Type of Anonymous Reports, Professional Development Calendar, Grant Reports

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Implement the Texas Education Agency's School Safety Standards Formula Grant (\$658,000 for Waco ISD). The district will use funding for improving campus fencing, adding card readers, re-keying doors, and adding intruder resistant window film for entry doors and adjacent windows.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved school safety</p> <p><b>Staff Responsible for Monitoring:</b> Supt., Chief of Facilities &amp; Operations, Chief Technology Officer</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Apply for newly released state SAFE grant (Sept. 2023) to continue to build on physical safety enhancements at campuses.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved School Safety</p> <p><b>Staff Responsible for Monitoring:</b> Chief of Facilities &amp; Operations, Chief Technology Officer</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Comply with House Bill 3 including providing an armed security guard at each campus, making facility improvements, and providing mental health training for staff.</p> <p><b>Strategy's Expected Result/Impact:</b> Compliance with legislative intent to provide increased response to shooter events and ensure campuses are safe</p> <p><b>Staff Responsible for Monitoring:</b> Supt., Chief of Police, Asst. Supt. of Student Services and Support</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Promote a district SRO to a position of District Safety Coordinator to oversee employee safety training initiatives. The Safety Coordinator will be housed on a smaller district campus to provide required security presence.</p> <p><b>Strategy's Expected Result/Impact:</b> Employees properly trained on safety procedures</p> <p><b>Staff Responsible for Monitoring:</b> Chief of Police, Exec. Director of Student Services</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Contract with ESC 12 to provide Standard Reunification training for campus teams and require documentation of plans at each campus. The district will support campuses with needed materials to implement plans and protocols.</p> <p><b>Strategy's Expected Result/Impact:</b> Clear plans in place for emergency evacuations</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Student Services</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 6 Details	Formative Reviews		
<p><b>Strategy 6:</b> Implement new emergency software system to support the documentation of drills, intruder assessments, threat assessment and reunification processes.</p> <p><b>Strategy's Expected Result/Impact:</b> Greater efficiency in the implementation of best practices to support safety</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Student Services</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 7 Details	Formative Reviews		
<p><b>Strategy 7:</b> Comply with new state safety and reporting requirements, ensuring the Emergency Operations Plan is updated annually and meets state criteria.</p> <p><b>Strategy's Expected Result/Impact:</b> New safety requirements implemented, EOP is in compliance with state requirements, procedures clearly communicated across district</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Student Services</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 8 Details	Formative Reviews		
<p><b>Strategy 8:</b> Implement new artificial intelligence scanners at secondary campuses and require clear backpacks at all schools.</p> <p><b>Strategy's Expected Result/Impact:</b> Elimination of prohibited items in school</p> <p><b>Staff Responsible for Monitoring:</b> Supt., Asst. Supt. of Student Services, Chief Technology Officer</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 9 Details	Formative Reviews		
<p><b>Strategy 9:</b> Implement the use of metal detectors at stadium events.</p> <p><b>Strategy's Expected Result/Impact:</b> Elimination of prohibited items</p> <p><b>Staff Responsible for Monitoring:</b> Athletic Director</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 10 Details	Formative Reviews		
<p><b>Strategy 10:</b> Conduct regular district safety committee meetings to review processes, systems and training.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved school safety</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support, Exec. Director of Student Services</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 11 Details	Formative Reviews		
<p><b>Strategy 11:</b> Continue the use of the Stop It anonymous reporting system for students, parents, and/or others to report incidents of bullying or other unsafe behaviors. Ensure the program is widely communicated.</p> <p><b>Strategy's Expected Result/Impact:</b> Anonymous reporting system used to support school safety</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Student Services, Exec. Director of Communications, Principals</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>





Strategy 12 Details	Formative Reviews		
<p><b>Strategy 12:</b> Continue implementation of processes for the use of campus threat assessment teams. Continue the use of federal stimulus funds to support a Threat Assessment Specialist to implement processes and systems for compliance with SB 11.</p> <p><b>Strategy's Expected Result/Impact:</b> Threat assessment teams implemented with fidelity at all campuses</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support, Exec. Director of Student Services</p> <p><b>Funding Sources:</b> - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 13 Details	Formative Reviews		
<p><b>Strategy 13:</b> Continue to use federal stimulus funds to support two social worker transitional specialists at G.L. Wiley to ensure compliance with legislative mandates for transition plans.</p> <p><b>Strategy's Expected Result/Impact:</b> Students effectively transition from DAEP placement back to home campus</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Student Services</p> <p><b>Funding Sources:</b> salary of social workers - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 14 Details	Formative Reviews		
<p><b>Strategy 14:</b> Continue to provide training to staff on the identification of student mental health needs. Use federal stimulus funds to support training efforts for administrators and other staff members.</p> <p><b>Strategy's Expected Result/Impact:</b> Consistent research-based protocol to support student well-being</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support</p> <p><b>Funding Sources:</b> Emergent Tree - Title IV</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 15 Details	Formative Reviews		
<p><b>Strategy 15:</b> Monitor the use of Care Solace to provide online case management and timely access to mental health support for students and staff.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student and staff engagement and attendance</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Student Support</p> <p><b>Funding Sources:</b> - Title IV</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 16 Details	Formative Reviews		
<p><b>Strategy 16:</b> Continue Klaras support at Waco High School to provide direct mental health services to identified students.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student engagement and attendance</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Student Support</p> <p><b>Funding Sources:</b> Cost of Klaras - Title IV</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 17 Details	Formative Reviews		
<p><b>Strategy 17:</b> Identify, implement and/or refine strategies to address mental health, substance abuse, coping mechanisms, grief-informed care, trauma-informed practices and suicide prevention with students in compliance with current legislation.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved student well-being</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support</p> <p><b>Funding Sources:</b> SEL Coordinator - Title IV</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 18 Details	Formative Reviews		
<p><b>Strategy 18:</b> Monitor legislative guidelines regarding student welfare issues including dating violence prevention, reporting procedures, parent notifications and guidelines for victims, sexual harassment, retaliation, human trafficking, and age-appropriate educational materials.</p> <p><b>Strategy's Expected Result/Impact:</b> Processes and procedures are clear and ensure student safety</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support, Asst. Supt. of Curriculum and Instruction</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 19 Details	Formative Reviews		
<p><b>Strategy 19:</b> Implement the Unbound anti-trafficking curriculum.</p> <p><b>Strategy's Expected Result/Impact:</b> Increase student knowledge and safety</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 6:** Create and sustain safe and supportive learning environments.

**Performance Objective 3:** Deepen implementation of Social-Emotional Learning (SEL) strategies as a district-wide initiative.

**Evaluation Data Sources:** Professional Development Sign-In Sheets, Conference Registrations, Meeting Minutes of Principal Meetings, Stimulus Funding Budgets





Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Provide ongoing professional development and coaching to campuses to facilitate social-emotional learning (SEL) curriculum and practices. Build SEL leader capacity to promote sustainable and aligned SEL practices across all campuses.</p> <p><b>Strategy's Expected Result/Impact:</b> Decrease in achievement gap between student groups, district alignment of SEL strategies</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support, Exec. Director of Student Support</p> <p><b>Funding Sources:</b> SEL curriculum, counselor materials - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Continue the use of Title IV and federal ESSER funds to employ two SEL/Counseling Coordinators.</p> <p><b>Strategy's Expected Result/Impact:</b> Coordinated effort to facilitate the alignment of SEL strategies</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Student Support</p> <p><b>Funding Sources:</b> SEL Coordinator - American Rescue Plan (ARP/ESSER III), SEL Coordinator - Title IV</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Continue to identify and implement strategies to support the social-emotional health of employees.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved well-being of district employees, increased employee retention rate</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support, Asst. Supt. of Human Resources, Exec. Director of Student Support</p> <p><b>Funding Sources:</b> LPC for school employees - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 6:** Create and sustain safe and supportive learning environments.

**Performance Objective 4:** Evaluate effectiveness of behavior intervention programs across the district and make necessary adjustments to ensure equity and student success.

**Evaluation Data Sources:** Student Discipline Records, Climate Surveys, Job Descriptions, Branching Minds entries, Emergent Tree Education Campus Program Review Results





Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Use federal funds to provide behavior coaching and program consultation to campus leaders, teachers and support staff. The district will employ an MTSS Director and two district level behavior coaches.</p> <p><b>Strategy's Expected Result/Impact:</b> Campuses will implement an effective Multi-Tiered System of Support that adequately addresses the emotional, social, and behavioral needs of all students, which will lead to improved student performance</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support, Exec. Director of Student Support, Director of Multi-Tiered Systems of Support</p> <p><b>Funding Sources:</b> Emergent Tree PD - Title IV</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Monitor and develop plans to improve campus-based interventions and resources addressing unsafe or highly disruptive student behaviors.</p> <p><b>Strategy's Expected Result/Impact:</b> All students in need of behavior supports will have an active plan in the district RTI/MTSS system, evidence for each campus will include accurately tiered students with active behavior plans in Branching Minds, up-to-date progress monitoring, and teacher/staff notes</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support, Exec. Director of Special Education</p> <p><b>Funding Sources:</b> Branching Minds - State Compensatory Education</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Conduct a five-day new teacher Behavior Boot Camp to equip new teachers with strategies and procedures contributing to a safe, inclusive learning environment.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student engagement and attendance, fewer disciplinary referrals</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support, Ex. Director of Student Support</p> <p><b>Funding Sources:</b> - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Continue facilitating the development and progress of campus-based multi-tiered systems of support through periodic Behavior Academy work sessions and team coaching. This ongoing professional learning series will help administrators, teachers and support staff promote safe, responsible and respectful student behaviors.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student engagement, attendance and performance</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support, Ex. Director of Student Support</p> <p><b>Funding Sources:</b> - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Continue use of the universal behavior screener district-wide.</p> <p><b>Strategy's Expected Result/Impact:</b> Use specific criteria to identify students who need specialized behavioral support</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 6 Details	Formative Reviews		
<p><b>Strategy 6:</b> Continue the use of ESSER funding to send regular and special education teachers to Texas Tech University to get a master's degree in Applied Behavioral Analysis (ABA) in order to better serve students with severe behavioral needs.</p> <p><b>Strategy's Expected Result/Impact:</b> Develop specialists to support student behavior</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Special Education, Asst. Supt. of Student Services and Support</p> <p><b>Funding Sources:</b> cost of tuition and books - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 7 Details	Formative Reviews		
<p><b>Strategy 7:</b> Comply with state requirements to ensure 80% of counselor work time is spent on duties tied to the four components, which will lead to improved student performance.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved student achievement for all groups, consistent core practices demonstrated on all campuses</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support, Executive Director of Student Support</p> <p><b>Funding Sources:</b> software to track - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;"> No Progress</div> <div style="text-align: center;"> Accomplished</div> <div style="text-align: center;"> Continue/Modify</div> <div style="text-align: center;"> Discontinue</div> </div>			

**Goal 7:** Evaluate, develop and/or refine district processes and systems.

**Performance Objective 1:** Develop and implement strategies to ensure the financial health of the district.





**Evaluation Data Sources:** School FIRST Report, Annual Audit, Five-Year Student Projections, Fund Balance Projections

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Develop a five-year general fund budget forecast using projected enrollments, revenues and expenditures.  <b>Strategy's Expected Result/Impact:</b> Budget forecasting will provide the groundwork for longer-range planning to address significant future fiscal challenges.  <b>Staff Responsible for Monitoring:</b> Chief Financial Officer</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Contract for an external district staffing analysis, which considers identified positions ESSER funded positions.  <b>Strategy's Expected Result/Impact:</b> Identify areas where district may be out of staffing norms as compared to comparable districts  <b>Staff Responsible for Monitoring:</b> Supt., Asst. Supt. of Human Resources</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Transition the district to the state's health insurance plan during the next evaluation cycle.  <b>Strategy's Expected Result/Impact:</b> Ensure competitive health insurance rates for employees, maintain a no cost employee option for employees with highest level of benefits  <b>Staff Responsible for Monitoring:</b> Asst. Supt. of Human Resources, Chief Financial Officer</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Identify ESSER funded positions to be eliminated and those to be maintained beyond September 2024 when funding ends.  <b>Strategy's Expected Result/Impact:</b> Timely notification to grant personnel, staffing and budget plans in place for the fall of 2024  <b>Staff Responsible for Monitoring:</b> Supt., Chief Financial Officer, Asst. Supt. of Human Resources</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 7:** Evaluate, develop and/or refine district processes and systems.

**Performance Objective 2:** Research and explore options for engaging the board and the community in the development and implementation of a 3-5 year strategic plan.

**Evaluation Data Sources:** Plan identified with actionable steps for moving forward





Strategy 1 Details	Formative Reviews		
<b>Strategy 1:</b> Identify 3-5 recommended consultants for the facilitation of strategic plan development. <b>Strategy's Expected Result/Impact:</b> Understanding of available services and final products <b>Staff Responsible for Monitoring:</b> Supt.	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<b>Strategy 2:</b> Establish budget and initiate appropriate procurement for strategic plan development services. <b>Strategy's Expected Result/Impact:</b> Funds identified <b>Staff Responsible for Monitoring:</b> Supt.	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 7:** Evaluate, develop and/or refine district processes and systems.

**Performance Objective 3:** Increase student attendance.

**Evaluation Data Sources:** Attendance Data, STAAR Data





Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Continue using federal stimulus funding to employ a Director of Student Attendance and Outreach Services to oversee the district's attendance and truancy programs.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student attendance, increased student achievement</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Student Services and Support, Exec. Director of Student Services</p> <p><b>Funding Sources:</b> salary - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Monitor campus attendance campaigns for 2023-2024 and track student attendance data monthly with the campus attendance review committee.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased average daily student attendance</p> <p><b>Staff Responsible for Monitoring:</b> Director of Student Attendance and Outreach Services</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Identify and monitor students who are chronically absent. Identify root causes of absenteeism and develop an individualized plan for each student with chronic absenteeism.</p> <p><b>Strategy's Expected Result/Impact:</b> Decrease the number of students who are chronically absent</p> <p><b>Staff Responsible for Monitoring:</b> Director of Student Attendance and Outreach Services, Exec. Director of Student Services</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Identify and implement professional development activities to increase teacher and parent knowledge and skills to impact chronic absenteeism.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased collaboration between school and parent resulting in improved student attendance</p> <p><b>Staff Responsible for Monitoring:</b> Director of Student Attendance and Outreach Services</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Continue networking and participating in professional learning opportunities to learn best practices for tackling attendance problems and determine sustainability measures.</p> <p><b>Strategy's Expected Result/Impact:</b> Innovative ideas for addressing attendance issues emerge</p> <p><b>Staff Responsible for Monitoring:</b> Exec. Director of Student Services, Director of Student Attendance and Outreach Services</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 7:** Evaluate, develop and/or refine district processes and systems.

**Performance Objective 4:** Continue to increase staff knowledge and skills to support improved processes and use of student management software (Frontline) for online student registration, enrollment verification, attendance and secondary course selection.

**Evaluation Data Sources:** Streamlined Online Processes for Student Registration, Enrollment Verification, Attendance and Secondary Course Selection

Strategy 1 Details	Formative Reviews		
<b>Strategy 1:</b> Implement and develop training plans for best practices for student management and business information software system. <b>Strategy's Expected Result/Impact:</b> System used fully to support district operations <b>Staff Responsible for Monitoring:</b> Chief Technology Officer, Asst. Supt. of Finance and Operations, Director of PEIMS	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<b>Strategy 2:</b> Conduct weekly meetings to review leaver coding for high schools to ensure accurate dropout rate data. <b>Strategy's Expected Result/Impact:</b> Accurate coding and development of plans to contact students <b>Staff Responsible for Monitoring:</b> Director of Accountability Systems and Data Analysis	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			





**Goal 8:** Build capacity for school leadership.

**Performance Objective 1:** Develop campus and district capacity to serve student needs while working as a team to advance the goals of the district.

**Evaluation Data Sources:** Student Achievement Data, Culture and Climate Survey

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Grow the capacity of campus leadership teams through targeted professional development to deepen knowledge and identification of system structures for strong Instructional Leadership Teams and Professional Learning Communities.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased understanding, execution, and feedback anchored in effective implementation of both systems</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Executive Directors of Curriculum and Instruction, Director of Opportunity Culture</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Use a district coaching platform to track and respond to campus level data related to action coaching.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student achievement and increased observation and feedback resulting in improved Tier I instruction</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Partner with ESC 12 to facilitate year 2 of "Lead Like a Champion" leadership academy for cohort campus leaders.</p> <p><b>Strategy's Expected Result/Impact:</b> Second year campus leaders deepen skills for instructional leadership</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction</p> <p><b>Funding Sources:</b> cost of registration - Title II, Part A (TPTR)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Continue to develop campus leaders to understand and implement processes to support the implementation of the Leadership Definition Framework that was initiated at the Holdsworth Center.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased number of ready leaders for a strong leadership pipeline</p> <p><b>Staff Responsible for Monitoring:</b> Supt., Deputy Supt., Asst. Supt. of Curriculum and Instruction</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>





Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Facilitate annual retreat with school and district leaders to launch the 2023-2024 school year with a focus on leadership skill development.</p> <p><b>Strategy's Expected Result/Impact:</b> Deepen leadership skills while focusing on the strategic plan for 2023-2024</p> <p><b>Staff Responsible for Monitoring:</b> Deputy Supt.</p> <p><b>Funding Sources:</b> - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 6 Details	Formative Reviews		
<p><b>Strategy 6:</b> Deliver an annual new administrator orientation for new school leaders.</p> <p><b>Strategy's Expected Result/Impact:</b> New campus principals and assistant principals are oriented to tools, processes and systems to ensure a smooth start in leadership role and understand who to call for help in the district as needed by program/department area</p> <p><b>Staff Responsible for Monitoring:</b> Deputy Supt., Exec. Director of Professional Development</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 7 Details	Formative Reviews		
<p><b>Strategy 7:</b> Provide monthly targeted, real-time leadership training to support campus principals and assistant principals.</p> <p><b>Strategy's Expected Result/Impact:</b> Strengthen leadership definition priority competencies</p> <p><b>Staff Responsible for Monitoring:</b> Deputy Supt., Asst. Supt. of Curriculum and Instruction, Asst. Supt. of Human Resources, Asst. Supt. of Student Services and Support</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 8 Details	Formative Reviews		
<p><b>Strategy 8:</b> Provide summer book study opportunities for district and campus leaders.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased knowledge of research-based strategies for topics such as high-yield instructional strategies, school/organizational culture, literacy knowledge, systems approaches, and leadership competencies</p> <p><b>Staff Responsible for Monitoring:</b> Supt., Deputy Supt.</p> <p><b>Funding Sources:</b> - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 9 Details	Formative Reviews		
<p><b>Strategy 9:</b> Prioritize professional learning conferences for campus leaders including University of Texas Human Dimensions of Organizations (HDO) Leadership Certificate Programs, Stanford University and University of Texas Design Thinking Institutes, Momentous Institute, CASEL, Texas Association of Behavior Specialists, Emergent Tree, Texas Library Association, Teacher's College, and sessions supporting trauma-informed practices.</p> <p><b>Strategy's Expected Result/Impact:</b> Leaders develop in-depth leadership skills in racial equity, problem solving, social-emotional learning, and behavior</p> <p><b>Staff Responsible for Monitoring:</b> Supt., Deputy Supt., Asst. Supt. of Curriculum and Instruction, Asst. Supt. of Student Services and Support, Exec. Director of Curriculum and Professional Development</p> <p><b>Funding Sources:</b> Travel and Registration - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 10 Details	Formative Reviews		
<p><b>Strategy 10:</b> Continue training secondary administrators and counselors to support campus master scheduling and tracking platforms.</p> <p><b>Strategy's Expected Result/Impact:</b> Timely completion of master schedules, improved scheduling of students, accurate four-year graduation plans</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 11 Details	Formative Reviews		
<p><b>Strategy 11:</b> Strengthen instructional leadership capacity of campus instructional specialists and multi-classroom leaders through monthly targeted professional development based on district patterns and trends.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased student achievement, increased teacher effectiveness</p> <p><b>Staff Responsible for Monitoring:</b> Asst. Supt. of Curriculum and Instruction, Exec. Director of Curriculum and Professional Development, Director of Opportunity Culture</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 8:** Build capacity for school leadership.

**Performance Objective 2:** Develop capacity of aspiring leaders to build a pipeline for succession planning.

**Evaluation Data Sources:** PD Surveys, Number of Internal Candidates in Hiring Pool, Number of Aspiring Leaders Hired





Strategy 1 Details	Formative Reviews		
<b>Strategy 1:</b> Continue to integrate the competencies from District's Leadership Definition Framework into aspiring leadership programs. <b>Strategy's Expected Result/Impact:</b> Increased number of ready leaders who have strong leadership competencies as identified in the Leadership Definition Framework <b>Staff Responsible for Monitoring:</b> Deputy Supt., Asst. Supt. of Curriculum and Instruction	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<b>Strategy 2:</b> Sustain and extend the Aspiring Leaders Academy to develop aspiring assistant principals and principals. <b>Strategy's Expected Result/Impact:</b> Develop a high quality pool of candidates for school leadership roles <b>Staff Responsible for Monitoring:</b> Deputy Supt., Asst. Supt. of Human Resources, Exec. Director of Professional Development	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<b>Strategy 3:</b> Launch Cohort 2 of the Teacher Leadership Academy and expand opportunities for teacher leadership throughout the district. <b>Strategy's Expected Result/Impact:</b> Improved teacher collective efficacy and build a build a strong teacher pipeline <b>Staff Responsible for Monitoring:</b> Deputy Supt., Asst. Supt. of Curriculum and Instruction, Exec. Director of Professional Development	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  No Progress         </div> <div style="text-align: center;">  Accomplished         </div> <div style="text-align: center;">  Continue/Modify         </div> <div style="text-align: center;">  Discontinue         </div> </div>			

**Goal 9:** Provide technology to support teaching and learning initiatives and support district operations.

**Performance Objective 1:** Maintain and update the district's technology systems and infrastructure.

**Evaluation Data Sources:** Budget Records, Replacement Cycle Plan, WAN Usage, e-Rate plan, Technology Organizational Chart





Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Provide security support for all campuses through a new security and emergency management system (Raptor).  <b>Strategy's Expected Result/Impact:</b> Enhanced school safety through additional card readers, door contact alerts, Silent Panic Alarm Technology and Prohibited Items Detection systems (secondary only)  <b>Staff Responsible for Monitoring:</b> Chief Technology Officer, Chief of Police, Chief of Facilities &amp; Operations</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Review and update the cybersecurity plan to meet legislative compliance for safety, security, and privacy. Provide training for all end users, including students and faculty.  <b>Strategy's Expected Result/Impact:</b> Improved cybersecurity of district resources and systems  <b>Staff Responsible for Monitoring:</b> Chief Technology Officer</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Use federal stimulus funding to add additional external wireless access points at Bell's Hill and Dean Highland to provide increased bandwidth.  <b>Strategy's Expected Result/Impact:</b> Provide external internet connectivity at two locations to provide equity for learning  <b>Staff Responsible for Monitoring:</b> Chief Technology Officer   <b>Funding Sources:</b> - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Increase utilization of Google Suites platform through continued online/on-demand training to systematize and improve district processes including the use of Google Meet, Google Classroom, and Email Security.  <b>Strategy's Expected Result/Impact:</b> Increased efficiency and control of data and sharing  <b>Staff Responsible for Monitoring:</b> Chief Technology Officer   <b>Funding Sources:</b> TCEA PD - Title IV</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Continue contract for expert assistance for e-Rate services as needed to ensure proper filings in order to maximize funding to support technology needs.</p> <p><b>Strategy's Expected Result/Impact:</b> e-Rate plans submitted and fully funded without delays</p> <p><b>Staff Responsible for Monitoring:</b> Chief Technology Officer</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 6 Details	Formative Reviews		
<p><b>Strategy 6:</b> Advance the current web platform to an improved user interface.</p> <p><b>Strategy's Expected Result/Impact:</b> Enhanced access to information and more effective use of district resources</p> <p><b>Staff Responsible for Monitoring:</b> Chief Technology Officer, Exec. Director of Communications, Chief of Staff</p> <p><b>Funding Sources:</b> - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<p style="text-align: center;">  No Progress       Accomplished       Continue/Modify       Discontinue </p>			

**Goal 9:** Provide technology to support teaching and learning initiatives and support district operations.

**Performance Objective 2:** Use technology to support teaching and learning initiatives.

**Evaluation Data Sources:** Student Achievement Data, e-Rate Reports, Budget Records, Surveys, Stimulus Budgets





Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Use stimulus funds (ARP/Emergency Connectivity Fund/ERATE) to maintain and upgrade the district's technology infrastructure to support increased student achievement and ensure the district is prepared to meet online state testing requirements.</p> <p><b>Strategy's Expected Result/Impact:</b> District technology replacement cycle is implemented and devices are updated and deployed</p> <p><b>Staff Responsible for Monitoring:</b> Chief Technology Officer, Asst. Supt. of Finance and Operations</p> <p><b>Funding Sources:</b> Student/Faculty Devices - American Rescue Plan (ARP/ESSER III), Technology Devices for Instruction - Title IV</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Increase teacher knowledge and skills regarding the use of the district's digital learning management systems (Canvas and SeeSaw) to support instruction.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved delivery of high-quality instruction</p> <p><b>Staff Responsible for Monitoring:</b> Chief Technology Officer, Exec. Director of Professional Development</p> <p><b>Funding Sources:</b> Professional Development both in person and online/on demand Seesaw PD - Title IV</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Provide high-quality, on-demand training for teachers to support digital learning and effective instructional strategies for engaging learning environments.</p> <p><b>Strategy's Expected Result/Impact:</b> Increased teacher knowledge and skills of how to properly use digital tools</p> <p><b>Staff Responsible for Monitoring:</b> Chief Technology Officer</p> <p><b>Funding Sources:</b> - Title IV</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Enhance the Technology Advisory Committee by adding student and parent voice to update the District's Technology Plan.</p> <p><b>Strategy's Expected Result/Impact:</b> Updated Technology Plan meets minimum technology standards needed for instruction</p> <p><b>Staff Responsible for Monitoring:</b> Chief Technology Officer, Asst. Supt. of Curriculum and Instruction</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 10:** Ensure well-maintained, quality teaching and learning spaces.

**Performance Objective 1:** Implement the Long-Range Facilities Master Plan.

**Evaluation Data Sources:** Board Meeting Minutes, Architectural Plans





Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Request bids and recommend a Guaranteed Maximum Price for the construction of Kendrick and South Waco elementary schools.  <b>Strategy's Expected Result/Impact:</b> Project budgets, construction completed within contract specifications  <b>Staff Responsible for Monitoring:</b> Chief of Facilities and Operations, Asst. Director of Construction</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Provide oversight of the Waco High School, Tennyson Middle School, Kendrick Elementary, and South Waco Elementary construction projects.  <b>Strategy's Expected Result/Impact:</b> Projects completed on time and in budget  <b>Staff Responsible for Monitoring:</b> Chief of Facilities and Operations, Asst. Director of Construction</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Implement Kahua internal document software system for bond projects and integrate it with facilities management.  <b>Strategy's Expected Result/Impact:</b> Document storage and tracking for bond and other facilities projects, historical data including costs available for future planning  <b>Staff Responsible for Monitoring:</b> Chief of Facilities and Operations, Asst. Director of Construction</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Formalize Waco ISD construction standards/expectations to communicate district's preferred systems and expectations for the quality of performance for facilities.  <b>Strategy's Expected Result/Impact:</b> Standardization and consistency of systems, efficiency in design process for new facilities  <b>Staff Responsible for Monitoring:</b> Chief of Facilities and Operations, Asst. Director of Construction</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Work with the district's demographer to develop a strategy for engaging an attendance boundaries committee for late Fall 2024 and Spring 2025. Attendance boundaries will address elementary and middle school boundaries, focusing on high school feeder patterns.  <b>Strategy's Expected Result/Impact:</b> Attendance boundaries in place for the fall of 2025 when the new Kendrick Elementary opens and Alta Vista Elementary closes  <b>Staff Responsible for Monitoring:</b> Supt., Chief of Staff</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 6 Details	Formative Reviews		
<b>Strategy 6:</b> Develop options and identify plans for the current and future uses of the Administration Building, Alta Vista Elementary, Brazos High School and Indian Spring Middle School. <b>Strategy's Expected Result/Impact:</b> Vision for use of facilities established <b>Staff Responsible for Monitoring:</b> Supt.	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 10:** Ensure well-maintained, quality teaching and learning spaces.

**Performance Objective 2:** Update the long-range facilities plan to address deferred maintenance items

**Evaluation Data Sources:** District facility asset database, project records, reports addressing deficiencies





Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Complete and close out ESSER funded HVAC and controls projects.  <b>Strategy's Expected Result/Impact:</b> Federal stimulus funding used to improve campus HVAC systems, projects completed and closed out  <b>Staff Responsible for Monitoring:</b> Director of Maintenance   <b>Funding Sources:</b> HVAC - American Rescue Plan (ARP/ESSER III)</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Contract for a roofing assessment to prioritize replacement projects.  <b>Strategy's Expected Result/Impact:</b> Improve existing facility roofs and the learning environment  <b>Staff Responsible for Monitoring:</b> Chief of Facilities and Operations, Director of Maintenance</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Continue to evaluate the district's overall number of portables and discontinue leases on existing portables.  <b>Strategy's Expected Result/Impact:</b> Strategically utilize leased portables and reduce usage of portables district wide  <b>Staff Responsible for Monitoring:</b> Supt., Chief of Facilities and Operations, Director of Maintenance</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Maintain an updated Capital Projects Plan to identify large construction projects to be completed as funds become available.  <b>Strategy's Expected Result/Impact:</b> Capital Projects Plan available for the Board to review when funding is available for projects and/or there is a bond program  <b>Staff Responsible for Monitoring:</b> Supt., Chief of Facilities and Operations</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 10:** Ensure well-maintained, quality teaching and learning spaces.

**Performance Objective 3:** Ensure efficient and effective maintenance, custodial, grounds, warehouse, transportation and child nutrition departments.

**Evaluation Data Sources:** Five-Year Maintenance Plan, Budget Records, Program Reviews

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Plan for the transition of contracted transportation services to a district operated department including staffing, technology, facilities, equipment, and training.</p> <p><b>Strategy's Expected Result/Impact:</b> Improved services for families</p> <p><b>Staff Responsible for Monitoring:</b> Supt., Deputy Superintendent, Director of Transportation</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Continue the use of robotic equipment to clean larger campuses.</p> <p><b>Strategy's Expected Result/Impact:</b> Efficiency in cleaning campuses, reduced personnel costs</p> <p><b>Staff Responsible for Monitoring:</b> Chief of Facilities &amp; Operations, Director of Maintenance, Custodial Supervisors</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Contract with the Texas Association of School Business Officials (TASBO) for an analysis of the custodial department.</p> <p><b>Strategy's Expected Result/Impact:</b> Recommendations for improvement identified and implemented</p> <p><b>Staff Responsible for Monitoring:</b> Director of Maintenance</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Dedicate Child Nutrition fund balances to purchase new equipment to support new menu initiatives, product storage, cooking initiatives and program efficiencies to provide new offerings to students and increase participation.</p> <p><b>Strategy's Expected Result/Impact:</b> Upgraded serving lines and equipment will allow for faster service and new food offerings which we hope will lead to increased participation as well as student and staff satisfaction</p> <p><b>Staff Responsible for Monitoring:</b> Director of Child Nutrition Services, Chief Financial Officer</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>





Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Support district operations through the efficient and effective management of warehousing and distribution services, maintaining accurate inventory counts and tagging controlled assets in an effort to optimize resources, improve utilization, and provide accountability to district stakeholders.</p> <p><b>Strategy's Expected Result/Impact:</b> Efficient and effective application of procedures will assist the district in forecasting materials and equipment requirements to better optimize the use of resources, preventing spoilage, obsolescence, theft and loss of supply inventories and facilitating the accountability of asset condition, use, and performance</p> <p><b>Staff Responsible for Monitoring:</b> Director of Purchasing, Warehousing, and Distribution Services and Warehouse Supervisor</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 6 Details	Formative Reviews		
<p><b>Strategy 6:</b> Support campus operations through a systematic bookroom cleanup, removing all out-of-adoption materials and establishing accurate bookroom counts in the textbook management system for each campus.</p> <p><b>Strategy's Expected Result/Impact:</b> This process will provide an up-to-date, accurate count of textbooks and other instructional materials and the disposal of out-of-date items will give the campuses better storage space for new materials</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 7 Details	Formative Reviews		
<p><b>Strategy 7:</b> Implement structured custodial training program starting with all new hires.</p> <p><b>Strategy's Expected Result/Impact:</b> Better performance of new hires, increased job satisfaction, better retention</p> <p><b>Staff Responsible for Monitoring:</b> Director of Maintenance</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 10:** Ensure well-maintained, quality teaching and learning spaces.

**Performance Objective 4:** Implement the Long-Range Facilities Master Plan.

**Evaluation Data Sources:** Board Meeting Minutes, Architectural Plans





Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Request bids and recommend a Guaranteed Maximum Price for the construction of Kendrick and South Waco Elementary Schools.</p> <p><b>Strategy's Expected Result/Impact:</b> Project budgets, construction completed within contract specifications</p> <p><b>Staff Responsible for Monitoring:</b> Chief of Facilities and Operations, Asst. Director of Construction</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Provide oversight of the Waco High School, Tennyson Middle School, Kendrick Elementary, and South Waco Elementary construction projects.</p> <p><b>Strategy's Expected Result/Impact:</b> Projects completed on time and in budget</p> <p><b>Staff Responsible for Monitoring:</b> Chief of Facilities and Operations, Asst. Director of Construction</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Implement Kahua internal document software system for bond projects and integrate it with facilities management.</p> <p><b>Strategy's Expected Result/Impact:</b> Document storage and tracking for bond and other facilities projects, historical data including costs available for future planning</p> <p><b>Staff Responsible for Monitoring:</b> Chief of Facilities and Operations, Asst. Director of Construction</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Formalize Waco ISD construction standards/expectations to communicate district's preferred systems and expectations for the quality of performance for facilities.</p> <p><b>Strategy's Expected Result/Impact:</b> Standardization and consistency of systems, efficiency in design process for new facilities</p> <p><b>Staff Responsible for Monitoring:</b> Chief of Facilities and Operations, Asst. Director of Construction</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Work with the district's demographer to develop a strategy for engaging an attendance boundaries committee for late Fall 2024 and Spring 2025. Attendance boundaries will address elementary and middle school boundaries, focusing on high school feeder patterns.</p> <p><b>Strategy's Expected Result/Impact:</b> Attendance boundaries in place for the fall of 2025 when the new Kendrick Elementary opens and Alta Vista Elementary closes</p> <p><b>Staff Responsible for Monitoring:</b> Supt., Chief of Staff</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 6 Details	Formative Reviews		
<b>Strategy 6:</b> Develop options and identify plans for the current and future uses of the Administration Building, Alta Vista Elementary, Brazos High School and Indian Spring Middle School. <b>Strategy's Expected Result/Impact:</b> Vision for use of facilities established <b>Staff Responsible for Monitoring:</b> Supt.	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 10:** Ensure well-maintained, quality teaching and learning spaces.

**Performance Objective 5:** Update the long-range facilities plan to address deferred maintenance items

**Evaluation Data Sources:** District facility asset database, project records, reports addressing deficiencies





Strategy 1 Details	Formative Reviews		
<b>Strategy 1:</b> Complete and close out ESSER funded HVAC and controls projects. <b>Strategy's Expected Result/Impact:</b> Federal stimulus funding used to improve campus HVAC systems, projects completed and closed out <b>Staff Responsible for Monitoring:</b> Director of Maintenance  <b>Funding Sources:</b> HVAC - American Rescue Plan (ARP/ESSER III)	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<b>Strategy 2:</b> Contract for a roofing assessment to prioritize replacement projects. <b>Strategy's Expected Result/Impact:</b> Improve existing facility roofs and the learning environment <b>Staff Responsible for Monitoring:</b> Chief of Facilities and Operations, Director of Maintenance	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<b>Strategy 3:</b> Continue to evaluate the district's overall number of portables and discontinue leases on existing portables. <b>Strategy's Expected Result/Impact:</b> Strategically utilize leased portables and reduce usage of portables district wide <b>Staff Responsible for Monitoring:</b> Supt., Chief of Facilities and Operations, Director of Maintenance	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<b>Strategy 4:</b> Maintain an updated Capital Projects Plan to identify large construction projects to be completed as funds become available. <b>Strategy's Expected Result/Impact:</b> Capital Projects Plan available for the Board to review when funding is available for projects and/or there is a bond program <b>Staff Responsible for Monitoring:</b> Supt., Chief of Facilities and Operations	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
 No Progress  Accomplished  Continue/Modify  Discontinue			

**Goal 10:** Ensure well-maintained, quality teaching and learning spaces.

**Performance Objective 6:** Ensure efficient and effective maintenance, custodial, grounds, warehouse, transportation and child nutrition departments.

**Evaluation Data Sources:** Five-Year Maintenance Plan, Budget Records, Program Reviews

Strategy 1 Details	Formative Reviews		
<p><b>Strategy 1:</b> Implement SMARTtag and maintain effective use of new routing software.  <b>Strategy's Expected Result/Impact:</b> On-time, reliable service for our students and community, improved morale for bus drivers and staff  <b>Staff Responsible for Monitoring:</b> Chief Officer of Facilities and Operations</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 2 Details	Formative Reviews		
<p><b>Strategy 2:</b> Begin the transition of contracted transportation services to a district operated department including staffing, technology, facilities, equipment, and training.  <b>Strategy's Expected Result/Impact:</b> Improved services for families  <b>Staff Responsible for Monitoring:</b> Chief of Facilities and Operations, Deputy Superintendent, Director of Transportation</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 3 Details	Formative Reviews		
<p><b>Strategy 3:</b> Continue the use of robotic equipment to clean larger campuses.  <b>Strategy's Expected Result/Impact:</b> Efficiency in cleaning campuses, reduced personnel costs  <b>Staff Responsible for Monitoring:</b> Chief of Facilities and Operations, Director of Maintenance, Custodial Supervisors</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 4 Details	Formative Reviews		
<p><b>Strategy 4:</b> Contract with the Texas Association of School Business Officials (TASBO) for an analysis of the custodial department.  <b>Strategy's Expected Result/Impact:</b> Recommendations for improvement identified and implemented  <b>Staff Responsible for Monitoring:</b> Director of Maintenance</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 5 Details	Formative Reviews		
<p><b>Strategy 5:</b> Dedicate Child Nutrition fund balances to purchase new equipment to support new menu initiatives, product storage, cooking initiatives and program efficiencies to provide new offerings to students and increase participation.  <b>Strategy's Expected Result/Impact:</b> Upgraded serving lines and equipment will allow for faster service and new food offerings which we hope will lead to increased participation as well as student and staff satisfaction  <b>Staff Responsible for Monitoring:</b> Director of Child Nutrition Services, Chief Financial Officer</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>

Strategy 6 Details	Formative Reviews		
<p><b>Strategy 6:</b> Support district operations through the efficient and effective management of warehousing and distribution services, maintaining accurate inventory counts and tagging controlled assets in an effort to optimize resources, improve utilization, and provide accountability to district stakeholders.</p> <p><b>Strategy's Expected Result/Impact:</b> Efficient and effective application of procedures will assist the district in forecasting materials and equipment requirements to better optimize the use of resources, preventing spoilage, obsolescence, theft and loss of supply inventories and facilitating the accountability of asset condition, use, and performance</p> <p><b>Staff Responsible for Monitoring:</b> Director of Purchasing, Warehousing, and Distribution Services and Warehouse Supervisor</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 7 Details	Formative Reviews		
<p><b>Strategy 7:</b> Support campus operations through a systematic bookroom cleanup, removing all out-of-adoption materials and establishing accurate bookroom counts in the textbook management system for each campus.</p> <p><b>Strategy's Expected Result/Impact:</b> This process will provide an up-to-date, accurate count of textbooks and other instructional materials and the disposal of out-of-date items will give the campuses better storage space for new materials.</p> <p><b>Staff Responsible for Monitoring:</b> Director of Purchasing, Warehousing, and Distribution Services and Warehouse Supervisor</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
Strategy 8 Details	Formative Reviews		
<p><b>Strategy 8:</b> Implement structured custodial training program starting with all new hires.</p> <p><b>Strategy's Expected Result/Impact:</b> Better performance of new hires, more job satisfaction, better retention.</p> <p><b>Staff Responsible for Monitoring:</b> Director of Maintenance</p>	<b>Formative</b>		
	<b>Jan</b>	<b>May</b>	<b>May</b>
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;"> No Progress</div> <div style="text-align: center;"> Accomplished</div> <div style="text-align: center;"> Continue/Modify</div> <div style="text-align: center;"> Discontinue</div> </div>			

**WACO INDEPENDENT SCHOOL DISTRICT  
BOARD MEETING MINUTES**

Regular Meeting, August 24, 2023 - 6:00 p.m.  
WISD Administration Offices Board Room

**BOARD MEMBERS PRESENT**

Stephanie Korteweg  
Jose Vidana  
Jeremy Davis  
Keith Guillory  
Angelo Ochoa  
Jonathan Grant  
Jim Patton

**BOARD MEMBERS ABSENT**

**CALL TO ORDER**

Stephanie Korteweg, Board President, called the meeting of the Waco Independent School District Board of Trustees to order at 6:01 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**

Pam Cooper, Greater Waco AFT Member, spoke positively about the 2023 New Teacher Induction held this summer. She also raised a concern regarding the teacher shortage. Ms. Cooper emphasized the role of paraprofessional staff filling in as teachers during these shortages and advocated for their fair compensation through a stipend for the additional duties they take on.

**SPECIAL RECOGNITIONS**

**Pledge of Allegiance**

Denise Palacion and Yessenia Antonio, Waco High students, led the Pledge of Allegiance.

**Educators Rising National Competition Award Winners**

Waco ISD's Future Educators Academy achieved national recognition when a team of University High School students, Nahyeli Villa, Kentavia Dotson-Duffey, and Isela Martinez, secured third place in the "Inside Our Schools Presentation" category at the Educators Rising National Competition. The event, which took place in Orlando, Florida

from June 29 to July 2, featured students from across the country showcasing innovative strategies their schools or districts employ to enhance teaching and learning.

Competing against 52 other teams, the Waco ISD trio created a video highlighting their district's "Grow Your Own" teacher program, which begins with the Future Educators Academy.

### **Texas Art Education Association District of Distinction Award**

Waco ISD has achieved a distinction as one of only 68 school districts out of more than 1,200 in Texas to receive the Texas Art Education Association (TAEA) District of Distinction Award. Waco ISD is one of 16 districts in the entire state that have consistently earned the TAEA District of Distinction Award every year since its inception five years ago. Waco ISD's visual arts teachers will be honored at the TAEA Fall Conference General Assembly on Friday, November 17, 2023.

### **No Place for Hate® Designations**

No Place for Hate® is a collaborative initiative led by the Anti-Defamation League, aimed at promoting anti-bias and diversity education within schools. It provides educators and students with resources to integrate these values into the school culture effectively.

In the 2022-2023 school year, 20 Waco ISD campuses achieved the No Place for Hate® designation, marking a continuous growth of 5 campuses each year since 2021. The 2022-2023 No Place for Hate® Designated Campuses are:

- Alta Vista Elementary
- Bell's Hill Elementary
- Brook Avenue Elementary
- Cedar Ridge Elementary
- Crestview Elementary
- Dean Highland Elementary
- Hillcrest PDS
- Kendrick Elementary
- Lake Air Montessori Magnet
- Parkdale Elementary
- Provident Heights Elementary
- South Waco Elementary
- West Avenue Elementary
- Cesar Chavez Middle School
- Tennyson Middle School
- University High School
- Waco High School
- Brazos High School

- Mountainview Elementary
- Wiley Opportunity Center

### **Community Partner Award**

The Board honored Moldbreakers Fellowship with the August Community Partner Award. The church has actively supported Waco High the past three years. The Moldbreakers Fellowship has made substantial contributions, including replenishing the Waco High food pantry, providing Thursday night meals to the Waco High football team, supplying snacks, sports drinks, and nutritious meals to Waco High athletics programs. They also engage in mentoring students beyond school hours, have donated fair tickets and clear backpacks to students, hosted a community back-to-school event to distribute school supplies, and actively participate in the Waco ISD Back-to-School Family Fest event.

### **SUPERINTENDENT'S REPORT**

#### **First Week of School/Enrollment Counts**

On the first day of school, there were 12,465 students in classrooms, and the current enrollment is 13,370. The official PEIMS snapshot date is the last Friday in October.

#### **Instructional Staffing**

The district is facing ongoing challenges related to the teacher shortage, particularly in the field of special education. Currently, there are 23 classrooms without a teacher. To fill these vacancies, permanent substitutes are temporarily taking over until qualified teachers can be hired. The board's approval of sign-on bonuses for certified teachers was instrumental in hiring 142 certified teachers.

#### **2023 STAAR Scores**

The Texas Education Agency (TEA) initiated a comprehensive redesign of the state testing and A-F accountability system as part of a five-year refresh plan. Due to these changes, the district received results later than normal.

The redesign of the State of Texas Assessments of Academic Readiness (STAAR) test is substantial, introducing several key modifications. Despite the increased rigor, student performance improved on 16 out of 20 STAAR tests, including the STAAR reading test for third-grade students, which now includes a substantial writing component. Moreover, grades 3-8 saw a 15% increase in students passing the mathematics test at the approaches level, along with a 5 percentage point increase in students reaching the meets level. High school students exhibited growth on every end-of-course exam, particularly in English I, contributing to improved graduation rates.

Dr. Kincannon pointed out that the new methodologies employed by TEA may lead to lower ratings for campuses and the district, despite significant student gains on the STAAR tests.

### **House Bill 114**

House Bill 114, passed during the Legislative Session, mandates that school districts must enforce Disciplinary Alternative Education Program (DAEP) placements for students who are found in possession of, using, selling, giving, or delivering e-cigarettes on school premises or at school-related events. Furthermore, any student discovered with a THC vape cartridge will face a state jail felony charge. State law dictates that any student caught with e-cigarettes or vapes will immediately be subject to DAEP placement.

The district is dedicated to raising awareness and educating students and families about this legal change and the health risks associated with e-cigarettes. Dr. Kincannon communicated this information to families through a letter, and efforts continue to reinforce this message among students and their families.

### **PUBLIC MEETING TO DISCUSS THE 2023-2024 BUDGET AND PROPOSED TAX RATE**

A public hearing is required by Section 44.004 of the Education Code to discuss the 2023-2024 budgets and the proposed tax rate in compliance with all budget adoption and tax rate setting requirements. The purpose of the hearing is to provide an opportunity for any taxpayer of the District to present comments regarding the budget or the proposed tax rate.

The public hearing was duly noticed, with publication in the newspaper on August 14, 2023. Furthermore, both the notice and the proposed budget, as compared to the prior year, have been available on the District's website since that date.

### **INFORMATION ITEMS/REPORTS**

- Monthly Financial Reports for the Period Ended July 31, 2023
- 2023-2024 Student Handbook
- School Safety & Student Behavior Report

### **CONSENT AGENDA: CONSIDER AND TAKE APPROPRIATE ACTION**

- Amendments to the 2022-2023 Budget
- Resolution Committing Unassigned General Fund Balance as of August 31, 2023

- Bid Award for Educational Consulting, Professional Development, and Other Student-Based Contracted Services
- Bid Award for Maintenance Supplies, Equipment and Services
- Bid Award for Restaurant & Catering Services
- Bid Renewal for Exclusive Beverage Contract
- Bid Renewal for Job Order Contracting for Data Wiring and Installation Services
- Bid Renewal for Job Order Contracting for Electrical Services
- Bid Renewal for Job Order Contracting for Roof Repair Services
- Bid Renewal for Job Order Contracting Kitchen Equipment Repair Services
- Bid Award for Job Order Contracting for Refrigeration Services
- Purchases over \$50,000 Under Pre-Existing Bid, Purchasing Cooperative, or Allowed Professional Service
- Approval of Changes to Utility Easement at Tennyson Middle School
- Resolution Regarding Hazardous Traffic Conditions
- 2023-2024 Student Code of Conduct
- T-TESS Appraisers for 2023-2024 School Year
- 4-H Extracurricular Status Request
- Board of Trustees Meeting Minutes
  - Regular Meeting - July 27, 2023
  - Special Meeting - August 10, 2023

Jim Patton made a motion, seconded by Keith Guillory to approve the Consent Agenda as presented. The motion was carried unanimously (7-0).

**CONSIDER, DISCUSS, AND TAKE APPROPRIATE ACTION REGARDING  
ADOPTION OF THE BUDGETS FOR THE 2023-2024 FISCAL YEAR**

In accordance with Section 44.002 of the Education Code, the Superintendent has prepared a proposed budget for the 2023-2024 fiscal year that covers all estimated revenue and proposed expenditures, including the general, food service, and debt service funds, as required by the State Board of Education. This budget was presented to the Board of Trustees on August 10, 2023.

The proposed budgets are as follows:

- General Fund budget: \$161,660,047
- Child Nutrition Fund budget: \$11,281,649
- Debt Service Fund budget: \$25,920,221

Keith Guillory made a motion, seconded by Jim Patton to approve the Adoption of the Budgets for the 2023-2024 Fiscal Year. The motion was carried unanimously (7-0).

**CONSIDER, DISCUSS, AND TAKE APPROPRIATE ACTION REGARDING A RESOLUTION ADOPTING THE TAX RATE FOR THE 2023 TAX YEAR**

Annually, the Board is tasked with determining the property tax rate necessary to generate sufficient local revenue to fund the upcoming fiscal year's budget. This year's proposed tax rate does not exceed the no-new-revenue tax rate, which eliminates the requirement for the "tax increase" language in accordance with §26.05(b) of the Property Tax Code.

Jim Patton made a motion, seconded by Keith Guillory to approve the adoption of a tax rate of \$1.028587. The motion was carried unanimously (7-0).

**REVIEW, DISCUSS AND TAKE APPROPRIATE ACTION ON THE DESIGN DEVELOPMENT AND PROJECT BUDGETS FOR KENDRICK AND SOUTH WACO ELEMENTARY SCHOOLS**

When the original bond program budgets were established for Kendrick and South Waco, cost escalation was factored in. However, factors such as supply chain cost increases, resource shortages, expanded scope, and a busy local market have led to significantly higher prices. Additional funds needed for both elementary projects amount to approximately \$18.7 million.

To address the increased project costs, the district identified additional funding sources including contingencies within ongoing projects (Carver and Waco High), insurance proceeds from the Carver fire incident, and bond interest earnings.

Jose Vidana made a motion, seconded by Jeremy Davis to approve the Design Development and Revised Budgets for Kendrick and South Waco Elementary Schools. The motion was carried unanimously (7-0).

**CONSIDER, DISCUSS, AND TAKE APPROPRIATE ACTION REGARDING ALLOWANCE EXPENDITURE AUTHORIZATION #6 FOR TENNYSON MIDDLE SCHOOL ALTERNATES**

Allowance Expenditure Authorization #6 included the acceptance of Alternate #2 for field storage and Alternate #4 for the Upfit Canopy, along with other minor items. The decision to postpone the acceptance of these alternates and allow further refinement of the scope resulted in a combined cost reduction of \$280,245.

Jim Patton made a motion, seconded by Jeremy Davis to approve the Allowance Expenditure Authorization #6 (AEA) to accept Alternate #2 and Alternate #4 for Tennyson Middle. This motion was carried unanimously (7-0).

**CONSIDER, DISCUSS, AND TAKE APPROPRIATE ACTION TO CLAIM A GOOD CAUSE EXCEPTION UNDER TEXAS EDUCATION CODE SECTION 37.0814**

The statute provides an option for boards of trustees that are unable to meet the "armed security officer" requirement. These boards may claim a "good cause exception" but are required to develop an alternative standard that the district can comply with.

Given the ongoing funding challenges, personnel shortages, and responsible contingency planning, the administration recommended that the Board of Trustees claim a "good cause exception" and work on developing an alternative standard that the District can feasibly meet.

Keith Guillory made a motion, seconded by Jeremy Davis to Claim a Good Cause Exception Under Texas Education Code Section 37.0814. The motion was carried unanimously (7-0).

**ANNOUNCEMENTS**

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

- Waco High School and University High School Football games
- Volleyball District Competition kicking off
- Labor Day Holiday - 09/04/2023
- GWAMA 10 Year Anniversary Celebration Luncheon - 09/07/2023
- Student Holiday, Staff Inservice Day - 09/15/2023

The Board convened into closed session at 7:48pm

The Board reconvened at 9:10pm

**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

**CONSIDER, DISCUSS, AND TAKE APPROPRIATE ACTION TO APPROVE THE DISTRICT'S ALTERNATIVE STANDARD UNDER TEXAS EDUCATION CODE SECTION 37.0814**

Waco ISD Board Meeting Minutes  
August 24, 2023

Keith Guillory made a motion, seconded by Jeremy Davis to approve the District's Alternative Standard Under Texas Education Code Section 37.0814. The motion was carried unanimously (7-0).

**CONSIDER, DISCUSS, AND TAKE APPROPRIATE ACTION TO AUTHORIZE  
INTERVENING IN LAWSUIT AGAINST TEXAS EDUCATION AGENCY**

Jonathan Grant made a motion, seconded by Jim Patton to Authorize Intervening in Lawsuit Against Texas Education Agency. The motion was carried unanimously (7-0).

**ADJOURNMENT**

The meeting adjourned at 9:13 p.m.

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Board President

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Board Secretary

**WACO INDEPENDENT SCHOOL DISTRICT  
BOARD MEETING MINUTES**  
Regular Meeting, September 21, 2023 - 6:00 p.m.  
WISD Administration Offices Board Room

**BOARD MEMBERS PRESENT**

Stephanie Korteweg  
Jose Vidana  
Jeremy Davis  
Keith Guillory (left at 7:33pm)  
Angelo Ochoa  
Jonathan Grant  
Jim Patton

**BOARD MEMBERS ABSENT**

**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**

No public comments.

**MOMENT OF SILENCE AND PLEDGE OF ALLEGIANCE**

Kaelani Morales-Rodriguez, a student from South Waco Elementary, led the Pledge of Allegiance.

**SPECIAL RECOGNITIONS**

**Advanced Placement Scholars**

The Board recognized Advanced Placement (AP) Scholars in three categories: AP Scholar, AP Scholar with Honor, and AP Scholar with Distinction. A total of 27 students received one or more AP Scholar awards.

**Community Partner Award**

Hiz Houze Church was honored with the Community Partner Award.

Hiz Houze Church has been an exceptional partner to Waco ISD, offering their support to Kendrick Elementary School and University High School. Contributions include providing free disc jockey services and organizing a STAAR pep rally at Kendrick

Elementary. They actively participate in the STAR Book Club and send church members to read to students during lunch. Additionally, they play a vital role in welcoming students on the first day of school, recording the campus STAAR song annually, sponsoring and volunteering for the Easter Hop event, and helping establish the Parent Teacher Association this year. Over the past few years, they have donated over 300 backpacks to students.

At University High School, Hiz Houze Church has volunteered to prepare meals for perfect attendance student luncheons, offered free disc jockey services for the senior class picnic, and provided mentoring support to students.

## **SUPERINTENDENT'S REPORT**

### **Hispanic Heritage Month**

Dr. Kincannon thanked campuses for their work to celebrate Hispanic Heritage Month. Activities included special classroom lessons, festivals, and events to highlight Hispanic culture, traditions, and history.

### **Accountability Lawsuit Update**

Dr. Kincannon updated the Board on the pending accountability lawsuit. During the August 24 Regular meeting, the Board unanimously approved filing a petition in intervention in a lawsuit against Commissioner Mike Morath in his role as Commissioner of the Texas Education Agency (TEA).

On September 8, Commissioner Morath announced a review of accountability methodologies and ratings, leading to a delay in the release of ratings by at least one month. Due to court scheduling, a new date has been set for October 13. Over 100 school districts have joined the lawsuit.

### **Tennyson Middle School Beam Signing**

The school is celebrating a construction milestone as part of the 2021 Bond Program. Dr. Kincannon invited the community to participate in a Beam Signing event on Monday, September 25.

## **INFORMATION ITEMS/REPORTS**

- Cooperative Fees Paid by Waco ISD
- Reports on Gifts to Waco ISD
- Acceptance of Gifts over \$50,000
- 2022-2023 Literacy Data Report
- Summer Enrichment 2023

**CONSENT AGENDA: CONSIDER AND TAKE APPROPRIATE ACTION**

- Amendments to the 2023-2024 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
- Interlocal Cooperation Agreement and Fiscal Agent Contract between the McLennan County Challenge Academy and Participating Districts for the 2023-2024 School Year
- Required Annual Review of College, Career and Military Readiness (CCMR) Board-Adopted Goals
- Required Annual Review of Early Childhood Literacy and Mathematics Board-Adopted Goals
- School Health Advisory Council (SHAC) Members
- Report on Class Size Waiver
- Staff Development Minutes Waiver
- Resolution to Nominate Candidate for the McLennan Central Appraisal District Board of Directors

Keith Guillory made a motion, seconded by Jeremy Davis to approve the Consent Agenda as presented. The motion was carried unanimously (7-0).

**CONSIDER, DISCUSS AND TAKE APPROPRIATE ACTION REGARDING APPROVAL OF ALLOWANCE EXPENDITURE AUTHORIZATION #11 FOR WACO HIGH SCHOOL**

Allowance Expenditure Authorization (AEA) #11 was presented for costs linked with alterations made to the building footprint to decrease construction costs. The modifications were implemented after the initial pricing of the plans by the Construction Manager at Risk (CMAR).

The additional cost of \$446,438.56 is covered by the Contractor's Contingency Allowance, which was included in the project contract.

Jose Vidana made a motion, seconded by Angelo Ochoa to approve the Allowance Expenditure Authorization #11 for Waco High School. The motion passed unanimously (7-0).

September 21, 2023

**CONSIDER, DISCUSS AND TAKE APPROPRIATE ACTION REGARDING APPROVAL OF ALLOWANCE EXPENDITURE AUTHORIZATION #17 FOR G. W. CARVER MIDDLE SCHOOL**

The Allowance Expenditure Authorization (AEA) #17 was presented for unforeseen site conditions encountered at G.W. Carver Middle School. The conditions necessitated the casing of every pier for the foundation due to challenging underground conditions.

Additional costs of \$111,636.00 will be covered by the Owner's Contingency Allowance, which was included in the project contract.

Jose Vidana made a motion, seconded by Jonathan Grant to approve the Allowance Expenditure Authorization #17 for G.W. Carver Middle School. The motion passed unanimously (7-0).

**CONSIDER, DISCUSS AND TAKE APPROPRIATE ACTION REGARDING APPROVAL OF GUARANTEED MAXIMUM PRICE (GMP) #1 FROM MAZANEC CONSTRUCTION FOR SOUTH WACO ELEMENTARY ADDITIONS AND RENOVATIONS**

GMP #1 for South Waco Elementary includes various scope components such as site development, utility relocation, and preparation of the building pad for the new additions. Mazanec Construction's Executive Summary, outlined a total cost of \$1,090,487 for GMP #1.

Jonathan Grant made a motion, seconded by Angelo Ochoa to approve the Guaranteed Maximum Price (GMP) #1 from Mazanec Construction for South Waco Elementary Additions and Renovations. The motion passed unanimously (7-0).

**CONSIDER, DISCUSS AND TAKE APPROPRIATE ACTION REGARDING APPROVAL OF GUARANTEED MAXIMUM PRICE (GMP) #1 FROM BWC EDUCATION GROUP FOR KENDRICK ELEMENTARY SCHOOL**

GMP #1 for Kendrick Elementary includes various scope components such as the demolition of the existing building, site development, utility relocation, preparation of the building pad for the new additions, and an allowance for expediting HVAC and electrical equipment purchases. BWC Education Group's Executive Summary outlined a total cost of \$8,361,059 for GMP #1.

Angelo Ochoa made a motion, seconded by Jonathan Grant to approve Guaranteed Maximum Price (GMP) #1 from BWC Education Group for Kendrick Elementary. The motion passed unanimously (7-0).

### **2023 STATE TESTING & ACCOUNTABILITY UPDATE**

Denise Bell provided the Board with an overview of changes to state testing and accountability. The TEA (Texas Education Agency) released STAAR scores later than usual in 2023 due to a comprehensive five-year plan to refresh the state's assessments.

The Board discussed methodologies communicated by the state and potential future revisions.

### **GROW OUR OWN PROGRAM**

Dr. Daniel Lopez and Melissa Cox provided an overview of Waco ISD's Grow Our Own Program, highlighting various components of Waco ISD's Grow Our Own strategies, including:

- Opportunity Culture Model
- Future Educators Academy
- Alternative Certification Pathway
- Bachelor's Degree Pathway

Leadership development activities include:

- Aspiring Leadership Academy
- Development and communication of a District Leadership Definition
- Teacher Leader Academy

A new program to support paraprofessionals in obtaining a bachelor's degree was introduced.

### **ANNOUNCEMENTS**

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

- UHS Football Homecoming Game - 09/22/2023
- Student Holiday, Staff Development Day - 09/25/2023
- Tennyson Middle School Community Beam Signing - 09/25/2023
- UHS Fall Choir Concert - 09/28/2023
- WHS Football Homecoming Game - 09/29/2023
- Middle Schools Distinguished Soloist Recital - 10/04/2023
- Student/Staff Holiday - 10/09/2023
- Workshop Board Meeting - 10/19/2023

The Board convened into closed session at 8:50 p.m.

The Board reconvened at 9:47 p.m.

**REVIEW AND DISCUSS HOUSE BILL 3 REQUIREMENT FOR ARMED SECURITY OFFICERS**

**REVIEW AND DISCUSS POTENTIAL CONTRACTS ON REAL PROPERTY**

**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

**ADJOURNMENT**

The meeting adjourned at 9:47 p.m.

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Board President

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Board Secretary

**Waco Independent School District  
Board of Trustee Meeting Agenda Item**

**Date:** October 26, 2023

**Contact Person:** Dr. Susan Kincannon

**RE: Consider, Discuss and Take Appropriate Action Regarding a Resolution Approving the Renovation, Construction, and Financing of an Addition to the McLennan Central Appraisal Center**

=====

**Background Information:**

The Appraisal District seeks approval for the expansion of their facilities to accommodate a larger customer service counter and to facilitate additional hearings in the future. Three-fourths entity approval is required for real estate acquisition or to renovate existing structures.

Attached is a copy of the Building Renovation Proposal provided by the Chief Appraiser.

**Fiscal Implications:**

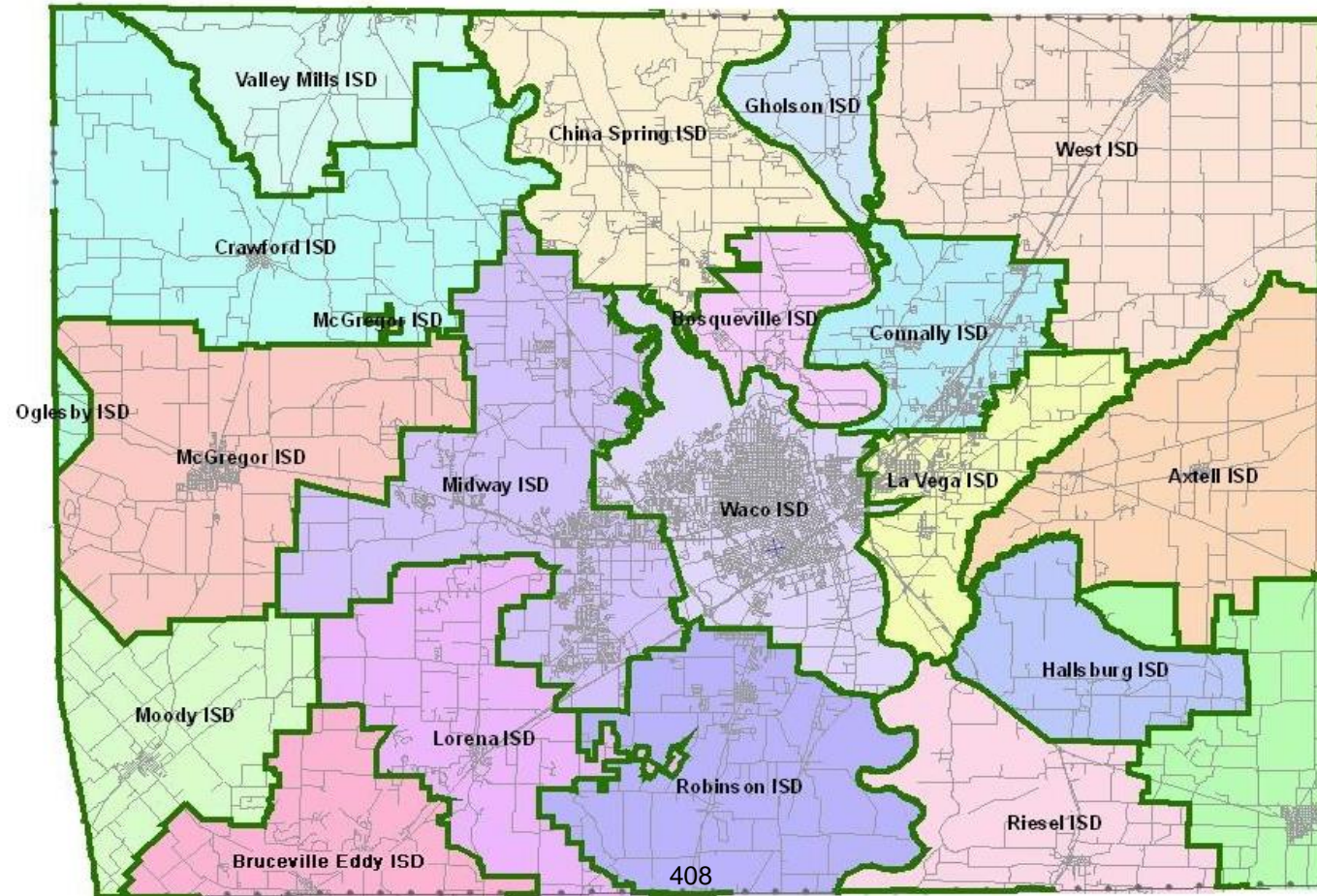
Not Applicable

**Administrative Recommendation(s):**

Approval of Resolution Approving the Renovation, Construction, and Financing of an Addition to the McLennan Central Appraisal Center.

# McLennan Central Appraisal District

## Building Renovation Proposal



# Current Waiting Area

Small waiting area

16 Seats



# Customer Service Counter

One window availability.

Confined space.



Hallway to Appraisal Review Board  
waiting area and five hearing rooms on  
the right.



# ARB Waiting Area

Secondary waiting area for ARB hearings at end of hallway.



# Recommendation

1. Addition to the current building to create a proper entry and customer service counter. This space would be occupied by the customer service and records departments. The space currently occupied by the records department would be remodeled to add two ARB hearing rooms and a larger ARB waiting area.

## Estimated Total Costs:

Approx. 2500 sf building addition @ \$400/sf = \$1,000,000

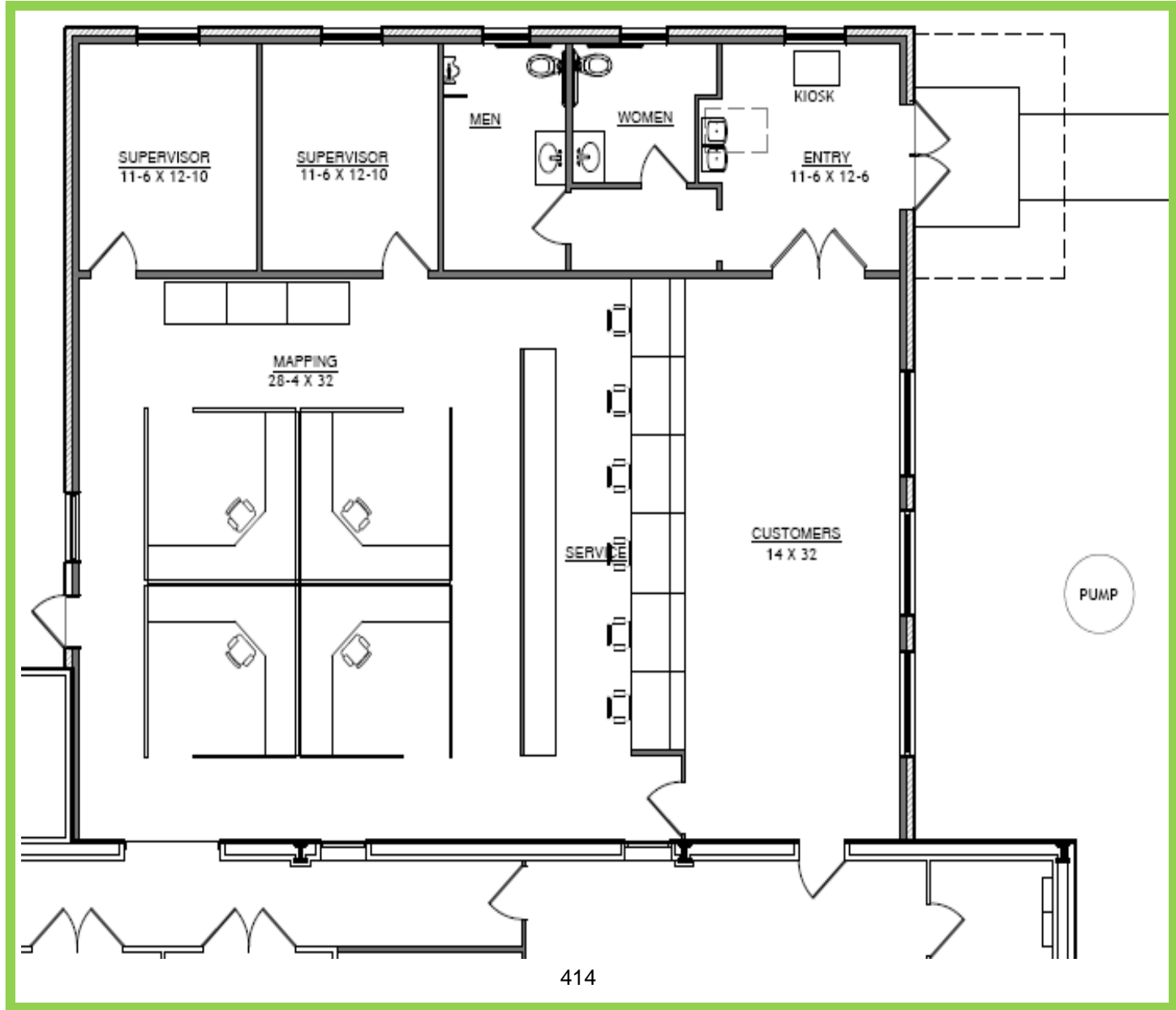
Approx. 25,000 sf Parking lot addition @ \$10/sf = \$250,000

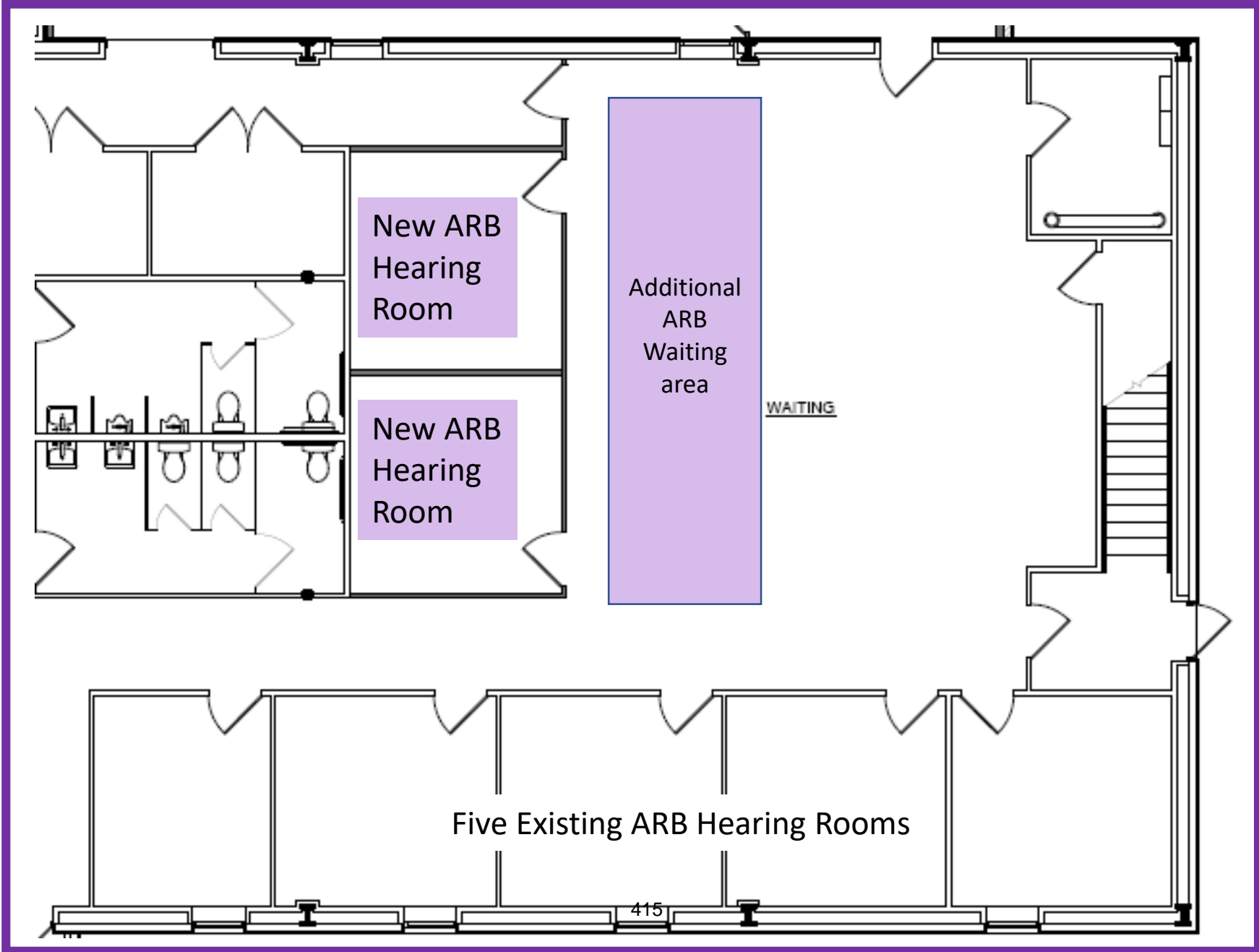
Remodel of existing building = \$250,000 - \$750,000

Estimated Total cost = \$1,500,000 - \$2,000,000



1 FLOOR PLAN  
TOP VIEW  
2575 SQ. FT.





New ARB  
Hearing  
Room

New ARB  
Hearing  
Room

Additional  
ARB  
Waiting  
area

WAITING

Five Existing ARB Hearing Rooms

415

# Parking Lot

Addition to the parking lot to create an adequate flow of traffic.



# Alternatives

- Construct a new MCAD office on the vacant land behind the existing building that MCAD already owns. The new building would be designed with customer flow in mind with a larger waiting area and easy access to the ARB area. This would also provide a customer parking lot completely in front of the building.
  - Estimated Cost \$4.6M
- Purchase and remodel building in a different location and sell current facility. Deemed impractical to find suitable site and would require extensive remodeling. Only two buildings that meet size range are currently available and significantly older.
  - Estimated Cost \$2.5M
- 6000 sf addition to the rear of the existing building. The addition would move the main entrance of the building to the back of the property. Customer service and ARB hearing rooms would be in this wing. No remodel to the existing building.
  - Estimated Cost \$2M
- Complete remodeling of the existing building and a small two-story addition to the rear of the building. This would create a central waiting area on the first floor by moving restrooms and elevator. The upstairs would be remodeled to accommodate all valuation departments and administration.
  - Estimated Cost \$3M

**RESOLUTION NO. 2023-8**

**RESOLUTION BY THE BOARD OF DIRECTORS OF THE McLENNAN  
CENTRAL APPRAISAL DISTRICT REQUESTING AUTHORIZATION  
TO RENOVATE AND CONSTRUCT AN ADDITION TO ITS APPRAISAL  
OFFICE AND TO FINANCE THE RENOVATION AND  
CONSTRUCTION OF AN ADDITION TO ITS APPRAISAL OFFICE**

WHEREAS, the McLennan Central Appraisal District (“MCAD”) is an appraisal district and political subdivision of the State of Texas operating pursuant to Chapter 6 of the *Texas Tax Code*; and

WHEREAS, Section 6.051 of the *Texas Tax Code* authorizes the MCAD to construct or renovate a building as necessary to establish and operate an appraisal office; and

WHEREAS, the Board of Directors of MCAD has determined that its office located at 315 South 26<sup>th</sup> Street, Waco, Texas is not adequate for its staff to perform their functions to appraise property and to serve the public as required under the Texas Property Tax Code; and,

WHEREAS, based on the study of its office facilities, the Board of Directors is considering improving its office by renovating and constructing an addition to it that will benefit both the staff of the appraisal district and the public that it serves for a cost not to exceed \$2,000,000; and,

WHEREAS, the Texas Property Tax Code requires the approval of three-fourths of the voting Taxing Units that fund MCAD to approve the renovation and construction of an addition to its office; and,

WHEREAS, the Board of Directors determined that it would be in the public interest to renovate and construct an addition to its office and at this time seeks the authorization from the Voting Taxing Units to renovate and construction an addition to its office and to approve the financing of the renovation and construction for an amount not to \$2,000,000,

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF DIRECTORS OF THE McLENNAN CENTRAL APPRAISAL DISTRICT THAT:

1. The above recitals are true and correct.
2. The Board of Directors of McLennan Central Appraisal District requests the approval and authorization of the Voting Taxing Units to:
  - a. Renovate and construct an addition to its office located at 315 South 26<sup>th</sup> Street, Waco, Texas for an amount not to exceed \$2,000,000.
  - b. Finance the costs of renovating and constructing an addition to its office for an amount not to exceed \$2,000,000, such financing to be by a note and deed of trust or

by a lease structure, with the final terms of the financing arrangement to be subject to the approval of Board of Directors; provided, however, that the liability in regard to such financing shall in all respects be solely that of McLennan Central Appraisal District and not that of the Voting Taxing Units.


That it is officially found and determined that this meeting was open to the public as required by law, and that notice of the time, place and subject matter of this meeting has been posted in the manner required by law.

PASSED AND APPROVED this 5th day of October, 2023.

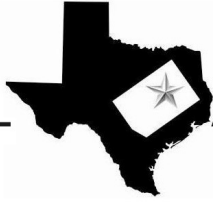
McLENNAN CENTRAL APPRAISAL DISTRICT

By:   
Ben Perry, Chairman

ATTEST:

By:   
Jim Holmes, Secretary

# McLENNAN CENTRAL APPRAISAL DISTRICT



Dear Governing Body,

The McLennan Central Appraisal District (MCAD) must provide easy access for taxpayers and certify the appraisal roll timely so that taxing units may prepare budgets and set tax rates. Due to the current layout of the MCAD office and because the deadline for certification is statutorily prescribed MCAD has limited options related to taxpayer flow and the timeline to complete the work. The only recourse is to increase the physical resources dedicated to these efforts. **The facilities at 315 S. 26<sup>th</sup> Street are not currently sufficient for MCAD to meet the needs of both taxpayer flow and statutory deadlines for certification.**

The current facility MCAD is located in was originally built as a call center for a student loan company. As such, there was minimal space dedicated to waiting areas, counters for assisting customers, and a minimal parking lot with an inadequate traffic flow pattern. The lack of customer service space only allows MCAD to have one window for assisting taxpayers which leads to longer wait times that can be frustrating for taxpayers. During the summer months when hearings are occurring, the current small waiting area with 16 seats is insufficient for the amount of taxpayers waiting for a hearing. The parking lot lacks a flow pattern around the building causing visitors to make u-turns in the rows or drive through the grass at the back causing damage to the sprinkler system. There is also an inadequate amount of parking spots for staff, ARB members, and taxpayers.

For MCAD to certify the appraisal roll, the Appraisal Review Board (ARB) must first resolve 95% of protests filed and approve the records. Since 2009 the number of protests filed has increased from 7,643 to 19,702 in 2023 and the number of hearings held has increased from 1961 to 6005. To address the increased protest demand, MCAD has increased the number of panel rooms over the years from three in 2009 to five in 2023. This was accomplished by reducing cubicle sizes to allow for more cubicles and moving staff from existing offices into the newly created cubicles. There are no more spaces available to hold ARB hearings.

Because the need for ease of access and certification is time-sensitive, **MCAD urgently needs a long-term reliable solution to address the lack of space** so that we can continue to provide quality service to the taxing jurisdictions and the taxpayers of McLennan County. The District explored several options to meet the growing need for additional space including expanding the current building, building on the lot the district owns behind its current facility, or purchasing an existing larger facility. New construction is a more expensive option and the time required for new construction would delay operational use for the 2024 and 2025 protest seasons. **The District determined the best option for MCAD is to expand its current building by adding an addition that would create a new customer entrance with a counter to assist multiple taxpayers simultaneously and an adequate waiting area. Moving**

315 S. 26<sup>th</sup> Street ● Waco, Texas 76710 ● (254) 752-9864

[www.mclennanad.org](http://www.mclennanad.org)

customer service to the new addition would allow for the construction of two additional panel rooms to allow for more hearings to be scheduled per day to meet the statutory deadlines of certification.

**The District will not request any additional funds from the taxing units for this addition and remodel.** The District holds sufficient funds in reserves to pay off the existing loan on the building. The District will obtain financing for the addition and remodel that will not increase from what the current loan payment is currently.

The Texas Property Tax Code Section 6.051 requires the acquisition or conveyance of real property by the appraisal district or the construction or renovation of a building to be approved by the governing bodies of three-fourths of the taxing units entitled to vote on the appointment of board members. Please find enclosed a copy of the resolution from the McLennan Central Appraisal District for the construction and renovation of the current building and a summary of the alternatives considered by the District. **The District needs a resolution from your governing body approving the renovation. A sample resolution and sample agenda item language have been included for your convenience.** A non-response is counted as voting no.

Please feel free to contact me if you have any questions or need additional information. My contact information is 254-755-6567 or by e-mail at [jbobbitt@mcleannacad.org](mailto:jbobbitt@mcleannacad.org).

Sincerely,

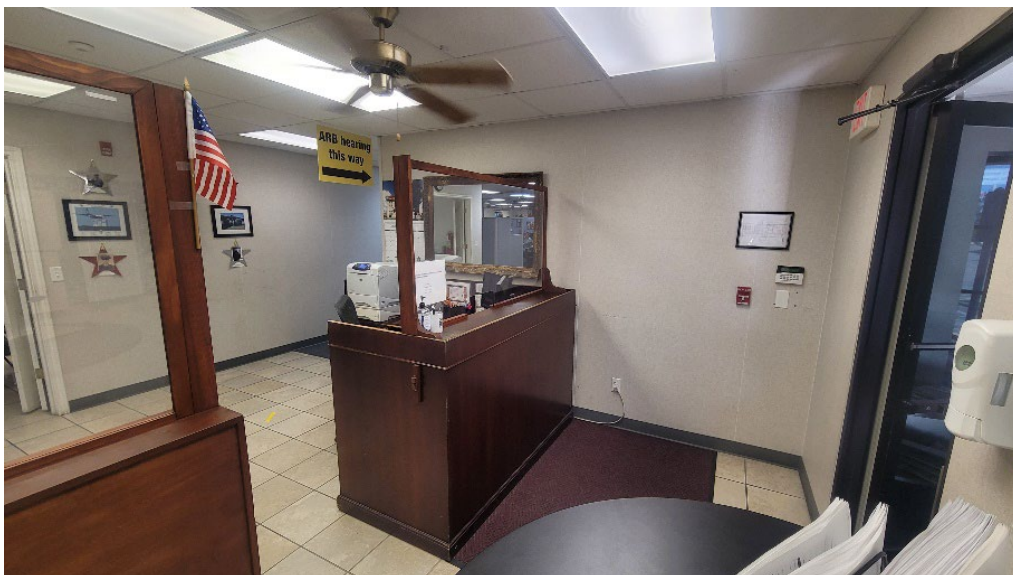
Joe Don Bobbitt  
Chief Appraiser  
McLennan Central Appraisal District

## Current Facilities



### Waiting Area

Small waiting area with limited seating. Single doorways.



### Reception

One window availability. Confined space.



## Hall

Elongated walkway to Appraisal Review Board waiting area and five hearing rooms on the right.

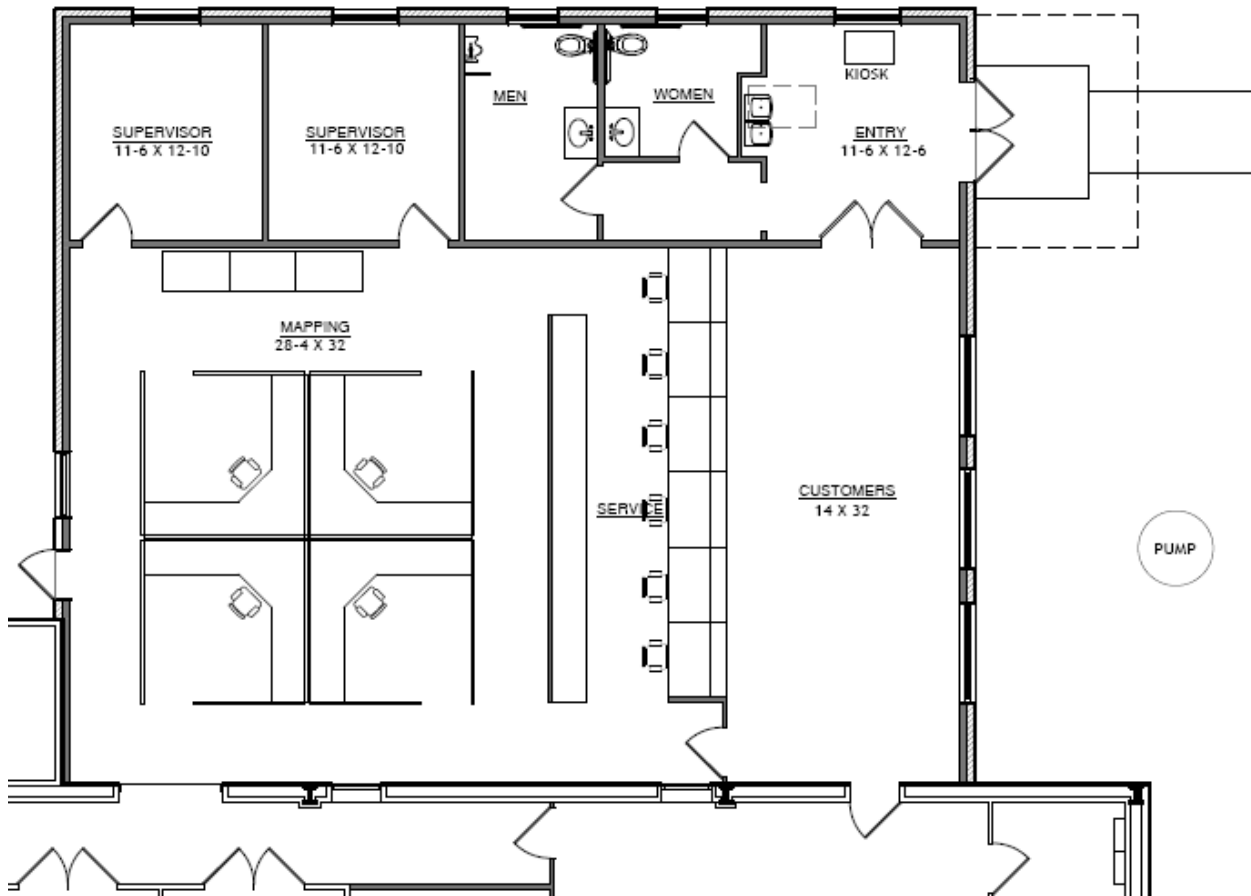


## ARB Waiting Area

Secondary waiting area for ARB hearings at end of hallway.



# Addition



2. Addition to the parking lot to create an adequate flow of traffic.



Estimated Total Costs:

Approx. 2500 sf building addition @ \$400/sf = \$1,000,000

Approx. 25,000 sf Parking lot addition @ \$10/sf = \$250,000

Remodel of existing building = \$250,000 - \$750,000

Estimated Total cost = \$1,500,000 - \$2,000,000

## Alternatives

1. Construct a new MCAD office on the vacant land behind the existing building that MCAD already owns. The new building would be designed with customer flow in mind with a larger waiting area and easy access to the ARB area. This would also provide a customer parking lot completely in front of the building.



**Estimated Total Costs:**

Approx. 15000 sf building @ \$250/sf = \$3,750,000

Approx. 75,000 sf Parking lot addition @ \$10/sf = \$750,000

Approx cost for FFE = \$200,000













Approx cost to demo existing building = \$150,000

Estimated Total cost = \$4,600,000

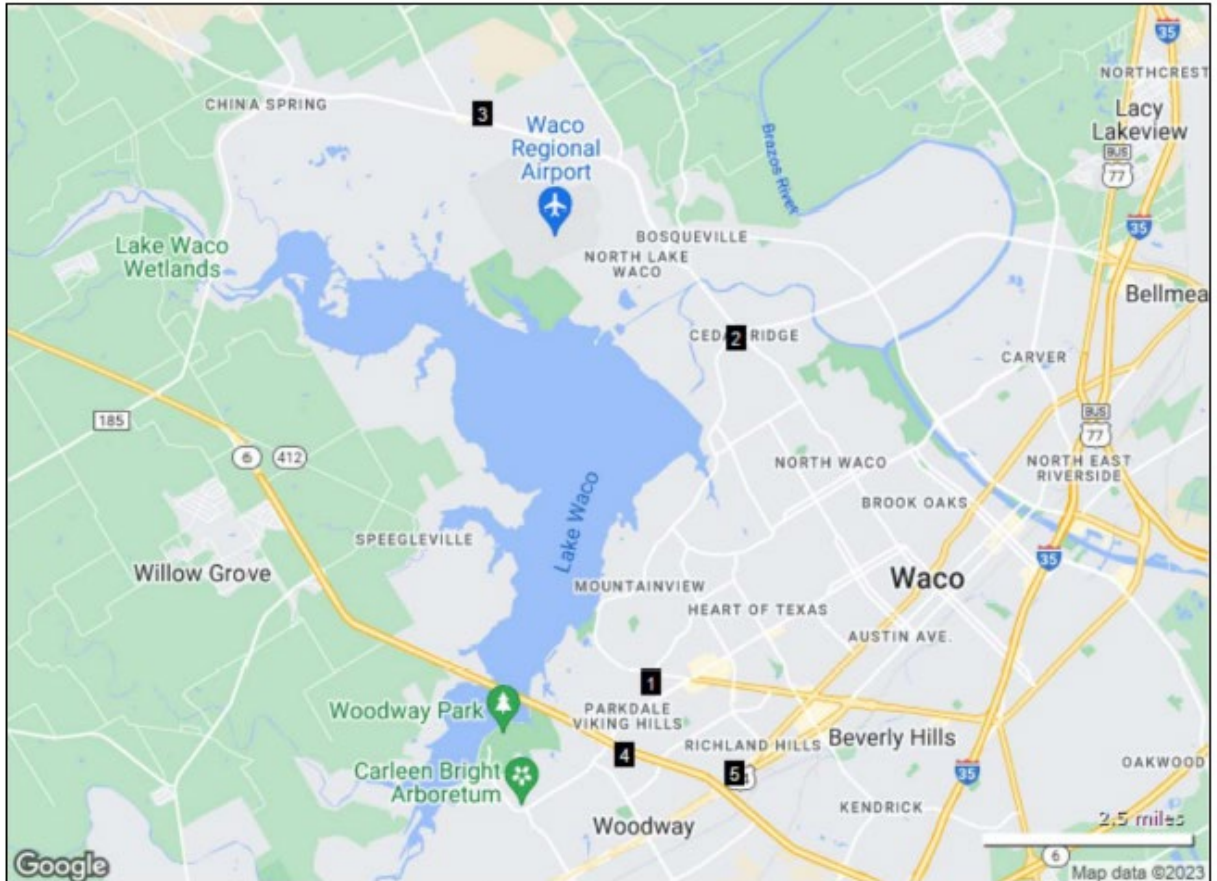
- Purchase and remodel an existing building and sell the current facility.

Current Listings:

## For Sale Map & List Report

Property Name - Address	Property				Sale			
	Type	Yr Built	Size	Vacancy	Price	Price/Area	Cap Rate	Days on Market
 3420 W Waco Dr Waco, TX 76710	Office ★★★★★	1955	17,126 SF	-	Price Not Disclosed	-	-	59
 4547 Lake Shore Dr Waco, TX 76710	Office ★★★★★	1986	15,570 SF	-	Price Not Disclosed	-	-	687
 117 Burnett Ct Waco, TX 76712	Office ★★★★★	2022	9,999 SF	0%	Price Not Disclosed	-	-	263
 2124 N 25th St Waco, TX 76708	Medical ★★★★★	1980	7,545 SF	-	\$599,900	\$80/SF	-	59
 611 Spring Valley Rd Hewitt, TX 76643	Office ★★★★★	1986	6,504 SF	0%	\$510,000	\$78/SF	-	70
 1330 N Valley Mills Dr Waco, TX 76710	Office ★★★★★	2006	6,000 SF	0%	\$1,350,000	\$225/SF	-	23
 2925 & 2929 N. 18th... 2 Properties Portfolio	Office	-	5,680 SF	0%	\$800,000	\$141/SF	-	106
 Richland Mall 5901 W Waco Dr Waco, TX 76710	Medical ★★★★★	1998	5,636 SF	0%	\$8,072,014	\$1,432/SF	7.1%	144
 504 Austin Ave Waco, TX 76701	Office ★★★★★	1930	4,020 SF	100%	\$549,000	\$137/SF	-	60
 Bldg 100 6400 Cobbs Dr Waco, TX 76710	Medical ★★★★★	1977	2,258 SF	0%	Price Not Disclosed	-	-	134
 1925 N 25th St Waco, TX 76707	Medical ★★★★★	1955	2,158 SF	100%	\$188,550	\$87/SF	-	109
 Edward Jones 6403 Cobbs Dr Waco, TX 76710	Office ★★★★★	1961	1,704 SF	0%	\$375,000 Under Contract	\$220/SF	-	123

Recent Sales:



	Address	City	Property Info	Sale Info
1	6403 Cobbs Dr	Waco	1,704 SF Class C Office	Under Contract: w/Asking Price of \$375,000 (\$220.07/SF)
2	2100 Lake Shore Dr	Waco	14,769 SF Class C Office/Medical	Sold: \$5,175,000 (\$350.40/SF)
3	10112 Saddle Creek	Waco	675 SF Class C Office	Sold: \$145,000 (\$214.81/SF)
4	1000 W State Highway 6	Waco	8,340 SF Class B Office	Sold: \$785,000 (\$94.12/SF)
5	5901 W Waco Dr	Waco	5,636 SF Class B Office/Medical	Sold: \$1,305,000 (\$231.55/SF)

Estimated Total Costs:

Approx. purchase price of 15000 sf building @ \$300/sf = \$4,500,000

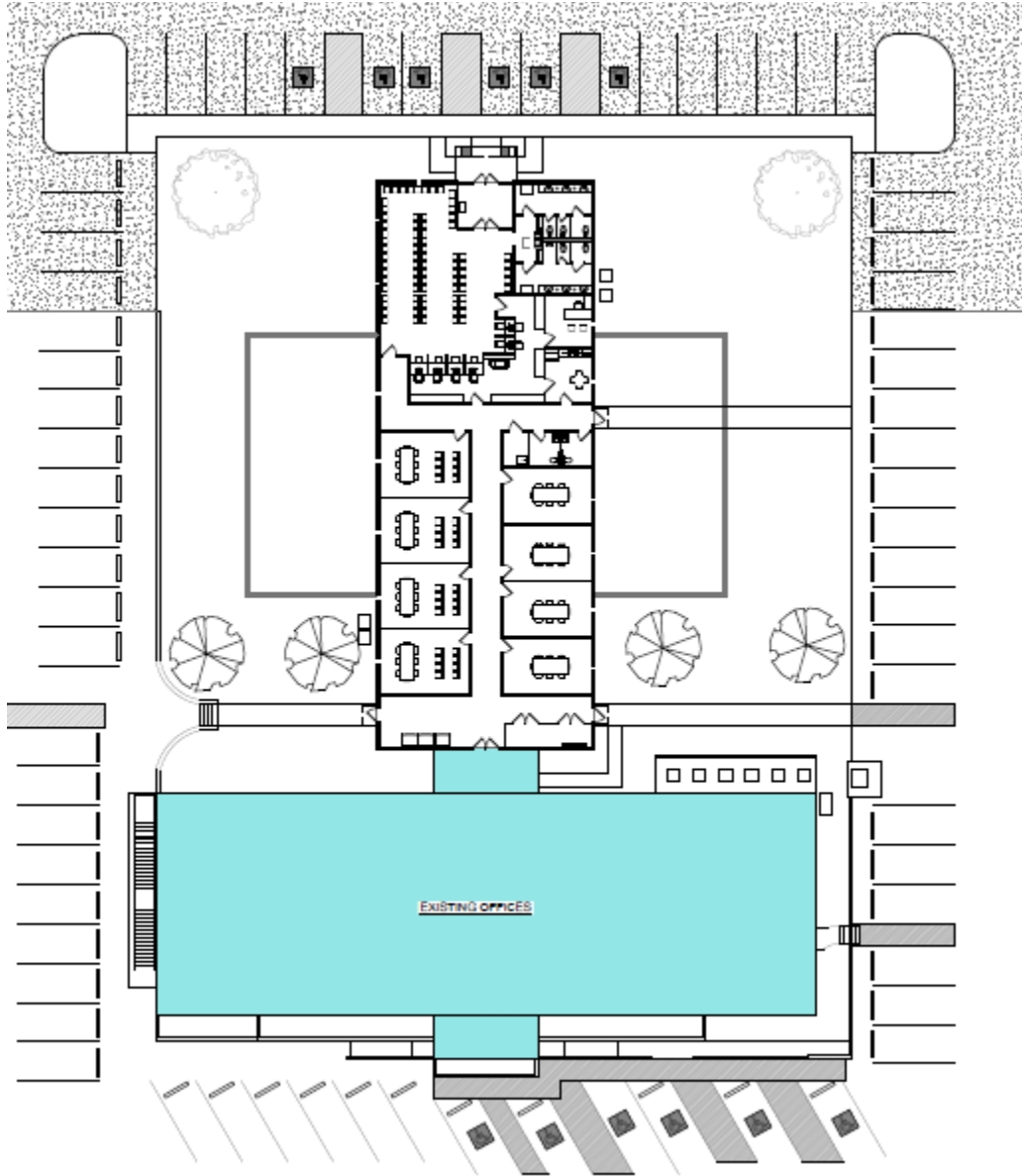
Approx. cost for remodel / improvements: \$750,000

Approx cost for FFE = \$200,000

Approx sale price of existing building = \$3,000,000

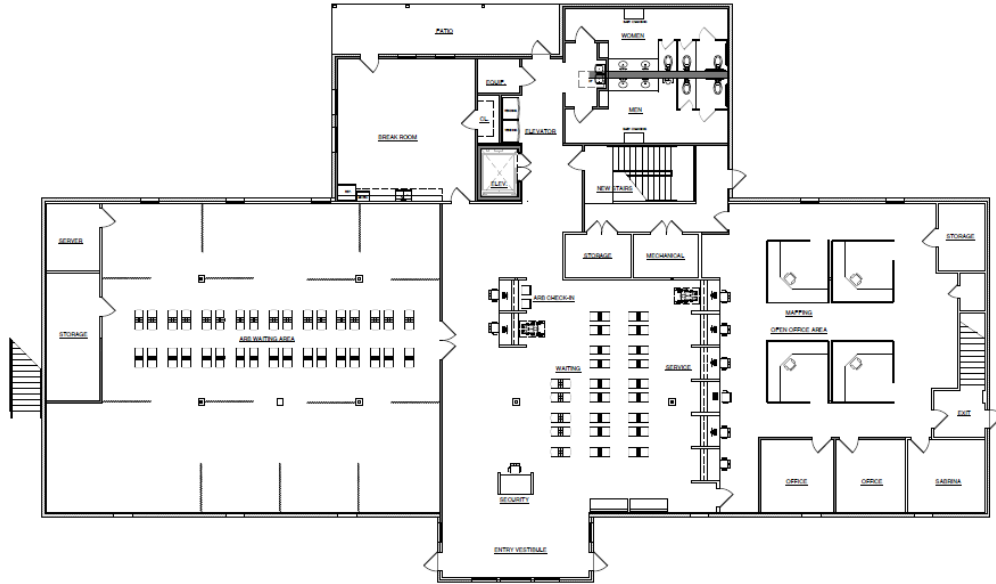
Estimated Total cost = \$2,450,000

3. 6000 sf addition to the rear of the existing building. The addition would move the main entrance of the building to the back of the property. Customer service and ARB hearing rooms would be in this wing. No remodel to the existing building.

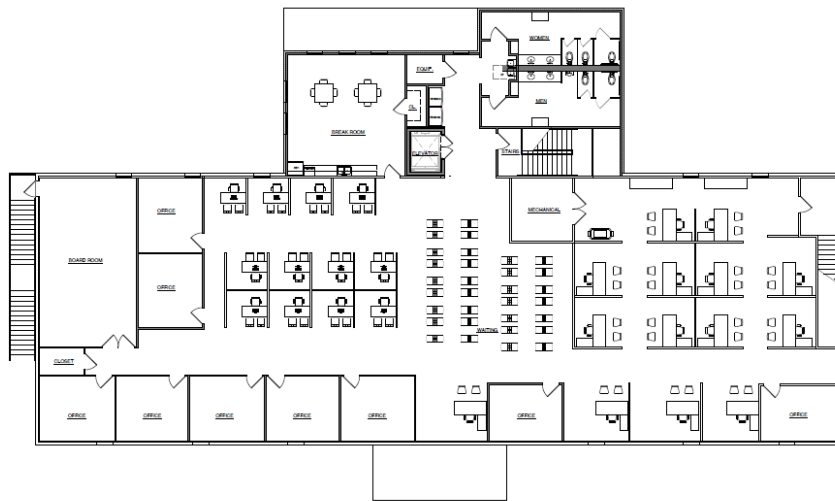


Estimated Total Cost: \$2,000,000

- Complete remodeling of the existing building and a two-story addition to the rear of the building. This would create a central waiting area on the first floor by moving restrooms and elevator. The upstairs would be remodeled to accommodate all valuation departments and administration.



1 FIRST FLOOR PLAN  
1/8" = 1'-0"



1 SECOND FLOOR PLAN  
1/8" = 1'-0"

Estimated Total Cost: \$3,000,000

RESOLUTION NO. \_\_\_\_\_

**RESOLUTION BY THE GOVERNING BODY OF Waco Independent School District (TAXING UNIT) APPROVING THE RENOVATION AND CONSTRUCTION OF AN ADDITION TO ITS APPRAISAL OFFICE AND TO FINANCE THE RENOVATION AND CONSTRUCTION OF AN ADDITION TO ITS APPRAISAL OFFICE**

WHEREAS, pursuant to Chapter 6 of the Texas Property Tax Code, \_\_\_\_\_ (list name of governmental unit) (the Governmental Unit) appoints a member or members to the Board of Directors of the McLennan Central Appraisal District (“MCAD”); and

WHEREAS, pursuant to Section 6.051 of the Texas Property Tax Code, MCAD has the legal right to purchase or lease real property and to construct or renovate improvements as necessary to establish and operate the MCAD appraisal office; and

WHEREAS, the Governmental Unit has received Resolution 2023-8, adopted by the MCAD Board of Directors recommending the renovation and construction of an addition to its appraisal office located at 315 South 26<sup>th</sup> Street, Waco, Texas (the Project”) as well as alternatives for a MCAD office that were considered prior to making such decision; and

WHEREAS, the Governmental Unit has also been presented with information regarding the financing alternatives regarding the renovation and construction of the Project;

NOW, THEREFORE, BE IT RESOLVED BY THE GOVERNING BODY OF THE GOVERNMENTAL UNIT THAT:

1. The above recitals are true and correct.
2. This Governmental Unit hereby approves the renovation and construction of the Project at a maximum total price not to exceed \$ 2,000,000.
3. This Governmental Unit further approves the financing arrangement for the renovation and construction of the Project either by note and deed of trust or by a lease structure, with the final terms of the financing arrangement to be subject to the approval of MCAD; provided, however, that the liability in regard to such financing shall in all respects be solely that of McLennan Central Appraisal District and not that of the Voting Taxing Units.

That it is officially found and determined that this meeting was open to the public as required by law, and that notice of the time, place and subject matter of this meeting has been posted in the manner required by law.

PASSED AND APPROVED this \_\_\_\_\_ day of \_\_\_\_\_, 2023.

GOVERNMENTAL UNIT

By: \_\_\_\_\_

ATTEST:

By: \_\_\_\_\_

**Waco Independent School District**

**Board of Trustee Meeting Agenda Item**

**Date: October 26, 2023**

**Contact Person: Gloria Barrera**

**RE: Review and Discuss the Waco High School Construction Project**

**Background Information:**

In September of 2022, the Board of Trustees approved GMP 2 for Waco High School. The project has been underway for over a year and many significant milestones have been achieved.

Representatives from Rogers O'Brien, O'Connell Robertson, and Waco ISD will present a status report on the work to date as well as key performance indicators.

**Fiscal Implications**

There are no funding implications.

**Administrative Recommendation(s):**

Receive Report.



## Waco Independent School District

### Waco HS Project Update

10.26.2023

# Animation

436

# Waco High School



O'CONNELL  
ROBERTSON



Rogers-O'Brien  
CONSTRUCTION

# Site Progression

438



439



440



441



442



443



444



445



# Work Accomplished

447



Area C Pour

**Concrete: 65% Complete**  
**Roughly 8,125 Cubic Yard of Concrete**  
**poured containing 566 Tons of Rebar**  
**Roughly 2.5 Olympic size swimming pools full**



**Structural Steel: 65% Complete  
910 Tons of Structural Steel Erected  
More than the weight of Fifty 18 wheelers**

449



**Underground Utilities: 90% Complete**  
**11,519 linear feet Installed to date**  
**Over 2 miles of pipe**

450

- **68%** of cost of work budget is awarded to local contractors = **\$86,457,654**
- **25%** work completed and billed to date
- **32%** of project schedule completed to date



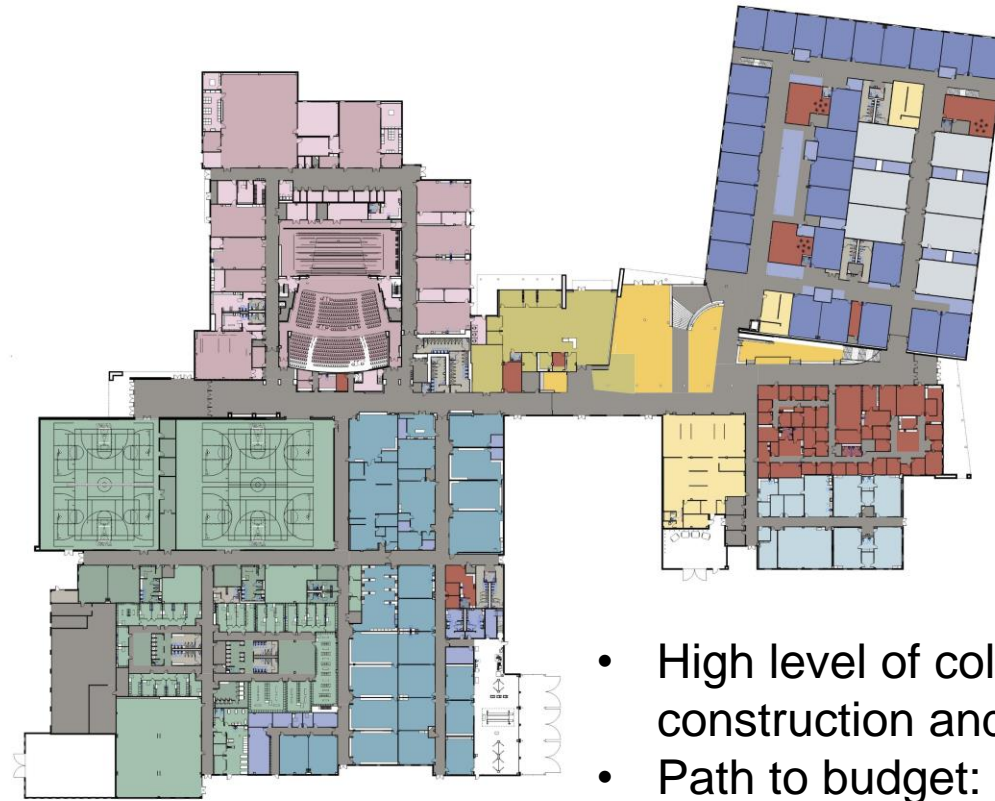
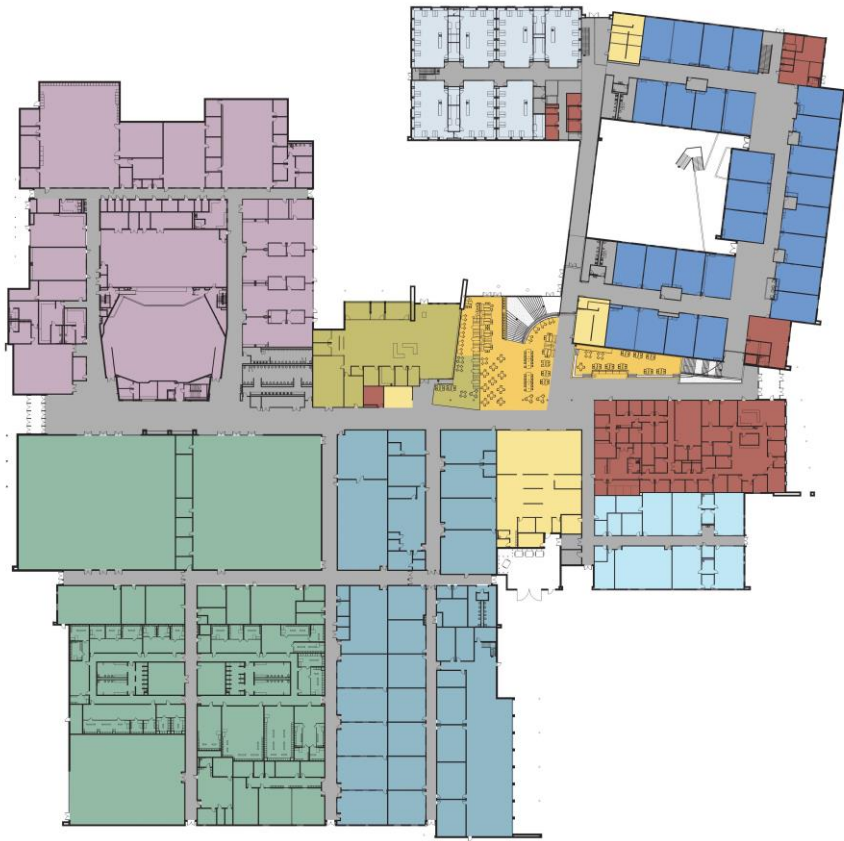
451

# Achievements

452



# Original Design vs. Plan Modifications



- High level of collaboration between construction and design team
- Path to budget: Coordinating plan modifications with ongoing construction
- Maintaining critical milestones

# Engagement

455



Student engagement



WISD Maintenance BIM Coordination



SurPrize Patrol



2023 Fun Fest



Groundbreaking



GWAMA College & Career Fair

# Upcoming Work

457

# MILESTONE SCHEDULE

