Regular Meeting with Public Hearing Agenda
Thursday, June 4, 2026
Linda Lippe Instructional Materials Center
1775 W New Hope Drive
B1001.01 and B1001.02
Cedar Park, Texas 78613
6:15 PM

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

Doors will open to the public at 5:45 PM.
Members of the public may access this meeting via live stream at https://www.leanderisd.org/boardlivestream. Please note, this link will not be active until approximately 5 minutes before the scheduled meeting time.

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

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

The notice for this meeting was posted in compliance with the Texas Open Meetings Act on May 29, 2026, at 4:20 PM.

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

1. **CALL TO ORDER AND DECLARATION OF QUORUM**
2. **OPENING CEREMONY**
   A. Pledge of Allegiance
   B. Moment of Silence
3. **CITIZEN COMMENTS** ***(See the notes at the top of the agenda for instructions on how to sign up and details regarding speaking.)***
4. **PUBLIC HEARING**
   A. End of Course Accelerated Instruction Public Hearing 3
5. **CITIZEN COMMENTS FOR END OF COURSE ACCELERATED INSTRUCTION PUBLIC HEARING** ***(See the notes at the top of the agenda for instructions on how to sign up and details regarding speaking.)***
6. **CONSENT AGENDA**
   A. Consider Approval of Instructional Material Tier 1 K-5 Math 18
   B. Consider Approval of Expedited Waiver for Staff Development 19
   C. Consider Approval of Foreign Exchange Student Waiver 21
   D. Consider Approval of Minutes of Regular and Called Board Meetings 25
   E. Consider Approval of the Project Search Interlocal Agreement and Memorandum of Understanding (MOU) with Liberty Hill ISD 29
7. **SUPERINTENDENT'S REPORT** **36**
   A. Empowered Student Learning
   B. Empowered Staff Learning

C. Safe and Innovative Learning Environments

8. **DISCUSSION / ACTION ITEMS**

A. GOVERNANCE

1. Discussion of Gibson Consulting Group's Human Resources and Procurement Internal Audit Reports — 60

2. Consider Approval of a Delegate and Alternate to the 2026 Texas Association of School Boards (TASB) Delegate Assembly — 252

B. OPERATIONS

1. Resolution Regarding Financial Sustainability and Long-Range Planning for Leander Independent School District Update — 253

2. Consider Approval to Transfer Funds from the Assigned General Fund Balance to the Self-Insured Health Care Fund — 273

9. **CLOSED SESSION**

A. Texas Government Code 551.071: consultation with attorney regarding, pending or contemplated litigation, and/or attorney client privileged matter

B. Texas Government Code 551.074: personnel - deliberation regarding resignations, terminations, employment, reassignments, duties, and evaluation of personnel and public officers

C. Texas Government Code 551.0821: deliberation regarding matters whereby personally identifiable information regarding one or more students will be disclosed

D. Texas Government Code 551.074: personnel - House Bill 3372 Administrator Personal Services Contracts

E. Texas Government Code 551.074: deliberation and consideration of employment of Deer Creek Elementary School Principal

F. Texas Government Code 551.074: deliberation and consideration of employment of Tarvin Elementary School Principal

G. Texas Government Code 551.074: deliberation and consideration of employment of Chief Financial Officer

H. Texas Government Code 551.074: deliberation and consideration of employment of Deputy Superintendent of Administrative Services

10. **ACTION PURSUANT TO CLOSED SESSION**

A. Consider Approval of House Bill 3372 Administrator Personal Services Contracts

B. Consider Employment of Deer Creek Elementary School Principal

C. Consider Employment of Tarvin Elementary School Principal

D. Consider Employment of Chief Financial Officer

E. Consider Employment of Deputy Superintendent of Administrative Services

11. **BOARD MEETING DEBRIEF**

12. **ADJOURNMENT**

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

Leander ISD Board Meeting Agenda Item Information

Meeting Date: Thursday, June 4, 2026

Agenda Item:	End of Course Accelerated Instruction Public Hearing
Purpose:	☒ Discussion Item/Report Only ☐ Action Requested
Administrator Responsible:	Paige Collier, M.Ed., Assistant Superintendent of Special Programs; Ashley Mezger, M.Ed., Director of Intervention and Special Programs
Attachments:	End of Course Accelerated Instruction and Public Hearing Presentation

Background Information:

The Texas Education Code (TEC) §28.0217 requires each school district to provide accelerated instruction in the applicable subject area each time a student does not perform satisfactorily on an end-of-course (EOC) assessment instrument. Accelerated instruction may require participation of the student before or after normal school hours and may include participation at times of the year outside normal school operations. TEC §29.081 requires school districts to offer, without cost to a student, additional accelerated instruction in any subject if the student failed to perform satisfactorily on an EOC assessment instrument that measures the knowledge and skills in that course and is required for graduation. TEC §29.081 requires each school district to evaluate the effectiveness of accelerated instruction programs for high school students and hold an annual public hearing to consider the results of the evaluation. During tonight's presentation, accelerated instruction data from the 2024-2025 and 2025-2026 school years will be reviewed.

Administrative Recommendation:

N/A

Sample Motion:

N/A

June 4, 2026

End of Course Accelerated Instruction Public Hearing

PURPOSE

The purpose of this presentation is to provide information and hold a public hearing regarding the effectiveness of Leander Independent School District's (LISD) End of Course (EOC) Accelerated Instruction Program in accordance with Texas Education Code (TEC) §29.081.

State Requirements

Texas Education Code (TEC) §28.0217 established the Foundation High School Program and indicates that students are able to fulfill the requirements of five content areas via State of Texas Assessments of Academic Readiness (STAAR) End of Course (EOC) or a substitute assessment:

- Algebra I
- English I and II
- Biology
- US History

Any student who does not perform satisfactorily on an EOC exam must receive accelerated instruction and Leander ISD must evaluate the effectiveness of these interventions in a public hearing. (TEC §29.081)

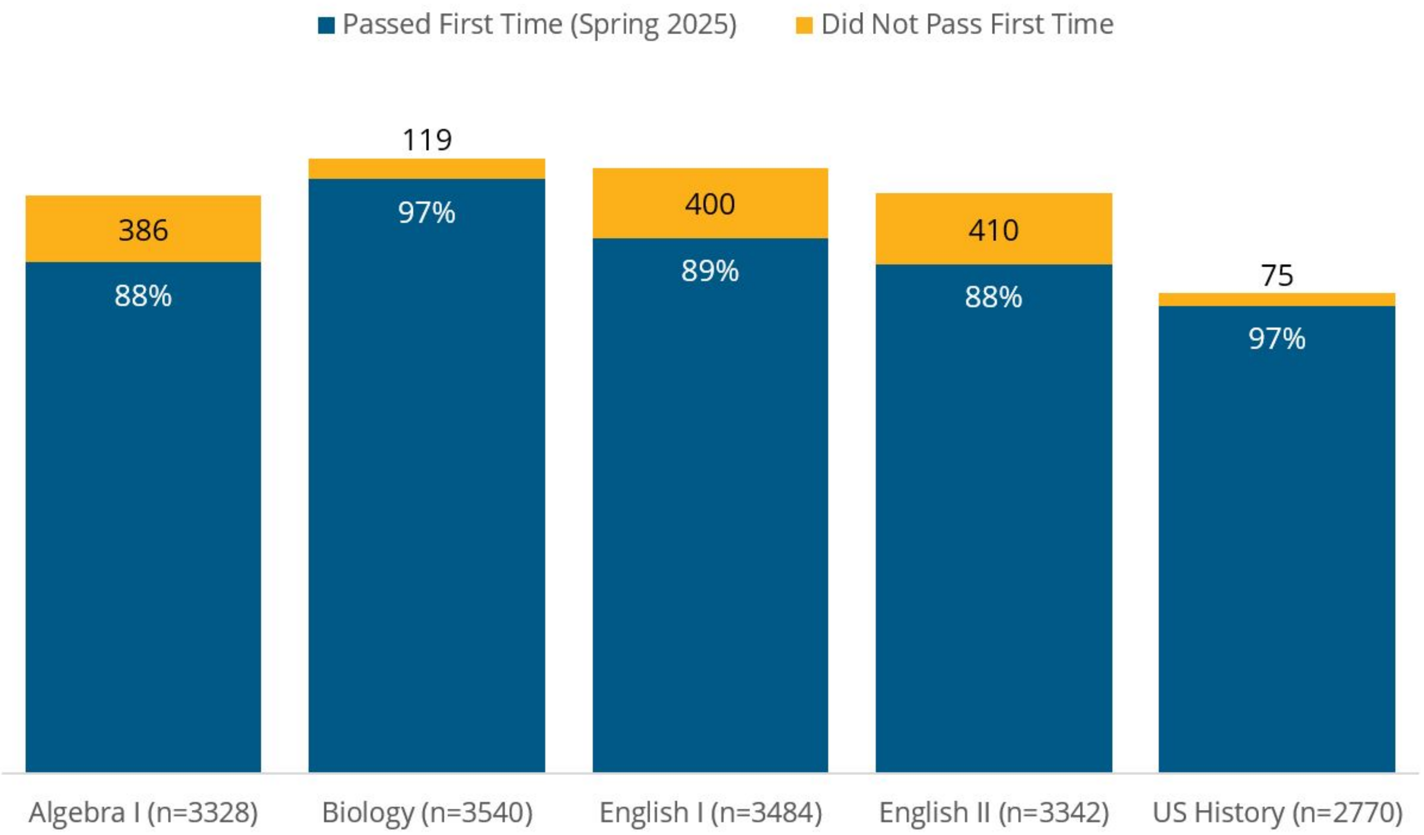
Communication

Preliminary STAAR EOC results were available to districts on May 22, 2026 and final assessment results should be available to families June 10, 2026.

All families of students who are eligible for accelerated instruction will receive communication informing them: 7

- which EOC(s) their student failed,
- how many hours they are eligible to receive, and
- what options are available to support the House Bill 1416 hours during the summer and 2026-2027 school year

2025 EOC First Attempt Snapshot



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Accelerated Instruction Requirements

All students who do not achieve approaches or higher on a STAAR grades 3-8 or End of Course (EOC) assessment should be provided accelerated instruction.

Option 1: Assign student to a Teacher Incentive Allotment (TIA) designated teacher for the subsequent school year in the applicable area. 9

OR

Option 2: Provide supplemental instruction (i.e., tutoring) for up to two subject areas, with Math and English/Language Arts being prioritized.

Accelerated Instruction Intervention

2025-2026 Interventions

- Before or after school tutorials
- Flex Times built into Instructional Day
- EOC Retester Prep Sessions 10
- Embedded time in Tier One for small group instruction

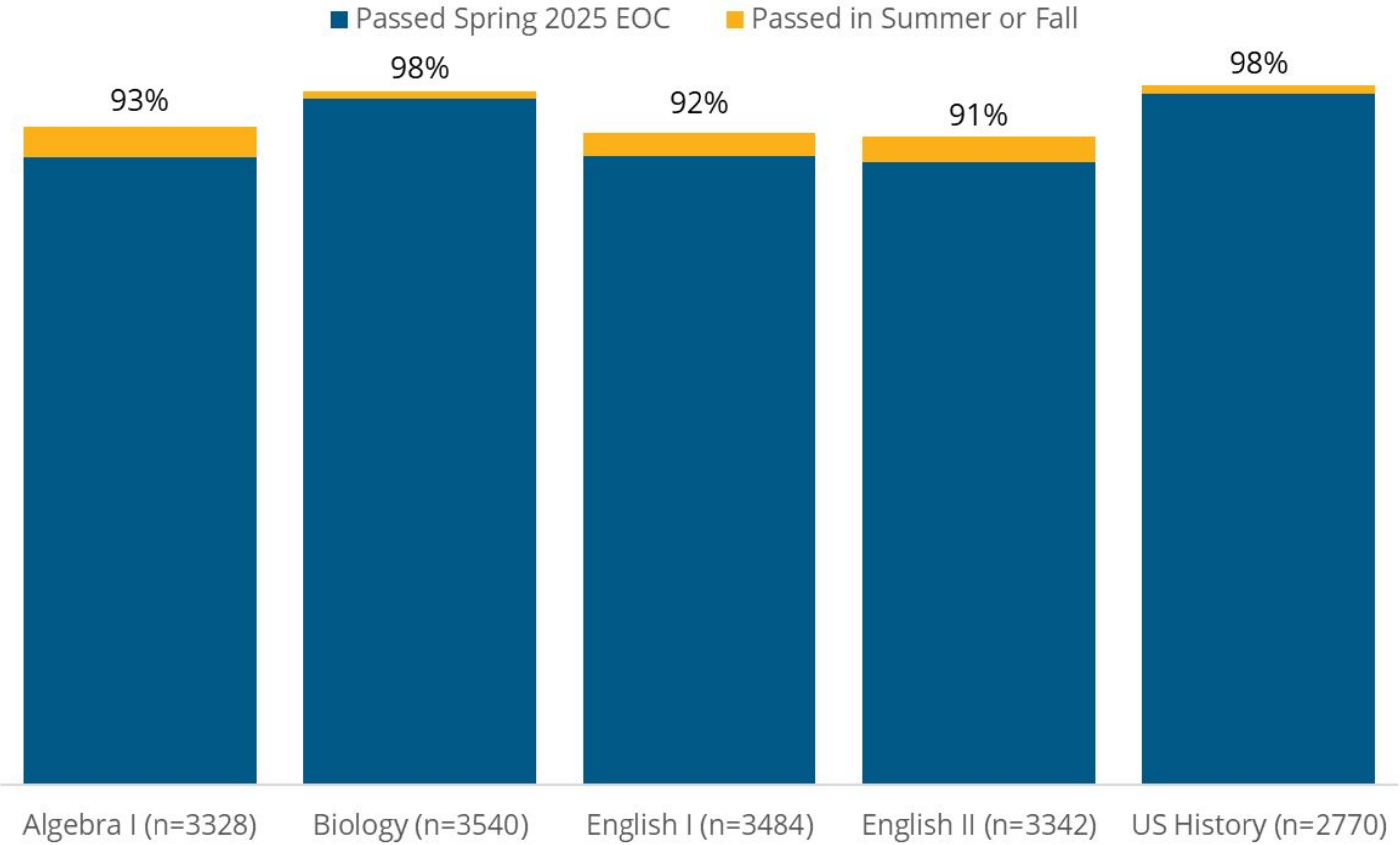
Middle School Only

- Double blocked periods
- Student Success Facilitators (SSF's)
- Super Saturdays (New for Spring 2026)

Accelerated Instruction Intervention

- **2026 Summer Interventions**
  - EOC Re-tester Prep
  - Algebra I Prep Academy for rising 9th graders
  - Logic League for rising 3rd graders at Title One campuses
  - Asynchronous learning

Cumulative Pass Rates for 2025 After 1 Year



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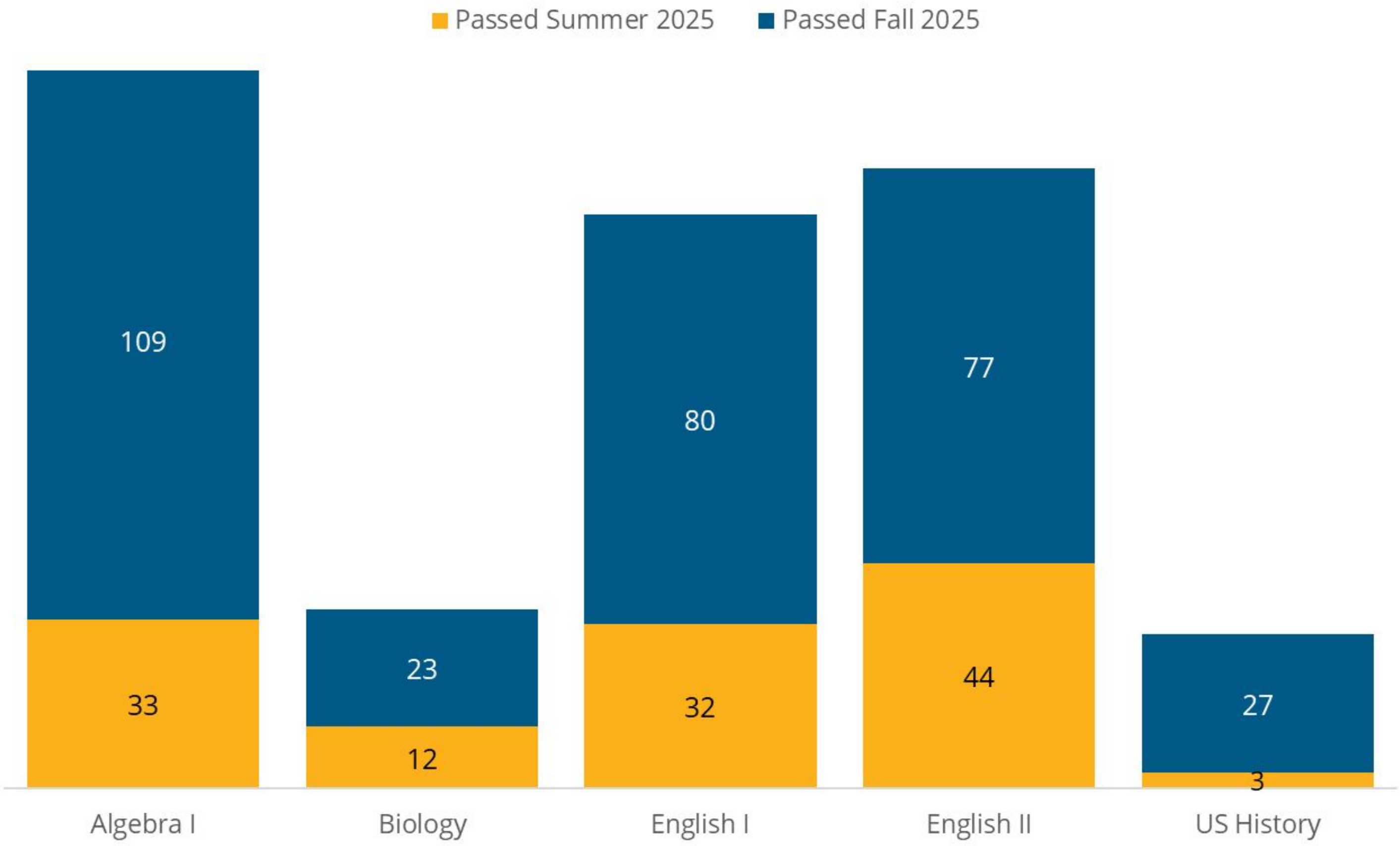
Student Success after Accelerated Instruction



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Communicating House Bill 1416 Eligibility

- Parents are emailed
- Special education: Include communication in Special Programs monthly newsletter
- Provide training for Admission, Review, and Dismissal (ARD) facilitators
- Provide training for Special Education team leaders to communicate expectations
- Partner with families in the ARD committee to review student support and services

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Texas Education Code (TEC) §28.0258

An Individual Graduation Committee (IGC) must evaluate a student candidate's completed project(s). In addition, the IGC must confirm the candidate meets the following:

- Met passing standard on a minimum of 3 EOCs
- Attempted all offered EOC administrations
- Attended EOC interventions offered through LISD
- Meets LISD credit requirements

2026 IGC Graduates = 36

Public Hearing

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DISCUSSION

Leander ISD Board Meeting Agenda Item Information
Meeting Date: Thursday, June 4, 2026

Agenda Item:	Consider Approval of Instructional Material Tier 1 K-5 Math
Purpose:	☐ Discussion Item/Report Only ☒ Action Requested
Administrator Responsible:	Lauren Meeks, M.Ed. Assistant Superintendent of Curriculum and Instruction; Amanda Hardwick, Ed.D., Director of Humanities
Attachments:	N/A

Background Information:

Tonight, administration is requesting approval of the adoption of the K-5 Math Tier 1 instructional resource, Amplify Desmos Math Texas.

During the May 21, 2026, Board Meeting, administration presented a recommendation to the Board to adopt Amplify Desmos Math Texas as the K-5 Tier 1 Math instructional resource starting in the 2026-2027 school year, and district-wide in 2027-2028. This recommendation stems from comprehensive feedback gathered from Professional Learning Communities (PLCs) and Community Members during Spring 2026.

	Amplify Desmos Math TX	Savvas enVision+
Professional Learning Communities	59 votes	40 votes
Community Members	67%	33%

Based on stakeholder feedback, a comprehensive professional learning plan will be drafted with Amplify Desmos Math Texas that focuses on initial training and follow-up training for campuses that choose to implement early in the 2026-2027 school year. This plan will be shared with the Board once finalized.

Administrative Recommendation:

Administration recommends the Board approve the adoption of Amplify Desmos Math Texas as the Tier 1 K-5 Math instructional material starting in the 2026-2027 school year for early implementation campuses and district-wide in 2027-2028, as presented.

Sample Motion:

I move that the Board approve the adoption of Amplify Desmos Math Texas as the Tier 1 K-5 Math instructional material starting in the 2026-2027 school year for early implementation campuses and district-wide in 2027-2028, as presented.

Leander ISD Board Meeting Agenda Item Information

Meeting Date: Thursday, June 4, 2026

Agenda Item:	Consider Approval of Expedited Waiver for Staff Development
Purpose:	☐ Discussion Item/Report Only ☒ Action Requested
Administrator Responsible:	Brenda Cruz, M.Ed., Assistant Superintendent of Empowered Learning April Chauvette, M.Ed., Director of Professional Learning
Attachments:	LISD 2026-2027 Approved District Calendar

Background Information:

Texas Education Code (TEC) §25.081 enables districts to file a Staff Development Minutes Waiver to train staff on various education strategies designed to improve student performance in lieu of a maximum of 2,100 minutes of student instruction. There have been no changes in the waiver application for staff development minutes for the 2026-2027 school year.

Each district may choose how to apply their approved Staff Development Minutes Waiver. For instance, schools may choose to offer early release, late start, all day staff development, or a combination. However, the total waiver minutes for staff development shall not exceed 2,100 minutes per year.

This waiver is for staff development in place of student instruction; therefore, the waiver minutes are only applicable to staff development that is provided in place of student instruction during the school year. Districts should continually seek to provide high-quality staff development that will impact student outcomes. LISD has built in staff development for the 2026-2027 calendar.

Administrative Recommendation:

Administration recommends that the Board approve the waiver request for staff development that provides for a maximum of 2,100 minutes of professional development for the 2026-2027 district calendar.

Sample Motion:

I move that the Board approve the waiver request for staff development that provides for a maximum of 2,100 minutes for professional development for the 2026-2027 district academic calendar.

LEANDER ISD
LEADING TO A BRIGHT FUTURE

LEADER ISD
LEADING TO A BRIGHT FUTURE

2026-2027 Approved Calendar

JULY

SU	M	TU	W	TH	F	SA
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

AUGUST

SU	M	TU	W	TH	F	SA
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

SEPTEMBER

SU	M	TU	W	TH	F	SA
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

OCTOBER

SU	M	TU	W	TH	F	SA
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

NOVEMBER

SU	M	TU	W	TH	F	SA
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

DECEMBER

SU	M	TU	W	TH	F	SA
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	**ER**	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

JANUARY

SU	M	TU	W	TH	F	SA
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

FEBRUARY

SU	M	TU	W	TH	F	SA
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	1	2	3	4	5	6
7	8	9	10	11	12	13

MARCH

SU	M	TU	W	TH	F	SA
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

APRIL

SU	M	TU	W	TH	F	SA
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

MAY

SU	M	TU	W	TH	F	SA
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	**ER**	28	29
30	31	1	2	3	4	5

JUNE

SU	M	TU	W	TH	F	SA
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

List of Dates
August 3rd-11th: Teacher Professional Learning
August 12th: First Day of School
September 7th: Labor Day (No staff/Students)
September 21st: Professional Learning
October 9th: Parent Teacher Conferences/Professional Learning Day
October 12th & 13th: Student & Staff Break
November 2nd and 3rd: CIC
November 23rd-27th: Thanksgiving Break (No staff/Students)
December 18th: Early Release
December 21st-31st: Winter Break (No staff/Students)
January 1st: New Years' Day (No staff/Students)
January 4th: Professional Learning
January 18th: MLK Day (No staff/Students)
February 12th: Professional Learning
February 15th & 16th: Student & Staff Break
March 15th-19th: Spring Break (No staff/Students)
March 26th: (No staff/Students)
March 29th: Professional Learning
April 26th: Professional Learning
May 27th: Early Release/Last Day of School

Calendar Color Key
New Teacher Training
Teacher Professional Learning
Staff/Student Holiday
Early Release
First Day of School

Statutory Guidelines

1) 187 Teacher Days

2) 75,600 minutes (with enough on top of that for two bad weather days)

3) Allowed to start earlier in August

4) No school on Memorial Day

Calendar presented to the board on February 19, 2026

Leander ISD Board Meeting Agenda Item Information

Meeting Date: Thursday, June 04, 2026

Agenda Item:	Consider Approval of Foreign Exchange Student Waiver
Purpose:	☐ Discussion Item/Report Only ☒ Action Requested
Administrator Responsible:	Bryan Miller, M.Ed, Sr. Executive Director, Student Support Services
Attachments:	Leander ISD Foreign Exchange Student Enrollment & Eligibility Guidelines

Background Information:

Every three years, Leander ISD completes the application for the Foreign Exchange Student Waiver to limit the number of foreign exchange students at each Leander ISD high school. The Commissioner of Education will respond with an approval or denial letter no later than the 60th day after the date of receipt of the request. This waiver allows for a limit of five or fewer foreign exchange students at each Leander ISD high school. Our current waiver expires at the end of the 2025-2026 school year. Leander ISD may reapply for a new foreign exchange student waiver at the end of the period in which the existing waiver will expire. An application for a new waiver should be submitted no earlier than May 1st of the year in which the currently approved waiver expires. Upon Board approval, the application for the 2026-2027, 2027-2028, and 2028-2029 school years will be submitted to the Commissioner of Education for renewal. The Leander ISD Foreign Exchange Student Enrollment & Eligibility Guidelines are attached for reference.

Administrative Recommendation:

Administration recommends that the Board approve the submission of the Foreign Exchange Student Waiver, which will limit the number of foreign exchange students to five or fewer for each Leander ISD High School for the 2026-2027, 2027-2028, and 2028-2029 school years, as presented.

Sample Motion:

I move the Board approve the Foreign Exchange Student Waiver, which limits the number of foreign exchange students to five or fewer for each Leander ISD High School for the 2026-2027, 2027-2028, and 2028-2029 school years, as presented.

Foreign Exchange Student Enrollment & Eligibility Guidelines

Leander Independent School District's (LISD) foreign exchange program provides students from other countries the opportunity to learn about the history of the United States, and the workings of our government, and to improve fluency in both the written and spoken English language. Students are encouraged to take an active part in the academic process and to experience the social culture of youth in the LISD.

FD (Legal) Board Policy for Foreign Exchange Students:

The person is a foreign exchange student placed with a host family that resides in the district by a nationally recognized foreign exchange program unless the district has applied for and been granted a waiver by the commissioner of education because:

1. This requirement would impose a financial or staffing hardship on the district;
2. The admission would diminish the district's ability to provide high-quality education services for the district's domestic students; or
3. The admission would require domestic students to compete with foreign exchange students for educational resources.

Education Code 25.001(b)(6), (e)

FD (Legal) Board Policy for Students Holding F-1 Student Visas:

If a student is required, as a condition of obtaining or holding the appropriate U.S. student visa, to pay tuition to the district that the student attends to cover the cost of the student's education provided by the district, the district shall accept tuition for the student in an amount equal to the full unsubsidized per capita cost of providing the student's education for the period of the student's attendance at school in the district.

The commissioner shall develop guidelines for determining the amount of the full unsubsidized per capita cost of providing a student's education. A district may not accept tuition in an amount greater than the amount computed under the commissioner's guidelines unless the commissioner approves a greater amount as a more accurate reflection of the cost of education to be provided by the district.

The attendance of a student for whom a district accepts tuition is not counted for purposes of allocating state funds to the district. Education Code 25.0031

Note: Enrolling students with F-1 visas is optional. If the district is interested in enrolling students with F-1 visas, it must comply with the federal Student and Exchange Visitor Program (SEVP) under the Department of Homeland Security.

Guidelines for Foreign Exchange Students:

The following guidelines are provided to assist foreign exchange organizations, foreign exchange students, and host families in understanding the District's foreign exchange program:

1. **Foreign Exchange Organizations**
   a. Foreign exchange organizations shall meet the requirements and be listed ("Listing Status: Full") on the Council on Standards for International Educational Travel (CSIET) approved list of foreign exchange organizations for the school year in which placement is requested. The CSIET-approved list may be found at www.csiet.org.
   b. Foreign exchange organizations must be able to bring the student via a J-1 Exchange Visitor Visa since Board policy and State law prohibit the LISD from issuing an I-20 form for a student to obtain an F-1 Visa. Please refer to the U.S. Department of State website for questions regarding other visa types.
   c. LISD has obtained a waiver from the Texas Education Agency (TEA) to **limit the number of foreign exchange students to a maximum of five (5) foreign exchange students per high school per year.** Foreign exchange students shall not be permitted to enroll in Early College High School or New Hope High School.
   d. Placements will be made on a first-come, first-served basis. The foreign exchange organization representative will contact the LISD Student Support Services after April 1 and prior to August 1 to inquire whether any openings are available at a particular high school, and if so, to begin the placement process (see LISD Foreign Exchange Student Placement Process).
   e. Waiting lists will not be maintained to hold a company's or a student's request for enrollment. Only completed documentation will be accepted, and only if the waiver limit has not been met.
   f. Foreign exchange students will only be accepted for one calendar year, and they must be enrolled before the first day of school in the fall semester. Foreign exchange students will not be approved for a single semester.
   g. If a foreign exchange student is returned to his/her home country or is moved to another district during the school year, no new foreign exchange student will replace the withdrawn student.
   h. For questions regarding Leander ISD Immigration Support, please refer to Leander ISD Immigration FAQ.

2. **Host Families**
   a. Host families must be residents of the accepting high school's Attendance Zone.
   b. Host families must provide proof of residency as described on the Leander ISD New Student Registration website.
   c. When a host family has a student currently enrolled in an LISD high school, placement of the exchange student will be made at that same high school if a spot is available.

3. **Foreign Exchange Students**
   a. The foreign exchange student must be between 16 and 18 years of age by September 1 of the school year in which he/she plans to attend a LISD high school.
   b. The foreign exchange student must have been enrolled in high school in his or her home country the semester preceding the exchange.
   c. No exchange student who has completed the equivalent of the 12th grade in his or her home country, has received a diploma or a certificate of graduation, or is considered eligible for college or university placement will be eligible to attend LISD high schools.
   d. Foreign exchange students are not eligible to participate in graduation ceremonies because they typically do not meet Texas State graduation requirements. They will receive a certificate of attendance in lieu of a high school diploma from LISD.
   e. Foreign exchange students will be classified at a level no higher than the 11th grade. Foreign exchange students may, however, be permitted to participate in senior-level (12th grade) events/activities at the discretion of the campus principal or designee.
   f. Foreign exchange students will not be placed in the class ranking.
   g. Foreign exchange students become exempt from state-mandated testing (End of Course exams). In addition, foreign exchange students will not be able to participate in school-day PSAT, SAT, or ASVAB on the LISD College/Career Day of Testing.
   h. Foreign exchange students will take a full course load typical of any other LISD student. Their schedule will include English 3, United States history, one science course, one math course, and electives as deemed appropriate.
   i. Foreign exchange students shall not participate in work-based programs.
   j. Foreign exchange students wishing to participate in athletics, fine arts, and other activities/competitions governed by the University Interscholastic League (UIL) must submit to the UIL rules and regulations governing participation. Participation is not conveyed with high school placement. Coaches and sponsors of extracurricular activities will be responsible for checking and obtaining proper credentials for participation in each activity.
   k. Foreign exchange students are subject to LISD attendance and discipline regulations and policy and are expected to participate fully in their classes. Students must be in attendance at least 90 percent of the days each course is offered to receive credit.

For further information, please contact:

Student Support Services
Leander Independent School District
204 W. South St Leander, Texas 78641
Phone: 512-570-0150   Email: Foreign.Exchange@leanderisd.org

Leander ISD Board Meeting Agenda Item Information

Meeting Date: Thursday, June 4, 2026

Agenda Item:	Consider Approval of Minutes of Regular and Called Board Meetings
Purpose:	☐ Discussion Item/Report Only ☒ Action Requested
Administrator Responsible:	Chris Clark, Ed.D., Superintendent of Schools
Attachments:	05-21-26 Regular Meeting with Public Hearing Minutes DRAFT

Background Information:

Board Meeting minutes are attached for your review.

Administrative Recommendation:

Administration recommends approval of the Board Meeting minutes, as presented.

Sample Motion:

I move the Board approve the minutes, as presented.

Minutes of Regular Meeting with Public Hearing

The Board of Trustees
Leander Independent School District

STATE OF TEXAS
COUNTY OF WILLIAMSON

A meeting of the Board of Trustees of the Leander Independent School District was held on Thursday, May 21, 2026, beginning at 6:16 PM in Linda Lippe Instructional Materials Center, 1775 W New Hope Drive, B1001.01 and B1001.02, Cedar Park, Texas 78613. The following members were present: Anna Smith, Sade Fashokun, Nekosi Nelson, Trish Bode, Gloria Gonzales-Dholakia, and Laura Marques. Paul Gauthier was absent.

1. **CALL TO ORDER AND DECLARATION OF QUORUM**
2. **OPENING CEREMONY**
   A. Pledge of Allegiance
   B. Moment of Silence
3. **RECOGNITION**
   A. Spotlight on Learning: Grandview Hills Elementary School
   B. Spotlight on Student Empowerment: Stiles and Leander Middle Schools C2 Clubs
4. **CITIZEN COMMENTS**
   Three citizens addressed the Board of Trustees.
5. **PUBLIC HEARING**
   A. Discussion of Federal Funds Overview and Public Hearing
6. **CITIZEN COMMENTS FOR PUBLIC HEARING**
   No citizens addressed the Board of Trustees.
7. **CONSENT AGENDA**
   I move the Board approve the Consent Agenda items as presented, minus item 7G. This motion, made by Trish Bode and seconded by Dr. Gloria Gonzales-Dholakia, passed six in favor and one (Paul Gauthier absent).Trish Bode: In favor, Sade Fashokun: In favor, Paul Gauthier: Absent, Dr. Gloria Gonzales-Dholakia: In favor, Dr. Laura Marques: In favor, Nekosi Nelson: In favor, Anna Smith: In favor.
   A. Consider Approval of Early Release of Critical Positions
   B. Consider Adoption of Local Policies CY, DGBA, FNG, and GF
   C. Consider Approval of 2026-2027 Food Service Management Company (FSMC) Contract Renewal
   D. Consider Approval of an Independent Auditor for Efficiency Audit

E. Consider Approval of Minutes of Regular and Called Board Meetings

F. Consider Approval of a Missed School Day Waiver for the 2025-26 School Year

G. Consider Approval of Leander ISD Superintendent Guardrails

I move the Board approve the Leander ISD Superintendent Guardrails, as presented. This motion, made by Sade Fashokun and seconded by Dr. Gloria Gonzales-Dholakia, passed six in favor and one (Paul Gauthier) absent. Trish Bode: In favor, Sade Fashokun: In favor, Paul Gauthier: Absent, Dr. Gloria Gonzales-Dholakia: In favor, Dr. Laura Marques: In favor, Nekosi Nelson: In favor, Anna Smith: In favor.

8. **SUPERINTENDENT'S REPORT**

A. Empowered Student Learning

B. Empowered Staff Learning

C. Safe and Innovative Learning Environments

9. **DISCUSSION / ACTION ITEMS**

A. STUDENT EXPERIENCE

1. Discussion of 2026-2027 Instructional Materials, K-5 Math

B. GOVERNANCE

1. Board Policy Committee Update

C. OPERATIONS

1. Citizen Facility Advisory Committee (CFAC) Process Overview
2. Discussion of 2025-2026 Budget Projections
3. 2026 Property Value Overview, Discussion of 2026-2027 Proposed Budgets for Adoption, and House Bill 1522 Required Taxpayer Impact Statement
4. Consider Approval of Fiscal Year (FY) 26 Budget Amendment - #12

I move the Board of Trustees approve FY26 Budget Amendment - #12 as presented. This motion, made by Trish Bode and seconded by Dr. Laura Marques, passed six in favor and one (Paul Gauthier) absent. Trish Bode: In favor, Sade Fashokun: In favor, Paul Gauthier: Absent, Dr. Gloria Gonzales-Dholakia: In favor, Dr. Laura Marques: In favor, Nekosi Nelson: In favor, Anna Smith: In favor.

10. **CLOSED SESSION**

The Board of Trustees went into Closed Session at 10:27 PM after the Board President announced the right to do so under:

A. Texas Government Code 551.071: consultation with attorney regarding pending or contemplated litigation, and/or attorney client privileged matter

B. Texas Government Code 551.074: personnel - deliberation regarding resignations, terminations, employment, reassignments, duties, and evaluation of personnel and public officers

C. Texas Government Code 551.0821: deliberation regarding matters whereby personally identifiable information regarding one or more students will be disclosed

D. Texas Government Code 551.076 and 551.089: review of District Vulnerability Assessment (DVA) results

E. Texas Government Code 551.089: discussion of district-wide intruder detection audit report findings

F. Texas Government Code 551.074: deliberation and consideration of employment of North Elementary School Principal

G. Texas Government Code 551.074: deliberation and consideration of employment of Deputy Superintendent of Learning and Innovation

The Board of Trustees returned to Open Session at 11:19 PM.

11. **ACTION PURSUANT TO CLOSED SESSION**

A. Consider Employment of North Elementary School Principal

I move that the Board of Trustees accept the recommendation of Gina Freeman for Principal at North Elementary School 1-year probationary employment contract for personnel addition(s) as presented in accordance with the salary scale, policies and contract of Leander Independent School District for the 2026-27 school year. This motion, made by Dr. Laura Marques and seconded by Sade Fashokun, passed six in favor and one (Paul Gauthier) absent. Trish Bode: In favor, Sade Fashokun: In favor, Paul Gauthier: Absent, Dr. Gloria Gonzales-Dholakia: In favor, Dr. Laura Marques: In favor, Nekosi Nelson: In favor, Anna Smith: In favor.

B. Consider Employment of Deputy Superintendent of Learning and Innovation

I move that the Board of Trustees accept the recommendation of Angela Hodges for Deputy Superintendent for Learning and Innovation 2-year term employment contract for personnel addition(s) as presented in accordance with the salary scale, policies and contract of Leander Independent School District for the 2025-26 and 2026-27 school years. This motion, made by Trish Bode and seconded by Sade Fashokun, passed six in favor and one (Paul Gauthier) absent. Trish Bode: In favor, Sade Fashokun: In favor, Paul Gauthier: Absent, Dr. Gloria Gonzales-Dholakia: In favor, Dr. Laura Marques: In favor, Nekosi Nelson: In favor, Anna Smith: In favor.

12. **BOARD MEETING DEBRIEF**

13. **ADJOURNMENT**

THE BOARD OF TRUSTEES, HAVING NO FURTHER BUSINESS, ADJOURNED THE MEETING.

Time: 11:21 PM

These minutes were read and approved by the Board of Trustees on the 4th day of June 2026.

______________________________	______________________________
President	Secretary

Copies of Board information referred to are attached to the official minutes or filed in the office indicated.

Leander ISD Board Meeting Agenda Item Information

Meeting Date: Thursday, June 4, 2026

Agenda Item:	Consider Approval of the Project SEARCH Interlocal Agreement and Memorandum of Understanding (MOU) with Liberty Hill ISD
Purpose:	☐ Discussion Item/Report Only ☒ Action Requested
Administrator Responsible:	Paige Collier, M.Ed., Assistant Superintendent of Special Programs
Attachments:	Project SEARCH Interlocal Agreement and MOU with Liberty Hill ISD

Background Information:

Project SEARCH is an international model that provides local internship opportunities from August to May for young adults with intellectual and developmental disabilities, with every intern graduating with successful program completion. Project SEARCH is a business-led practice for students who are between 18 -22 years old and who are eligible for 18+ transition services. Leander ISD students have had amazing experiences learning and working within this program, which is hosted at Ascension Seton Northwest (ASNW) Hospital. A number of our students have been hired for paid employment following their internships at various community sites as well at ASNW hospital.

Leander ISD has had an active Memorandum of Understanding (MOU) with Project SEARCH since 2015, with an average of 8 students participating in this one-year program. The district currently collaborates with Liberty Hill ISD in proposing this MOU to partner with the Ascension Seton Northwest Hospital. LISD provides an embedded teacher and job coach at the ASNW site for each school year and works to have a total of 10 interns from the two districts at the hospital in order to cover all district costs of this program. During the 11 year partnership, 92 students have come through the program, with 91% still employed as of today. This partnership is an incredible opportunity for our students. The current MOU with Liberty Hill ISD is through August 30, 2026, with their fiscal year ending at that time.

Administrative Recommendation: Administration recommends the Board approve the 2027 Project Search Interlocal Agreement and Memorandum of Understanding with Liberty Hill ISD, as presented.

Sample Motion: I move the Board approve the 2027 Project Search Interlocal Agreement and Memorandum of Understanding with Liberty Hill ISD, as presented.

LEANDER INDEPENDENT SCHOOL DISTRICT

INTERLOCAL COOPERATION AGREEMENT AND MEMORANDUM OF UNDERSTANDING WITH

LIBERTY HILL INDEPENDENT SCHOOL DISTRICT

REGARDING

LIBERTY HILL INDEPENDENT SCHOOL DISTRICT STUDENT PARTICIPATION IN PROJECT SEARCH VIA LEANDER INDEPENDENT SCHOOL DISTRICT

This Agreement ("Memorandum") defines the cooperative responsibilities between Liberty Hill Independent School District ("LHISD") and Leander Independent School District ("LISD") (Collectively referred to hereinafter as "the Parties"). The purpose of this Memorandum is to coordinate services between these two districts, as more particularly described below.

WHEREAS, the participating school districts are "local governments" and public education in the context contemplated herein is a "government function and service" as those terms are defined in the Interlocal Cooperation Act ("Act"), codified as Chapter 791 of the Government Code of Texas; and,

WHEREAS, the Act authorized any local government to contract or agree with another local government in accordance with the Act to perform governmental functions and services that each party to the contract is authorized to perform individually; and,

WHEREAS, Chapter 29 of the Texas Education Code provides for the development of transition planning and post-secondary goals for students served under the Individual with Disabilities Education Act ("IDEA") ; and,

WHEREAS, LHISD seeks to place some LHISD students in Project SEARCH, a program providing opportunities for internship experience and educational opportunities available at Ascension Seton for instruction, employability skills, and work readiness in preparation for competitive employment through LISD's agreement with Ascension Seton ("Seton") a Texas non-profit corporation, Texas Workforce Solutions Vocational Rehabilitative Services ("TWS"), Goodwill Industries of Central Texas ("Goodwill") a Texas non-profit corporation, and Bluebonnet Trails Community Services.

NOW THEREFORE, pursuant to the Interlocal Cooperation Act and the Texas Education Code, it is mutually agreed by the Parties as follows:

I. Terms

A. When LISD has an additional unfilled slot available in Project SEARCH which is a program run pursuant to Project SEARCH criteria, LHISD may submit LHISD students for consideration to participate in that slot.

B. Student eligibility and participation will be in accordance with the program requirements and parameters of Project SEARCH.

C. The Parties will comply with applicable local, state and federal confidentiality laws, rules and regulations, as may be amended from time to time, regarding disclosing information on the Youth, parent or legally authorized representative receiving services hereunder, to include, but not necessarily be limited to, information covered under the Federal Rights and Privacy Act (FERPA) (20 U.S.C. Section 1232g.34 CFR Part 99) and under Health Insurance Portability and Accountability Act of 1996 (HIPPA; Pub.L. 014-191).

D. If a LHISD placed student is served under an IEP, pursuant to the IDEA, LHISD will ensure the appropriate LISD staff are included in ARD committee meetings and/or staffing meetings to determine appropriate modifications and accommodations, or implementation of such modifications and accommodations, for the student during his/her placement in Project SEARCH, including coordinating any discussion about medical or medication needs for the student.

II. Term of Contract and Termination

LHISD and LISD agree that this Memorandum is effective beginning September 1, 2026, and shall continue until terminated by either party, or until August 31, 2027, whichever is sooner. Either party may terminate this Memorandum by giving at least thirty (30) days' written notice.

III. Liability

To the extent permitted by applicable law, but without waiver or expansion of any limits established by the Texas Tort Claims Act, the Parties shall indemnify and hold harmless each other, their officer, employees and agents, from and against any and all claims proximately caused by the negligence, breach, or other act or omission by the indemnifying Party or its officers, employees, or agents.

IV. Compensation

LHISD shall pay LISD $15,000 per student, per school -year in exchange for the services described in this agreement. LISD will invoice LHISD once per month, for 10 months, at a rate of $1,500 per student per month. If a student starts after the September 1st date, Leander ISD will offer a prorated payment for the number of months that the student is going to attend at the rate of $1,500 per month.

V. Accountability/Attendance

For the purpose of accountability under Chapter 39 of the Texas Education Code and the Foundation School Program, a LHISD student participating in Project SEARCH through LISD shall be reported as if the student were enrolled at the student's sending campus in the student's regularly assigned education program, including special education program, where applicable. LHISD shall cooperate fully in making such reports and accepting such accountability. All PEIMS reporting requirements for the LHISD student(s) participating in Project SEARCH through LISD shall remain the responsibility of LHISD. All ADA funding entitlements generated by placements of LHISD students in Project SEARCH through LISD shall remain with LHISD.

LHISD students participating in Project SEARCH through LISD are expected to attend as required by compulsory attendance law, if applicable, pursuant to section 25.085 of the Texas Education Code. LHISD shall maintain responsibilities pursuant to Texas Education Code section 28.093 for the attendance officer of LHISD to file a complaint against the parent(s) in the justice of the peace court or municipal court of the political subdivision in which the parent resides or in which the school is located if the parent fails to require the child to attend school as require by law. Students who are not attending may be withdrawn by LISD administration from Project SEARCH for non-attendance according to the policy of Project SEARCH, and in concert with the administrations of LISD and LHISD.

In the event a LHISD student participating in Project Search through LISD is declared homeless (or in the process of being declared homeless) or is in the process of transferring to another district, the student will remain the financial and attendance responsibility of LHISD until the registration/enrollment of the student in another district is complete.

VI. Assignment

Neither party shall assign or otherwise transfer its rights and/or obligations under this Memorandum without prior written consent of the other party, Subject to the provisions hereof, all of the covenants, conditions and obligations contained in this Memorandum shall be binding upon and inure to the benefit of the respective permitted successors and assigns of each party, to the same extent as if each such successor and assign were named as party to the Memorandum.

VII. Severability

If any term or provision of this Memorandum or the application thereof to any person or circumstances shall to any, be invalid or unenforceable, the remainder of this Memorandum, or the application of such term or provision to persons or circumstances other than those as to which it is held invalid or enforceable, shall not be affected thereby, and each term and provision of this Memorandum shall be valid and enforceable to the fullest extent permitted by law.

VIII. Criminal History Record Information

LISD shall ensure that a criminal history record information review has been conducted on all of its employees, interns, volunteers or sub-contractors providing Services for LISD hereunder and there is no criminal history record that would prevent, pursuant to applicable laws and regulations, employees, interns, volunteers or sub-contractors from working in facilities or events sponsored by LISD.

IX. Notices

All notices, demands, requests, or other communications, which may be or are required to be given, served or sent by either party to the other, shall be in writing and delivered personally or by certified mail, return receipt requested, with postage prepaid, at the address shown below for the receiving party. Personally delivered notices are deemed received upon actual receipt; notices sent by certified mail as described above are deemed received upon the earlier of actual receipt or three (3) business days after deposit of the notice with the U.S. Postal Service. A party may change the name or address for the giving of notice by written notice to the other party in accordance with the terms of this paragraph.

If to LISD:

Paige Collier, Assistant Superintendent of Special Programs, Federal and State
Leander Independent School District
204 W. South Street P.O. Box 218
Leander, Texas 78646-0218

If to LHISD:

Kimberly de la Houssaye, Executive Director of Student Support Services
Liberty Hill Independent School District
301 Forrest Street
Liberty Hill, Texas 78642

X. Independent Contractor

The relationship between LHISD and LISD shall be that of an independent contractor. The parties agree that none of the provisions of this Memorandum is intended to create, nor will be deemed or construed to create, any relationship between LHISD and LISD other than that of independent parties contracting with each other to carry out this Memorandum. It is agreed that neither party hereto nor such party's employees, contractors or agents, will be considered an employee, agent, partner, joint venture, ostensible or apparent agent, servant, or borrowed servant of the other party hereto. LHISD shall not hold itself out as an agent of LISD to any Student or to any other persons.

In the performance of all services under this Memorandum, LISD is at all times acting as an independent contractor engaged in the delivery of services. LISD and its personnel and/or contractors, if any, will employ their own means and methods and exercise their own professional judgment in performing the services under this Memorandum, and shall perform its obligations hereunder in an effective, competent, efficient, and satisfactory manner in compliance with policies and procedures.

XI. Entire Agreement/Amendment

This Memorandum and all attachments referenced herein shall constitute the entire, full and compete agreement between the parties regarding the subject matter described herein, and there are no representations, inducements, promises, or agreements, oral or otherwise, between the parties not embodied herein, which are of any force or effect.

Except as expressly provided otherwise in this Memorandum, this Memorandum may not be changed or modified except by written document signed by both parties.

XII. Survival

The provisions of this Memorandum which, by their nature, are intended to survive termination or expiration of this Memorandum shall so survive.

XIII. Headings

The headings contained in this Memorandum are for the convenience of the parties only and shall not be deemed to affect the meaning of the provisions hereof.

XIV. Waiver

The failure of either party to insist upon the strict observation or performance of any provision of this Memorandum or to exercise any right or remedy shall not impair or waive any such right or remedy. Every right and remedy given by this Memorandum to the parties may be exercised from time to time and as often as appropriate.

XV. Force Majeure

Neither party shall be responsible for its failure to fulfill, or delay in fulfilling, its obligations under this Memorandum during any period of time in which such failure or delay is due to the force of majeure or other causes beyond its control, provided that such party shall be required to exercise commercially reasonable efforts to fulfill its obligations during any such period of time.

IN WITNESS WHEREOF, the parties have executed this agreement.

Leander Independent School District

By:____ Date:_________________

Paige Collier
Assistant Superintendent for Special Programs, Federal and State

Liberty Hill Independent School District

By:_______________________________________ Date:__________________

Printed Name:_____________________________________

Title:____

LEANDER INDEPENDENT SCHOOL DISTRICT

INTERLOCAL COOPERATION AGREEMENT AND MEMORANDUM OF UNDERSTANDING WITH

LIBERTY HILL INDEPENDENT SCHOOL DISTRICT

REGARDING

LIBERTY HILL INDEPENDENT SCHOOL DISTRICT STUDENT PARTICIPATION IN PROJECT SEARCH VIA LEANDER INDEPENDENT SCHOOL DISTRICT

Appendix A

The cost chargeable to LHISD pursuant to this agreement shall be a total of $15,000 per student per year in exchange for the services described in this agreement. LISD will invoice LHISD once per month, for 10 months, at a rate of $1,500 per student per month. A provision will be made in case a student cannot start in August and needs to delay the start. The months will be adjusted according to the date the student started.

June 4, 2026

Superintendent’s Report

EARLY COLLEGE HIGH SCHOOL GRADUATION

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EARLY COLLEGE HIGH SCHOOL GRADUATION

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GRADUATIONS

GRADUATIONS

GRADUATIONS

Cedar Park HS

Vandegrift HS

GRADUATIONS

Leander HS

Rouse HS

GRADUATIONS

Vista Ridge HS

Glenn HS

GRADUATIONS

EMPOWERED STUDENT LEARNING

DESTINATION IMAGINATION

EMPOWERED STUDENT LEARNING

MATHEMATICS PENTATHLON®

Parkside ES

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🥈 **National Silver Medalist Team**

NATIONAL MATHEMATICS PENTATHLON ACADEMIC TOURNAMENT

EMPOWERED STUDENT LEARNING

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Akin ES

🥇 **Texas Gold Award**

NATIONAL MATHEMATICS PENTATHLON ACADEMIC TOURNAMENT

EMPOWERED STUDENT LEARNING

Reagan ES

Texas Bronze Award

NATIONAL MATHEMATICS PENTATHLON ACADEMIC TOURNAMENT

EMPOWERED STUDENT LEARNING

Mason ES

🎗️ **Texas Honorable Mention**

EMPOWERED STUDENT LEARNING

8 Year Awardee - Running Brushy MS, Willow "Ace" Peterson

7 Year Awardee - Stiles MS, Hridya Bino

7 Year Awardee - Stiles MS, Krithik Agraj Lekkala

NATIONAL MATHEMATICS PENTATHLON ACADEMIC TOURNAMENT

EMPOWERED STAFF

MS. MILLER - PARKSIDE ELEMENTARY

EMPOWERED STAFF LEARNING

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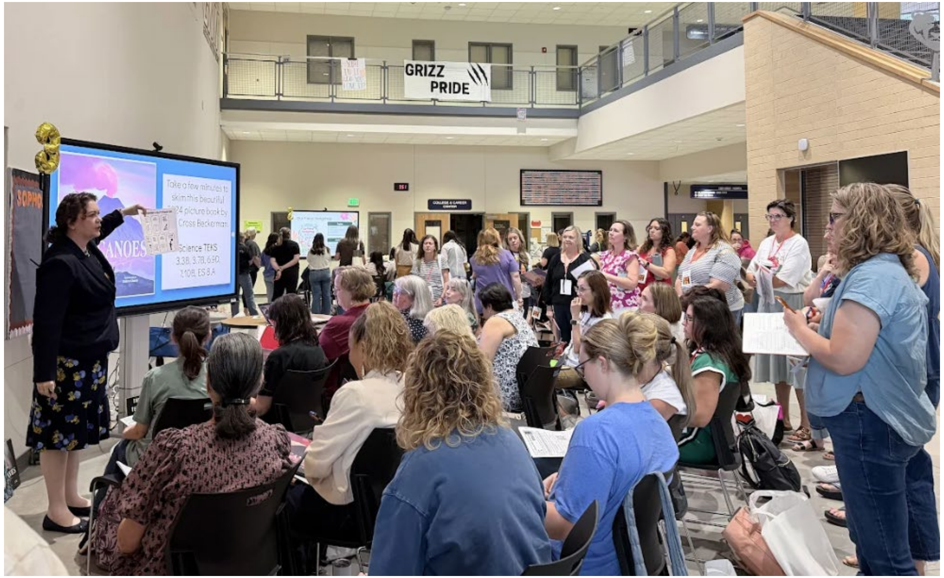
AP & COUNSELOR COLLABORATION

EMPOWERED STAFF LEARNING

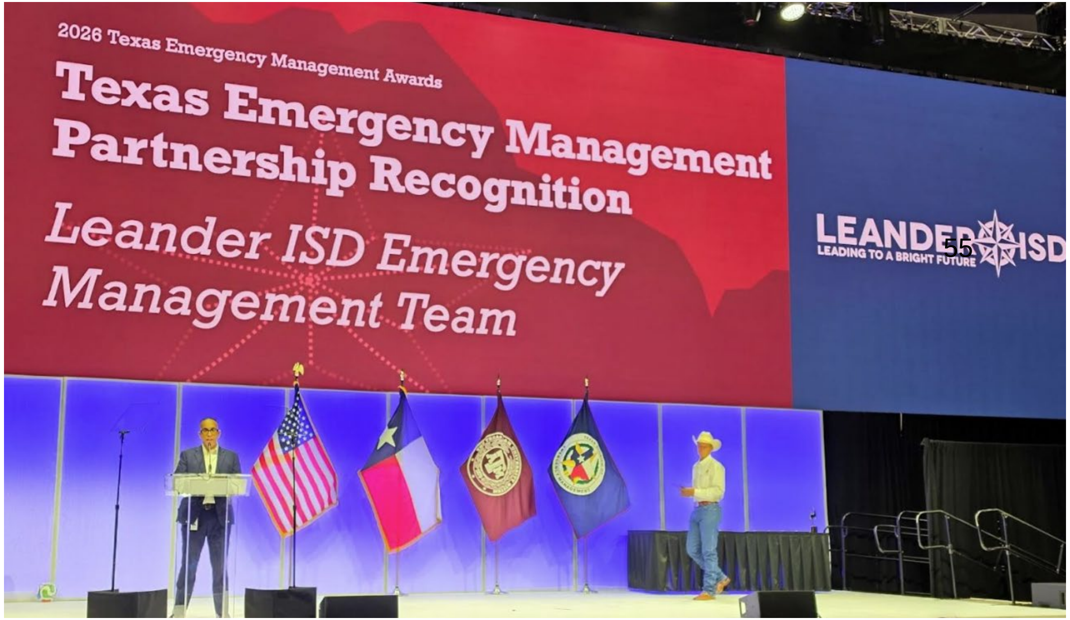


LIT LOVE SYMPOSIUM

EMPOWERED STAFF LEARNING

MATH JOY CONFERENCE

SAFE & INNOVATIVE LEARNING ENVIRONMENTS



TEXAS EMERGENCY MANAGEMENT PARTNERSHIP AWARD

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90th LEGISLATIVE SESSION

EMPOWERED COMMUNITY

June 10-25 & July 6-16 @
Knowles Elementary School

Breakfast: 7:30–9 a.m.

Lunch: 11a.m.–1 p.m. 57

June 10-25 & July 6-30 @
Bagdad Elementary School

Breakfast: 7:30–9 a.m.

Lunch: 11a.m.–1 p.m.

EMPOWERED COMMUNITY

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SUMMER MEAL SERVICE

DISCUSSION

Leander ISD Board Meeting Agenda Item Information

Meeting Date: Thursday, June 4, 2026

Agenda Item:	Discussion of Gibson Consulting Group Internal Audits Reports
Purpose:	☒ Discussion Item/Report Only ☐ Action Requested
Administrator Responsible:	Chris Clark, Ed.D., Superintendent; Pete Pape, Ed.D., CPA, Chief Financial Officer; Greg Gibson, Consulting Director, Gibson Consulting Group, Inc.; Shannon Johns, Consulting Analyst, Gibson Consulting Group, Inc.; Will Hardaway, Consulting Analyst, Gibson Consulting Group, Inc.
Attachments:	Gibson Consulting Group Internal Audits Reports Presentation Human Resources Internal Audit Final Report Procurement Internal Audit Final Report

Background Information:

During the June 27, 2024, Regular Meeting, the Board approved the Internal Audit Risk Assessment Report and proposed sequence of internal audit activities presented by Gibson Consulting Group. Subsequently, during the April 24, 2025, Regular Meeting, the Board approved conducting the next phase of internal audits to include the Human Resources and Procurement departments. Tonight, Gibson Consulting will present their findings for both the Human Resources and Procurement departments' internal audits.

Administrative Recommendation:

N/A

Sample Motion:

N/A

LEANDER ISD
LEADING TO A BRIGHT FUTURE

Human Resources Internal Audit

Leander Independent School District

Report Presentation to the Board of Trustees

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

June 4, 2026

Agenda

- Audit Objectives and Scope
- Findings & Recommendations
  - Organization and Management
  - Staffing
  - Compensation and Benefits
  - Employee Relations
- Questions

Audit Objectives and Scope

Audit Objectives

- To evaluate the efficiency, effectiveness, and compliance of the LISD Human Resources Department, and identify opportunities for improvement.

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Audit Scope

Six major areas of human resources management were analyzed during this audit:

- Organization and Management
- Compliance with Laws and Regulations
- Recruitment and Onboarding Activities
- Employee Relations
- Information Technology
- Compensation and Benefits

Audit Recommendations

No.	Priority	Recommendation
Chapter 3: Organization and Management		
1	Medium	Develop a functionally aligned organizational structure for the HR Department.
2	High	Establish a performance reporting architecture for the HR Department.
3	High	Transition all personnel files to a single, digital environment.
4	Low	Codify all standard operating procedures in a department manual.
5	High	Develop a system roadmap to define technology needs and determine future investments.
Chapter 4: Staffing		
6	High	Redesign the district's position control function.
7	Low	Quantify "student need" in district special program staffing formulas.
8	Medium	Standardize district hiring practices.

Audit Recommendations

No.	Priority	Recommendation
		Chapter 5: Compensation and Benefits
9	High	Verify and document all supplemental payments.
10	Medium	Strengthen controls over workers' compensation.
11	Low	Develop and deploy a benefits communications strategy.
		Chapter 6: Employee Relations
12	Medium	Establish a dedicated employee relations function.
13	High	Calibrate the district's performance evaluation process.

Findings and Recommendations

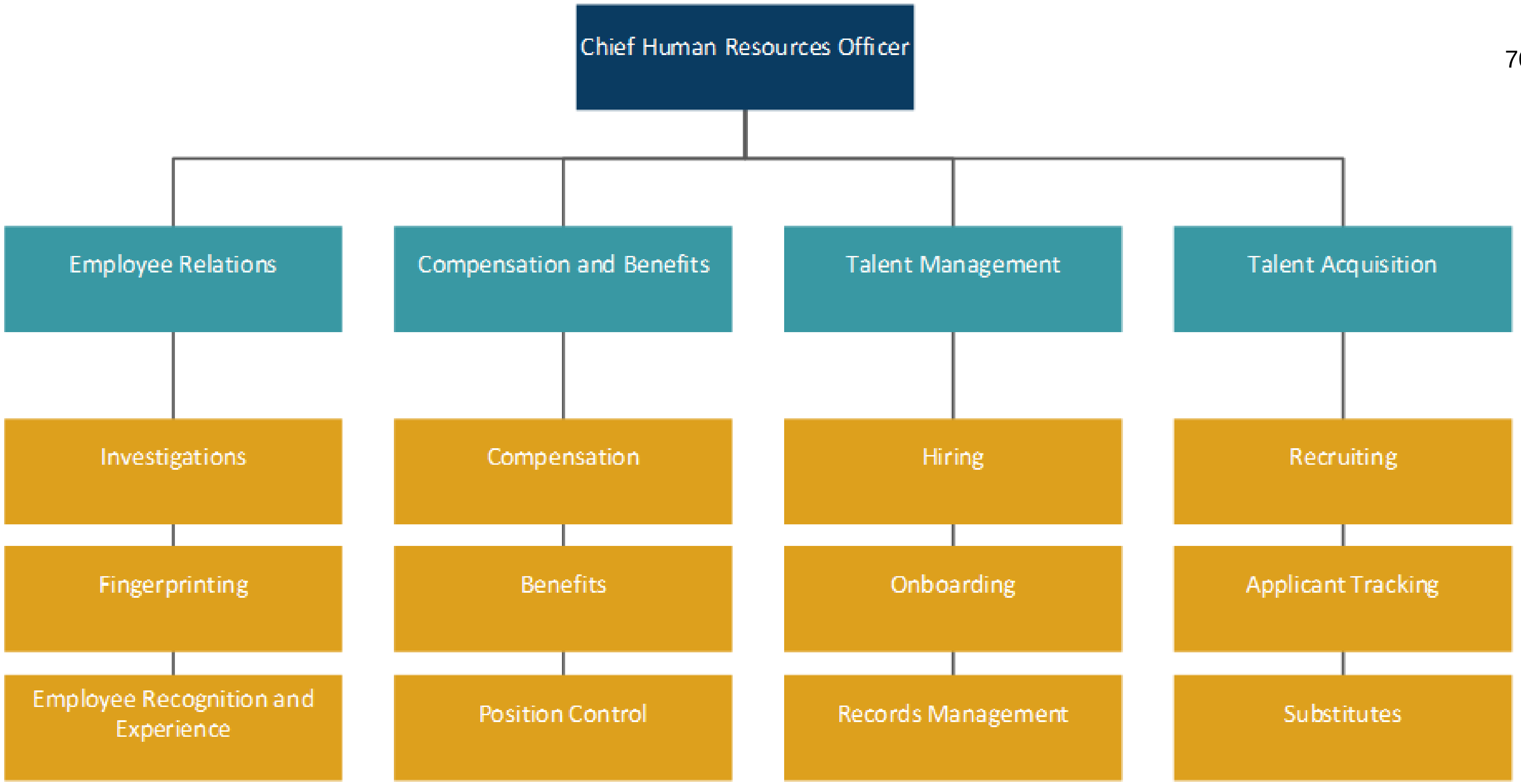
Organization and Management

Finding 1: The HR Department's organizational chart reflects a hybrid structure, which does not support accountability and blurs responsibilities.

- Functional – divides work and employees by functional area (e.g., recruiting, staffing, employee relations).
- Divisional – divides work by school type (i.e., elementary or secondary) with the various functions that support that school type reporting under it.

Organization and Management

Recommendation 1: Develop a functionally aligned organizational structure for the HR Department.



Organization and Management

Finding 2: Misaligned goals and insufficient progress monitoring hinder the HR Department's effectiveness.

- The HR Department's Improvement Plan does not clearly support the district's Strategic Plan or align with other districtwide strategies.
- The department does not have defined Key Performance Indicators (KPIs) or metrics to measure performance.

Organization and Management

Recommendation 2: Establish a performance reporting architecture for the HR Department.

- Align department goals, metrics, and reporting cadence to Goal 2 of the Strategic Plan.

Function	Efficiency and Effectiveness Indicators and Metrics
Global Performance and Financial Management	Student-to-Staff Ratio
	Student-to-Teacher Ratio
	Number of district employees per HR FTE
	HR Department cost per district employee FTE
	Average HR customer service response times
	Average performance rating on HR customer survey
	Employee-related litigation expenditures as a percentage of payroll
	Substitute expenditures as a percentage of salaries and wages, by campus

Organization and Management

Finding 3: LISD personnel files are incomplete, exposing the district to unacceptable levels of risk.

- Sensitive personnel documents are stored in multiple places across multiple departments.
- The majority of files are kept hard copy, which heightens risk and inefficiency.
- Testing of 30 files showed high exception rates.

Organization and Management

Recommendation 3: Transition all personnel files to a single, digital environment.

- Phase 1: Establish a strong governance foundation
- Phase 2: Remediate existing gaps
- Phase 3: Embed sustainable practices

Organization and Management

Finding 4: The HR Department lacks critical standard operating procedures, increasing its reliance on the institutional knowledge of individuals.

- Key HR processes are highly dependent on a small number of individuals.
- The department faces increased risk related to staff turnover.

Organization and Management

Recommendation 4: Codify all Standard Operating Procedures (SOPs) in a department manual.

- Define the purpose, roles, and responsibilities, step-by-step procedures, timelines, and required forms
- Cover all core HR processes (e.g., new hire processing)

Organization and Management

Finding 5: The district annually spends $900,000 on technology tools that are duplicative, underutilized, and do not support efficient HR management.

- Half of the HR Department's key system interfaces are fully manual.
- The underutilization of key technology tools results in the proliferation of additional tools.
- Most HR support tickets could be automated.
- The district pays approximately $150,000 per year for software that is not deployed.

Organization and Management

Recommendation 5: Develop a system roadmap to define technology needs and determine future investments.

- Create and carry out a 12-18 month plan focused on four outcomes:
  - Reducing or eliminating tools that perform the same function
  - Making better use of the systems that the district already pays for
  - Minimizing hand entry of data between systems
  - Making it easier for employees to access HR services without submitting tickets

Staffing

Finding 6: The district's highly manual approach to position control increases the risk of inaccurate reporting.

- Position control is a complex, foundational function.
- It is currently executed through a combination of Tyler Munis and manual Excel workarounds.
- The audit team identified multiple issues with this approach which increases risk related to the integrity of payroll, budget, and staffing data.

Staffing

Recommendation 6: Redesign the district's position control function.

- Phase 1: Engage Human Resource Information System (HRIS) expertise[80] and establish governance
- Phase 2: Redesign the position model within Tyler Munis
- Phase 3: Align system configuration to compliance and reporting requirements
- Phase 4: Implement, train, and establish ongoing controls

Staffing

Commendation 1: LISD has achieved exceptional substitute fill rates through strategic program development.

- Fill rates have reached 97% district wide.
- Performance has improved dramatically over a short period of time.
- Targeted retention strategies have driven results.

Staffing

Finding 7: Imprecise staffing formulas raise the risk of inequitable allotments.

Figure 24. Programmatic Teacher Staffing Formulas, LISD Middle Schools, 2025-26

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Teachers	
QUEST	Based on Need
Dyslexia	Based on Need
ESL/Bilingual	Based on Need
Title I	Based on Need
Special Education	Based on Need
Instructional Assistants	Based on Need

Source. LISD Staffing Formulas, 2025-26

Staffing

Recommendation 7: Quantify "student need" in district special program staffing formulas.

- Over the course of Gibson's audit, the HR Department updated the district's staffing guidelines for the 2026-27 school year.
- The updated guidelines apply weighted ratios.

Staffing

Finding 8: The hiring process in inconsistently applied throughout the district, hindering the HR Department's ability to ensure equitable, transparent, and defensible hiring decisions.

- The district has not established standard interview guides or scoring rubrics.
- According to principals, candidates are not routinely screened.
- Hiring data – such as applicant pools, interview outcomes, or selection trends – is not collected or analyzed.

Staffing

Recommendation 8: Standardize district hiring practices.

- Establish a formal district hiring framework

- Implement mandatory recruiter prescreening protocols
- Develop and require structured interview tools
- Collect and analyze hiring data
- Provide required training for staff involved in hiring

Staffing

Commendation 2: LISD's onboarding process reliably prepares new hires for their first day.

- Principals praised the onboarding process during interviews.
- New hire paperwork is completed efficiently and digitally.
- The Records and Staffing team views customer service as their core mission.

Compensation and Benefits

Finding 9: LISD annually distributes $15-20 million in supplemental pay; however, current approval practices provide limited assurance that the compensated work aligns with district requirements.

Table 16. Top 10 (By Total) Stipend and Extra Duty Payment Categories, 2024-25

Stipend		Extra Duty Payment	
SPED General	$994,033	Retention Payment	$5,814,500
SPED Self Contained	$866,051	Athletic Summer Camp	$661,021
Bilingual Teacher	$718,931	Summer School (Teacher)	$498,970
SPED Behavior	$299,953	Curriculum Development	$293,946
HS Football Varsity Days	$178,007	Sign-on Stipend	$232,250
HS Agriculture Advisor	$146,416	Supplemental Pay	$230,163
HS Football JV/Freshman Days	$119,229	Training (Daily)	$213,335
MS Football A/B Days	$119,964	Exempt EE Extra-Duty Hourly	$167,927
MS Department Head	$114,681	Summer Supplemental Pay	$156,351
HS Football Varsity	$110,824	Elementary Team Lead	$128,000

Compensation and Benefits

Recommendation 9: Verify and document all supplemental payments.

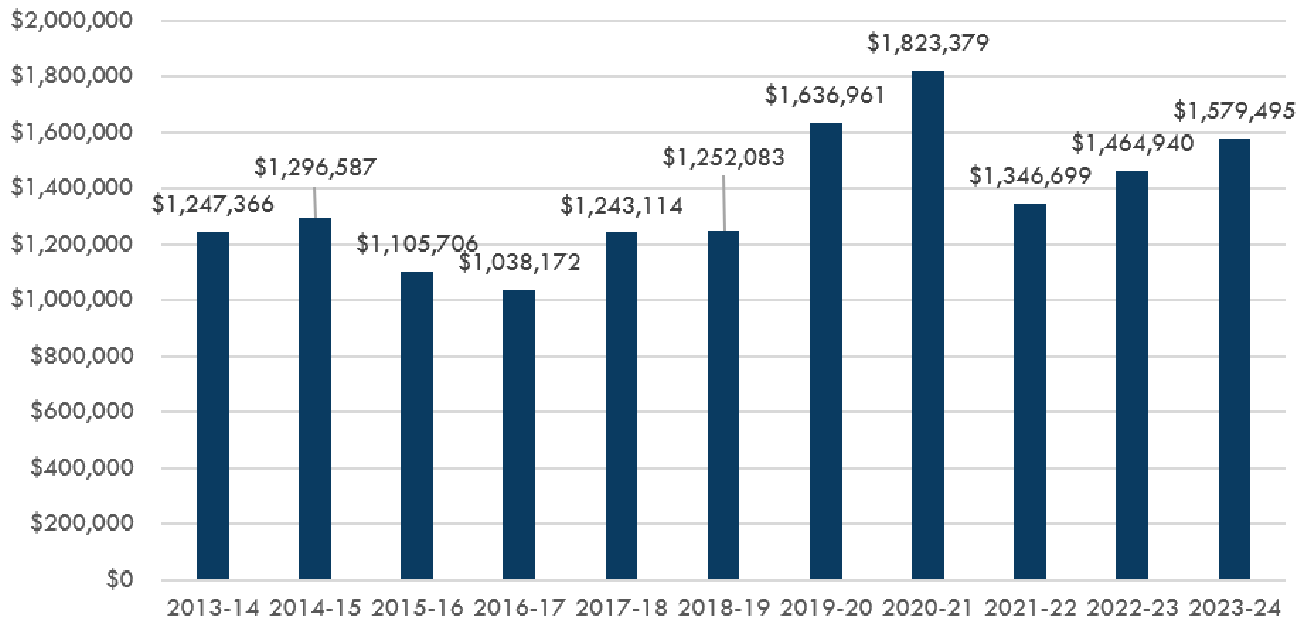
- Require all supplemental work to be formally authorized in advance. 88
- Transition the tracking and calculation of supplemental pay out of spreadsheets and into the Enterprise Resource Planning (ERP) system.
- Train campus and department staff on documentation requirements.

Compensation and Benefits

Finding 10: Inadequate controls over workers' compensation expose the district to compliance and financial risks.

- Case notes are not consistently maintained.
- Limited supporting documentation weakens claim defensibility.

Figure 29. Leander ISD Workers' Compensation Expenditures, General Fund, 2013-14 to 2023-24



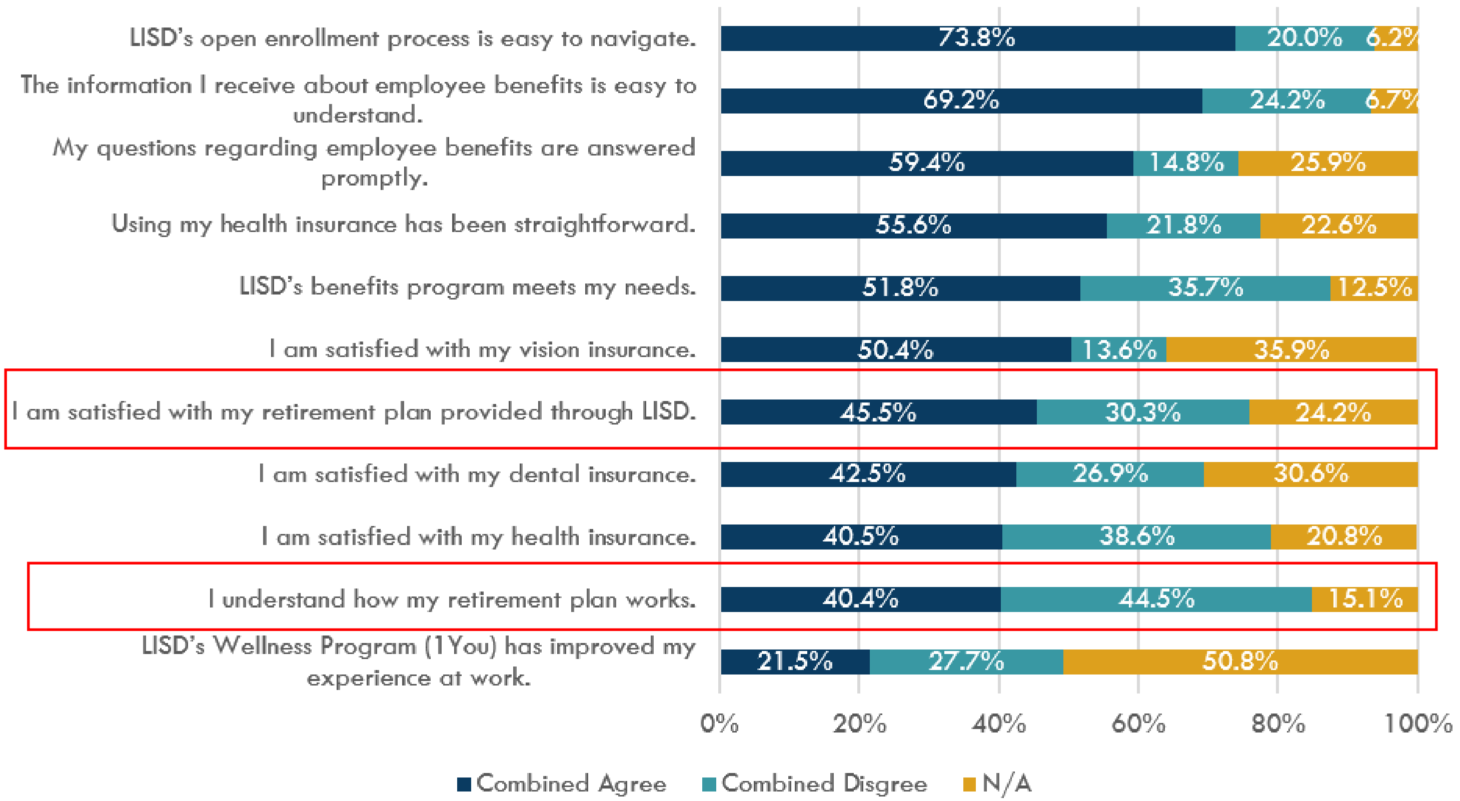
Compensation and Benefits

Recommendation 10: Strengthen controls over workers' compensation.

- Standardize workers' compensation processes and requirements. 90
- Improve documentation, visibility, and data quality at the case level.
- Strengthen oversight and monitoring through routine review and reporting.

Compensation and Benefits

Finding 11: Employees feel dissatisfied with LISD's benefit program, partly because they do not fully understand it.



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Compensation and Benefits

Recommendation 11: Develop and deploy a benefits communications strategy.

- Establish a centralized communication framework

- Plan recurring, diverse education efforts (workshops, webinars, written guides, etc.)
- Develop focused initiatives for retirement education
- Evaluate and adapt to current staffing capacity

Employee Relations

Finding 12: Documentation related to employee misconduct is inconsistent and exposes the district to risk.

- Gibson found significant gaps in the completeness, detail, and general organization of LISD's Employee Relations (ER) files.
- Incomplete investigation records limit the district's ability to justify discipline, address complaints, or defend against legal and public scrutiny.
- ER responsibilities are fragmented across multiple roles without specialized training. As a result, investigation and documentation practices are inconsistent and vary by staff involved.

Employee Relations

Recommendation 12: Establish a dedicated employee relations function.

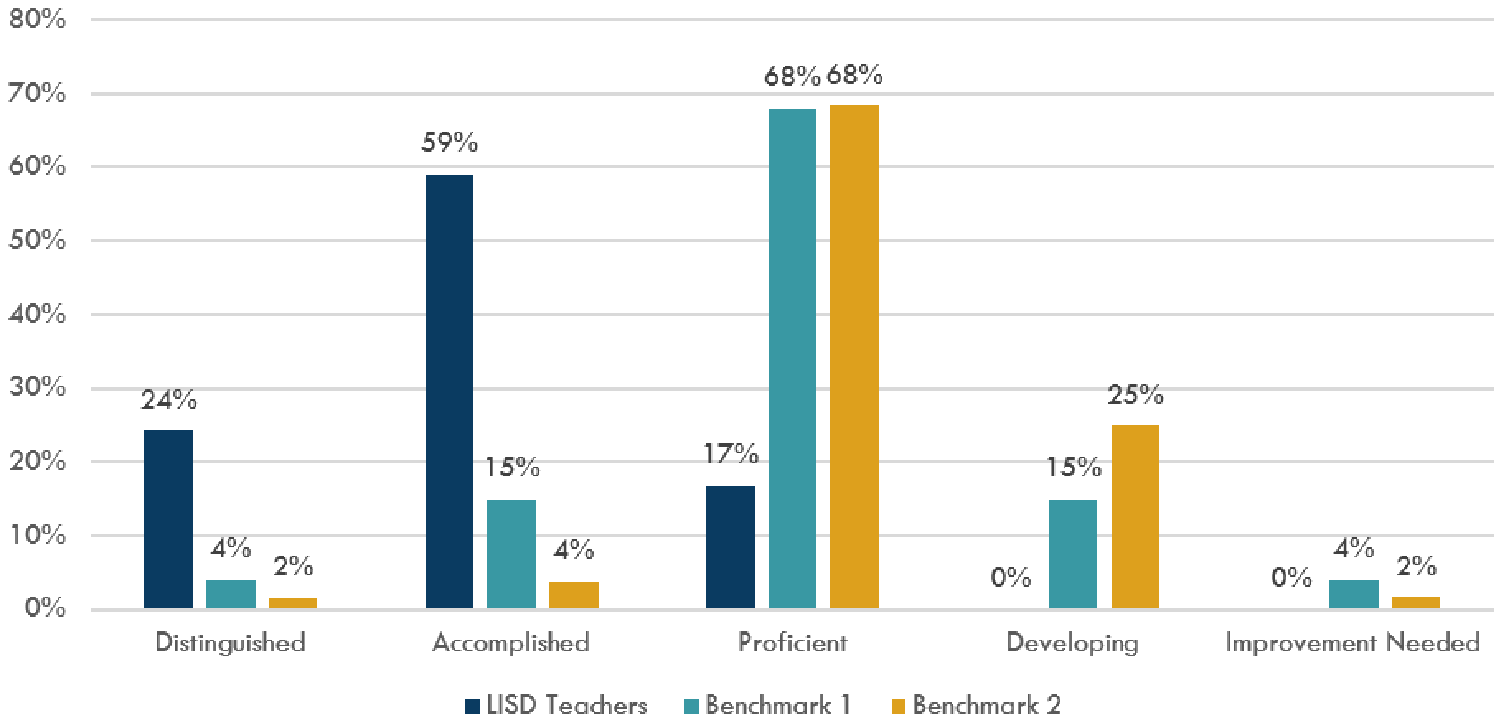
- Assign clear ownership and governance
- Enforce established investigative tools and minimum documentation requirements
- Build investigation capability through training and ongoing coaching
- Implement consistent file structure and quality control

Employee Relations

Finding 13: Inflated performance evaluation scores undermine accountability and growth.

95

Figure 38. LISD Teacher Evaluation Scores Compared to Benchmark Distributions, 2024-25



Employee Relations

Recommendation 13: Calibrate the district's performance evaluation process.

- Strengthen evaluator training and calibration practices
- Regularly monitor evaluation patterns
- Connect evaluation outcomes to professional development

Questions

LEANDER ISD
LEADING TO A BRIGHT FUTURE

Procurement Audit

Leander Independent School District

Report Presentation to the Board of Trustees

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

June 4, 2026

Agenda

- Audit Objectives and Scope
- Executive Summary
- Findings and Recommendations
  - Organization and Management
  - Competitive Procurement and Contracting
  - Purchasing (PO's and Pro-Card)
  - Receiving
- Questions

Objective and Scope

- Objective:
  - Evaluate compliance, efficiency, and effectiveness of the Purchasing Department
  - Identify opportunities for improvement
- Scope:
  - Organization and Management
  - Competitive Procurement and Contracting
  - Purchasing (PO's and Pro-Card)
  - Receiving

Executive Summary

- The procurement function demonstrates strong compliance with policies and regulations.
- The Purchasing Department does not track performance measures to evaluate efficiency or effectiveness.
- Delays in PO processing and limited use of the Pro-Card program were identified through analysis and stakeholder input.
- Existing systems are not fully leveraged, resulting in manual workflows and process inefficiencies.

Summary of Audit Recommendations

No.	Priority	Recommendation
1	High	Develop performance measures for the Purchasing Department.
2	Medium	Update and upgrade purchasing resource guides and training.
3	Medium	Develop standard district contract templates.
4	High	Streamline the purchase order approval workflow.
5	High	Strengthen vendor approval controls.
6	High	Restructure the Pro-Card program.

Findings and Recommendations

Organization and Management

Finding 1: The lack of performance measures limits the ability to hold the Purchasing Department accountable for performance.

- No formal metrics to evaluate department efficiency or effectiveness
- Limit's ability to monitor performance and accountability
- Available system data is not being utilized for reporting

Organization and Management

Recommendation 1: Develop performance measures for the Purchasing Department.

- Track performance measures aligned to procurement activities
- Establish metrics aligned to industry benchmarks
- Use MUNIS data for monitoring and reporting

Organization and Management

Finding 2: There is insufficient training on purchasing processes and procedures.

- Training materials in the TRAIN Depot contain outdated information and are difficult to navigate
- 65% of links pertaining to purchasing documents were non-functional
- Staff reported uncertainty in purchasing procedures

Organization and Management

Recommendation 2: Update and upgrade purchasing resource guides and training.

- Complete a comprehensive review of the purchasing training program and resources repository
- Update all materials and guides to ensure they are accurate and aligned with district policies and best practices
- Publish a contact list for purchasing support

Competitive Procurement/Contracting

Finding 3: The district overly relies on vendor-provided contracts.

- Contracts are typically based on vendor-provided documents
- No standard district contract templates
- Requires repeated legal review for each contract
- Vendor-provided contracts lack performance metrics or expectations

Competitive Procurement/Contracting

Recommendation 3: Develop standard district contract templates.

- Develop standard contract templates in collaboration with legal counsel and relevant stakeholders
- Ensure templates include key provisions and performance metrics
- Implement templates and use MUNIS to track contract terms, renewals, and outcomes

Purchasing – PO's

Finding 4: The district's Purchase Order (PO) approval process is inefficient and contributes to longer PO processing times.

- 56% of the POs tested exceeded seven days, with 12% exceeding 18 days
- Workflow requires multiple sequential approvals
- All PO's currently require Senior Director approval, regardless of the amount

Purchasing – PO's

Recommendation 4: Streamline the PO approval workflow.

- Establish approval thresholds based on dollar amounts
- Implement parallel approval process; such as allowing Accounting and Purchasing to review requisitions simultaneously
- Use system controls to prevent errors
- Provide targeted training to staff

Purchasing – Vendors

Finding 5: Non-approved vendors are used in the purchasing process.

- Transactions identified using non-approved vendors

- Vendor setup process can take several weeks
- Staff bypass processes to meet purchasing needs

Purchasing – Vendors

Recommendation 5: Strengthen vendor approval controls.

- Implement controls to restrict use of non-approved vendors
- Streamline vendor onboarding process
- Provide training on vendor approval requirements

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Purchasing – Pro-Cards

Finding 6: The district's use of Pro-Cards does not achieve the intended benefits of the program.

- 31 of 424 Pro-Cards (7.3%) in use are assigned to individuals; the remainder are assigned to groups or departments
- Individual spending controls cannot be applied when cards are assigned at the group level
- Pro-Card transactions are processed by administrative staff rather than the cardholder

Purchasing – Pro-Cards

Recommendation 6: Restructure the Pro-Card program.

- Issue Pro-Cards to individual staff members, beginning with high-frequency users
- Require cardholders to enter transaction data and upload supporting documentation
- Establish spending controls for individual cardholders
- Perform ongoing data analytics and periodic audit reviews

Receiving

Receiving process showed strong performance and full compliance.

Questions

March 2026

LEANDER ISD
LEADING TO A BRIGHT FUTURE

Human Resources Internal Audit Report

Prepared for
Leander Independent School District

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

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Chapter 1: Introduction

This report presents the results of the Human Resources (HR) Department Audit, as part of the Leander Independent School District's (Leander ISD's/LISD's/the district's) internal audit program to support continuous improvement. This audit began in August 2025 and was completed in March 2026. This introductory Chapter provides a summary of audit findings and recommendations, describes the audit scope and objectives, and presents a description of Gibson Consulting Group's (Gibson's) approach and methodology.

The audit team wishes to thank the LISD leadership and staff for their assistance in conducting this audit, and the Board Audit Committee for overseeing this important work.

Executive Summary

Leander ISD has experienced significant organizational growth and increasing operational complexity over the past two decades. These changes have placed disproportionate demands on its human resources systems, structures, and controls. The HR Department plays a central role in supporting the district's workforce – its largest financial investment and its most critical asset – and has made notable progress in several operational areas. At the same time, this audit identified foundational issues that limit the department's ability to operate efficiently, manage risk, and consistently support districtwide strategic priorities.

Overall, LISD benefits from a committed and capable workforce, a strong customer service orientation within many HR functions, and pockets of operational strength. Survey results and interviews confirm that many employees view HR staff as responsive, knowledgeable, and supportive. These strengths provide a solid base for continuous improvement. However, the audit found that many HR processes rely heavily on manual workarounds, fragmented systems, and informal practices that have not kept pace with the district's size or complexity. As a result, essential functions such as position control, supplemental pay administration, and employee relations carry elevated operational, financial, and compliance risks.

The major themes of this audit are the following:

- **The HR Department operates a fragmented, highly manual technology environment that increases cost, risk, and workload.** LISD currently maintains 17 HR-related technology modules across 13 separate systems at an annual cost of approximately $900,000. Nearly half of all system interfaces are fully manual, requiring staff to re-enter sensitive data across platforms rather than relying on automated connections. This approach creates significant data integrity risks, increases staff workload, and has resulted in the proliferation of redundant tools, including two separate customer support ticketing systems and an internally developed notification system (EMATS) used to compensate for an underutilized enterprise resource planning (ERP) tool. These conditions directly impede the efficiency and effectiveness of the HR Department.

- **The HR Department's organizational structure blurs accountability and limits performance oversight.** The current structure blends divisional and functional alignments in a way that creates ambiguity about who is responsible for key outcomes. Executive Directors are assigned by school type/position group but rely on functionally organized staff who do not report directly to them. Compounding these structural challenges, the department does not have a defined set of key performance indicators (KPIs), and its Improvement Plan is not explicitly aligned to the district's Strategic Plan. As a result, HR operates primarily in a reactive, transactional capacity rather than as a strategic partner to district leadership.
- **Critical HR records are incomplete, dispersed, and primarily maintained in hard copy.** A review of 30 personnel files found significant gaps in required documentation. Personnel files are stored across multiple departments and locations, including a legacy S-Drive that has not been formally maintained since the pandemic. Similarly, separate employee relations files – which document misconduct investigations and disciplinary actions – were found to be incomplete in six of the 10 files tested, with missing investigation packets, unsigned communications, and absent follow-up documentation. These conditions expose the district to legal and compliance risks and limit leadership's ability to make informed, defensible employment decisions.
- **The district's position control function is highly manual and creates unacceptable financial, compliance, and operational risks.** Tyler Munis is technically designated as LISD's system of record for position management; however, the HR Department relies on Excel spreadsheets to supplement the work of tracking and managing position-level data. The district's ERP configuration contains 600 job classes (including 122 for teachers) and 30 separate work calendars, creating a system that is difficult to maintain and prone to error. The audit also identified 32 employees whose salaries fell outside of board-approved ranges, an issue that is difficult to detect without a properly configured position control system.
- **Supplemental pay and workers' compensation programs lack the controls necessary to ensure compliance and financial integrity.** LISD distributes $15-20 million annually in supplemental compensation across 195 stipend types and 122 extra duty pay categories. Testing of 21 supplemental payments found that 67% lacked required documentation, including signed job agreements, proof of work performed, and supporting pay calculations. Workers' compensation is tracked exclusively through a standalone Excel spreadsheet, which contains missing dates, incomplete case notes, and limited supporting documentation. Further, the district is not conducting trend analysis of workers' compensation data, limiting its ability to proactively manage risk and cost.
- **Employee evaluation results are highly concentrated at the top of the rating scale, undermining the utility of the Learning, Evaluation, and Development System (LEADS).** In 2024-25, 83% of LISD teachers were rated Accomplished or Distinguished – the two highest performance tiers. By comparison, research-based benchmarks suggest that only 5-20% of teachers in a healthy distribution should occupy these tiers. Only one teacher (0.06%) was rated Developing, and none were rated Improvement Needed. These results, combined with interview feedback describing the evaluation process as primarily a compliance exercise, suggest that the system is not currently functioning as an effective tool for professional growth or accountability.

This audit identified 13 recommendations to improve the human resources function at LISD. These recommendations are listed in Table 1, along with the priority assigned by the audit team. The audit team assigned a priority level to each recommendation based on perceived risk and/or impact to the organization. Recommendations are not listed in order of priority but rather the order in which they appear in the report.

Table 1. Summary of Audit Recommendations

No.	Priority	Recommendation
		Chapter 3: Organization and Management
1	Medium	Develop a functionally aligned organizational structure for the HR Department.
2	High	Establish a performance reporting architecture for the HR Department.
3	High	Transition all personnel files to a single, digital environment.
4	Low	Codify all standard operating procedures in a department manual.
5	High	Develop a system roadmap to define technology needs and determine future investments.
		Chapter 4: Staffing
6	High	Redesign the district's position control function.
7	Low	Quantify "student need" in district special program staffing formulas.
8	Medium	Standardize district hiring practices.
		Chapter 5: Compensation and Benefits
9	High	Verify and document all supplemental payments.
10	Medium	Strengthen controls over workers' compensation.
11	Low	Develop and deploy a benefits communications strategy.
		Chapter 6: Employee Relations
12	Medium	Establish a dedicated employee relations function.
13	High	Calibrate the district's performance evaluation process.

Project Objectives and Scope

The objectives of this audit were to evaluate the compliance, efficiency, and effectiveness of the Leander ISD Human Resources Department, and to identify opportunities for improvement. Six major areas of human resources management were analyzed during this audit:

- Organization and Management;
- Compliance with Laws and Regulations;
- Recruitment and Onboarding Activities;

- Employee Relations;
- Information Technology; and
- Compensation and Benefits.

The findings and recommendations included in this report were informed by the following data collection and analytical activities.

Data Analysis and Benchmarking

As part of this audit, Gibson collected and analyzed current-year and historical data provided by LISD, which included position data, budget and expenditure data, and other program-specific information. To provide additional context, Gibson benchmarked LISD to five districts, which were selected by the audit team based on similarity in size, demographics, and district type. Gibson also compared LISD to state averages, where applicable. Throughout this report, Gibson used the most current data publicly available from the Texas Education Agency (TEA). Table 2 presents a profile of the comparator districts and LISD.

Table 2. Profile of Benchmark Districts, 2024-25

District	Region	Student Enrollment	Staff FTE Count	% Economically Disadvantaged	2024-25 Accountability Rating
Clear Creek ISD	4	39,532	5,013.5	35.8%	B (88)
Keller ISD	11	31,986	3,903.4	32.7%	B (85)
Leander ISD	13	42,507	5,649.4	16.6%	B (88)
Lewisville ISD	11	47,776	6,336.1	36.3%	B (81)
Plano ISD	10	46,432	6,520.6	36.5%	B (82)
Round Rock ISD	13	46,846	6,180.9	27.1%	B (87)

Source. TEA Texas Academic Performance Reports, 2024-25

Interviews and Focus Groups

In October 2025, the Gibson audit team conducted 16 individual interviews with the Superintendent, central office administrators, and Human Resources Department staff. Additionally, the audit team conducted group interview sessions with campus administrators, teachers, and HR staff. The objectives of the interviews and focus group sessions were to gather information about LISD's human resources function and to assess stakeholder perceptions regarding areas of strength and opportunities for improvement.

A complete list of interviewees and group interviews can be found in *Appendix A: Interview List*.

Staff Survey

Gibson developed and administered a survey to all campus staff to collect feedback related to the district's Human Resources Department. In total, the audit team received 1,766 completed surveys via email and achieved an overall response rate of 25.7%. The survey was administered using Qualtrics, an online survey platform. The survey instrument incorporated a five-point rating scale: Strongly Disagree, Disagree, Neutral, Agree, and Strongly Agree. Results are presented in two ways throughout this report:

- Percentages for each of the five responses – this is primarily used when a figure presents the results to only one question; and
- Aggregate percentages for Strongly Disagree and Disagree (i.e., combined Disagree) and Strongly Agree and Agree (i.e., combined Agree). This is primarily used when a figure presents the results for multiple questions.

Table 3 details the response rate by school level. Survey results were not used to unilaterally draw conclusions regarding customer service, but provided an important data point considered by the audit team.

Table 3. Survey Response Rate, by Location

Location	Total Responses	Response Rate
Elementary School	647	30.1%
Middle School	251	28.2%
High School	343	29.0%
Other Staff	525	19.7%
Overall	**1,766**	**25.7%**

Source. Gibson Consulting Group Staff Survey

Full survey results can be found in *Appendix B: Gibson Staff Survey Results*.

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

Chapter 2: District Staffing Profile

Chapter 3: Organization and Management

Chapter 4: Staffing

Chapter 5: Compensation and Benefits

Chapter 6: Employee Relations

Appendix A: Interview List

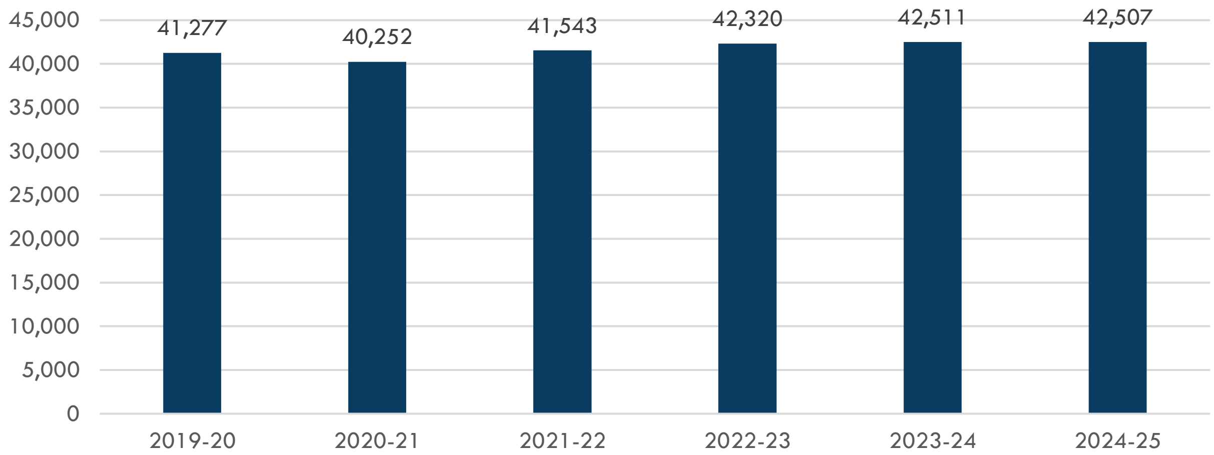
Appendix B: Gibson Staff Survey Results

Chapter 2: District Staffing Profile

Leander ISD is based in Leander, Texas and spans a 200 square-mile area, serving parts of Austin, Cedar Park, Georgetown, Leander, and Jonestown. Established in 1893, LISD is comprised of 30 elementary schools, nine middle schools, six high schools, and four alternative schools.

Figure 1 presents LISD student enrollment from 2019-20 to 2024-25. After many years of rapid growth, student enrollment growth has slowed over the past six years. Since 2019-20, enrollment numbers fluctuated, increasing at an average annual rate of just under 1 percentage point.

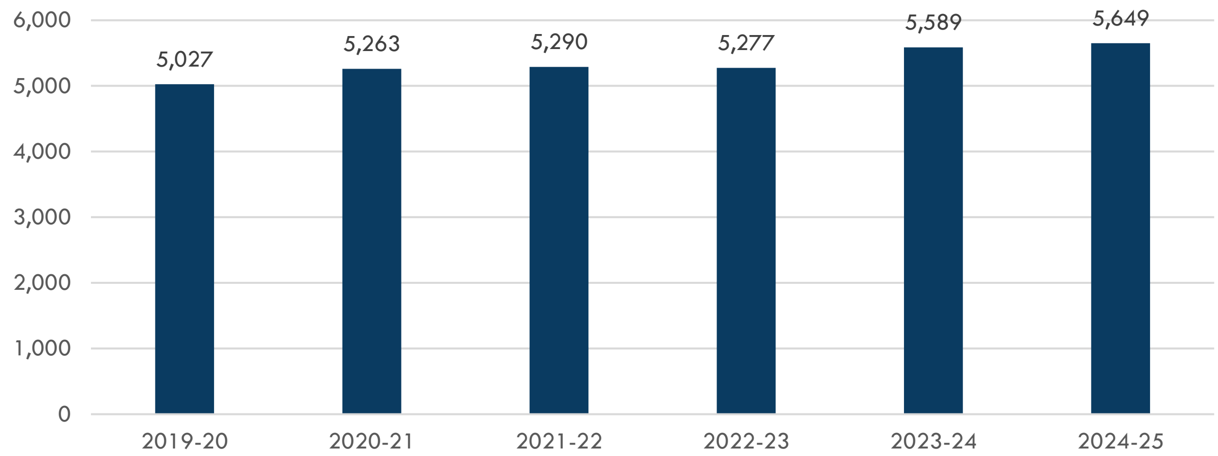
Figure 1. LISD Student Enrollment, 2019-20 to 2024-25



Source. TEA Texas Academic Performance Reports, 2019-20 to 2024-25

Full-time equivalent (FTE) staff counts have steadily increased over the same six-year period, as shown in Figure 2. Overall, the FTE count increased 12.4% between the 2019-20 and 2024-25 school years, an average of 2.1% annually.

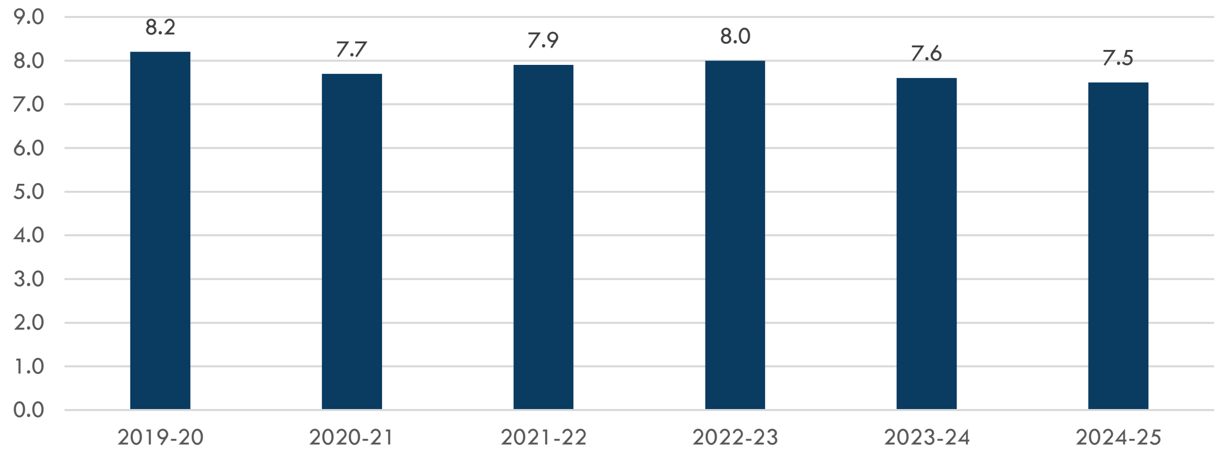
Figure 2. LISD Total Staff FTEs, 2019-20 to 2024-25



Source. TEA Texas Academic Performance Reports, 2019-20 to 2024-25

The student-to-staff ratio is an effective overall staffing efficiency measure for K-12 school systems. A higher ratio indicates fewer staff relative to the student population (more efficient), and a lower ratio reflects more staff relative to the student population (less efficient). Other than staffing efficiency, additional factors can affect this ratio, such as an intentional decision to maintain smaller class sizes. Figure 3 presents LISD's student-to-staff ratio since 2019-20. The student-to-staff ratio has fluctuated since 2019-20 but, overall, decreased by 8.5%. The decrease reflects the slowing enrollment growth (Figure 1) and steady FTE increase (Figure 2).

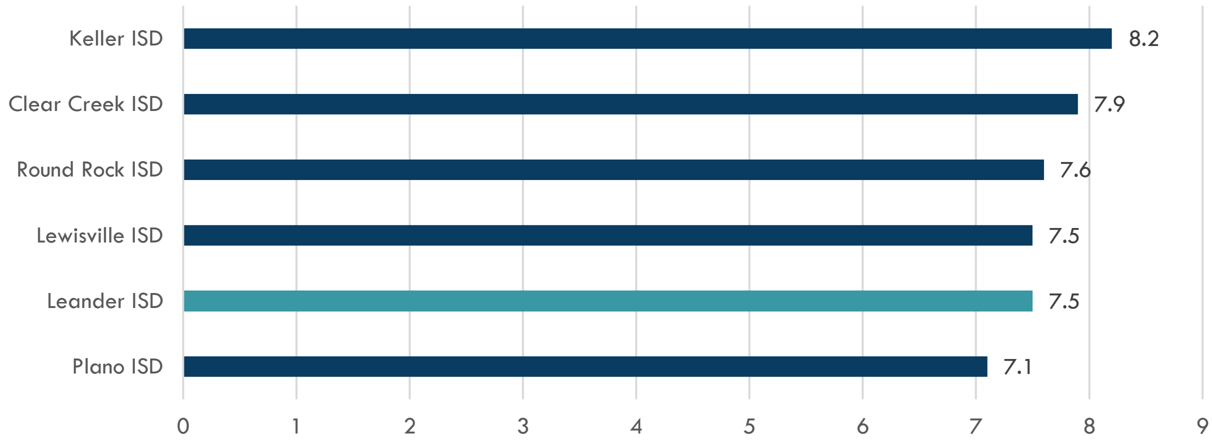
Figure 3. LISD Student-to-Staff Ratio, 2019-20 to 2024-25



Source. TEA Texas Academic Performance Reports, 2019-20 to 2024-25

LISD's 2024-25 student-to-staff ratio was the second lowest among its peers, as shown in Figure 4.

Figure 4. Student-to-Staff Ratio, Peers and State Comparison, 2024-25



Source. TEA Texas Academic Performance Report, 2024-25

Table 4 shows FTE counts and percentages by staff category in 2019-20 and 2024-25. Over this period, the percentage of LISD's workforce comprised of professional staff contracted by 1.1% while the percentage of educational aides and auxiliary staff increased.

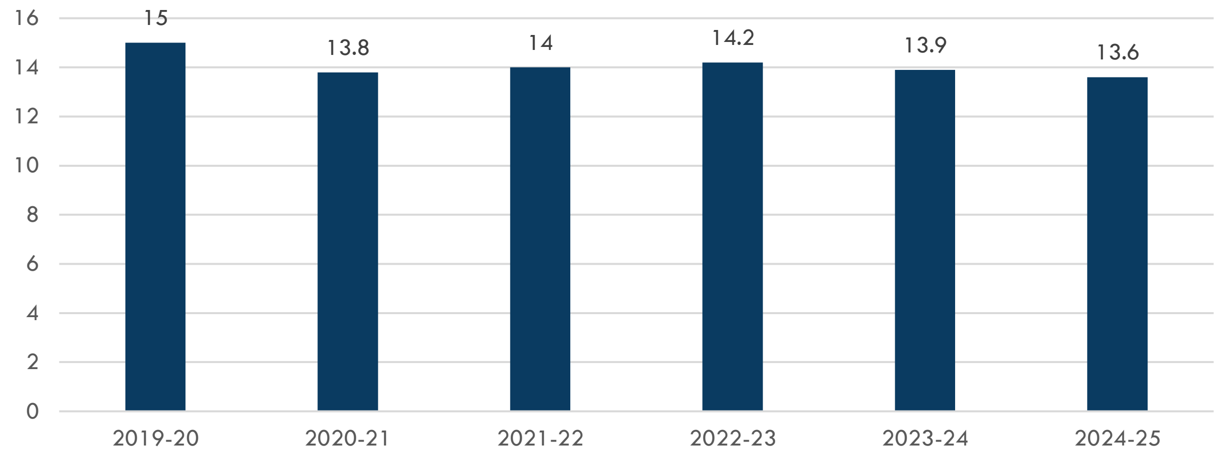
Table 4. LISD Staff FTE Counts and Percentages, by Staff Category, 2019-20 and 2024-25

Staff Category	2019-20 FTEs	2019-20 Percentage	2024-25 FTEs	2024-25 Percentage	Percentage Point Change
Professional Staff	**3,499.7**	**69.6%**	**3,869**	**68.5%**	**(1.1)%**
Teachers	2,753.6	54.8%	3,118.7	55.2%	0.4%
Professional Support	596.3	11.9%	531.8	9.4%	(2.5)%
Campus Administration	127.4	2.5%	184.9	3.3%	0.8%
Central Administration	22.5	0.4%	33.6	0.6%	0.2%
Educational Aides	**528.9**	**10.5%**	**620.9**	**11.0%**	**0.5%**
Auxiliary Staff	**998.0**	**19.9%**	**1,159.5**	**20.5%**	**0.6%**
Totals	**5,026.7**	**100.0%**	**5,649.4**	**100.0%**	**12.4%**

Source. TEA Texas Academic Performance Reports, 2019-20 and 2024-25

The student-to-teacher ratio refers to the number of students enrolled per FTE teacher. Figure 5 presents LISD's student-to-teacher ratio from 2019-20 to 2024-25. After dropping to 13.8 in 2020-21, the ratio increased toward pre-pandemic levels in 2022-23 (14.2). However, it then decreased to its lowest ratio in the last six years (13.6) in 2024-25.

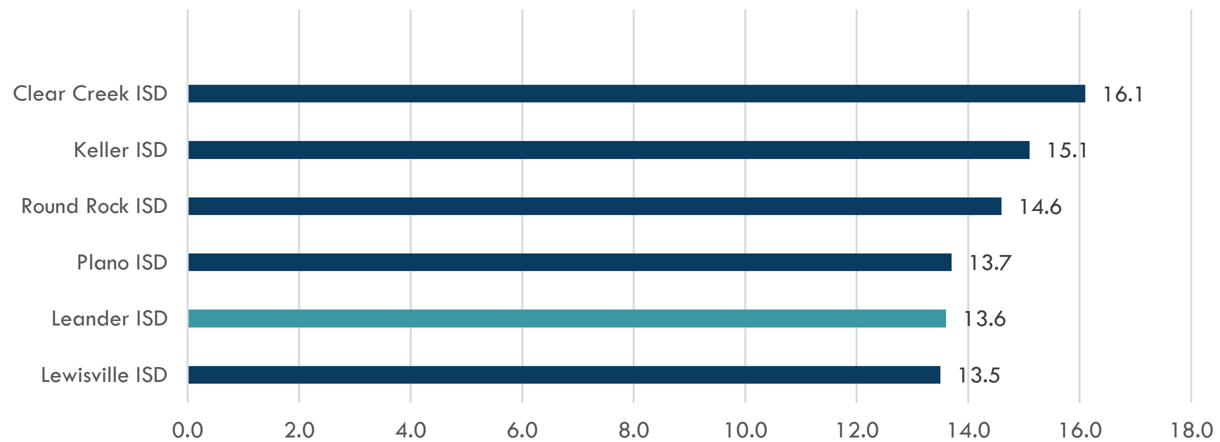
Figure 5. LISD Student-to-Teacher Ratio, 2019-20 to 2024-25



Source. TEA Texas Academic Performance Reports, 2019-20 to 2024-25

In 2024-25, Leander ISD's student-to-teacher ratio of 13.6 was second lowest among its peers (Figure 6).

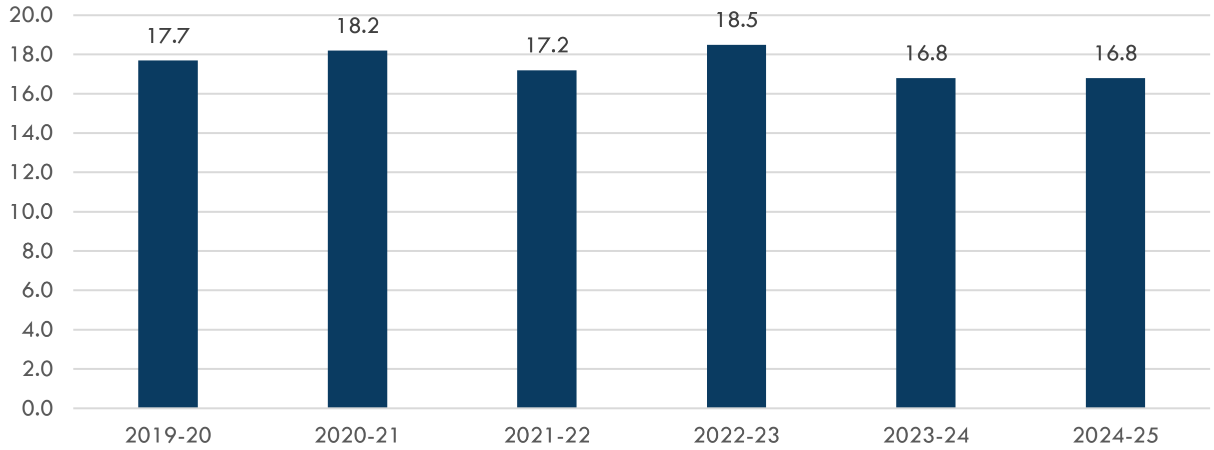
Figure 6. Student-to-Teacher Ratio, LISD and Peer Districts, 2024-25



Source. TEA Texas Academic Performance Reports, 2024-25

The student-to-non-teacher ratio refers to the number of students enrolled per each FTE non-teacher staff member. Non-teacher staff members include professional support, campus administration, district administration, educational aides, and auxiliary staff. Figure 7 illustrates LISD's student-to-non-teacher ratio from 2019-20 to 2024-25. LISD's ratio peaked at 18.5 in 2022-23 before declining to 16.8 in 2023-24 and 2024-25.

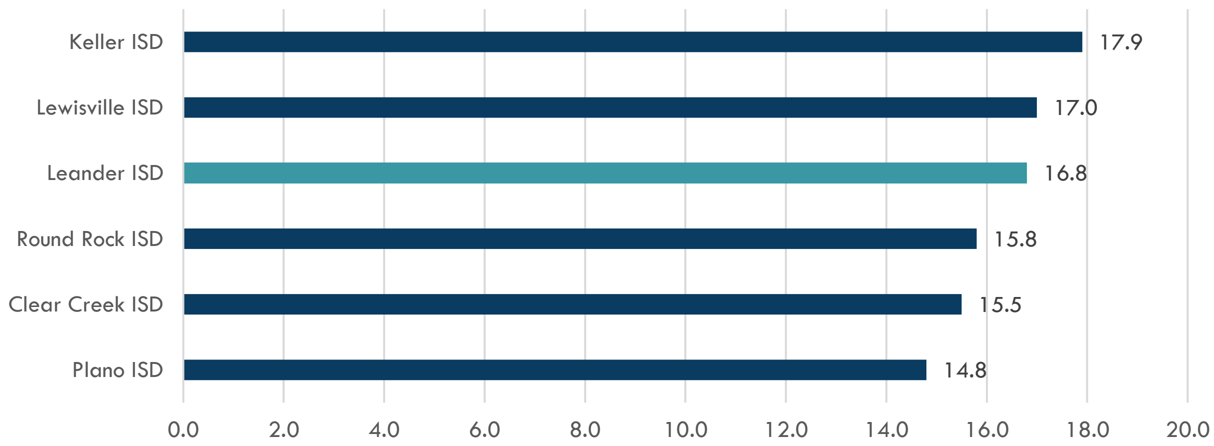
Figure 7. LISD Student-to-Non-Teacher Ratio, 2019-20 to 2024-25



Source. TEA Texas Academic Performance Reports, 2019-20 to 2024-25

Figure 8 compares LISD's student-to-non-teacher ratio to its peer districts. LISD's student-to-non-teacher ratio was 16.8 in the 2024-25 school year, which ranks third highest (most efficient) among its peers. It is important to note that third-party contracting of major operating functions (e.g., transportation, custodial services) could be contributing to some of the variances.

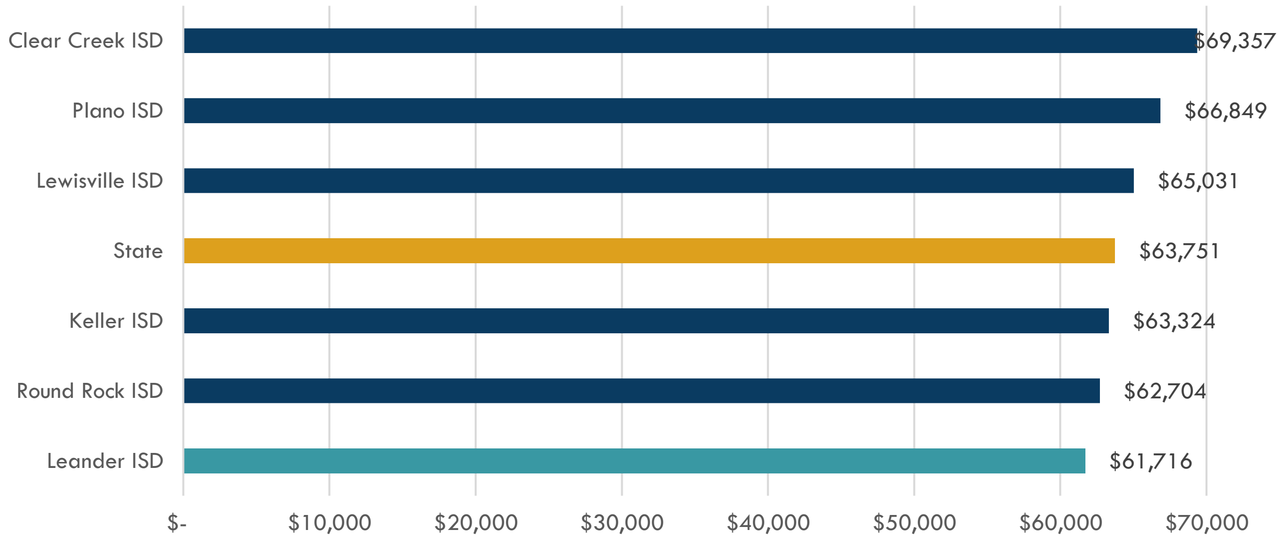
Figure 8. Student-to-Non-Teacher Ratio, LISD and Peer Districts, 2024-25



Source. TEA Texas Academic Performance Reports, 2024-25

Figure 9 presents the average teacher base salary for LISD, the state, and its peers in 2024-25. At $61,716, Leander ISD ranks last among its peers, but just below Round Rock ISD, the only other peer district in the Austin metroplex.

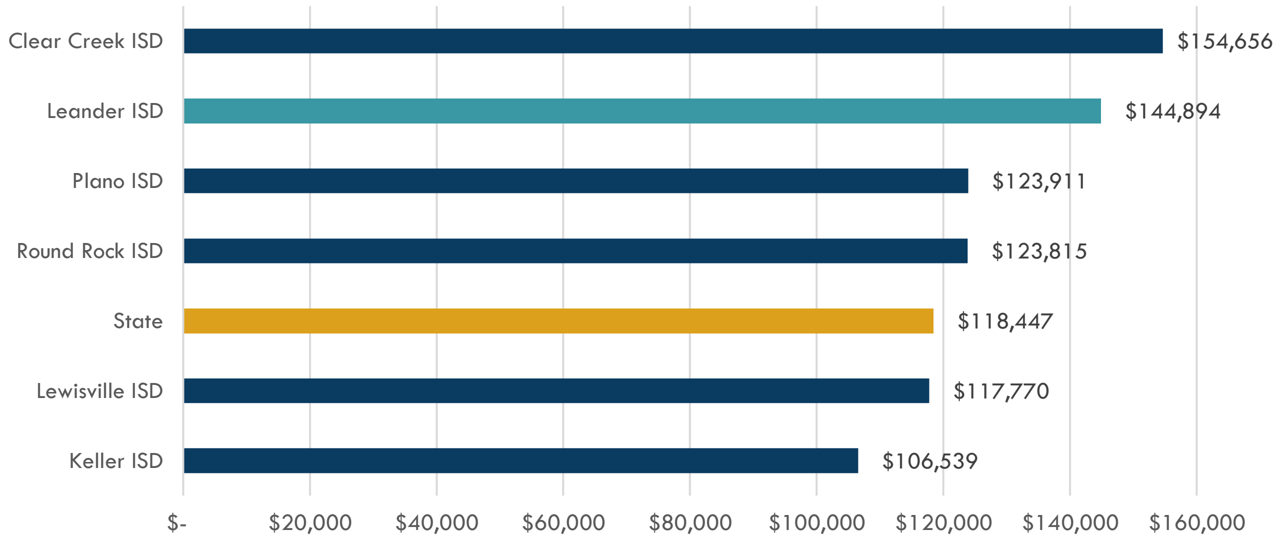
Figure 9. Average Actual Salary, Teachers, LISD, State, Peer Districts, 2024-25



Source. TEA Texas Academic Performance Reports, 2024-25

Figure 10 compares LISD's average actual salary for central administrators (all administrators with a central office ID, not a specific school ID) to its peer districts. At $144,894, LISD's average central administrator salary is the second highest among its peers, and approximately $20,000 higher than its neighbor, Round Rock ISD. The number, type, and organizational alignment of central administrator positions may be contributing to differences in average compensation across LISD and its peers.

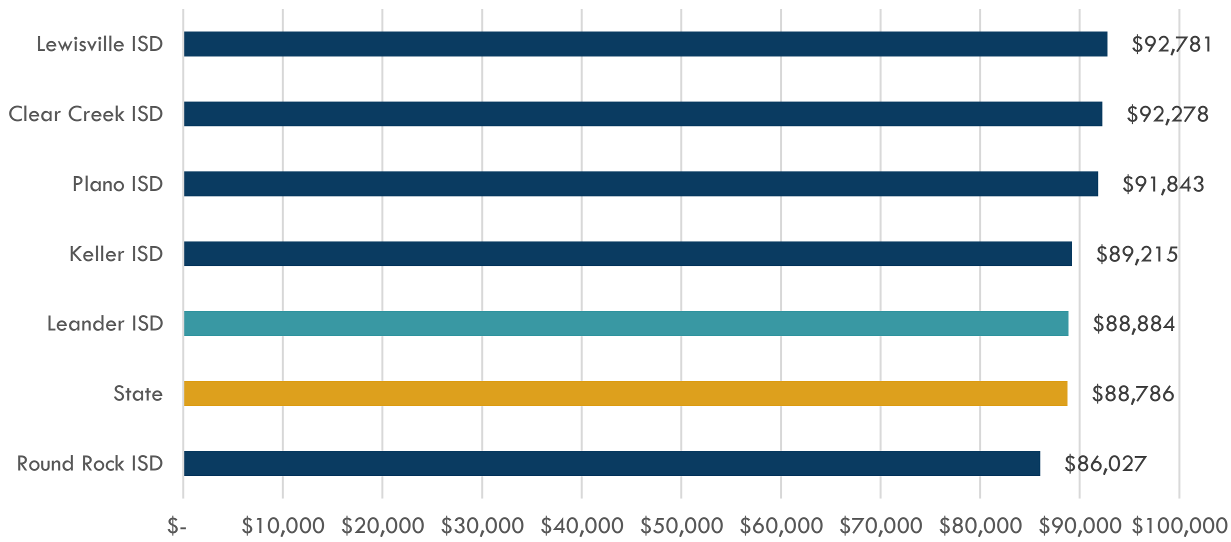
Figure 10. Average Actual Salary, Central Administration, LISD, State, Peer Districts, 2024-25



Source. TEA Texas Academic Performance Reports, 2024-25

Figure 11 compares LISD's average actual salary for campus administrators (principals, assistant principals, and other admin with a specific school ID) to its peer districts. At $88,884, LISD's average campus administrator salary is the second lowest among its peers, but slightly above Round Rock ISD.

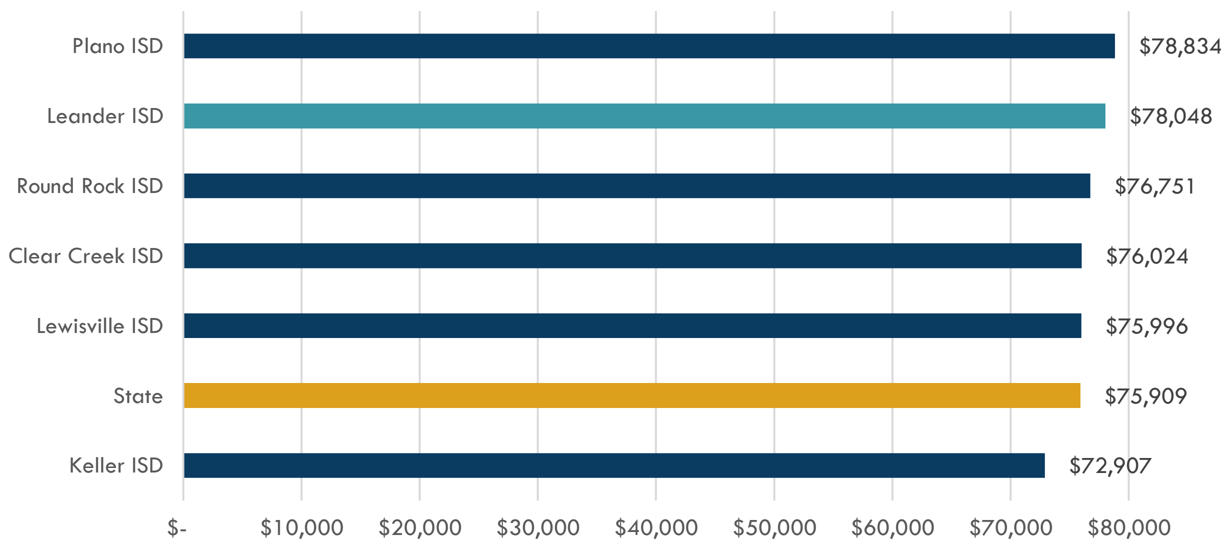
Figure 11. Average Actual Salary, Campus Administration, LISD, State, Peer Districts, 2024-25



Source. TEA Texas Academic Performance Reports, 2024-25

Figure 12 compares LISD's average actual salary for professional support (therapists, nurses, librarians, counselors, and other campus professional personnel) to its peer districts. At $78,040, LISD's average professional support salary is second highest among its peers.

Figure 12. Average Actual Salary, Professional Support, LISD, State, Peer Districts, 2024-25



Source. TEA Texas Academic Performance Reports, 2024-25

Profile Summary

- Enrollment growth has slowed, with student counts remaining relatively stable from 2019-20 to 2024-25 after years of rapid expansion.
- Total staffing (FTEs) increased by 12.4% during the same period, outpacing enrollment growth and resulting in overall lower student-to-staff ratios.
- Student-to-staff and student-to-teacher ratios declined, indicating more staff per student, and were at the low end of staffing efficiency among peer districts in 2024-25.
- Staff composition shifted, with slight decreases in professional staff share and increases in educational aides and auxiliary staff; campus administration FTEs grew notably.
- LISD's salary competitiveness varies, with teachers ranking last among peers, while central administrators rank near the top and professional support staff rank relatively high.

Chapter 3: Organization and Management

This Chapter describes the legal and policy framework of human resources management at Leander ISD and assesses the performance management, organizational structure, and administration of the Human Resources Department.

Regulatory Environment

Laws and regulations at the federal, state, and local levels regulate how school districts ensure equal employment opportunities, make hiring decisions, determine pay wages, meet the special needs of employees, assess performance, and provide required protections. The LISD board charges the Human Resources Department with monitoring and ensuring compliance of these laws, regulations, and rules. The board's Legal and Local policies pertaining to personnel and employment are located primarily in Section D (Personnel) of its online policy manual, which is posted on the district's website.[1]

Federal Law and Mandates

The primary federal laws pertaining to employment – that require LISD compliance – include the following:

- Title VII of the Civil Rights Act of 1964 prohibits employers from discriminating in hiring or pay based on a person's race, religion, sex, or national origin. It also prohibits sexual harassment.
- The Fair Labor Standards Act (FLSA) sets the federal minimum wage and requires time-and-a-half overtime pay for hourly employees who work more than 40 hours in a week.
- The Family Medical Leave Act (FMLA) provides that eligible employees – those with at least one year of service – can take up to 12 weeks per year of unpaid, job-protected time off for the birth of a child, adoption of a child, or to care for themselves or a sick child, spouse, or parent who has a serious health condition.
- The Age Discrimination in Employment Act prohibits employers from discriminating in any way against applicants or employees older than 40 because of their age.
- The Americans with Disabilities Act (ADA) prohibits job discrimination against qualified people with disabilities (i.e., those who can perform the job's essential functions with or without a reasonable accommodation).

[1] https://pol.tasb.org/PolicyOnline?key=1248.

- The Uniformed Services Employment and Reemployment Rights Act (USERRA) makes it illegal to discriminate against employees who volunteer or are called to military duty. Whenever reservists return from active military duty tours of less than five years, they must be reemployed in their previous job or one that is equal to it.
- The Equal Pay Act (EPA) requires that female employees receive the same pay as male employees for equal work or jobs that require equal skill, effort, and responsibility.
- The Occupational Safety and Health Act (OSHA) requires employers to run a business free from recognized hazards.
- The Pregnancy Discrimination Act (PDA) prohibits job discrimination based on pregnancy, childbirth, and related medical conditions.
- The Immigration Reform and Control Act (RCA) makes it illegal to hire and employ illegal aliens and requires that employers verify identification and workplace eligibility of all new hires by completing I-9 forms.

LISD Board Policy

Several LISD board policies govern the Human Resources Department and human resources function. Board policies are categorized as Legal or Local policies. Legal policies are required by state or federal law and must be adopted by all school boards in Texas. Local policies are enacted by school boards based on the needs of their individual school district and, as such, can differ from district to district. The following is an overview of the key LISD board policies related to human resources.

- Policy DAA (LEGAL) establishes that the district is an equal opportunity employer committed to nondiscrimination in recruitment, selection, hiring, pay, promotion, retention, and other personnel actions.
- Policy DAB (LEGAL) establishes that the district is committed to nondiscrimination with regard to age, race, national origin, ancestry, and other human capital factors.
- Policy DBA (LEGAL) establishes the credential requirements for professional personnel, paraprofessional employees, and bus drivers.
- Policy DIA (LEGAL)/DIA (LOCAL) states that the district prohibits sexual harassment and any other type of harassment to school personnel at school or any school-sponsored activity.
- Policy DGBA (LOCAL) establishes the three-level employee complaint and grievance process for LISD and includes general guidance and protocols for handling complaints or grievances.

Human Resources Department Organization

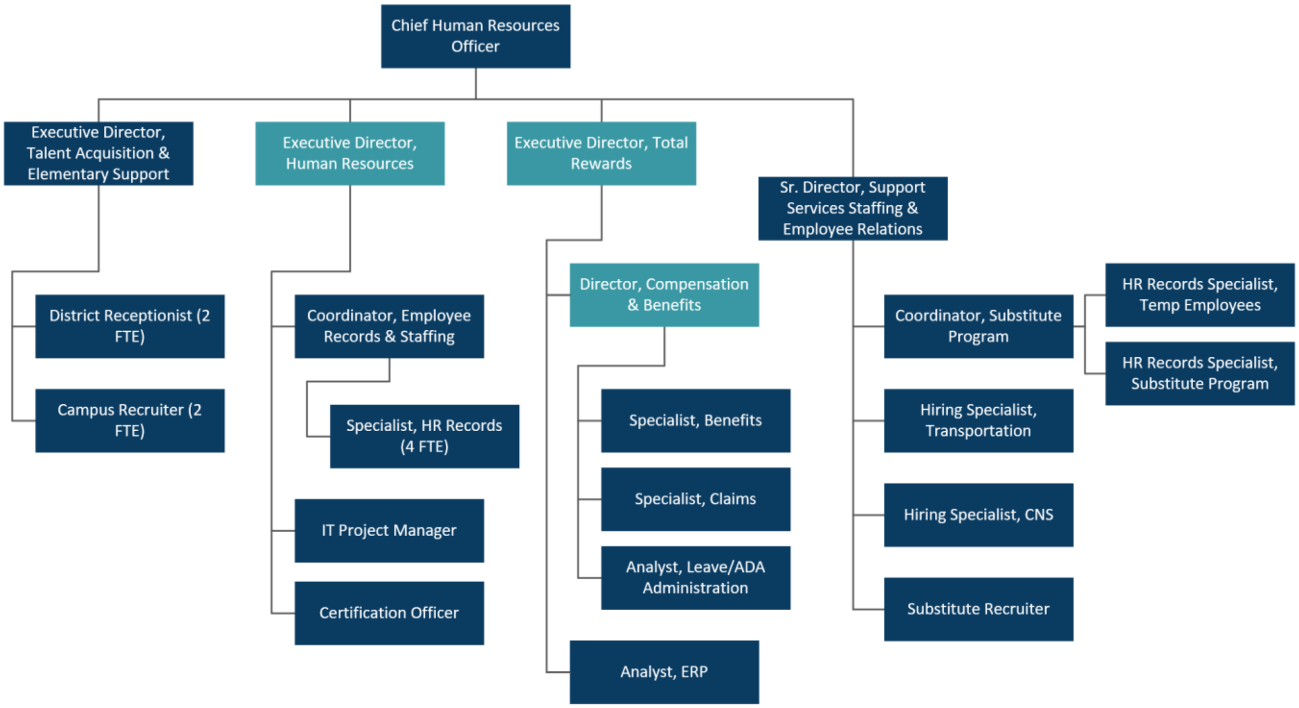
The Human Resources Department is led by a Chief Human Resources Officer (CHRO), who reports to the Superintendent. The CHRO is responsible for providing leadership and coordination across the Human Resources Department. Additionally, the CHRO is responsible for the direction, supervision, and review of performance, coordination of activities, and reporting of results to the Superintendent and other district officials. Other duties include the following:[2]

- Lead Recruitment and Retention: develop and implement strategies to attract, select, and retain high-quality district staff, ensuring all teachers and employees meet qualification standards;
- Oversee Staffing and Workforce Planning: collaborate with principals and administrators to forecast staffing needs, create staffing plans, and manage orientation, contracts, and renewals for all employees;
- Ensure Legal and Regulatory Compliance: ensure compliance with federal and state laws and oversee certification requirements;
- Manage Compensation and Benefits: analyze wage and salary data, recommend compensation plans, administer salary schedules, oversee benefits programs (e.g., health insurance, workers' compensation, etc.), and ensure cost-effective management of funds;
- Support Employee Relations and Performance: direct performance appraisal processes, provide training for supervisors, assist with employee counseling and improvement plans, and coordinate communication and mediation for complaints and grievances;
- Administer Records and Information Systems: supervise employee records management, ensure compliance with records programs, maintain systems for information retrieval, and secure all required reports and documents; and
- Lead Department Operations and Development: hire and organize department staff, evaluate performance, provide training, develop and monitor the annual budget, and ensure department goals align with district objectives.

Twenty-five positions report under the CHRO. Figure 13 presents the LISD Human Resources Department organizational chart for 2025-26. Positions in grey are currently (as of March 2026) vacant.

[2] LISD Chief Human Resources Officer job description (last revised May 2024).

Figure 13. LISD HR Organizational Chart, 2025-26



Source. LISD Organizational Chart

Four positions and an Administrative Assistant report directly to the CHRO. The distribution of their roles and responsibilities is as follows:[3]

- The **Executive Director, Talent Acquisition & Elementary Support** oversees talent acquisition, staffing, and employee relations for elementary campuses by developing recruitment and retention strategies, supporting staffing projections and credential compliance, and collaborating with Principals on applicant selection. The role manages relationships with universities and external organizations, coordinates student teacher and intern programs, monitors criminal history reviews, and conducts or assists with investigations involving employee, parent, and community complaints. It provides guidance on policy interpretation, supports evaluation monitoring for elementary staff, and supervises recruiters and district receptionists.
- The **Executive Director, Human Resources** provides strategic leadership to secondary campus administrators on staffing, talent management, employee relations, and HR operations, while driving departmental improvements aligned with district goals. The role oversees districtwide talent acquisition and retention strategies and ensures proper staffing projections and certification compliance. It also leads formal investigations, manages employee complaints and performance

[3] LISD HR job descriptions, provided to Gibson by the department.

documentation, and delivers training on employment practices. Additionally, the position directs HR data systems and processes.

- The **Executive Director, Total Rewards** oversees the strategic design, implementation, and administration of the district's compensation, benefits, wellness programs, employment law advisory services, and HR metrics. The role is responsible for maintaining competitive compensation structures, managing job classifications, conducting salary studies and cost analyses, and presenting program recommendations to leadership. It leads the development and management of medical and voluntary benefit plans, coordinates with consultants and third-party vendors, and facilitates the Benefits Advisory Committee. Additionally, the position monitors claims data, oversees HR handbooks and resource materials, manages the development and reporting of HR metrics, supports budget planning for total rewards programs, ensures effective data and system processes, and supervises Total Rewards staff.
- The **Senior Director, Support Services Staffing & Employee Relations** oversees non-campus staffing, employee relations, and HR operations, guiding administrators on performance management, investigations, corrective action, and compliance matters. The role oversees major HR programs – including employee leave and disability accommodations, workers' compensation, unemployment, interim workforce hiring, and non-campus evaluations – while managing formal investigations, responding to Equal Employment Opportunity Commission (EEOC)/Texas Commission on Human Rights (TCHR) matters, and supporting legal preparation for complex cases. Additionally, the position leads process improvement and automation efforts, ensures accurate HR data management, develops and delivers employee relations training, coordinates cross-departmental collaboration, and supervises a team responsible for hiring, leave administration, and claims functions.

Human Resources Department Staffing and Expenditures

Table 5 presents actual operating expenditures, by object code or type of expenditure, for the Human Resources Department from 2021-22 to 2024-25. Total HR expenditures increased from $2.10 million in 2021-22 to $2.68 million in 2024-25, representing a 27.4% increase over the four-year period. Payroll costs – the department's largest cost driver – rose from $1.55 million in 2021-22 to $2.02 million in 2024-25, an overall increase of 30.8%, reflecting steady growth through 2023-24 before stabilizing in 2024-25 (0.4% decrease).

Table 5. LISD General Fund Expenditures, Human Resources Department, 2021-22 to 2024-25

HR Department	2021-22	2022-23	2023-24	2024-25
6100 Payroll Costs	$1,546,179	$1,790,036	$2,029,944	$2,022,239
6200 Professional and Contracted Services	$279,039	$160,836	$265,849	$274,150
6300 Supplies and Materials	$204,471	$94,590	$214,387	$154,508
6400 Other Operating Costs	$74,123	$89,486	$118,827	$229,626
Total HR Expenditures	**$2,103,812**	**$2,265,334**	**$2,688,468**	**$2,680,523**

Note. Benefits are estimated as a part of Payroll Costs due to other district wide payroll costs charged to the HR Department.

Source. Expenditure data provided by LISD

The Council of Great City Schools (COGCS) collects data from large urban districts around the United States and calculates performance measures on an annual basis for many district functional areas, including human resources. One of the efficiency measures tracked is the "human resources cost per district staff FTE." This metric can help evaluate the size of the HR Department's budget. Because districts vary in structure and priorities, it should be interpreted alongside other measures that reflect actual performance.

The audit team compared LISD's human resources cost per district FTE to the median in the COGCS benchmark data for the most recent years available. Table 6 shows that LISD human resources' cost per FTE is below COGCS' lower quartile in 2021-22 and 2022-23.

Table 6. HR Cost per District FTE and COGCS Median, 2021-22 and 2022-23

Year	HR Expenditures	FTE	LISD HR Cost per FTE	COGCS Lower Quartile	COGCS Median	COGCS Upper Quartile
2021-22	$2,103,812	5,289.8	$397.7	$491	$737	$895
2022-23	$2,265,334	5,277.1	$429.3	$601	$787	$1,133

Source. Staffing data and expenditure data provided by LISD; Council of Great City Schools 2023-24 Managing for Results Report

Human Resources Information Systems

Effective human resources operations depend on reliable, well-integrated information systems that support accurate data management, efficient workflows, and timely decision making. In a district the size and complexity of LISD, HR technology plays a foundational role. When these systems are appropriately configured and aligned, they reduce manual effort, strengthen internal controls, improve data integrity, and enhance both employee and administrator experience.

LISD currently relies on a broad portfolio of HR-related technology tools to support its core human resource management functions. These systems span recruiting, onboarding, time and attendance, compensation and benefits, professional development, records management, and customer support. Key enterprise platforms include Tyler Munis as the district's enterprise resource planning (ERP) system of record, Frontline applications for recruiting and evaluations, UKG/Kronos for timekeeping, and multiple standalone tools supporting benefits enrollment, leave management, substitute scheduling, and HR service requests. In total, the district operates 17 HR-related modules across 13 distinct systems, with annual operating costs of approximately $900,000.

As described throughout this report, many HR processes at LISD remain highly manual and transaction heavy despite this level of system investment. The current HR technology landscape has grown incrementally over time, often to address immediate operational needs or system gaps. While these workarounds have allowed day-to-day operations to continue, they have also contributed to duplication of functionality, inconsistent workflows, and increased reliance on manual controls. As a result, HR staff spend significant time reconciling data, verifying transactions, and responding to routine service requests that could otherwise be automated.

Against this backdrop, the following section provides a detailed assessment of LISD's HR information systems, including system inventory, cost, interface design, and utilization. Gibson's finding focuses on how fragmentation, underutilization, and manual integration increase operational risk, elevate workload, and limit the district's ability to fully leverage its technology investments.

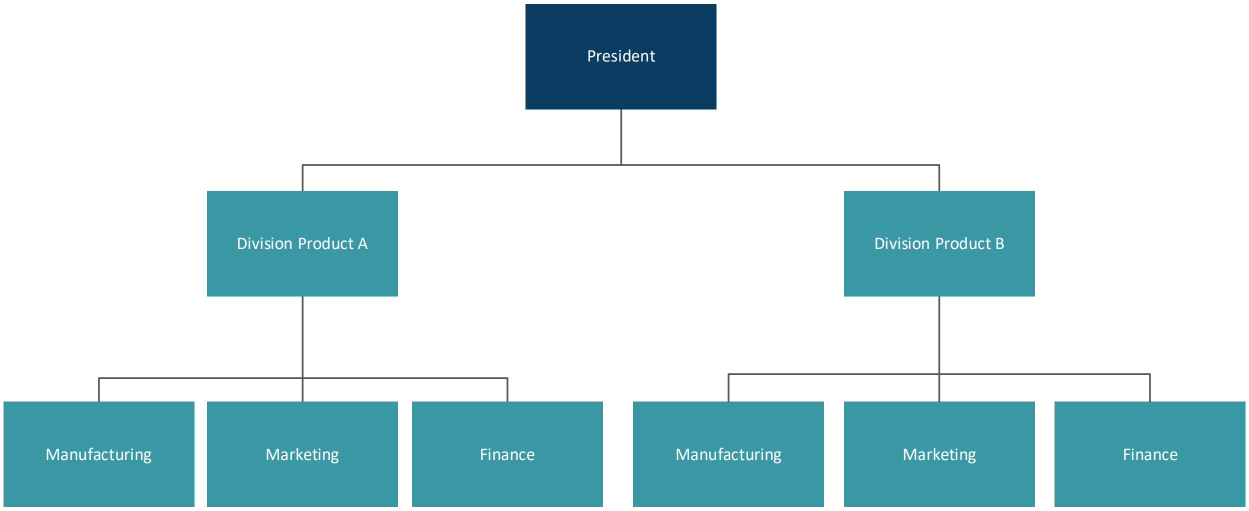
Findings and Recommendations

Finding 1: The HR Department's organizational chart reflects a hybrid structure, which does not support accountability and blurs responsibilities.

There are two main types of vertical organizational structures: functional and divisional.[4] A divisional organizational structure is organized by outputs/products with the various functions that support that output reporting under it. In a school system, a "product" would be a school type or position group (e.g., elementary, secondary, auxiliary staff). Figure 14 presents an example of a traditional divisional organizational structure.

[4] "Understanding Organizational Structures," *SHRM*, https://www.shrm.org/resourcesandtools/tools-and-samples/toolkits/pages/understandingorganizationalstructures.aspx. Accessed 29 June 2022.

Figure 14. Example Divisional Organizational Structure



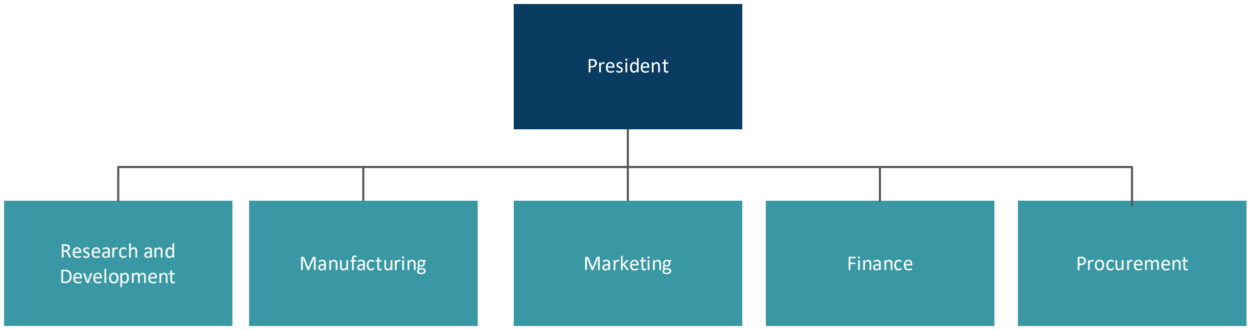
Source. Gibson Consulting Group

There are several advantages and disadvantages to divisional alignments:[5]

- **Advantages:** Coordination and collaboration within each divisional area is heightened; decision-making is pushed lower in the organizational chart, which allows for customized solutions to problems.
- **Disadvantages:** It often results in lost efficiency and duplication of effort, since resources are not shared; knowledge sharing is hindered.

The other primary type of vertical organizational structure is one that is aligned functionally. A functional organizational structure divides work and employees by functional area (i.e., recruiting, staffing, employee relations). Figure 15 shows an example of a traditional functionally aligned organizational structure.

Figure 15. Example Functional Organizational Structure



Source. Gibson Consulting Group

[5] "Understanding Organizational Structures," SHRM. Accessed 29 June 2022.

There are several advantages and disadvantages to functional alignments:[6]

- **Advantages:** It increases management's ability to hold functional areas accountable to respective performance goals and metrics; it maximizes transparency and communication both within the department and with external partners (i.e., people know who is responsible for tasks and who is most able to answer questions).

- **Disadvantages**: Cross-functional activity is more difficult to promote; the structure tends to be resistant to change.

The current HR Department organizational structure blends these two approaches, causing issues of clarity and accountability:

- Executive Directors are responsible for specific school types, but the staff supporting them are organized by functional area. This structure creates a misalignment between accountability and staffing. As a result, Executive Directors are expected to drive outcomes across a school group without having direct authority over all functional work impacting those schools. This split complicates decision making and creates ambiguity about who ultimately owns results such as hiring effectiveness, employee relations outcomes, and service quality.
- Executive Director job descriptions/titles, coupled with the unclear organizational chart, blur responsibilities and ownership. For example, "Employee Relations" is included only in the Senior Director's job title, but the Executive Directors are also responsible for employee relations matters, according to their job descriptions. Additionally, the Executive Director of Human Resources is responsible for the same functional areas as the other Executive Directors, but the job title is less detailed. This is potentially the reason that positions that are not clearly related to the role's purpose (e.g., IT Project Manager and Certification Officer) have migrated underneath the Executive Director of Human Resources.
- Inconsistency in approach (divisional vs functional) has resulted in suboptimal reporting relationships. For example, Hiring Specialists do not report under the Executive Director of Talent Acquisition. This limits the department's ability to leverage internal resources/expertise.
- Positions in the substitute office are entering employees and running payroll. This presents significant control, compliance, and risk issues. Segregation of duties is central to healthy HR and finance functions. Any and all payroll responsibilities should be moved out of the HR Department.

Ultimately, the greatest impact of the current hybrid structure is the absence of singular accountability – either by division (elementary, secondary, auxiliary) or by function (talent acquisition, employee relations, or staffing). Over time, these challenges can undermine organizational efficiency, staff confidence, and the HR Department's ability to effectively support district goals.

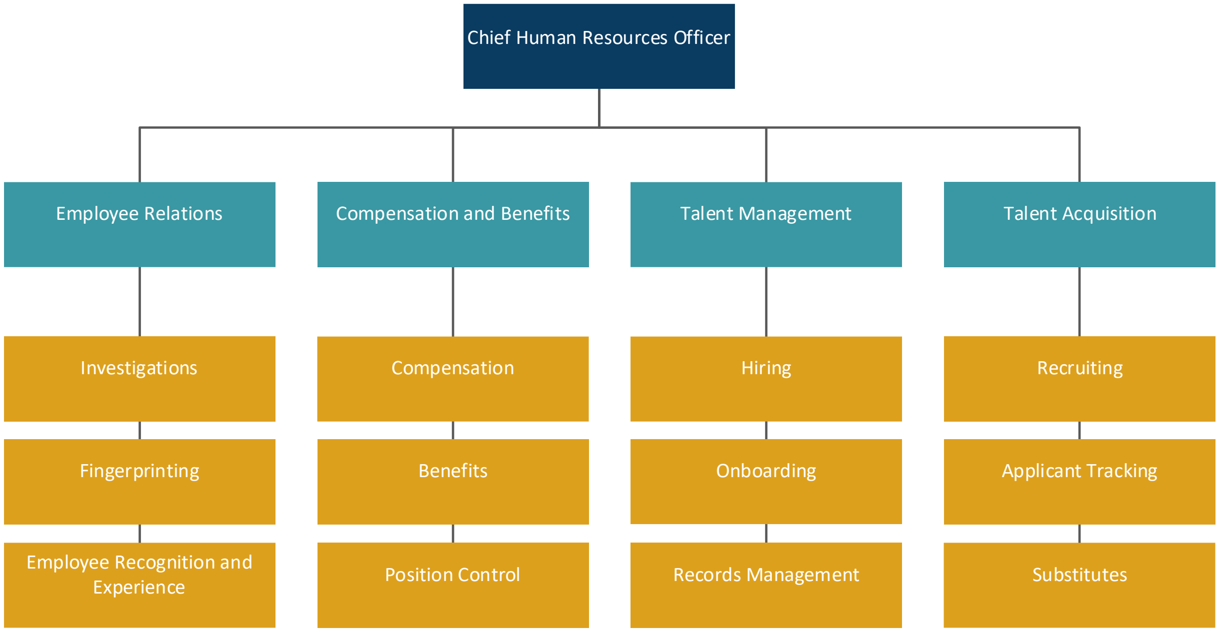
[6] https://www.shrm.org/resourcesandtools/tools-and-samples/toolkits/pages/understandingorganizationalstructures.aspx.

Recommendation 1: Develop a functionally aligned organizational structure for the HR Department.

Restructuring the HR Department's organizational chart will benefit LISD in multiple ways. First, a more functionally aligned organizational chart will allow for stronger accountability in the department. Performance metrics can be more easily established within a functional area, which will allow managers to monitor progress and department leadership to assess areas of strength and opportunities for improvement. Second, a functionally aligned organizational chart will promote strong communication in the department because of the clarity it provides. A functionally aligned organizational chart still allows for collaboration across functional areas but defines the parameters of that collaboration in a way that provides clarity for employees.

Figure 16 illustrates the recommended realignment of functions for the HR Department. The responsibilities of each unit – not necessarily separate positions – are depicted below and explained in the following bullets.

Figure 16. Proposed Functional Alignment for HR Department Organizational Chart



Source. Gibson Consulting Group

Below are explanations of the recommended realignment of responsibilities.

- Employee Relations – responsible for the management of employee grievances and complaints, employee investigations, employee recognition programs, and employee discipline. This function would also be responsible for the development of the employee handbook.
- Compensation and Benefits – responsible for determining employee salaries and maintaining salary schedules, monitoring and tracking leave, classifications, and building out positions. This function would also be responsible for the management of the district's benefits program.

- Talent Management – responsible for onboarding and processing new employees, processing transfers or reassignments, resignations, and terminations. The records management function would also be included in Talent Management. This would entail creating personnel files for employees, verifying the information included in I-9s and social security cards, safely storing files, performing Privacy Impact Assessments (PIAs), destroying files, and generating and verifying information to be submitted through the Public Education Information Management System (PEIMS).
- Talent Acquisition – responsible for posting position vacancies, recruiting candidates, and conducting initial screenings of job applicants. The substitute program would also be aligned under this function.

Additional considerations would need to be given to the redistribution of current roles and responsibilities of the positions within the department. This would include redefining job descriptions, skills, or qualifications required, and position classification if necessary. In implementing this recommendation, the HR Department should develop a migration plan to move from the current structure to the recommended alignment over the next two to three years.

Finding 2: Misaligned goals and insufficient progress monitoring hinder the HR Department's effectiveness.

Strategic alignment ensures that departmental efforts directly support broader organizational objectives, while performance monitoring provides leadership with timely information to assess effectiveness, identify risks, and make informed adjustments. When goals are not aligned and progress is not routinely measured, departments tend to operate reactively, and leadership lacks the visibility needed to drive continuous improvement.

Goal 2 (Empowered Staff) in LISD's 2022-2026 Strategic Plan is directly relevant to the work of the HR Department. Goal 2 – "Attract, grow and retain a collaborative community of first-rate employees who are empowered to meet the needs of each and every student" – includes three key questions, each with related evidence of success:

- To what degree are we attracting, growing, and retaining first-rate employees committed to the Leander ISD values, principles, & culture?
- To what degree do Leander ISD staff feel equipped and empowered to:
  - Build impactful relationships with each & every student?
  - Advocate for and meet the needs of each & every student?
  - Utilize innovative instructional practices that inspire curiosity, interests, & passion within each and every student?
  - Own their own learning?
- To what degree do Leander ISD staff feel valued & connected to their campus/department & the district?

Additionally, the HR Department developed a 2025-26 Department Improvement Plan that includes four objectives with associated action steps, deadlines, and assigned owners. The four objectives are:

- Identify and document requirements for a comprehensive Human Resources software solution;
- Provide consistent, accessible, and current HR information for all employees and leaders;
- Ensure transparent and consistent staffing processes for campuses with varying enrollment; and
- Ensure competitive compensation to support recruitment and retention.

While the department plan reflects thoughtful internal planning, it is separate from – and not clearly aligned to – the District Strategic Plan. Specifically, the HR Department Improvement Plan does not explicitly reference Goal 2 of the District Strategic Plan, nor does it articulate how departmental goals support districtwide strategies or success indicators. As a result, HR goals appear to function as stand-alone priorities rather than as an integrated component of the district's strategic framework.

Interviews with HR staff and district stakeholders reinforced the impact of this misalignment. HR staff consistently described the department's work as reactive rather than strategic, noting that limited capacity and competing priorities often prevent proactive planning. Similarly, district stakeholders characterized the HR Department primarily as a transactional service provider, focused on processing requests and resolving issues rather than as a strategic partner contributing to districtwide goals.

Although both the District Strategic Plan and the HR Department Improvement Plan include stated goals, the HR Department does not have defined KPIs or departmentwide metrics to measure progress. There is no formal mechanism to track performance over time, assess whether goals are being met, or report results to district leadership. Without KPIs that sit alongside stated goals, the department lacks a consistent, data-driven way to evaluate effectiveness, prioritize improvement efforts, or demonstrate value.

Recommendation 2: Establish a performance reporting architecture for the HR Department.

The HR Department should establish a formal performance reporting architecture that directly aligns departmental goals, metrics, and reporting cadence to Goal 2 of the District Strategic Plan. This effort should begin with a structured alignment exercise led by the Chief Human Resources Officer, in coordination with the Superintendent's Cabinet, to explicitly map each HR function – recruitment, retention, staffing, compensation, and employee relations – to the district's strategic priorities and success indicators related to attracting, growing, and retaining empowered staff. The outcome of this exercise should be a revised HR Department Improvement Plan that clearly articulates how each departmental objective supports districtwide goals and whether the plan is intended to serve as an internal management tool or a formal accountability document shared with district leadership.

Once goals are aligned, the department should define a limited set of KPIs that measure both operational effectiveness and strategic impact. These KPIs should move beyond activity tracking and instead focus on outcomes such as time to fill critical positions, early-career teacher retention, vacancy rates at the start of the school year, internal mobility, employee engagement indicators, and the consistency and timeliness of HR services (Table 7 below includes additional examples for consideration).

Table 7. Sample Human Resources Metrics by Function and Domain

Function	Efficiency and Effectiveness Indicators and Metrics
Global Performance and Financial Management	Student-to-Staff Ratio Student-to-Teacher Ratio Number of district employees per HR FTE HR Department cost per district employee FTE Average HR customer service response times Average performance rating on HR customer survey Employee-related litigation expenditures as a percentage of payroll Substitute expenditures as a percentage of salaries and wages, by campus
Recruitment and Hiring	Average days from position vacancy to recommendation by hiring manager Average days from recommendation by hiring manager to start date Number of employment applications processed per FTE Teacher vacancies unfilled on the first instructional day for students Non-certified teachers as a percentage of total teachers Percentage of teachers by ethnicity, compared to percentage of students by ethnicity Number of new EEO complaints by reason
Employee Satisfaction and Safety	Employee turnover rate, by employee group Teacher turnover rate, by campus New teacher (less than one year) turnover rate Number of new employee grievances by level Workers' compensation loss ratios by employee type
Compensation	Rank of average salary, by position type, among peer districts

Source. Gibson Consulting Group

The HR Department should then implement a recurring departmental performance review process to ensure KPIs are actively used to guide decision making, rather than simply reported. At a minimum, HR leadership should review performance metrics quarterly, assess progress against targets, identify risks or emerging trends, and document corrective actions. A concise performance summary should be shared with district leadership on a regular basis to increase transparency, elevate HR's role as a strategic partner, and shift the department's posture from reactive service delivery to proactive workforce planning.

To support sustainability, the district should assign clear ownership for performance reporting within the HR Department and provide training to HR leaders on using data to manage performance and communicate impact. Over time, this performance reporting architecture should be refined as district priorities evolve, ensuring HR goals, metrics, and reporting remain tightly connected to the district's long-term strategic direction.

Finding 3: LISD personnel files are incomplete, exposing the district to unacceptable levels of risk.

Personnel files contain employee information legally required or otherwise required by the district. Each full-time and part-time employee must have a personnel file.

The audit team conducted testing on a sample of LISD personnel files using a checklist constructed from multiple district documents and in collaboration with the HR Department. Below is a description of the audit test objectives, approach, and results.

Audit Test – Personnel Files

Test Objective

- Validate that a sample of personnel files include all required documentation.

Test Approach

- Obtained a record of current LISD employees.
- In collaboration with the HR Department, developed a checklist using HR Department onboarding documentation.
- Judgmentally selected 30 employees based on employee type (Professional, Classified, Substitute) and hire date.
- Reviewed (in-person) each personnel file for completeness using the HR Department's checklist.

Table 8 lists the requirements tested and the number of exceptions for each.

Table 8. Personnel File Test Results

Required Documentation	N	Number of Files Missing Required Documentation	% Missing
Employee Information Sheet	30	0	0%
Family Disclosure	20	2	10%
Employee Handbook Agreement	30	1	3%
Retire/Rehire Information	30	6	15%
ID Badge	20	2	10%
Job Description	30	1	3%

Required Documentation	N	Number of Files Missing Required Documentation	% Missing
Reasonable Assurance Letter	20	7	40%
Compensation Guidelines	20	10	50%
TEA Affidavit	20	11	55%
Fingerprint Clearance	30	4	13%
Verified IDs	30	1	3%
Workers' Compensation Acknowledgement	30	13	43%
Pay Cycle Acknowledgement	5	3	60%

Source. Gibson Consulting Group

Several issues emerged from the personnel file review, which are discussed below.

- Sensitive personnel documents are stored in multiple places across the HR, Benefits, and Payroll Departments, including:
  - Employee relations files (HR Department);
  - Personnel files (HR Department);
  - Substitute files (HR Department);
  - Payroll documents (Payroll Department); and
  - Benefits information (Benefits Department).

  Additionally, there are multiple "shadow files" where select documents are stored. For example, the "Catastrophic Event Benefit Enrollment" form, if an employee enrolls, is stored with the ERP Analyst.
- A document titled "Human Resources Check List" was submitted to Gibson in response to the request for a current personnel file checklist. Many of the documents on this list, however, are housed in other departments or files. This makes it challenging for the HR Department to audit files or to evaluate its own compliance.
- Some files are kept digitally, but the majority are hard copy. During the pandemic, the HR Department started using the district's internal S-Drive for personnel file storage. This practice has since stopped, but those files are still kept on the S-Drive. Hard copy files necessitate manual data entry in multiple systems, which heightens risk and inefficiency.

The district's help ticket data quantifies the inefficiency described above. The category "Service Record / Transcript Request" accounts for 76 tickets with an average cycle time of seven days. If records were digital and centralized, this cycle time would be minutes (download) or hours (verification).

Recommendation 3: Transition all personnel files to a single, digital environment.

To strengthen control over personnel records and ensure compliance, the district should transition all personnel files to a single, digital environment. This should be approached in phases that 1) establish a strong governance foundation, 2) remediate existing gaps, and 3) embed sustainable practices.

Phase 1: Governance, Standards, and System Design

The district should establish clear governance over personnel records and define standardized requirements prior to system implementation. This includes formally designating a single system of record owner, defining roles and responsibilities across HR and payroll, and eliminating shadow files. The district should also consolidate all legally required and district-required documents into a single, approved personnel file checklist by employee type.

Phase 2: Digitization, Centralization, and Remediation

Inventory all existing personnel documents maintained across departments and storage locations, including hard copy files and legacy digital repositories. All records should be digitized, indexed, and migrated into the approved system of record using standardized naming conventions. Using the standardized checklist, the district should perform a comprehensive review of active personnel files and remediate missing or incomplete documentation, with priority given to high-risk and compliance-related items.

Phase 3: Process Integration and Ongoing Monitoring

Update onboarding, rehire, and employee status-change processes to require digital document collection and verification within the system of record. Manual and duplicative data entry should be minimized where feasible. To sustain compliance, the district should implement periodic internal audits of personnel files using the approved checklist, track exception rates, and document corrective actions. Training should be provided to relevant staff to reinforce documentation standards, system usage, and file ownership expectations.

Finding 4: The HR Department lacks critical standard operating procedures, increasing its reliance on the institutional knowledge of individuals.

The HR Department does not have a comprehensive, current, and consistently maintained set of standard operating procedures (SOPs) to guide its core functions. As a result, key HR processes are highly dependent on the institutional knowledge of a small number of individuals rather than on documented, repeatable procedures. This dependency creates significant continuity, consistency, and risk management challenges for the district.

Where SOPs do exist, they are frequently outdated or inconsistently maintained. Of the SOPs reviewed, eight included dates, 14 were undated, and one did not specify a year. There is no standardized method within the department for tracking SOP versions, last revision dates, or approval status. As a result, staff cannot reliably determine whether they are following current procedures, increasing the likelihood of errors, rework, and inconsistent application of district policies.

In addition, the department lacks written SOPs for several core HR functions that are critical to effective workforce management. These include recruitment, employee onboarding, training and development, performance management and appraisals, and the employee exit process. In the absence of documented procedures, these functions are performed based on individual judgment and experience, which can lead to variability in employee experience and selective compliance with district expectations.

Without documented and enforced SOPs, the HR Department faces increased risk related to staff turnover, inconsistent service delivery, inefficiencies, and reduced transparency. These conditions limit the department's ability to scale operations, train new staff effectively, and provide consistent, timely support to district employees.

Recommendation 4: Codify all SOPs in a department manual.

The district should develop and implement a comprehensive HR Department SOP manual that documents all core HR processes and establishes clear standards for execution, accountability, and ongoing maintenance.

Each SOP should clearly define the purpose of the process, roles and responsibilities, step-by-step procedures, required forms or systems, expected timelines, and key decision points. Table 9 presents a list of critical HR functions for which SOPs are necessary.

Table 9. HR Functions for SOP Development

HR Function	Description
Recruitment and Hiring	Posting positions, screening applications, conducting interviews, reference checks, offer approvals, and compliance with hiring policies and equity requirements.
Employee Onboarding	New hire processing, I-9 and background checks, system access, benefits enrollment, orientation, and coordination with payroll and supervisors.
Employe Separation	Processing voluntary and involuntary separations, exit requirements, final pay, benefits continuation, system access removal, and documentation retention.
Position Control and Status Changes	Creation, modification, and approval of positions; transfers, promotions, reassignments, and changes in FTE, funding source, or assignment.
Compensation	Approval, documentation, eligibility verification, payroll processing, and reconciliation of supplemental pay.
Benefits	Eligibility determination, enrollment and life event changes, coordination with vendors, leave accruals, and annual open enrollment processes.
Leave and Absence Management	Processing and tracking of FMLA, sick leave, personal leave, paid leave programs, and extended absences, including coordination with payroll and benefits.
Employee Relations	Progressive discipline, performance evaluations, investigations, grievance handling, and documentation standards.

HR Function	Description
Workers' Compensation	Injury reporting, claims coordination, communication with injured employees, tracking of lost time, and return-to-work procedures.
Data Management	Data entry standards, system controls, access permissions, reporting protocols, privacy requirements, and compliance with records retention laws.

Source. Gibson Consulting Group

The SOP manual should be centrally stored in a location accessible to all HR staff and integrated into onboarding and training for new employees. Management should also use the SOPs as a basis for cross-training staff, reducing reliance on single points of failure and improving continuity during absences or turnover. Implementing a comprehensive SOP framework will support knowledge transfer and position the HR Department to operate more effectively and sustainably as staffing changes occur.

Finding 5: The district annually spends $900,000 on technology tools that are duplicative, underutilized, and do not support efficient HR management.

The district currently operates 17 technology modules (13 unique systems) to facilitate its core human resource management HRM) functions. Table 10 presents each system (organized by function), and a brief description of its use.

Table 10. LISD Core HR Management Systems and Modules, 2025-26

Function	System Name and Module	Purpose
Recruiting	EMATS	Notification system for new hire, exit, and move/change actions for employees
	Frontline Ed – Recruit and Hire	Applicant tracking system, including: Request to hire Request to post Temp employee request
	HireVue	Video interviewing and scoring system
Onboarding	Incident IQ – Forms Manager	Ticketing system used by IT and HR, including: Electronic onboarding forms HR support ticketing system
Time and Attendance	AbsenceSoft	Leave and accommodations system, including: Records retention Employee notification Supervisor notification
	Kronos	Time management system: Hourly employee clock in/out

Function	System Name and Module	Purpose
		Temp and retiree clock in/out Compensatory and overtime management
	UKG Ready Cloud	Time and attendance for hourly employees (clock in/out) and leave management
	Red Rover	Substitute management system, including: Employees absence reporting Substitute job selection and assignments
Compensation and Benefits	Benefit Focus	Benefit enrollment system
	Tyler Munis – Finance	Payroll systems Finance systems
	Tyler Munis – Human Resources	Employee records Employee Self Service (ESS)
Professional Development	Frontline – Professional Growth	Evaluation system management
	MobileMind	Professional learning, professional development, compliance training
	SafeSchools	Compliance, mandatory and safety training
Customer Support	Incident IQ – Ticketing	Ticketing system
	Let's Talk	Communication system with candidates, employees, and parents

Source. Prepared by Gibson Consulting Group based on information collected from interviews and LISD documentation

LISD annually spends approximately $900,000 operating these information systems. Table 11 depicts the approximate 2025-26 cost of each system based on invoices and contracts.

Table 11. LISD Core HR Management Systems and Cost

System	One-Year Cost (2025-26)
Tyler Munis	$217,186
Incident IQ	$189,267
UKG (Kronos)	$158,995
Frontline Ed	$96,523
Let's Talk	$88,258
MobileMind	$83,616
AbsenceSoft	$45,240

System	One-Year Cost (2025-26)
HireVue	$13,000
TOTAL	**$892,085**

Source. Compiled by Gibson Consulting Group using LISD invoices and contracts

The audit team found three key issues with the way LISD administers these systems: several are duplicative, most are underutilized, and few have been sufficiently configured by LISD to increase the efficiency of the HR Department. Several examples are detailed below.

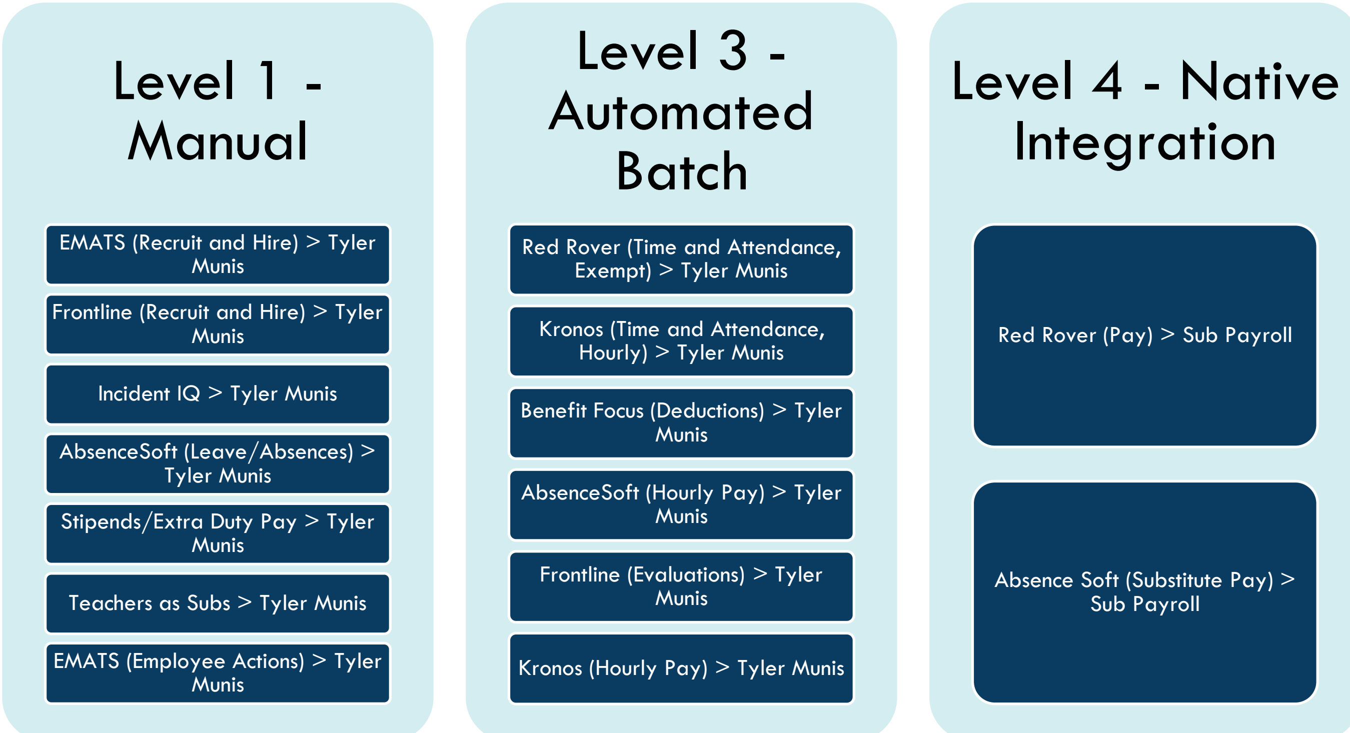
Manual interfaces drive workload and risk.

Half of the HR Department's key system interfaces are fully manual. In collaboration with district staff, the audit team evaluated and ranked all of the department's central system interfaces on a scale of 1 to 4.

- Level 1 – Fully manual (rekey/no digital connection) – burden: extremely high
- Level 2 – Flat file exchange – burden: high
- Level 3 – Automated batch (SSH file transfer protocol/scheduled sync) – burden: low
- Level 4 – Native application programming interface (API; real time, vendor supported) – burden: minimal

Forty-seven percent of the department's interfaces ranked Level 1, 0% ranked as Level 2, 40% ranked as Level 3, and 13% ranked as Level 4 (Figure 17).

Figure 17. LISD HR System Data Flow



Source. Gibson Consulting Group

The manual nature of the department's work has two primary implications. First, it adds to the work of each individual. For most of the interfaces listed above, department staff are maintaining spreadsheets in an attempt to verify the accuracy of the data in the system. This increases the work of the individual exponentially and creates the feeling – in a department that is reasonably staffed – of being overworked.

Second, the manual nature of the department's work greatly increases the risk of data errors and data security. Given the sensitivity of much of the information that the HR Department works with, any data entry error can have an outsized impact. Several examples are below:

- Incident IQ to Tyler Munis: Sensitive PII (Social Security, Direct Deposit) is being viewed, printed and typed rather than transferred via encrypted file.
- Teachers as Subs to Tyler Munis: Compensation data is originating in an unsecure spreadsheet, not a system of record.
- AbsenceSoft to Tyler Munis: HR staff rely on email notifications and spreadsheets to bridge the gap, resulting in payroll errors.

Underutilization leads to tool proliferation.

The underutilization of key technology tools results in the proliferation of additional tools. For example, the district utilizes EMATS personnel action notifications (new hires, exits, changes in location, or role). EMATS is an internally developed notification system currently used as a workaround to bridge visibility gaps (i.e., Principals not able to see up-to-date staffing projections) caused by Tyler Munis processing delays. The delays are a result of suboptimal system configuration. The district pays for the Tyler Munis license; however, due to the configuration issues, it is also incurring additional hidden costs to maintain the custom EMATS application (developer time, server resources).

Incident IQ and Let's Talk both serve as a customer support ticketing system for the district. There is no need for both and, in fact, it creates uncertainty for staff in deciding which one to use.

Additionally, LISD pays for an onboarding documentation workflow in Incident IQ; however, any efficiencies are negated because the documentation is printed, re-keyed into Tyler Munis, and stored in hard copy form.

Paying for software that is not deployed.

The district pays approximately $153,000 a year for UKG Ready (SaaS) while continuing to run Kronos Version 8.17. Both systems facilitate time and attendance. This is sunk cost without realized value and indicates weak lifecycle and vendor management.

Fragmentation causes measurable productivity loss.

Most HR support tickets could be automated. The department's ticketing data shows the following high-volume, low-complexity categories:

- Address/Phone Change: 111 tickets (average cycle: 0.6 days);
- W-4 Updates: 19 tickets (average cycle: 0.4 days); and
- Emergency Contact Change: 13 tickets (average cycle: 0.4 days).

These 143 tickets combined represent a "failure demand," or a customer demand placed on an organization by its failure to do something. They are clerical data entry tasks that should be handled via Employee Self-Service (ESS) in Tyler Munis. The fact that HR staff are manually closing these tickets suggests that the automation features of the ERP are being underutilized or ignored.

The district's fragmented HR technology approach materially increases cost, creates operational drag, and exposes the organization to risk. Duplicative licenses and parallel tools can inflate spending by hundreds of thousands of dollars over a multi-year horizon. Manual interfaces and rekeying activities generate thousands of avoidable staff hours, drive longer ticket cycle times, and elevate the likelihood of data entry errors in sensitive HR records. Meanwhile, underused capabilities in enterprise systems (e.g., Tyler Munis, UKG) remain untapped, causing the district to pay for value it doesn't receive while still investing in workarounds. Potential risks include inconsistent employee experiences and diminished confidence in HR data, all of which ultimately hinder management effectiveness and operating efficiency.

Recommendation 5: Develop a system roadmap to define technology needs and determine future investments.

The district should create and carry out a clear, 12- to 18-month plan to better organize and manage its HR technology systems. At a high level, this plan should focus on four outcomes:

- Reducing or eliminating tools that perform the same function;
- Making better use of the systems the district already pays for;
- Minimizing hand entry of data between systems; and
- Making it easier for employees to access HR services without submitting tickets or requests.

Leadership and Oversight

The district should assign clear executive leadership from the HR and Technology Departments to jointly oversee this effort and ensure accountability. A small, cross-functional working group, including HR, IT, payroll, and finance should guide decisions, monitor progress, and resolve issues. Progress should be tracked using straightforward measures – such as fewer HR systems, fewer manual work steps, and fewer access-related support requests – and reviewed through regular check-in meetings.

Understand the Current Environment

The district should complete a comprehensive inventory of all HR-related systems, including each system's purpose, ownership, contract terms, and cost. As part of this effort, staff should document how information moves between systems, identify where manual input is required, and note where errors or delays occur. The assessment should also capture the full cost of operating each system, including indirect costs such as staff time, manual tracking, and internal maintenance of workarounds.

Define a Clear Future Approach

Based on this assessment, the district should define which systems will serve as the primary tools for each major HR function and where overlap can be eliminated. System configurations and processes should be adjusted to reduce reliance on manual steps and parallel tools, and clear standards should be established for how systems exchange information going forward. These decisions should focus on functionality and efficiency rather than specific vendors.

Make Near-Term Improvements

While longer-term changes are being planned, the district should pursue practical near-term improvements that reduce burden on staff and employees. This includes simplifying system access, consolidating routine employee actions into fewer workflows, and reducing the number of systems with whiich employees must interact. The district should also pause renewal or expansion of tools that are likely to be phased out once a more organized approach is implemented.

Address Core System Issues

The district should resolve known configuration and process issues that currently require staff to rely on manual tracking or temporary solutions. Clear decisions should be made about how timekeeping, attendance, and other core HR functions are supported so the district is receiving full value from the systems it pays for. Improvements should focus on reducing errors, ensuring accurate payroll and benefits processing, and decreasing staff workload caused by reentering or reconciling data.

Simplify and Stabilize Over Time

As improvements are implemented, the district should gradually retire systems that are no longer needed and align contract timelines to support long-term cost savings. Training and clear guidance should be provided so HR staff, supervisors, and employees understand updated processes and expectations. This phased approach will help stabilize operations, reduce confusion, and improve confidence in HR data and services.

Chapter 4: Staffing

One of the most important functions a Human Resources Department serves is the staffing of the organization. LISD spends upwards of 80 percent of its annual budget on its staff. Additionally, the HR Department is traditionally the first interaction an employee has with LISD, meaning its staffing practices deeply influence the overall employee experience. Effective staffing includes three main functions:

- **Position Management**: the strategic creation, maintenance, and control of positions in the organization, as well as the assignment of employees to those positions, and the tracking of changes to assignments.
- **Recruitment**: the attraction and recruitment of high-quality candidates, as well as the use of interview protocols to identify the best candidate for the position.
- **Hiring and Onboarding**: the employee transactions that allow for a timely and effective entry into the organization for a new hire. This function also includes developing and implementing a comprehensive pay structure, as well as guidelines or pay rules for setting salaries for new hires.

Figure 18 presents a high-level view of where each of these operations occurs in a traditional staffing process.

Figure 18. Staffing Process

Source. Gibson Consulting Group

LISD uses eight information systems and tools to manage its staffing process: Tyler Munis, EMATS, Frontline Ed – Recruit and Hire, HireVue, Incident IQ, Benefit Focus, UKG Ready Cloud, and Google Sheets. Additionally, multiple sub-departments – largely within the HR Department – are responsible for different stages of the staffing process: Staffing and Recruiting, Compensation, Records, and Payroll. These technology tools and process owners will be discussed in more detail later in this Chapter.

Position Management

Position management is the process of how positions are budgeted, defined, and maintained within an organization. The function includes:

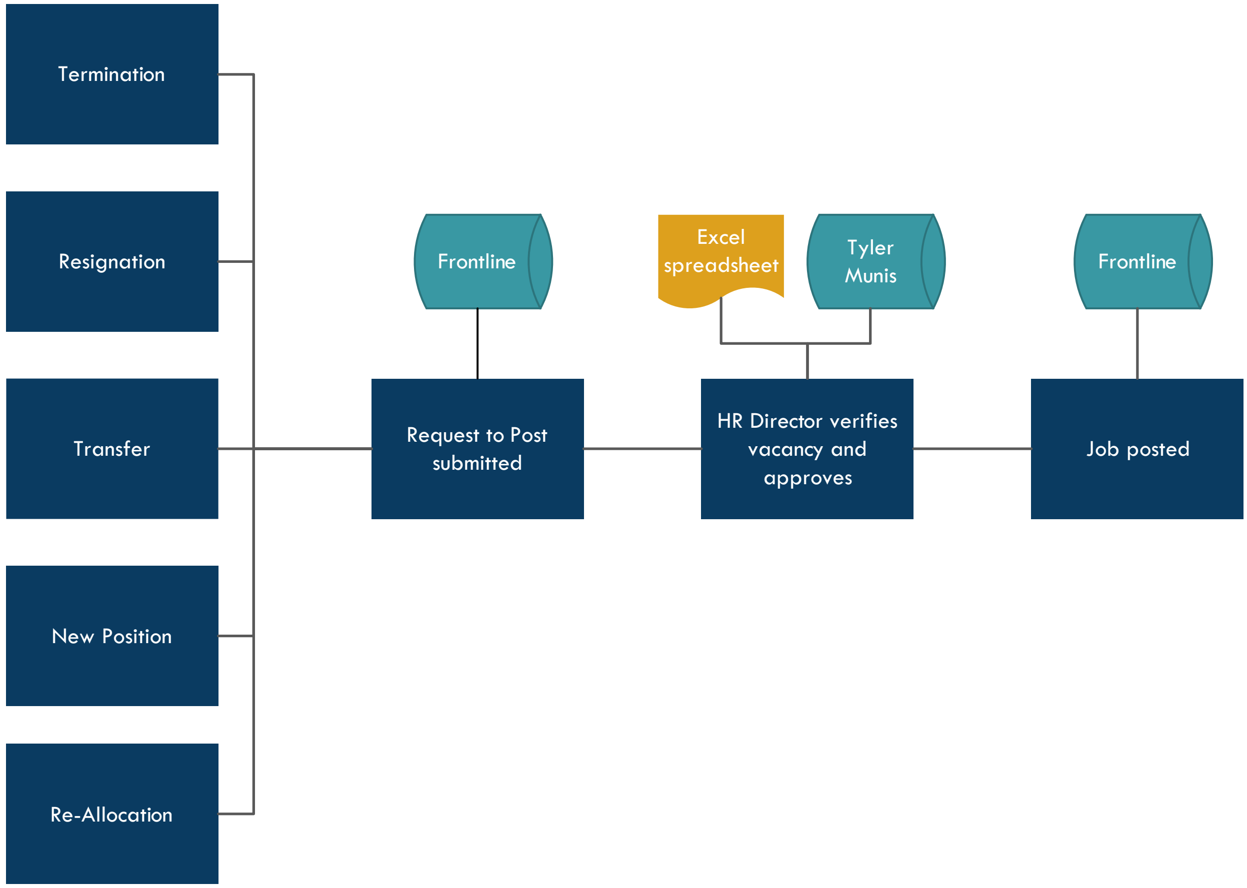
- **Position Control/Staff Planning:** an effective position control system improves budget management and control processes throughout the organization, while strengthening accountability and enhancing fiscal responsibility. Additionally, the position control function is responsible for the following operations.

  - Establishes staffing guidelines for campuses based on student to staff ratios, or needs of students. At LISD, the HR Department does not own staff planning. Staff planning is handled through the budgetary process with consideration for campus/departmental requests for FTEs. HR is notified when a position is added or should not be filled when vacated.
  - Determines the number of staff needed to serve the projected enrollment of students for the coming school year. As part of the position control process, the HR Department is responsible for developing and maintaining staffing guidelines for campus-based staff. Detailed formula schedules are developed for elementary, middle, and high schools. Additionally, staffing formulas include weights for economically disadvantaged percentages as well as Special Education percentages.
  - Determines the components of a position, including funding source, work calendar, employee or job type, pay grade, wage status, contract type, and where the position is aligned within the organizational structure of the district, campus, or department.
  - Builds the position in the ERP, not to include the funding or assigning of the budget code for the position.

- **Defining positions**: the creation and maintenance of job descriptions to reflect the necessary education, certification, skills, and knowledge to perform the scope of assigned duties.
- **Maintenance of positions:** the recording and tracking of data about the position and the employee assigned to the position. LISD tracks positions using an Excel spreadsheet, which tracks the employee assigned to the position. The same spreadsheet is also used to track personnel changes in assignments and is updated whenever a personnel change form is submitted to the department.
  - Assignment of employee to a position
  - Changes in employee pay
  - Assignment of stipends or supplemental pay

At LISD, the ERP Analyst oversees the majority of the position management function. This position reports to the Executive Director, Total Rewards. Figure 19 presents a process flow of the HR Department's position management process and is discussed further below.

Figure 19. LISD Position Management Process



Source. Gibson Consulting Group, based on LISD HR interviews

The district's position management process begins when a staffing change is triggered by an employee termination, resignation, transfer, reallocation, or the identification of a new position. A request to post is submitted via Frontline. The ERP Analyst then cross-checks this information against the internal Excel spreadsheet and the district's position control records in Tyler Munis to confirm that the position exists and is authorized. If the request involves a new or changed position, a formal position action request with an approved job description is routed through the appropriate HR, budget, and executive approvals before the position is created or updated in the ERP. Once position control is accurate and staffing spreadsheets have been updated to reflect the confirmed vacancy, the request to post is approved and posted to Frontline.

Recruitment

The HR Department updates its "Comprehensive Recruitment Plan" annually. The document includes the department's overall strategy for recruitment as well as the recruitment events the district will attend, the targeted positions it hopes to fill, and professional development needs. Table 12 presents the recruitment strategies described in the 2025-26 Recruitment Plan.

Table 12. LISD Recruitment Strategies, 2025-26

Strategy	Description
Recruitment and Data Analysis	▪ Recruit highly qualified candidates based on Ideal Teacher Candidate feedback collected by cabinet members ▪ Gather ongoing feedback from hiring managers regarding hiring process, candidate effectiveness and potential improvements.
Continuously Build and Expand Pipeline Programs	▪ Build relationships with colleges, universities, and educator preparation programs ▪ Build relationships with Leander ISD student teachers ▪ Participate in professional association meetings, panels, and serve on educator prep advisory boards ▪ Annually host Leander ISD Spring Teacher Job Fair ▪ Partner with Ready, Set, Teach high school teachers to build relationships with future teachers within the LISD system
UTeach STEM Partnership	▪ Inaugural year for UTeach partnership for secondary STEM teachers
Grow Our Own Recruitment	▪ Budget funds targeting staff who hold a Bachelor's Degree obtaining teacher certification through an Alternative Certification program ▪ Hold information sessions to share information and answer questions regarding program participation ▪ Use identification process to target potential candidates based on hard to fill areas of focus ▪ Parter with 240 Certification to provide ongoing communication and support for participants ▪ Maintain communication and support for Grow our Own participants ▪ Support efforts to find placement for Grow our Own participants in teaching roles
Longhorns in Residence	▪ Partner with UT for yearlong residencies ▪ Begin fall 25 with 5 Longhorns in Residence ▪ Campuses for placement of residents ▪ Attend District Partnership meeting to introduce LISD to resident candidates ▪ Attend follow-up meeting with UT to finalize number of residents and next steps for application process and placement ▪ Launch Longhorns in Residence 2025-26 school year ▪ Attend quarterly meetings with district partners and UT
Market Leander ISD	▪ Market Leander ISD as a destination district of innovation ▪ Promote competitive total compensation package ▪ Promote teacher stipends (including bilingual, special education, coaching)

Strategy	Description
	▪ Promote professional growth opportunities ▪ Utilize "Why Leander" recruitment videos ▪ Send follow-up marketing email to job fair attendees encouraging candidates to complete an online application ▪ Utilize social media outlets to promote careers in Leander ISD
Hiring Manager Support	▪ Be support and resource to hiring managers at all campuses ▪ Review and update HR Google Site for hiring manager success ▪ Ensure recruiter matrix is up to date ▪ Send candidate names directly to hiring managers ▪ Keep candidate folders in Frontline up to date with candidates ▪ Invite principals to attend area job fairs at surrounding universities ▪ Contact Education Preparation Programs to source candidates for specific campus positions
Professional Development	▪ Participate in book studies, webinars, and trainings to continually learn best practices in recruiting ▪ Provide training to hiring managers on HR processes and best practices

Source. LISD Comprehensive Recruitment Plan, 2025-26

LISD's recruitment process is largely facilitated using Frontline. Figure 20 presents a process flow of the HR Department's recruitment process and is discussed further below.

Figure 20. LISD Recruitment Process

Source. Gibson Consulting Group, based on LISD HR documentation

The recruitment process begins when the job is posted in Frontline by a Staffing Specialist. Once the position is posted, applications are received, and the hiring manager reviews the relevant applications directly in Frontline. The hiring manager then conducts interviews and, once a strong candidate has been identified, submits an Intent-to-Hire to the Specialist via EMATS.

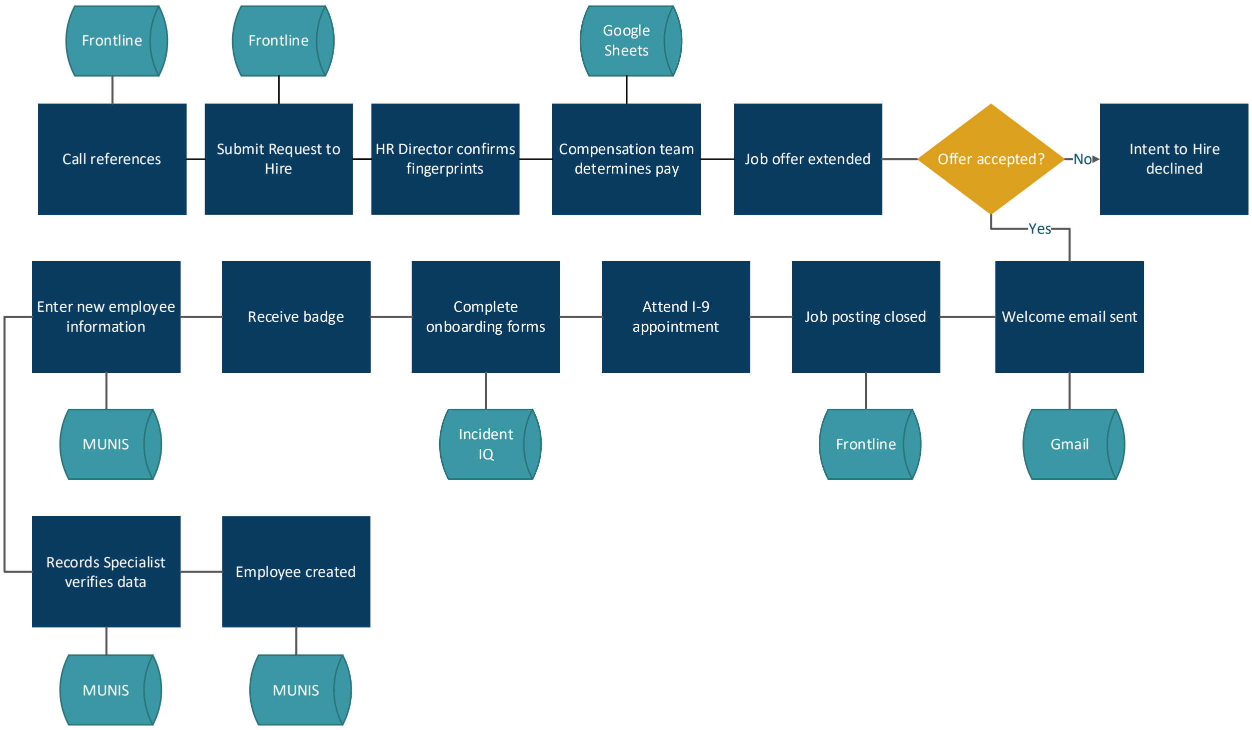
Hiring and Onboarding

The process begins within Frontline, where applications are reviewed and references are contacted. Once references are completed, a Request to Hire is submitted by the Hiring Manager through Frontline. The request is reviewed by the HR Director ensuring qualifications for position, fingerprinting, and other position requirements. It is then routed to the compensation team to determine compensation which is tracked on a Google sheet and on the Request to Hire form. The form is then routed to the hiring manager to offer the position and provide compensation as well as any contingencies to make eligible for hire (i.e. certification, fingerprinting, etc.) At this stage, a decision point occurs: if the offer is accepted, the process continues; if not, the process ends.

Upon offer acceptance, a welcome email is sent through Gmail, providing the new hire with onboarding instructions and required forms. The job posting is then closed in Frontline, ensuring the position is formally removed from the active hiring pool. The onboarding phase includes the completion of required forms via Incident IQ and attendance at a mandatory I-9 appointment. Once onboarding documentation is completed, the new hire receives a badge, signaling physical access readiness.

Employee information is then entered into Tyler Munis, where data is verified for accuracy. Following verification, the employee record is officially created in Tyler Munis, completing the administrative onboarding and enabling payroll, benefits, and system access. This process is illustrated in Figure 21 below.

Figure 21. Hiring and Onboarding Process



Source. Gibson Consulting Group, based on LISD HR documentation

Findings and Recommendations

Finding 6: The district's highly manual approach to position control increases the risk of inaccurate reporting.

As noted in the background section of this chapter, position control focuses on tracking and managing position-level information rather than employee-specific data, and is foundational to effective workforce planning, budgeting, and data transparency. While Tyler Munis is technically designated as the system of record, the HR Department currently manages positions manually using Excel spreadsheets. Given the volume, complexity, and importance of position-level data, this manual process creates a high risk of error, with potentially significant operational and financial impacts. The audit team identified multiple issues with this approach, detailed below.

- **Not Tracking Employees with Split Positions in the system:** The district does not systematically track employees working in split roles or partial positions (e.g., someone performing more than one role). Because all employees are coded into a single, unique position, split positions are processed manually outside of the system, and there is no inventory or system flag to identify employees in these split cases.
- **Too Many Job Classes (Mixing Job and Assignment):** Tyler Munis requires a critical distinction between a "Job Class" (what the position is, defined by pay grade and contract days) and an "Assignment/Position" (what the position does, such as specific subjects). The district has included the assignment directly in the Job Class, resulting in 600 total Job Classes. For teachers alone, there are 122 different Job Classes (e.g., separating "TEACHER HS SCIENCE" from "BIOLOGY" or creating hybrid titles like "ELEMENTARY TEACHER 187****FELLOW").
- **Excessive Number of Work Calendars:** The district currently maintains 30 different work calendars. Rather than tracking contract days as a separate attribute, the district creates entirely new position classes every time a contract day changes (e.g., 187, 197, 202, or 226 days), leading to bloated job descriptions.

There are critical compensation, reporting, and operational risks associated with the above issues which are described below. Currently, these risks are mitigated by manual workarounds (i.e., Excel spreadsheets) developed by HR Department staff.

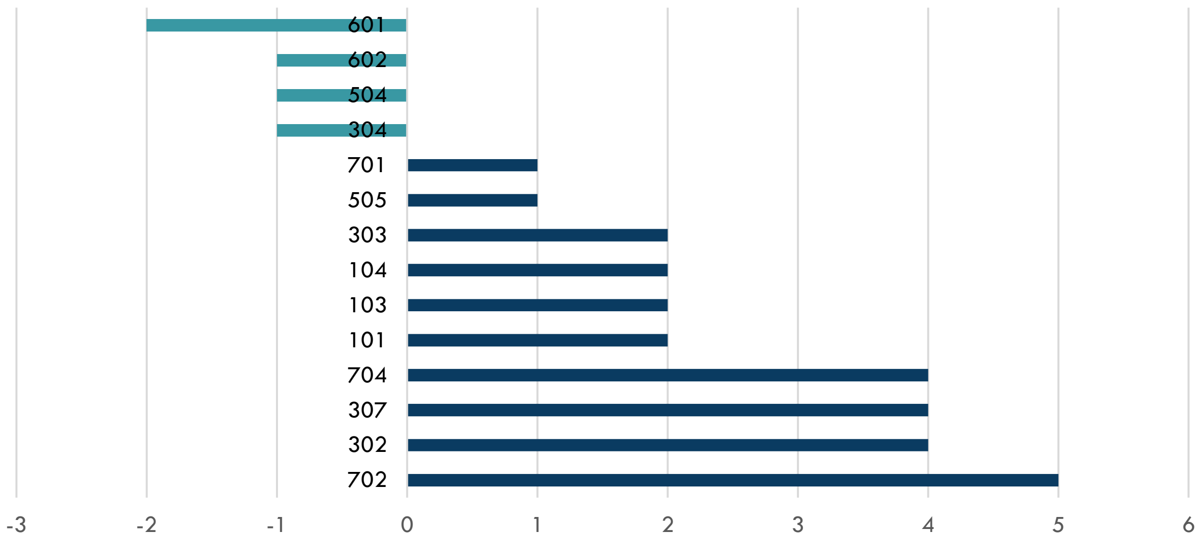
- **Payroll, Compensation, and Budget Risks – Split Positions**
  - **Blended Pay Rate Errors:** In its current configuration, the system cannot separate partial FTEs for employees in split positions, payroll may default to paying the entire 1.0 FTE at a single higher or lower rate, leading to potential systemic overpayments or underpayments.
  - **Daily Rate Mismatches:** Failing to track partial positions individually makes it difficult to calculate accurate daily rates for leave payouts, dock days, or supplemental pay, especially when a split position involves different work calendars.
  - **Budget Distortion:** If a split employee's total 1.0 FTE is assigned to a single department's budget, that department will show inaccurately high staffing levels.
- **State Reporting and Compliance Risks**

- **TRS Reporting Violations and Overpayments**: The Teacher Retirement System (TRS) requires separate demographic (ED40) and payroll (RP20) records for each distinct position an employee holds. By merging distinct roles into single job classes and not tracking partial workloads, the system cannot auto-generate these split reports, risking eligibility miscalculations and retiree surcharges. This setup directly contributed to $58,148 in TRS statutory minimum overpayments identified in the district's 2023 internal audit.
- **PEIMS Fragility and Fatal Errors:** PEIMS reporting relies on Role IDs and Service IDs. Hard-coding dynamic assignments into 122 different Job Classes means that if the state updates a Service ID, the district must manually update every specific Job Class tied to it. Furthermore, failing to hold granular data on split duties forces manual calculations that could result in PEIMS errors (e.g., reporting an employee's time exceeding 100%).
- **State Allotment and TIA Funding Loss:** If the system cannot systematically prove the exact percentage of a day an employee spends in a special allotment program (e.g., Bilingual Education) versus general education, the TEA may disallow expenditures or misallocate Teacher Incentive Allotment (TIA) funds.

- **Operational and Maintenance Risks**
  - **Job Changes**: If a teacher moves from Grade 2 to Grade 3, HR must process a complete "Job Change" action rather than a simple location or attribute update. If they transition between campus levels with different calendar days, the system often treats them as a new hire, inaccurately wiping out their recorded years of service (causing approximately113 help desk tickets regarding pay steps last year).
  - **Salary Schedule Maintenance**: Because there are 122 Teacher Job Classes, an annual board-approved salary raise requires someone to manually verify 122 different links to the salary schedule.
  - **Contract Management**: Using Tyler Munis to generate contracts with 122 Job Classes creates 122 potential points of failure for the "Job Title" merge fields.
  - **Equity Analysis Roadblocks**: Running a high-level report to check if teachers are paid equitably requires aggregating 122 different lines of data, making analytics nearly impossible without heavy, manual Excel manipulation.

As described above, compensation issues are some of the most impactful and visible outcomes of a highly manual position control function. In attempt to quantify this issue, the audit team tested current LISD salaries for placement within Board-approved ranges, the results of which are described below. Figure 22 presents the count of total employees (32 in total, separated into pay grades) that the audit team's analysis indicated are being compensated below (teal bars) or above (blue bars) the board-approved ranges.

Figure 22. Count of LISD Employees Below and Above Board-Approved Minimum and Maximum, by Pay Grade Number



Source. LISD Salary Schedule, 2025-26; LISD Salary Rates, 2025

In the summer of 2024, LISD contracted with Kreative Core Technologies (KCT) to evaluate issues within its ERP system. The audit team reviewed the KCT report and agreed with its findings and recommendations. According to interviews with department staff, and Gibson's review of ERP reports, these recommendations were not implemented.

Recommendation 6: Redesign the district's position control function.

Redesigning position control is a system configuration effort that requires alignment with the district's broader ERP strategy, as described in Recommendation 5. The current configuration relies heavily on manual workarounds and local practices that introduce payroll, budgeting, and compliance risk. Addressing these issues requires a coordinated redesign of how positions, assignments, calendars, and FTEs are structured and maintained within Tyler Munis.

To ensure consistency, sustainability, and effective system use, the district should assign clear responsibility for the position control redesign to staff with demonstrated expertise in Tyler Munis configuration and position architecture. This responsibility should be supported by formal cross-functional governance involving HR, Payroll, Finance, and PEIMS to ensure that system-level design decisions are standardized, documented, and maintained over time.

- **Phase 1: Engage HRIS Expertise and Establish Governance**
  The district should assign clear ownership for the position control redesign and establish cross-functional governance involving HR, Payroll, Finance, and PEIMS. This group should define and approve system design standards, including consistent distinctions between job classes (pay structure

and contract terms) and assignments or positions (role, campus, subject, funding). Governance procedures should also establish approval protocols to prevent future system changes that recreate manual workarounds or reporting risk.

- **Phase 2: Redesign the Position Model Within Tyler Munis**
  The district should reconfigure its position structure in Tyler Munis by consolidating job classes, reducing the number of work calendars, and separating contract-day attributes from job class definitions. The system should be configured to directly track split positions and partial FTEs rather than relying on external spreadsheets. Configuration changes should be validated through testing to ensure accurate calculations for payroll, leave payouts, blended rates, supplemental pay, and budgeting under common operational scenarios.

- **Phase 3: Align System Configuration to Compliance and Reporting Requirements**
  As part of the redesign, the district should confirm that the updated position structure supports accurate TRS and PEIMS reporting. This includes the system's ability to generate correct demographic and payroll records for employees holding multiple positions and to assign Role IDs and Service IDs at the assignment level. Particular attention should be given to employees with split duties, multiple funding sources, or roles tied to special allotment programs, as these present heightened compliance and financial risk.

- **Phase 4: Implement, Train, and Establish Ongoing Controls**
  The district should implement the redesigned position structure using a phased approach that includes parallel testing prior to full deployment. Targeted training and documentation should be provided to staff responsible for maintaining position data to promote consistent application of design standards. Ongoing controls should be established to review new job classes, work calendars, and configuration changes to ensure continued alignment with system standards and reporting requirements.

Commendation 1: LISD has achieved exceptional substitute fill rates through strategic program development.

Ensuring consistent instructional coverage is one of the most operationally critical functions within a school district's human resources department. When teachers are absent and substitutes are not available to fill those vacancies, students lose instructional time, campus staff are stretched thin, and the burden of coverage falls on administrators and colleagues already managing full workloads. Substitute fill rates serve as an important indicator of an HR department's operational effectiveness and its ability to support campuses in real time.

LISD's HR Department has made substantial and measurable progress in this area. The audit team identified the following evidence of this improvement:

- Fill rates have reached 97% district wide. In a district of LISD's size, this represents a significant operational achievement. A 97% fill rate means that nearly every absence is covered on any given school day, minimizing disruption to students and staff alike.

- Performance has improved dramatically over a short period of time. Two years prior, the district's fill rate was 89.2%. This improvement reflects a deliberate and sustained operational effort.
- Targeted retention strategies have driven results. Retention-focused strategies, such as the substitute satisfaction surveys distributed by the HR Department, reduce the constant churn of substitute recruitment and build a more reliable, experienced pool of available staff.
- The substitute program was built from the ground up by in-house staff. The district previously outsourced substitute staffing. HR leadership built the program internally, taking on full ownership of substitute supervision, background checks, and the implementation of the Red Rover absence management system. This level of institutional investment reflects a long-term commitment to program quality.

Finding 7: Imprecise staffing formulas raise the risk of inequitable allotments.

LISD maintains staffing formulas for elementary, middle, and high schools as well as auxiliary staff (i.e., transportation, custodial, CNS). Figure 23 shows an example of the administrative/professional support formula for middle schools.

Figure 23. Administrative and Professional Support Staffing Formula, LISD Middle Schools, 2025-26

Position	1 - 599 Students	600 - 999 Students	1000 - 1199 Students	1200 - 1499 Students	1500+ Students
Administration/Professional Support					
Principal	1	1	1	1	1
Asst. Principals	3	3	3	3	4
Counselors	1	2	3	3	4
Librarian	1	1	1	1	1
Nurse	1	1	1	1	1

Source. LISD Staffing Formulas, 2025-26

Teacher allotments are also included in the staffing formulas. For example, General Education teachers are allocated at "Projected Enrollment / 23." Programmatic teacher roles, however, are less precise (Figure 24). For programs such as Special Education, ESL/Bilingual and position types such as Instruction Assistants, the exact allocations are "Based on Need."

Figure 24. Programmatic Teacher Staffing Formulas, LISD Middle Schools, 2025-26

Teachers	
QUEST	Based on Need
Dyslexia	Based on Need
ESL/Bilingual	Based on Need
Title I	Based on Need
Special Education	Based on Need
Instructional Assistants	Based on Need

Source. LISD Staffing Formulas, 2025-26

The district has not defined "need" as it relates to staffing allocations. This lack of clarity poses several issues:

- **Inconsistent application across campuses and leaders.** In the absence of clearly defined staffing criteria, campus leaders with greater institutional knowledge or experience may be more effective at navigating the staffing process. This variability increases the likelihood that similarly situated campuses receive different staffing allocations, not because of differences in student need, but due to differences in familiarity with district practices.
- **Subjective interpretations of "need."** Without standardized guidance, "need" may be interpreted differently across campuses and programs. Some stakeholders may base requests on student demographics, others on academic performance, historical staffing levels, or available budget capacity. This reduces the district's ability to ensure that staffing decisions are grounded in consistent, transparent criteria.
- **Limited ability to ensure and demonstrate equitable staffing.** Because staffing decisions are not tied to clearly articulated drivers of demand, the district has limited ability to verify that allocations align with student enrollment, program requirements, or service expectations. Over time, this makes it more difficult to communicate the rationale for allocation decisions to campuses, leadership, or external stakeholders.

"Based on Need" staffing language creates a structural vulnerability: it permits inconsistent decision-making across campuses while limiting the district's ability to validate that allocations align to student demand and service requirements.

Recommendation 7: Quantify "student need" in district special program staffing formulas.

Over the course of Gibson's audit, the HR Department updated the district's staffing guidelines for the 2026-27 school year. The updated guidelines quantify "need" by applying weighted ratios to school-based programmatic roles. This is in line with best practice and is an important improvement for LISD. Figure 25 presents the updated formulas for LISD elementary schools in 2026-27.

Figure 25. Programmatic Teacher Staffing Formulas, LISD Elementary Schools, 2026-27

<table>
<tr><th colspan="6">OTHER STAFF</th></tr>
<tr><td>SRP (Reading Specialist)</td><td colspan="5">1 per campus (additional based on need)</td></tr>
<tr><td>Quest</td><td colspan="5"><44 identified students = share with another campus
44-89 identified students = 1 FTE
90-150 identified students – 1.5 FTE or 1 FTE & 1 IA
>150 identified students = 2 FTEs
Staffing allocation is based on identified students up to 15% of the campus K-5 enrollment</td></tr>
<tr><td>ESL Compliance Support</td><td colspan="5">300 students per compliance support position</td></tr>
<tr><td>Multilingual Adult Educator</td><td colspan="5">1 per 3 campuses</td></tr>
<tr><td>Math Curriculum Specialist (Based on Federal Funds)</td><td colspan="5">Based on Identified Campus Need</td></tr>
<tr><th colspan="6">SPECIAL EDUCATION</th></tr>
<tr><td>Inclusion/Resource/Dyslexia Teacher/Classroom</td><td colspan="5">11-17 students</td></tr>
<tr><td>SCSS / SBS Teacher/Classroom</td><td colspan="5">11-17 students</td></tr>
<tr><td>ICAP/SELF/ELE Teacher/Classroom</td><td colspan="5">6-10 students</td></tr>
<tr><td>SLE/ELSE/IBC Teacher/Classroom</td><td colspan="5">3-7-9 students</td></tr>
<tr><td>Teachers & IAs per Classroom</td><td colspan="5">40-70 intensity points per adult</td></tr>
<tr><th colspan="6">TITLE CAMPUSES</th></tr>
<tr><td>Interventionist</td><td colspan="5">1 Per Title Campus, Additional based on Campus Need</td></tr>
<tr><td>Behavior Specialist (Based on Availability of Federal Funds)</td><td rowspan="2">Based on Ranked % Eco Dis</td><td rowspan="2">Ranked 1-2</td><td>1</td><td rowspan="2">Ranked 3-6</td><td>1</td></tr>
<tr><td>Math Co-Teacher (Based on Availability of Federal Funds)</td><td>2</td><td>1</td></tr>
<tr><td colspan="6">At-risk Adjustment: Campuses with >30% SED will be given consideration for adjustments to these guidelines.
Request for adjustments should be made to the Chief Human Resources Officer & Area Superintendent.</td></tr>
</table>

Source. LISD Staffing Guidelines, 2026-27

Finding 8: The hiring process is inconsistently applied throughout the district, hindering the HR Department's ability to ensure equitable, transparent, and defensible hiring decisions.

The district does not currently have a standardized, districtwide hiring framework that ensures consistency, transparency, and equity in hiring practices across campuses and position types. The absence of clearly defined procedures and controls limits the district's ability to ensure that candidates are evaluated using consistent criteria and that hiring decisions are supported by complete and reliable information. The audit team identified four primary issues, described below.

- The district has not established standardized interview guides or scoring rubrics to support consistent candidate evaluation. As a result, interview questions, evaluation criteria, and documentation practices vary by campus and hiring manager, limiting the district's ability to compare candidates consistently or demonstrate how hiring decisions were reached.
- According to principals, recruiters do not routinely prescreen candidates prior to referral to principals or hiring managers (district recruiters dispute this). As a result, principals are responsible for validating candidate qualifications, experience, and overall fit in addition to conducting interviews. This decentralized approach increases variability in how candidate information is reviewed and may result in inconsistent levels of due diligence across campuses.
- Principals frequently bypass portions of the intended hiring workflow in order to directly pursue preferred candidates. While this approach may expedite individual hiring decisions, it limits the district's ability to ensure that all candidates are considered under comparable standards. The district does not require the use of a scoring rubric or other structured evaluation tool during interviews, resulting in limited documentation of how hiring decisions are made or how candidates are compared.

Further, the district does not systematically collect or analyze hiring data, such as applicant pools, interview outcomes, or selection trends by campus or position type. Without this information, the HR Department lacks visibility into hiring patterns. This limitation is particularly notable for principal and other higher-level positions, where HR is not involved in candidate evaluation or selection decisions.

These conditions limit the district's ability to monitor hiring practices, identify potential inequities, and ensure that employment decisions are supported by consistent, documented criteria across all campuses.

Recommendation 8: Standardize district hiring practices.

The district should implement a standardized, districtwide hiring framework to improve consistency, transparency, and oversight across all campuses and position types. Key actions should include:

- Establish a formal district hiring framework
  - Document end-to-end hiring procedures, including required steps, decision points, and approvals.
  - Clearly define roles and responsibilities for Human Resources, recruiters, principals, and hiring managers.
- Implement mandatory recruiter prescreening protocols

- Develop minimum prescreening criteria by position type (e.g., certifications, years of experience, required documentation).
- Require recruiters to validate qualifications and application completeness before candidates are referred to principals.
- Document prescreening outcomes within the applicant tracking system to create an auditable record.

- Develop and require structured interview tools
  - Create standardized interview guides and scoring rubrics aligned to job-specific competencies for major position categories.
  - Require hiring managers to use district-approved rubrics during interviews and retain completed rubrics as part of the hiring file.
- Collect and analyze hiring data
  - Systematically track applicant pools, interview outcomes, and selection decisions by campus and position type.
  - Develop routine reports for HR leadership and district administration to identify trends, gaps, or inconsistencies.
- Provide required training for staff involved in hiring
  - Deliver formal training for recruiters, principals, and hiring managers on structured interviewing, use of scoring rubrics, and district hiring expectations.
  - Incorporate training into onboarding for new administrators and provide refresher sessions on a regular cycle.

Commendation 2: LISD's onboarding process reliably prepares new hires for their first day.

LISD's HR department has developed an onboarding process that is consistently recognized across the organization as a strength. The audit team identified the following evidence of this:

- Campus principals praised the onboarding process in direct terms. During the principal focus group, multiple campus leaders independently described HR's onboarding process as organized, efficient, and effective. One principal stated that HR "does a fantastic job of the onboarding process." Another noted that new hires always arrive prepared – referring to completed paperwork, technology access, and identification badges – highlighting the reliability of the process.
- New hire paperwork is completed efficiently and digitally. Employees digitally complete required documentation through Incident IQ prior to their start date. The audit team spoke with multiple new hires who reported that the process was easy to navigate and that their onboarding experiences were streamlined.
- The Records and Staffing team views customer service as their core mission. Multiple team members described their function as the primary point of contact for employees at the beginning and end of

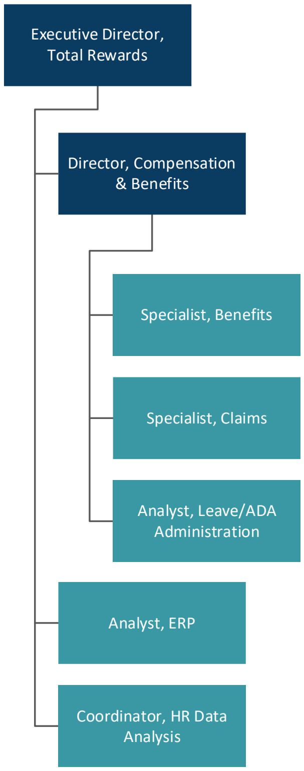
their employment, noting that once a candidate accepts a position, the records team takes ownership of the onboarding process. This orientation toward service and accountability reflects a team that takes its role seriously.

Chapter 5: Compensation and Benefits

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

The Compensation and Benefits division within LISD's HR Department is responsible for the oversight and maintenance of the district's compensation and benefits programs. Figure 26 presents the Compensation and Benefits division of LISD's HR Department. The Executive Director, Total Rewards reports to the Chief Human Resources Officer.

Figure 26. LISD Human Resources – Compensation and Benefits Organizational Chart, 2024-25



Source. LISD HR Organizational Chart, 2024-25

There are seven positions – seven FTE – that fulfill all major transactional responsibilities related to compensation at LISD. Table 13 lists the positions and the primary responsibilities of each.

Table 13. Compensation and Benefits Position Responsibilities

Position	Primary Responsibilities
Executive Director, Total Rewards	Oversees the strategic design, implementation, and maintenance of the district's employee total rewards program, including all compensation, medical plan, voluntary benefits, employee wellness, employment law advisory services, and HR metric development.
Director, Compensation and Benefits	Directs the daily operations of employee compensation, benefits, leave, disability accommodation, workers compensation, and unemployment programs.
ERP Analyst	Administers, updates, and maintains the position management information system, duty calendars, and leave and attendance modules.
Benefits Specialist	Assists the administration and daily operations of the Compensation and Benefits division. Develops and recommends strategies for benefits programs impacting current plan year including communication campaigns and providing education to employees on preventative, wellness, and benefit plan coverage.
Claims Specialist	Assists with the administration of all benefits, leave programs, workers' compensation, and unemployment claims. Maintains records and provides assistance to employees and team members to ensure effective use of benefits and leave.
Leave/ADA Administration Analyst	Administers leave of absence, workers compensation, and disability accommodation programs and policies for all employees. Advises employees on eligibility and benefits of programs and claim procedures. Processes leave and disability accommodations according to established policy, rules, and regulations.
HR Data Analysis Coordinator	Provide data and analysis in support of all aspects of the Human Resources function, including creating and producing regularly scheduled and ad-hoc reports using data from various systems and other sources to identify possible issues and trends. Perform data analysis on various HR data and create meaningful metrics and analysis reports.

Source. LISD job descriptions and interviews with HR Department staff

Compensation

Compensation pay structures and pay levels guide the assignment of salaries and wages to exempt (salaried) and non-exempt (hourly) employees.

LISD's teacher pay scale is in accordance with the state minimum salary schedule as defined by Section 153.1021 of the Texas Administrative Code, Commissioner's Rules on Creditable Years of Service, which mandates the following: "In no instance may a school district pay less than the state base salary listed for individuals for classroom teachers, full-time librarians, full-time counselors, and full-time registered nurses." The LISD step scale provides annual compensation based on years of creditable service for a 10-month contracted employee working a minimum of 187 days as required by the Texas Education Code Section 21.401. Under the step system, pay levels are established for each year or step – up to a defined maximum – based on the number of years of creditable experience. The maximum creditable years of service a new teacher may bring into the district is 30 years. In addition to legislative mandated step increases, the district may periodically evaluate adjustments to the step scale to reflect cost-of-living or market adjustments to increase pay.

Pay grades drive compensation for non-teaching positions. Grades represent groups of positions having similar experience and education, as well as the level of work required, even though they may be different positions. Each pay group has low-range, mid-range, and maximum-range levels of compensation. Creditable years of service/experience are also relevant to pay groups, but there is a broader definition of relative or like experience than what is applied for those on the step structure. For example, an administrative position may consider leadership experience as well as technical experience in determining the value and relevance of prior work experience. Like the step pay system, pay grades can be adjusted periodically to adjust for cost-of-living and market factors.

One of the primary benefits of a step and grade system is pay equity. Employees with the same experience and skill levels in the same pay grade receive the same or similar pay. One of the drawbacks of the step and grade system is that it does not consider employee performance. As a result, a higher performing employee with the same or similar experience would receive the same compensation as a lower performing employee, unless that employee is promoted to a different, higher paying position. In a step and grade system, compensation increases or decreases cannot be applied to reward high performance or address under-performance outside the established ranges for the same position.

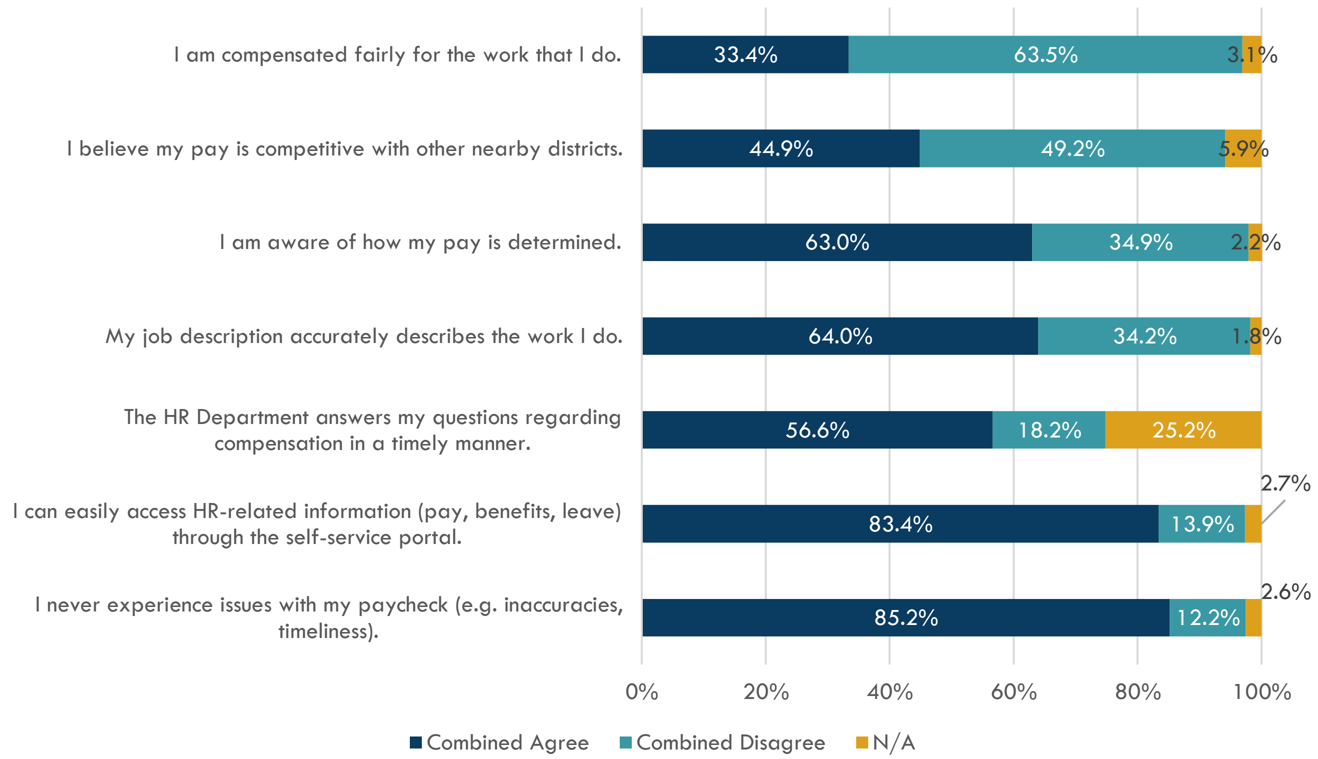
Other factors can affect annual compensation, such as the number of scheduled work days for the particular position. Because most school systems, including LISD, operate on a 180-day school year, many positions (e.g., teachers, cafeteria workers, and certain administrative positions) are not year-round positions. As a result, pay equity is not evaluated against total annual compensation, but rather an average daily rate of salaried pay, or a rate per hour for hourly pay.

Some employees may be eligible for additional forms of compensation:

- Annual stipends may be assigned to certain employees for work performed outside their job description (e.g., coaching girls' volleyball). LISD maintains a schedule of all stipends.
- Extra duty/supplemental pay represents additional wages for activities outside the primary role of the position (e.g., teachers providing after-school tutoring).
- Overtime compensation is driven by the Fair Labor Standards Act and requires employers to pay a higher hourly rate for hours worked in excess of a 40-hour week.

In Gibson's staff survey, seven questions were asked of staff related to their general satisfaction with LISD's compensation program. Figure 27 presents the questions and results.

Figure 27. Staff Survey Results – Compensation



Source. Gibson Consulting Group – LISD staff survey

Benefits

Employee benefits in public school districts constitute a large, complex, and dynamic set of programs that are either mandated by federal or state law or are voluntarily provided by the district to help attract, retain, and motivate employees, and to contribute to the district's strategic objectives. Such voluntary benefits include retirement savings programs and disability income.

The LISD benefits function is responsible for the management of the district's health insurance plans, supplemental employee benefits, and interacting with insurance vendors and third-party administrators. The function also manages employee leave, workers compensation claims and reporting, Affordable Care Act (ACA) rules and regulations, and ensuring compliance with the Internal Revenue Service (IRS) and Department of Labor (DoL) to protect the district against fines and penalties – all which require dedicated time.

The district's benefit plans run from January through December, with open enrollment occurring in October of each year. Table 14 presents all of the district's benefit offerings in 2025 with their respective enrollment numbers, plan providers, and effective/review dates.

Table 14. LISD Benefit Plan Details, 2025

Coverage	# Enrolled	Provider	Effective Date
Medical			
BCBS HDHP 1650	1,072	Blue Cross Blue Shield of Texas	1/1/25
BCBS HDHP 3300	1,473	Blue Cross Blue Shield of Texas	1/1/25
BCBS PPO 1500	849	Blue Cross Blue Shield of Texas	1/1/25
HCH ACO Co-Pay 1000	331	HCH Health Plan	1/1/25
HCH Co-Pay 5000	349	HCH Health Plan	1/1/25
Dental			
High Plan	858	Guardian	1/1/25
Low Plan	2,671	Guardian	1/1/25
Other			
Vision	3,550	VSP	1/1/25
Cancer	938	Guardian	1/1/25
Critical Illness	660	Guardian	1/1/25
Flexible Spending Account	539	National Benefits Services	1/1/25
Dependent Care Spending Account	72	National Benefits Services	1/1/25
Basic Life	5,715	OneAmerica	1/1/25
Supplemental Life	1,700	OneAmerica	1/1/25
Supplemental AD&D	1,388	OneAmerica	1/1/25
Supplemental Spouse Life	532	OneAmerica	1/1/25
Permanent Life	570	Transamerica	1/1/25
Accident Elite	619	The Hartford	1/1/25
Hospital Indemnity – High Plan	113	The Hartford	1/1/25
Hospital Indemnity – Low Plan	638	The Hartford	1/1/25
Texas Legal	1,129	Texas Legal	1/1/25
LEEF Employee Giving	1,025	Leander Educational Excellence Foundation	1/1/25

Coverage	# Enrolled	Provider	Effective Date
Long Term Disability	1,471	The Hartford	1/1/25

Source. Benefit plan data provided by LISD

A competitive benefits package is one of the primary ways an organization can distinguish itself to potential candidates. Increasing health care costs and a competitive labor market make it critical for an organization to find a sustainable balance between attractive benefits and efficiently spent funds. One useful metric in evaluating the overall health of an organization's benefits program is calculating benefits cost as a percentage of salaries and wages. This provides insight for both the employer and employee; the employer is able to assess the strength of its overall compensation package (in 2025, the U.S. Bureau of Labor Statistics reported that benefits accounted for 29.7% of overall compensation costs across public and private industries), while the employee is provided insight into the true value of his or her compensation (many do not realize the price of employer contributions that would otherwise come out of the employee's pocket).

Table 15 presents the district's benefits costs as a percentage of salaries and wages between 2020-21 and 2023-24. This metric provides an additional perspective on the overall health and competitiveness of an organization's compensation package.

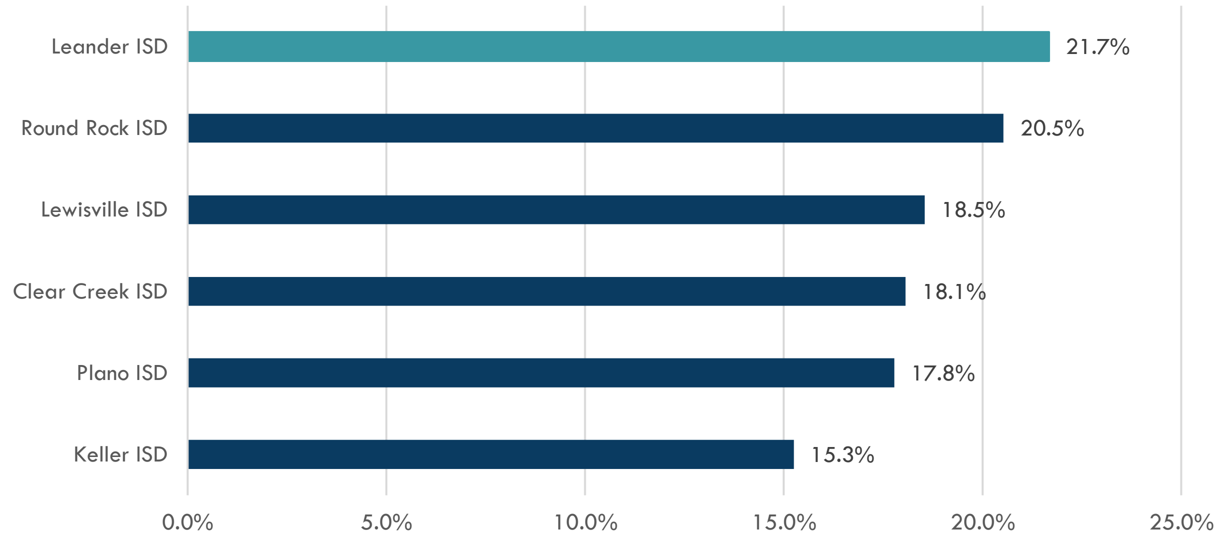
Table 15. LISD Benefits as a Percentage of Salaries and Wages, 2020-21 to 2023-24

Metric	2020-21	2021-22	2022-23	2023-24
Salaries and Wages	$262,412,016	$266,089,743	$286,096,513	$310,106,590
Total Benefits	$54,733,858	$55,394,267	$61,973,620	$67,211,347
Benefits as a % of Salaries and Wages	**20.9%**	**20.8%**	**21.7%**	**21.7%**

Source. TEA PEIMS Financial Data, 2020-21 to 2023-24

Figure 28 presents benefits costs as a percentage of salaries and wages for LISD and its peers in 2023-24. At 21.7%, LISD's percentage is highest among its peers.

Figure 28. Benefits as a Percentage of Salaries and Wages, LISD and Peer Districts, 2023-24



Source. TEA PEIMS Financial Data, 2023-24

Findings and Recommendations

Finding 9: LISD annually distributes $15-20 million in supplemental pay; however, current approval practices provide limited assurance that the compensated work aligns with district requirements.

In the 2024-25 school year, LISD paid its employees over $17 million in supplemental compensation (i.e., stipends and extra duty pay). These amounts were paid out across 195 different types of stipends and 122 different types of extra duty pay. Table 16 presents the top 10 categories of stipend and extra duty pay by total amount.

Table 16. Top 10 (By Total) Stipend and Extra Duty Payment Categories, 2024-25

Stipend		Extra Duty Payment	
SPED General	$994,033	Retention Payment	$5,814,500
SPED Self Contained	$866,051	Athletic Summer Camp	$661,021
Bilingual Teacher	$718,931	Summer School (Teacher)	$498,970
SPED Behavior	$299,953	Curriculum Development	$293,946
HS Football Varsity Days	$178,007	Sign-on Stipend	$232,250
HS Agriculture Advisor	$146,416	Supplemental Pay	$230,163
HS Football JV/Freshman Days	$119,229	Training (Daily)	$213,335

Stipend		Extra Duty Payment	
MS Football A/B Days	$119,964	Exempt EE Extra-Duty Hourly	$167,927
MS Department Head	$114,681	Summer Supplemental Pay	$156,351
HS Football Varsity	$110,824	Elementary Team Lead	$128,000

Source. LISD Stipend and Extra Duty Data, 2024-25

The audit team conducted testing on a sample of supplemental payments made between 2024 and 2026. Below is a description of the audit test objectives, approach, and results.

Audit Test – Supplemental Pay

Test Objective

- Validate that a sample of supplemental payments were properly validated.

Test Approach

- Obtained a record of supplemental payments.
- Judgmentally selected 21 payments that were made to individual employees based on payment type (stipend or extra duty).
- Requested digital verification of each payment from the HR Department. Reviewed all submitted documentation to ensure each payment was properly validated.

Out of 21 payments tested, 13 (62%) were not properly validated. Table 17 shows the results of the test.

Table 17. Supplemental Pay Test Results

Pay Description	Amount	Result	Notes
Athletic Event	$360	Fail	No “Extra Duty Job Agreement”
Supplemental Pay	$765	Fail	No “Extra Duty Job Agreement” and pay stubs do not total $765.
General Tutoring	$1,965	Fail	Pay stubs do not total $1,965. “Extra Duty Job Agreement” included.
Curriculum Development	$1,480	Fail	Pay stubs do not total $1,480. “Extra Duty Job Agreement” included.
Athletic Summer Camp	$1,800	Fail	No “Extra Duty Job Agreement”
Non-TRS Supplemental Pay	$72,000	Pass	

Pay Description	Amount	Result	Notes
Non-TRS Supplemental Pay	$10,000	Fail	No supporting documentation
Supplemental Pay	$106	Fail	No "Extra Duty Job Agreement" and pay stubs do not total $106
Exempt Extra-Duty Hourly	$152	Pass	
General Tutoring	$532	Pass	
Summer Supplemental Pay	$2,384	Pass	
After School Enrichment	$330	Pass	
Training (Daily)	$255	Pass	
Training (Daily)	$595	Pass	
Twilight Coordinator	$3,000	Fail	Email from administrative assistant
Bilingual Teacher	$7,000	Fail	No proof of required 28 hours of training
Athletic Event	$1,640	Fail	No "Extra Duty Job Agreement"
Teachers as Subs	$209	Fail	No supporting documentation
FAC Rental Lead	$5,505	Fail	No supporting documentation
Supplemental Pay	$5,184	Fail	No "Extra Duty Job Agreement"
ESY Licensed Specialists	$2,209	Pass	

Source. Gibson Consulting Group

The results of the supplemental pay test indicate that existing approval and documentation controls do not consistently ensure that payments are supported, accurate, or aligned with district requirements. In many cases, required documentation – most notably the "Extra Duty Job Agreement" – was missing entirely, even though such agreements are intended to formally define the scope of work, duration, rate of pay, and approval authority for extra duty assignments. Without this documentation, the district has limited assurance that employees performed the work for which they were compensated or that payments were authorized in advance.

In addition, several payments lacked sufficient supporting records to validate the amount paid. For some transactions, pay stubs did not reconcile to the approved amount, while others had no evidence demonstrating how hours were tracked or how lump-sum amounts were calculated. These inconsistencies suggest that approval reviews are not consistently verifying completeness or accuracy prior to payment processing.

Certain stipends and extra duty payments are managed through Google documents or informal tracking tools outside of the district's ERP system. As a result, key controls such as standardized approvals, automated validations, and system-enforced documentation requirements are bypassed. In these cases, complex pay rules are often calculated manually or in spreadsheets and then keyed into payroll, increasing the risk of calculation errors.

Finally, the use of decentralized and inconsistent processes makes it difficult for central staff to monitor compliance, perform reconciliations, or identify anomalies. Without a standardized, system-based workflow that links approvals, documentation, and payment processing, the district lacks a reliable mechanism to confirm that supplemental pay is consistently justified, accurately calculated, and properly authorized.

Recommendation 9: Verify and document all supplemental payments.

To strengthen oversight and provide reasonable assurance over supplemental pay, the district should implement a standardized, system-based approval and documentation process for all stipends and extra duty payments. This process should require that all supplemental work be formally authorized in advance through a consistent agreement or approval form that clearly defines the assignment, eligibility requirements, expected work, rate of pay, and approving authority. Payments should not be processed unless this documentation is complete and retained in a centralized location accessible for review.

The district should also transition the tracking and calculation of supplemental pay out of standalone spreadsheets and Google documents and into the ERP system, or a controlled workflow that interfaces directly with payroll.

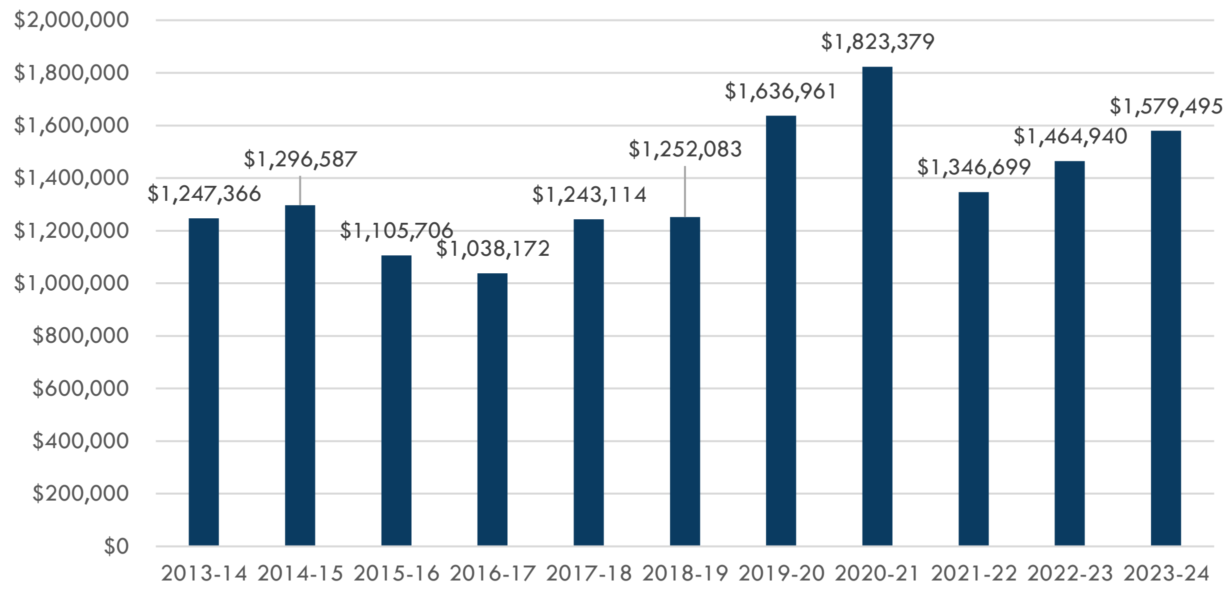
Finally, the district should define clear roles and accountability for validating supplemental payments prior to processing. This includes training campus and department staff on documentation requirements, establishing periodic compliance reviews of supplemental pay transactions, and using exception reporting to identify payments that lack required approvals or support. Together, these steps will improve transparency, reduce financial and compliance risk, and ensure that supplemental pay aligns with district expectations and board-approved practices.

Finding 10: Inadequate controls over workers' compensation expose the district to compliance and financial risks.

Board Policy CRE (LEGAL) describes the district's obligations related to workers' compensation. It defines how the district must provide workers' compensation coverage, who qualifies as an employee, and the required notices to state agencies and staff. It sets clear requirements and timelines for reporting injuries, wage information, supplemental updates, and communication about return-to-work or modified duty options. The policy also protects employee rights by prohibiting retaliation, explaining how benefits interact with paid leave, and limiting termination or adverse action while an employee is receiving workers' compensation benefits.

Over the last eleven years, LISD's workers' compensation expenditures have fluctuated between a low of $1.038 million in 2016-17 and a high of $1.823 million in 2020-21 (Figure 29). The highest two years occurred in the early stages of the COVID-19 pandemic. Overall, the district has seen a 26.6% increase in workers' compensation expenditures from 2013-14 to 2023-24.

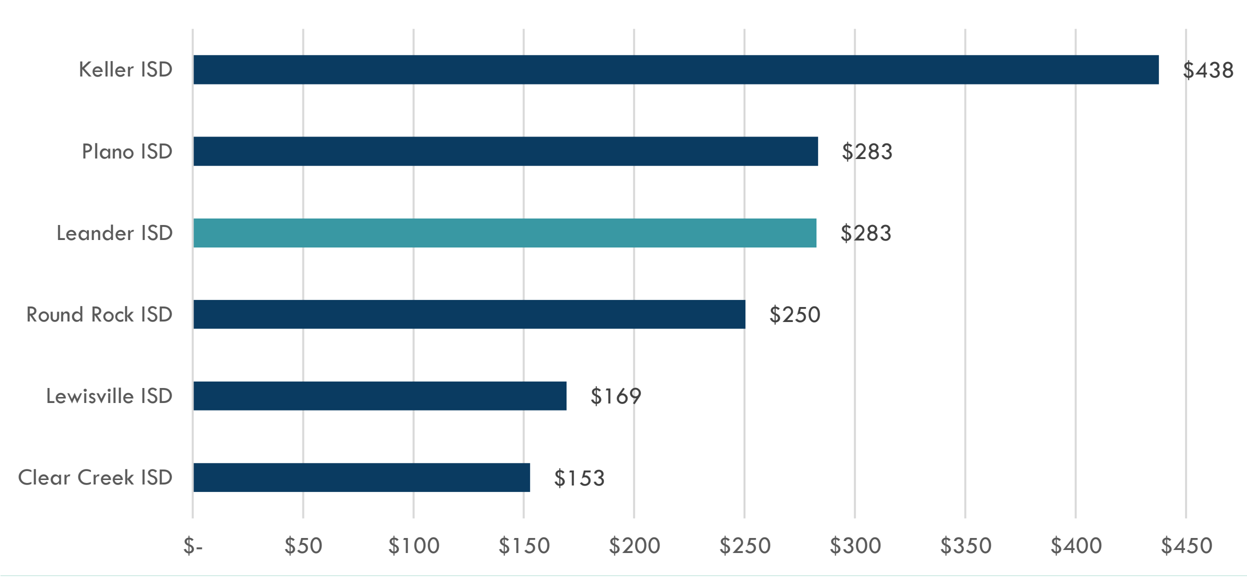
Figure 29. Leander ISD Workers' Compensation Expenditures, General Fund, 2013-14 to 2023-24



Source. TEA PEIMS Financial Data, 2013-14 to 2023-24

Figure 30 presents workers' compensation expenditures per staff FTE for LISD and its peer districts in 2023-24. At $283, LISD is tied for second highest behind Keller ISD.

Figure 30. Workers' Compensation Expenditures per Total Staff FTE, LISD and Peers, 2023-24



Source. TEA PEIMS Financial Data, 2023-24

Due to the significant cost and complexity of the workers' compensation function, effective controls are critical to managing cases, supporting employees, and facilitating return-to-work when feasible. The HR Department relies on an Excel spreadsheet to track workers' compensation cases, which the audit team reviewed and found to contain several issues that highlight opportunities for improvement.

- **Data integrity issues limit effective case management and regulatory compliance.**
  The district's workers' compensation tracking spreadsheet contains inaccurate, incomplete, or missing key dates, including injury dates, reporting dates, and return-to-work milestones. These dates are critical for monitoring statutory timelines, ensuring timely communication with employees and carriers, and demonstrating compliance with reporting and notification requirements outlined in Board Policy CRE (LEGAL). Inconsistent or unreliable dates reduce management's ability to identify delays, intervene early in cases, or verify that required actions occurred within mandated timeframes.
- **Limited supporting documentation weakens claim oversight and defensibility.**
  According to interviews and the audit team's review of the WC tracker, the district's files lack supporting documentation such as incident photographs, employee or witness statements, medical documentation summaries, or correspondence related to the claim. Without this documentation, the district has limited ability to validate claim circumstances, respond effectively to disputes, or support decisions related to compensability, modified duty, or return-to-work planning.
- **Case notes are not consistently maintained or standardized.**
  Case notes within the tracking spreadsheet are incomplete or inconsistently updated. While specialists rely on dates to manage their individual caseloads, the absence of clear, narrative case histories limits visibility into actions taken, communications with employees, and case status changes. This creates challenges when cases are reassigned, when supervisory review is required, or when management seeks to understand drivers of prolonged or high-cost claims.
- **Workers' compensation is managed outside the district's system of record.**
  All workers' compensation case tracking is maintained in a standalone Excel spreadsheet rather than within Tyler Munis, the district's financial and HR system of record. Managing claims outside the primary system increases the risk of inconsistent data, limits integration with payroll and leave information, and reduces the district's ability to implement automated controls, reporting, or supervisory review. This decentralized approach also makes it more difficult to ensure consistent practices across cases and over time.

Lastly, in large part due to the issues described above, the HR Department is not analyzing workers' compensation data for trends. Analyzing workers' compensation trends is critical to identifying recurring causes of injuries, monitoring claim duration and costs, and assessing whether cases are being resolved efficiently. Without trend analysis, the district has limited ability to proactively manage risk and evaluate whether existing practices are effectively controlling costs and supporting timely return-to-work outcomes.

Recommendation 10: Strengthen controls over workers' compensation.

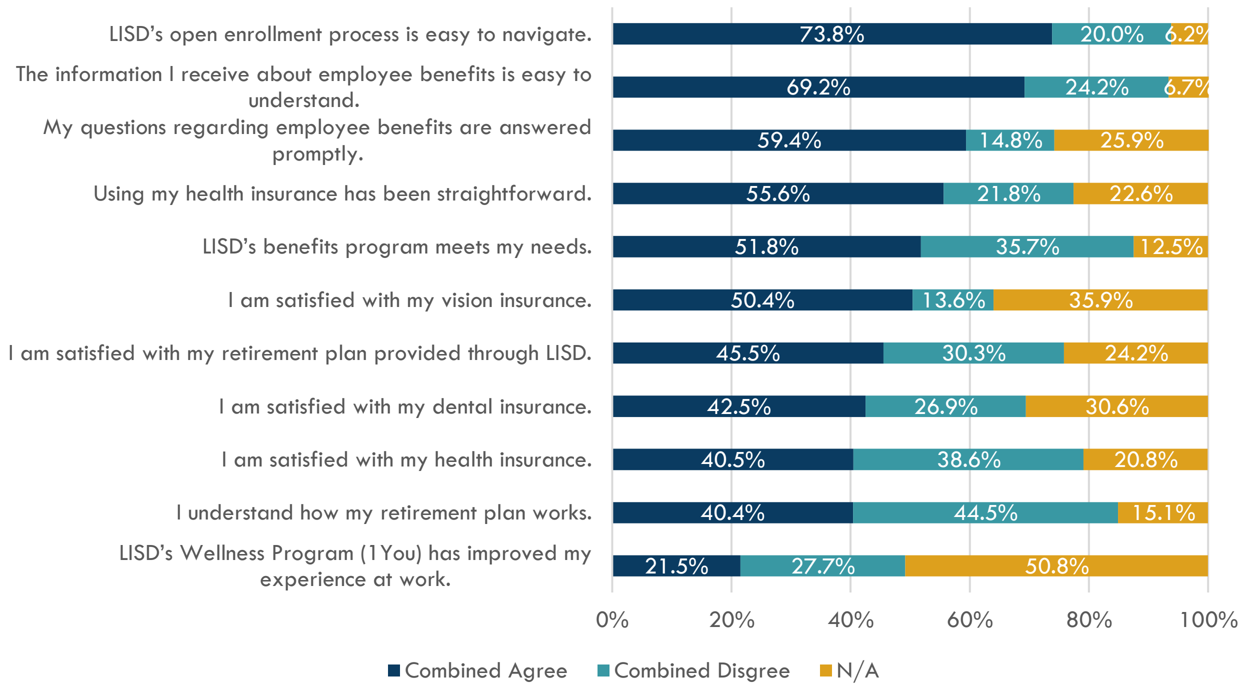
Given the financial implications, regulatory requirements, and employee-related risks associated with workers' compensation, the district should strengthen controls to ensure compliance with Board Policy and state requirements. There are three key steps in doing so, described below.

- **Standardize workers' compensation processes and requirements.**
  The district should formally define and document end-to-end workers' compensation workflows, including injury reporting, carrier notification, documentation collection, employee communication, leave coordination, and return-to-work decision-making. Clear standards should be established for required data elements, statutory timelines, and documentation expectations aligned with Board Policy CRE (LEGAL), including consistent tracking of injury dates, reporting dates, and return-to-work milestones. Where feasible, these standards should be embedded into structured internal forms and configured within Tyler Munis to ensure workers' compensation activity is managed within the district's official system of record rather than through standalone spreadsheets.
- **Improve documentation, visibility, and data quality at the case level.**
  The district should conduct a targeted review of open and higher-risk claims to verify that key dates, supporting documentation, and narrative case notes are complete, accurate, and up-to-date. Management should establish clear expectations for ongoing case documentation, including minimum documentation requirements and standardized case notes that clearly summarize actions taken, communications with employees and providers, and changes in claim status. Strengthening documentation practices will improve continuity when cases are reassigned, enhance supervisory oversight, and improve the district's ability to defend claims and facilitate timely return-to-work outcomes.
- **Strengthen oversight and monitoring through routine review and reporting.**
  The district should implement routine supervisory review processes, such as structured monthly reviews of active claims, to identify missing information, overdue actions, extended claim durations, or delays in return-to-work efforts. In addition, management should develop recurring summary reports to monitor trends in injury causes, claim duration, and costs, and use this information to inform preventive strategies and operational improvements. Over time, consistent oversight and reporting will enable the district to move from reactive case management toward a more proactive, data-informed approach to risk and cost control.

Finding 11: Employees feel dissatisfied with LISD's benefits program, partly because they do not fully understand it.

In Gibson's staff survey, 11 questions were asked of staff related to their general satisfaction with LISD's benefits program. Figure 31 presents the questions and results. Survey results indicate low rates of satisfaction with the district's benefit offerings. In isolation, this metric is not uncommon – many organizations' employees report similar sentiments. However, LISD employees also reported low rates of understanding related to the district's benefit package. For example, 40.4% of respondents stated that they understand how their retirement plan works; this data point closely resembles the 45.5% of respondents that agreed they are satisfied with their retirement plan. Additionally, over half of respondents answered "Not Applicable" to the statement related to the district's wellness program, suggesting that they simply do not know it exists given the program is available to all LISD employees.

Figure 31. Staff Survey Results – Benefits



Source. Gibson Consulting Group – LISD staff survey

Interviews further reinforced these findings and identified structural limitations within the HR Department. Currently, benefits administration is largely managed by a single staff member who is responsible for managing the full scope of benefits-related work. Due to the volume and complexity of these responsibilities, there is limited capacity to provide proactive, ongoing education or tailored support to employees outside of required enrollment periods.

In addition, employees reported confusion about how and where to seek assistance when they have benefits-related questions. The district does not have a clearly defined or consistently communicated support system for benefits inquiries, resulting in multiple entry points for questions (email, Incident IQ, Let's Talk) and no centralized or standardized process for response.

Collectively, these factors limit employees' ability to make informed decisions about their benefits and diminish overall satisfaction with LISD's benefits program, despite the district's investment in comprehensive offerings.

Recommendation 11: Develop and deploy a benefits communications strategy.

LISD should develop and implement a comprehensive benefits communication strategy designed to improve employee understanding, satisfaction, and utilization of the district's benefits program. The strategy should be structured to provide clear, consistent, and accessible information throughout the year, not solely during open enrollment, and should be tailored to address the varied needs and benefit literacy levels of LISD employees.

At a minimum, the benefits communication strategy should include the following components:

- **Centralized communication framework:** Establish a clearly defined and widely communicated single point of access for benefits information and questions to reduce employee confusion and ensure consistent responses.
- **Year-round education plan:** Implement planned, recurring education efforts (e.g., workshops, webinars, recorded sessions, and written guides) that explain core benefits, with particular emphasis on health insurance plan selection, retirement benefits, and how benefit plans function in practice.
- **Targeted retirement education:** Develop focused education initiatives to address the demonstrated lack of understanding related to the district's retirement plan, including explanations of plan structure, employee contributions, district contributions, and long-term implications.
- **Defined roles and capacity support:** Evaluate staffing capacity related to benefits administration to ensure sufficient time and resources are available for employee education, communication, and support.

To assess effectiveness, LISD should establish measurable outcomes for the communication strategy, such as improvements in employee survey results related to benefits satisfaction and understanding. Strengthening benefits communication will help ensure employees can accurately assess the value of their total compensation and maximize the benefits provided by the district.

Chapter 6: Employee Relations

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

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

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

Three positions within the HR Department are primarily responsible for functions related to employee relations: the Executive Director of Talent Acquisition and Elementary Support, the Executive Director of Human Resources, and the Senior Director of Support Services, Staffing, and Employee Relations. Table 18 details the employee relations responsibilities of each position.

Table 18. Employee Relations Responsibilities of Select HR Department Positions

Position	Employee Relations Responsibilities
Executive Director of Talent Acquisition and Elementary Support	▪ Work closely with the Assistant Superintendent for Human Resources to investigate allegations involving non-campus employees. ▪ Conduct investigations of employee, parent, and community complaints. ▪ Support administrators and managers in the development of appropriate and legally-sound employee performance documentation. ▪ Provide direction, guidance, and counseling to administrators and employees regarding resolution of problems, interpretation of policies and procedures, and application of corrective action and issues related to cases. ▪ Assist legal counsel in preparation of complex cases that involve potential lawsuits against the district. ▪ Respond to all EEOC and Texas Commission on Human Rights (TCHR) charges in a timely manner and participate in other employee hearings as needed. ▪ Develop, coordinate, and conduct employee/employer relations training programs on issues such as equal employment opportunity, sexual harassment, counseling, or disciplinary procedures. ▪ Research cases, gather supporting documentation, and prepare written responses with recommendations for appropriate action in a timely manner.

Position	Employee Relations Responsibilities
	▪ Implement relevant policies and oversee the processing of employee complaints. ▪ Interview individuals, witnesses, and representatives involved in allegations and maintain contact until resolution of situation. ▪ Maintain appropriate and thorough employee complaint and investigation case documentation.
Executive Director of Human Resources	▪ Same as above
Senior Director of Support Services, Staffing, and Employee Relations	▪ Same as above

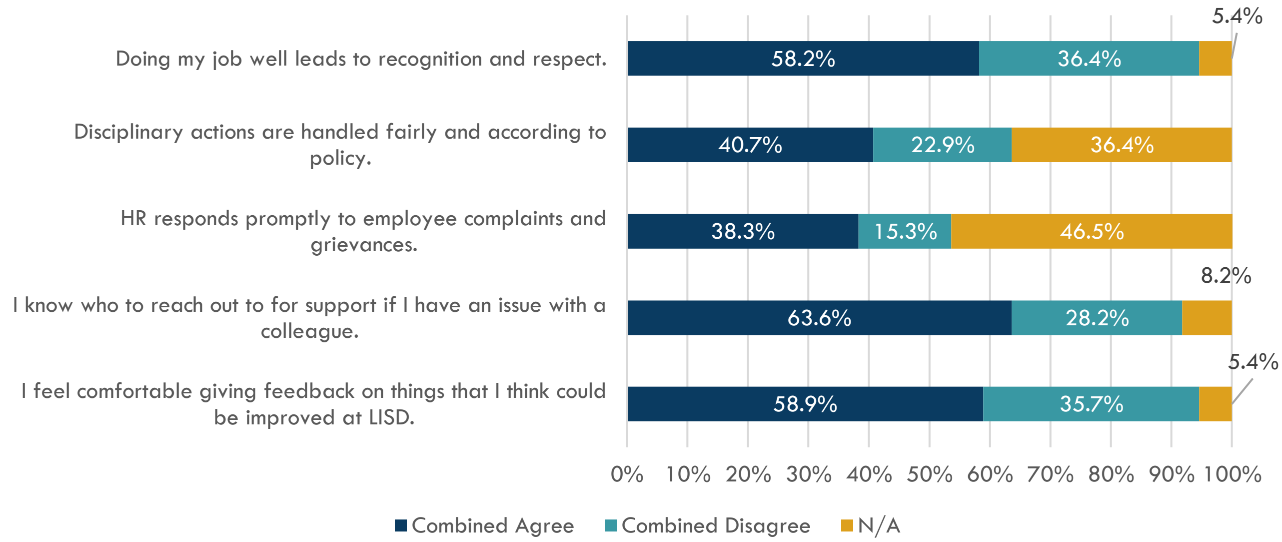
Source. LISD HR job descriptions

LISD Board Policies related to employee relations are located in Section D in the online Board Policy Manual. The relevant policies are as follows:

- Policy DAA (LEGAL) establishes that the District is an equal opportunity employer committed to nondiscrimination in recruitment, selection, hiring, pay, promotion, retention, and other personnel actions.
- Policy DAB (LEGAL) establishes that the District is committed to nondiscrimination with regard to age, race, national origin, ancestry, and other human capital factors.
- Policy DIA (LEGAL)/DIA (LOCAL) states that the District prohibits sexual harassment and any other type of harassment of any kind to school personnel or student at school or any school sponsored activity.
- Policy DGBA (LOCAL) establishes the three-level employee complaint/grievance process for LISD and includes general guidance and protocol for handling complaints/grievances.
- Policy DN (LOCAL) states that all employees should be evaluated in the performance of their duties.
- Policy DNA (LEGAL)/DNA (LOCAL) establishes the appraisal process for teachers.
- Policy DNB (LEGAL)/DNB (LOCAL) establishes the appraisal process for campus administrators.

In Gibson's staff survey, five questions were asked of staff related to their general satisfaction with basic employee relations functions. Figure 32 presents the questions and results. Over a third of all respondents strongly disagreed or disagreed with the statements, "Doing my job well leads to recognition and respect," and, "I feel comfortable giving feedback on things that I think could be improved at LISD." This suggests there is significant area for improvement in two core employee relations functions.

Figure 32. Staff Survey Results – General Employee Relations

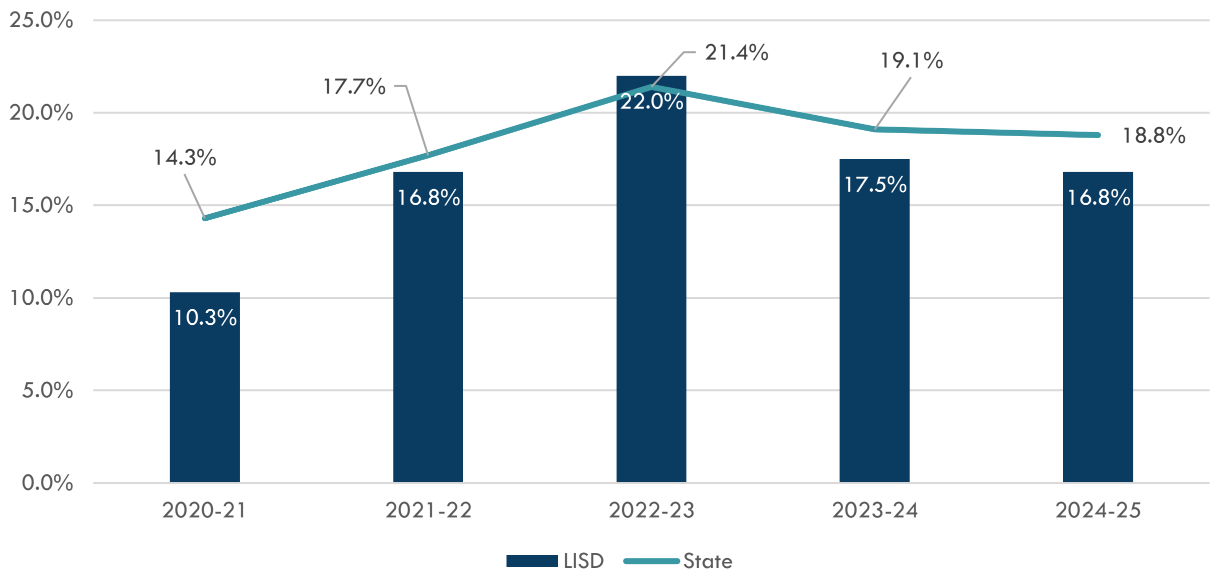


Source. Gibson Consulting Group

Employee Turnover

Employee turnover refers to the total number of workers who leave a company over a certain period of time. The employee turnover rate is an important metric used to assess employee satisfaction and the overall health of an organization's culture. Figure 33 shows the rate of teacher turnover at LISD compared to the state average between 2020-21 and 2024-25. LISD's teacher turnover rate fluctuated dramatically over the five-year period, from a low of 10.3% in 2020-21 to a high of 22% in 2022-23. The COVID-19 pandemic significantly impacted turnover rates at school systems across the country during this period, including LISD's. In fact, the district's turnover rate very closely reflects state trends and has dropped below the state average the last two years.

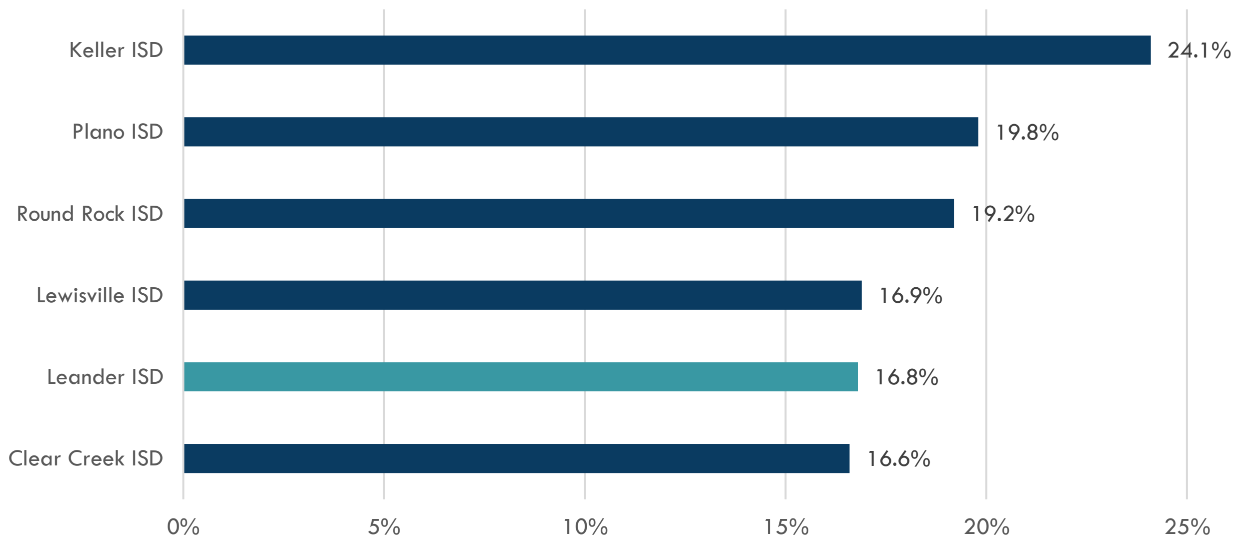
Figure 33. LISD and State Average Teacher Turnover Rate, 2020-21 to 2024-25



Source. TEA Texas Academic Performance Reports, 2020-21 to 2024-25

Figure 34 illustrates LISD's teacher turnover rate as it compared to peer districts in 2021-22. LISD's teacher turnover rate of 16.8% ranks second lowest among its peers.

Figure 34. LISD and Peer District Teacher Turnover Rate, 2024-25



Source. TEA Texas Academic Performance Reports, 2020-21 to 2024-25

Based on the district's turnover data, over the past three years, the five most common reasons for employees' separation from LISD are:

- Family/Personal Obligations;
- Transfer to another Central Texas school district;
- Other;
- Retirement; and
- Career Advancement.

Employee Grievances

An employee grievance refers to the dissatisfaction of an employee with what he or she expects from the organization and its management. An effective grievance procedure is important in fostering a culture of fair treatment that encourages commitment and staff retention.

Texas Government Code 617 provides for employees' rights to file a complaint regarding "wages, hours of employment, or conditions of work." It does not mandate a particular protocol, which leaves districts to create the specifics of their own grievance processes at the local level.

LISD has several Board policies dictating the legal framework and processes for grievances. The primary Board policies related to employee grievances are listed below:

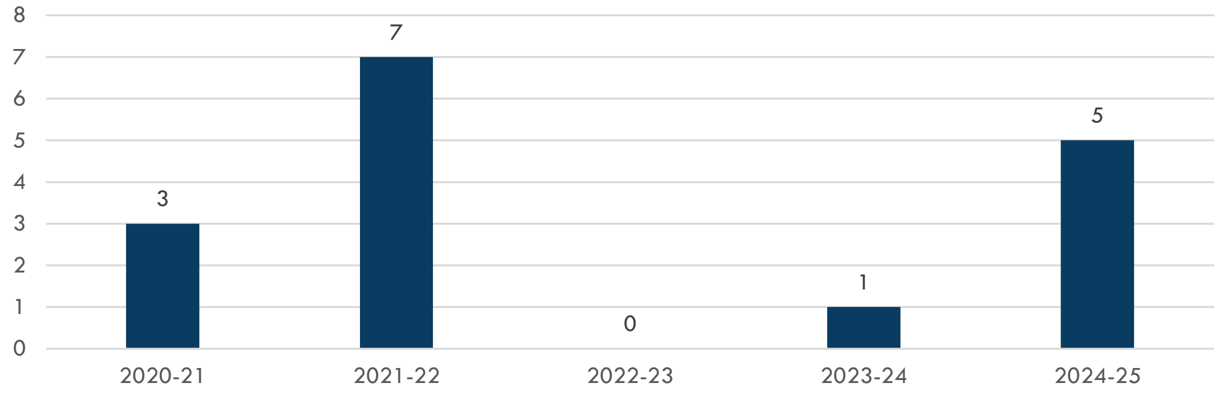
- DC (LEGAL) provides each employee with the right to present a grievance to the Board, and cannot restrict the ability of an employee to communicate directly with a member of the Board except under certain specific circumstances.

Board Policy DGBA (LOCAL) outlines the grievance process at LISD:

- Level One – this is the first step in the formal grievance process. The employee must complete and submit a complaint form to the lowest level administrator who has the authority to remedy the alleged problem.
- Level Two – if the employee is not satisfied with the Level One decision, an appeal may be filed. This is escalated to the Superintendent or that person's designee.
- Level Three – if the employee is not satisfied with the Level Two decision, an appeal will be heard by the Board.

Figure 35 shows a count of grievances filed at LISD over the last five years.

Figure 35. LISD Employee Grievances Filed, 2020-21 to 2024-25

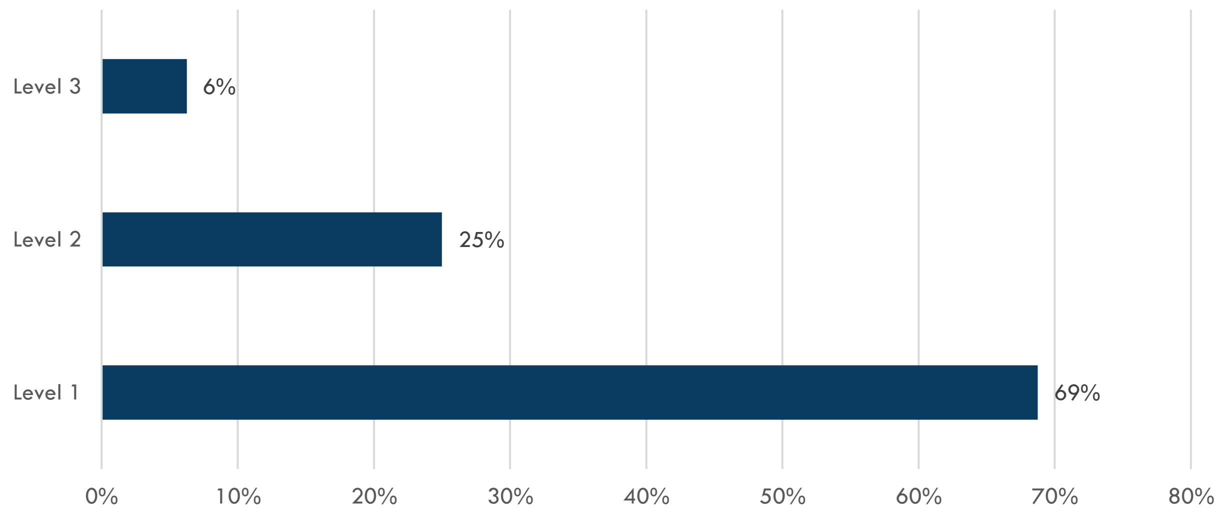


Source. Grievance data provided by LISD, 2020-21 to 2024-25

There are no applicable best practice benchmarks for the number or percentage of grievances filed. Further, the state does not collect these data. A school system's grievance volume could reflect the working environment, the degree of comfort employees have in filing grievances, or both. This complicates the ability to compare one district's grievance volumes and rates to another. However, LISD should use its own data to identify year-over-year trends (e.g., number of grievances filed, reasons for filing the grievance, time required to reach a resolution) in order to inform district policies and decision-making.

Figure 36 presents the number of grievances filed by level of resolution for 2020-21 to 2024-25 combined. Level 3 grievances are brought to the Board, Level 2 grievances are brought to the Superintendent or his/her designee, and Level 1 grievances are brought to the supervisor. Sixty-nine percent of all grievances remained at Level 1.

Figure 36. Percentage of Grievances Filed by Level of Resolution, 2020-21 to 2024-25 Combined



Source. Grievance data provided by LISD, 2020-21 to 2024-25

Employee Appraisals

Like most other HR functions in school districts, the LISD HR Department is responsible for managing the employee performance appraisal process. These responsibilities include:

- Ensuring steps in the actual process are followed; and
- Filing individual teacher/principal summaries and records showing the evaluation requirements are met.

LISD uses ten separate instruments/rubrics to evaluate its employees, which Table 19 details below.

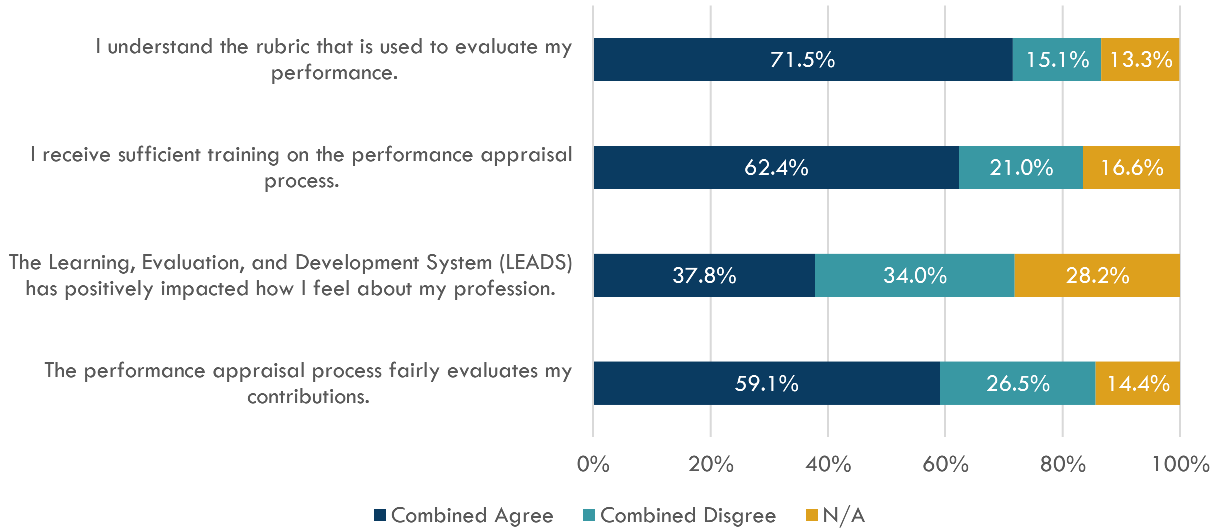
Table 19. LISD Appraisals and Description by Employee Group, 2025-26

Employee Group	Description
Teachers	Evaluates four standards: Planning, Instruction, Learning Environment, and Professional Practices & Responsibilities.
Administrative Professionals	Evaluates four standards: Instructional/Operational, Interpersonal, Professional, and Management.
Assistant Principals	Evaluates five standards: Instructional Leadership, Interrelational Leadership, Executive Leadership, Cultural Leadership, and Transformational Leadership.
Counselors	Evaluates four standards: Guidance Curriculum/Responsive Services/Individual Planning, Interpersonal, Professional, and Program Management/System Support.
Instructional Coaches	Evaluates four standards: Instructional System, Classroom Implementation, Leadership, and Professional Practices & Responsibilities.
Librarians	Evaluates four standards: Instructional System, Program Administration, Learning Environment, and Professional Practices & Responsibilities.
Nurses	Evaluates two standards: Professional and Performance.
Principals	Evaluates five standards: Instructional Leadership, Interrelational Leadership, Executive Leadership, Cultural Leadership, and Transformational Leadership.
Support Staff	Used for all non-teaching professionals. Evaluates five standards: Growth and Reflection, Collaboration and Contributions, Planning and Resources, Communication and Relationships, and Professional Standards.
Teachers (non-LEADS)	Evaluates four standards: Instructional, Interpersonal, Professional, and Management.

Source. Appraisal descriptions provided by LISD

In Gibson's staff survey, four questions were asked of staff related to employee appraisals. Figure 37 presents the questions and results.

Figure 37. Staff Survey Results – Employee Appraisals



Source. Gibson Consulting Group

Findings and Recommendations

Finding 12: Documentation related to employee misconduct is inconsistent and exposes the district to risk.

Employers are legally obligated to investigate complaints in the workplace – a process which is governed by laws such as Title VII, the ADA, and the Occupational Safety and Health Act (OSHA). At LISD, the HR Department is responsible for conducting employee investigations, but it is not exclusively responsible for the outcome of those investigations. Depending on the investigation, the General Counsel's Office and the LISD Police Department may also be involved.

The HR Department maintains employee relations (ER) files separate from personnel files. According to the district, these files are meant to include all documentation related to employee complaints, grievances, and investigations. As part of its audit testing, Gibson reviewed the district's ER files and found significant gaps in the completeness, detail, and general organization of LISD's ER files. The full results of the test are below.

Audit Test – Employee Relations Files

Test Objective

- Validate that a sample of employee relations files include all required documentation.

Test Approach

- Obtained a record of recent instances of employee misconduct, which included the district's response (i.e., investigation, Performance Improvement Plan [PIP], etc.)
- Judgmentally selected 10 incidents and requested those files from the district.
- Reviewed (in-person) each ER file for completeness (completed investigation packet, sufficient documentation, acknowledgements).

Out of 10 files reviewed, four contained sufficient supporting documentation. Table 20 displays the results. The highlighted files did not contain sufficient documentation.

Table 20. Employee Relations File Test Results

File Number	Primary Category	Gibson Notes
1	Hostile Work Environment	An investigation packet is referenced in the file but was not provided. There is no documentation evidencing the outcome of the investigation or any subsequent resolution or follow-up actions.
2	Professionalism	The email included in the file is unsigned, labeled as a draft, and it is unclear whether the communication was formally issued to the employee.
3	Professionalism	The file contains a completed investigation packet, including employee statements and a written investigative summary.
4	Performance	The file includes a signed email documenting a follow-up conversation with the employee. Documentation appears clear and complete.
5	Policy Violation	Disciplinary records indicate that an investigation occurred; however, no supporting investigation documentation is included in the file. Additionally, the circumstances described appear significant, yet documentation reflects only an informal conversation with no evidence of formal corrective action.
6	Professionalism	The file contains miscellaneous documents that do not clearly support the administrative action taken. There is no documentation explaining the basis for placing the employee on administrative leave. Although records reference an investigation, no investigation packet is included.
7	Professionalism	The file includes a signed email documenting a follow-up conversation with the employee. Documentation appears clear and appropriately maintained.
8	Employee/Student Relations	The file includes a partially completed investigation summary. Required information is missing, including identification of witnesses (e.g., parent, student, or staff).
9	Professionalism	The file includes a signed email documenting a follow-up conversation with the employee. Documentation appears clear and complete.

File Number	Primary Category	Gibson Notes
10	Policy Violation	An investigation packet is referenced in the file but is not included. There is no documentation demonstrating the resolution of the matter or any follow-up actions taken.

Source. Gibson Consulting Group

Incomplete and inconsistent ER files limit the district's ability to demonstrate that employee misconduct matters are handled in a timely, fair, and well-documented manner. When investigation records lack clear allegations, documented evidence, witness information, findings, or outcomes, the district is less able to support disciplinary decisions, respond to grievances or complaints, or defend its actions in the event of legal claims, external investigations, or public records requests. Poor ER documentation also reduces institutional knowledge, particularly when staff turnover occurs, and makes it difficult for district leadership to identify patterns of misconduct, repeat issues, or systemic risks. Over time, these weaknesses increase legal and reputational exposure, hinder effective decision-making, and undermine confidence in the district's ability to manage sensitive employee relations matters consistently and appropriately.

There are two primary factors contributing to the gaps and inconsistencies observed in LISD's ER files, both of which stem from the absence of a clearly defined, dedicated ER function. First, employee relations responsibilities are dispersed across multiple individuals and functions – including all three Executive Directors and staff within the Substitute Department – rather than being assigned to personnel whose primary role is ER. As a result, staff responsible for ER activities have not received formal training on how to conduct workplace investigations or perform other core ER functions (e.g., intake and triage, investigative planning, interviewing and evidence collection, documentation of findings, determining and documenting outcomes, and establishing follow-up actions). Second, because ER work is treated as an ancillary responsibility rather than a core function, investigative approaches, documentation standards, and handoff practices vary depending on who is involved in a given matter. This structure increases the likelihood of inconsistent investigative practices and incomplete documentation, and contributes to recurring gaps in critical elements such as witness identification, investigative summaries, determinations, employee acknowledgements, and evidence of resolution.

Recommendation 12: Establish a dedicated employee relations function.

The district should establish a dedicated ER function and strengthen investigation capability through standardized processes, training, and professional credentialing. This is consistent with Recommendation 2 in which ER serves as one of the HR Department's core major functions.

Specifically, LISD should designate an ER Lead accountable for the quality and consistency of investigations and ER file documentation, and require that the ER Lead obtain a recognized, advanced HR/ER certification (e.g., SHRM-SCP or an equivalent credential with a demonstrated focus on employee relations and investigations) within a defined timeframe (e.g., 12-18 months). To operationalize this recommendation, LISD should:

- **Assign clear ownership and governance:** Designate an ER Lead (and supporting staff, as appropriate) responsible for intake/triage, investigation planning, evidence collection and analysis, documentation of findings, coordination with General Counsel/LISD Police when applicable, and maintenance of the official ER file. Define decision rights and required handoffs across HR, General Counsel, and LISD Police, including documentation requirements when cases transition between functions.
- **Enforce established investigative tools and minimum documentation requirements:** Ensure that an investigation packet is completed for all cases. At minimum, require documented intake, allegation summary and scope, investigator assignment, witness list, interview notes/statements, evidence log, findings and rationale, determination/outcome, employee notification/acknowledgement (when applicable), documentation of corrective action, and documented follow-up/monitoring steps.
- **Build investigation capability through training and ongoing coaching:** Provide formal, role-based training for the ER Lead and any staff who conduct or support investigations (including campus leaders, HR partners, and other relevant roles) covering key ER competencies such as complaint intake, investigative interviewing, credibility assessment, documentation standards, confidentiality, timelines, and consistent case closure practices. Establish periodic calibration sessions led by the ER Lead to promote consistent investigative approaches and documentation quality.
- **Implement consistent file structure and quality control:** Create standardized file naming conventions and a uniform ER file structure (digital and/or physical), and require supervisory review of files prior to closure. Conduct routine quality assurance checks (e.g., quarterly sampling) against the checklist and track common deficiencies (e.g., missing investigation packets, missing determinations, incomplete witness documentation) to inform targeted retraining and process improvements.

Finding 13: Inflated performance evaluation scores undermine accountability and growth.

The school district evaluates the effectiveness and growth of its teachers and principals through the Learning, Evaluation, and Development System (LEADS). LEADS is a locally developed appraisal system, first implemented in the 2017-18 school year. Teachers and principals are rated on over a dozen indicators using the scale below:

- **Distinguished –** consistently delivers exceptional, standards-aligned instruction that results in high levels of student learning and student ownership of the learning process. Performance reflects best practice across planning, instruction, and classroom culture, and often serves as a model for others.
- **Accomplished –** consistently delivers strong, effective instruction aligned to standards and student needs, producing solid student growth and engagement for most learners. Practice is proactive and well-developed, with evidence of thoughtful adjustments and strong professional collaboration.
- **Proficient –** meets district expectations through reliable, standards-aligned practice that supports student learning and maintains an effective classroom environment. Instruction and professional

responsibilities are consistently fulfilled, with appropriate responsiveness to student needs and progress data.

- **Developing –** demonstrates emerging skills and partial alignment to expectations, but performance is inconsistent and outcomes vary across students or settings. Targeted support, coaching, and clearer consistency in implementation are needed to reach expected levels of effectiveness.
- **Improvement Needed –** does not yet meet expectations; critical elements of planning, instruction, classroom management, and/or professional practice are insufficient to ensure consistent student learning. Immediate, structured intervention and monitoring are required to address performance gaps and reduce risk to student outcomes.

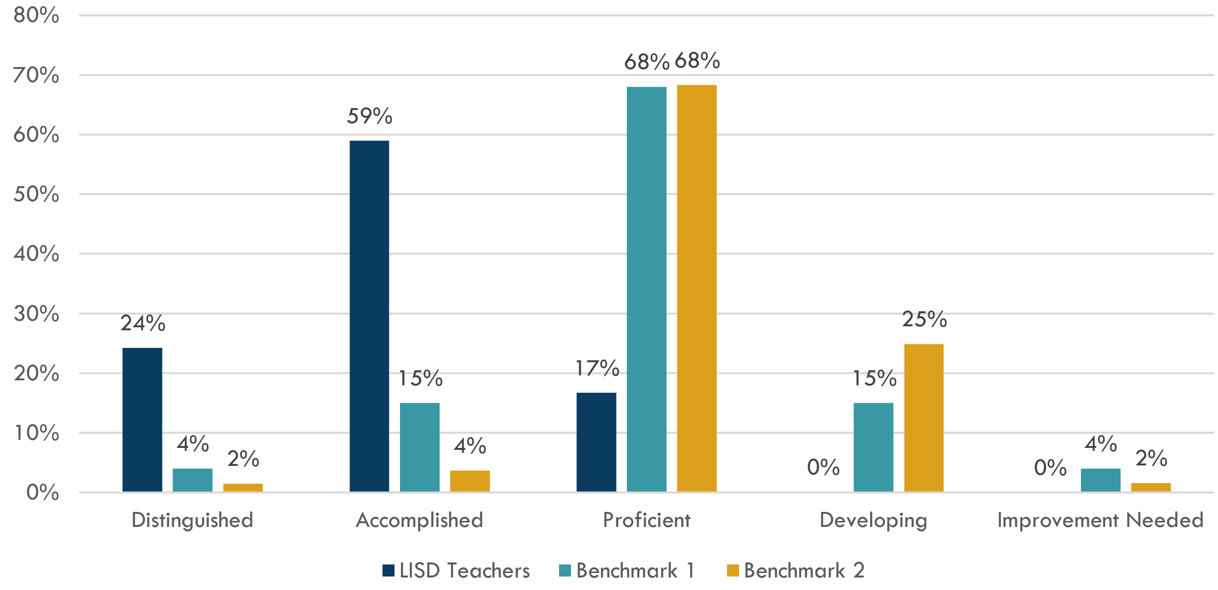
Facilitating a performance evaluation process at the scale of Leander ISD is a complex, resource-intensive undertaking that requires significant time, training, and coordination across the organization. The district trains hundreds of evaluators to manage extensive documentation and timelines, support goal setting, observations, conferences, and student growth measures for a large and diverse workforce. This level of operational complexity, combined with competing campus and central office demands, represents a significant investment of time and resources. However, the audit team's analysis of evaluation data shows that the district is likely not realizing the intended benefits from such an investment. Figure 38 presents 2024-25 LISD teacher evaluation scores compared to two separate benchmarks:

- **Benchmark 1 (Local ESC Calibration)**: Regional Education Service Centers train appraisers to expect a standard distribution where "Proficient is Rock Solid" and represents the core 60-75% of a healthy staff. Accomplished represents 10-20%, and Distinguished is reserved for the elite 2-5%.[7]
- **Benchmark 2 (State Empirical Data)**: In October 2017, the Institute of Education Sciences (IES) analyzed 8,250 teacher ratings across 51 districts. They established the actual statistical baseline for T-TESS: roughly 68% of teachers score Proficient, 25% score Developing/Needs Improvement, and only an elite 5% naturally achieve an Accomplished or Distinguished rating.[8]

[7] T-TESS Appraiser Training and Calibration Manual, TeachForTexas.org.

[8] Regional Educational Laboratory Southwest/IES Pilot Study.

Figure 38. LISD Teacher Evaluation Scores Compared to Benchmark Distributions, 2024-25



Source. LISD Teacher Evaluation Data, TEA Appraiser Manual, REL Southwest

As depicted above, Leander ISD's teacher evaluation data shows several significant issues which undermine the purpose and utility of its LEADS program:

- **Rating Concentration at the Top:** District results show 83% (1,295 teachers) were placed in the Accomplished and Distinguished tiers. Relative to typical benchmark distributions, this level of concentration reduces the system's ability to differentiate levels of practice and identify targeted development needs.
- **Limited Use of the "Proficient" Category**: Only 16.7% of teachers were rated Proficient. When Proficient is used infrequently, it becomes harder to interpret what "meeting expectations" looks like in practice and to use results consistently across campuses.
- **Very Small Representation in the Lower Categories:** One educator (0.06%) was rated Developing, and none were rated Improvement Needed. When lower categories are rarely used, the district has fewer documented signals to trigger structured support, follow-up, and monitoring for employees who may need additional coaching.
- **Pattern Appears Across Campuses:** This does not appear to be isolated to one location. Campus analysis shows 86% (38 of 44 schools) placed more than 70% of teachers in the top two tiers, and seven of eight high schools have more than 75% of teachers rated Distinguished or Accomplished. This consistency suggests districtwide calibration and shared expectations are opportunities for improvement.

These quantitative patterns are consistent with what the audit team heard in interviews – that employees and evaluators often view the evaluation process primarily as a compliance exercise rather than a meaningful tool for feedback, growth, and performance conversations. When evaluation outcomes do not differentiate levels of practice and are not consistently used to guide coaching, development planning, and follow-up, the system is less likely to influence instructional improvement or strengthen accountability, despite the significant time and effort required to administer it at scale.

Lastly, although the district does not currently participate in the Teacher Incentive Allotment (TIA), the observed evaluation data patterns would place the district at high risk if it were to pursue participation in the future. Based on current distributions, the observation data would likely perform poorly on Texas Tech University's data validation checks that assess alignment with statewide performance standards, signaling insufficient appraiser calibration and raising concerns about the validity and reliability of the evaluation system. If submitted as part of a TIA application, these issues could prevent system approval and limit the district's ability to access state-funded incentive compensation.

Recommendation 13: Calibrate the district's performance evaluation process.

The district should recalibrate its performance evaluation process to ensure ratings are applied consistently, differentiate levels of practice, and support the original intent of LEADS as a tool for growth and accountability. This includes clearly defining what performance levels look like in practice through shared districtwide expectations, concrete evidence examples, and aligned scoring guidance. Establishing common definitions will help evaluators apply standards more uniformly across campuses and roles.

To support consistent application, the district should strengthen evaluator training and calibration practices. This includes periodic calibration sessions using shared observation examples or anchor artifacts, setting expectations for inter-rater agreement, and reviewing rating distributions at the campus and district levels during the evaluation cycle. Regular monitoring of evaluation patterns will allow the district to identify where additional support or clarification is needed and reinforce consistent expectations without relying on informal norms or assumptions.

Finally, the district should more explicitly connect evaluation outcomes to coaching, professional development, and follow-up actions so the process has clear value beyond compliance. This includes establishing minimum growth or coaching actions associated with each performance level, strengthening mid-year feedback conversations, and tracking whether evaluations result in documented support, goal setting, or development activities. Using evaluation results in this way can help shift perceptions of the process from a procedural requirement to a meaningful tool for professional growth and instructional improvement.

Appendix A: Interview List

Individual Interviews

The audit team conducted interviews with the following 30 individuals who are employed at Leander ISD as administrators and staff (listed in alphabetical order):

- Sherri Anderson, HR Records Specialist, Temp Employees and Sub Program
- Scott Arterbury, Hiring Specialist, Transportation
- Dr. Rochelle Bond, Coordinator, Substitute Program
- Jamie Brzezinski, Campus Recruiter
- James Churchill, IT Project Manager
- Dr. Chris Clark, Deputy Superintendent of Learning and Innovation
- Lauren Clark, Benefits Analyst
- Kristin Daniels, Coordinator, Employee Records & Staffing
- Jennifer Dunn, Campus Recruiter
- Kindra Flores, District Receptionist
- Dr. Bruce Gearing, Superintendent
- Lisa Gibbs, Executive Director, Talent Acquisition & Employee Support
- Dr. Sarah Grissom, Deputy Superintendent of Administrative Services and Strategic Planning
- Erika Henning, Specialist, Blue Cross Blue Shield
- Beatriz Hernandez, Specialist, HR Records
- Martha Hinojosa, District Receptionist
- Carmen Lawson, Certification Officer
- Robin Lichtner, HR Claims Specialist
- Rachel Mackey, Executive Director, Human Resources
- Jamie McDonald, HR Records Specialist, Temp Employees and Sub Program
- Mindy Mendel, Specialist, HR Records
- Bella Mestoeva, Executive Director, Total Rewards
- Donita Meyer, Substitute Recruiter

- Dr. Casey O'Pry, Chief Human Resources Officer
- Sonia Owens-Walker, Specialist, HR Records
- Samantha Rodriguez, Leave/ADA ADM Analyst
- Jessica Scott, Hiring Specialist, CNS
- Kimberly Shafer, Analyst, ERP
- Amanda Vasquez, HR Records Specialist, Temp Employees and Sub Program
- John West, Senior Director, Support Services, Staffing, & Employee Relations

Group Interviews

The audit team conducted group interviews with the following stakeholders:

- Elementary and Secondary Teachers
- Elementary and Secondary Principals
- Auxiliary Staff

Appendix B: Staff Survey Results

Gibson developed and administered an online survey to all LISD staff. The survey was designed to measure staff satisfaction with the Human Resource Department's performance and related human resources functions. The survey was administered between October 27th and November 7th, 2025. In total, 1,766 staff completed the survey for an overall response rate of 25.7%. The survey was administered using Qualtrics, an online survey platform. The survey instrument included 36 items and incorporated a five-point rating scale: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree. Table B.1 below shows the results of each survey question as well as the total responses.

Table B.1. Staff Survey Results

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
The Human Resources Department provides sufficient opportunities to give feedback on its own programs and practices.	11.5%	44.8%	21.7%	9.9%	12.2%
"Let's Talk" is an effective way for LISD staff members to ask questions and provide feedback.	10.0%	43.0%	19.9%	8.9%	18.1%
I am satisfied with the overall customer service provided by the HR Department.	16.3%	50.5%	15.1%	7.3%	10.8%
HR staff are knowledgeable and up-to-date on HR policies and regulations.	18.8%	52.0%	8.2%	4.5%	16.5%
LISD's open enrollment process is easy to navigate.	15.6%	58.2%	15.1%	4.9%	6.2%
The district's benefits portal (Benefitplace) provides easy access to my benefits information.	15.0%	61.4%	12.1%	4.1%	7.4%
My questions regarding employee benefits are answered promptly.	13.2%	46.2%	10.4%	4.4%	25.9%
The information I receive about employee benefits is easy to understand.	12.3%	56.8%	18.3%	5.9%	6.7%
LISD's benefits program meets my needs.	8.2%	43.6%	23.1%	12.6%	12.5%
I am satisfied with my health insurance.	6.2%	34.4%	23.4%	15.2%	20.8%
Using my health insurance has been straightforward.	7.1%	48.5%	13.7%	8.1%	22.6%
I am satisfied with my dental insurance.	5.3%	37.2%	15.6%	11.3%	30.6%
I am satisfied with my vision insurance.	7.6%	42.8%	8.8%	4.9%	35.9%
I am satisfied with my retirement plan provided through LISD.	5.5%	40.0%	21.1%	9.2%	24.2%

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
I understand how my retirement plan works.	5.2%	35.2%	30.1%	14.3%	15.1%
LISD's Wellness Program (1You) has improved my experience at work.	3.8%	17.7%	18.2%	9.5%	50.8%
The HR Department answers my questions regarding compensation in a timely manner.	11.0%	45.6%	9.8%	8.4%	25.2%
I am compensated fairly for the work that I do.	5.0%	28.3%	30.0%	33.5%	3.1%
I am aware of how my pay is determined.	8.8%	54.1%	20.6%	14.3%	2.2%
I believe my pay is competitive with other nearby districts.	6.5%	38.4%	28.0%	21.2%	5.9%
My job description accurately describes the work I do.	9.9%	54.1%	21.1%	13.2%	1.8%
I never experience issues with my paycheck (e.g. inaccuracies, timeliness).	28.4%	56.8%	8.2%	4.1%	2.6%
I can easily access HR-related information (pay, benefits, leave) through the self-service portal.	22.5%	60.9%	10.4%	3.5%	2.7%
The performance appraisal process fairly evaluates my contributions.	10.2%	48.9%	16.8%	9.6%	14.4%
The Learning, Evaluation, and Development System (LEADS) has positively impacted how I feel about my profession.	6.7%	31.1%	21.8%	12.1%	28.2%
I receive sufficient training on the performance appraisal process.	11.2%	51.2%	13.0%	8.0%	16.6%
I understand the rubric that is used to evaluate my performance.	12.4%	59.1%	9.4%	5.8%	13.3%
HR responds promptly to employee complaints and grievances.	8.9%	29.3%	8.0%	7.3%	46.5%
I know who to reach out to for support if I have an issue with a colleague.	12.9%	50.8%	19.3%	8.9%	8.2%
I feel comfortable giving feedback on things that I think could be improved at LISD.	12.4%	46.6%	23.1%	12.6%	5.4%
Disciplinary actions are handled fairly and according to policy.	7.7%	33.0%	13.2%	9.7%	36.4%
Doing my job well leads to recognition and respect.	11.6%	46.5%	23.2%	13.2%	5.4%
LISD attracts top-quality candidates.	9.8%	54.7%	17.9%	6.2%	11.4%

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
I am satisfied with the time it takes to fill a vacancy.	6.2%	36.0%	27.5%	9.7%	20.7%
Technology is used effectively to expedite the hiring process.	8.1%	49.6%	8.0%	3.8%	30.5%
The district's onboarding program adequately prepares new employees.	7.8%	41.9%	20.8%	11.3%	18.2%

Source. Gibson Staff Survey

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Procurement Internal Audit

Prepared for:
Leander Independent School District

May 2026

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Appendix A: Interviews and Focus Groups List **A-1**

Chapter 1: Introduction

This report presents the results of the Purchasing Department Audit, as part of the Leander Independent School District's (Leander ISD's/LISD's/the district's) internal audit program to support continuous improvement. This audit began in August 2025 and was completed in December 2025. This introductory Chapter provides a summary of audit findings and recommendations, describes the audit scope and objectives, and presents a description of Gibson Consulting Group's (Gibson's) approach and methodology.

The audit team wishes to thank the LISD leadership and staff for their assistance in conducting this audit, and the Board Audit Committee for overseeing this important work.

Executive Summary

The LISD Purchasing and Materials Management Department (Purchasing Department) is responsible for the acquisition of more than $252 million of goods and services each year, representing the second largest category of expenditures – behind payroll-related expenditures. The department processes approximately 6,000 purchase orders (POs), including warehouse orders, each year with six full-time equivalent (FTE) staff. Purchasing is guided primarily by state law (reflected in board legal policies) and supplemented with local policy. LISD applies a centralized procurement function, managed through the Purchasing Department.

Overall, LISD performed very well in audit testing with respect to purchasing compliance. However, this audit identified several challenges within the district's procurement process that are adversely affecting its operating efficiency. These are highlighted below:

- **Lack of performance measures.** The LISD Purchasing Department does not track or analyze metrics to evaluate the efficiency and effectiveness of the procurement function, limiting the district's ability to hold the department accountable for performance. Current information systems track the data needed to develop these measures, and performance goals can be established for the department.
- **Delays in PO processing**. Fifty-six percent (56%) of 25 POs tested during this audit exceeded seven days of requisition processing time, with 12% taking more than 18 days. Delays were also cited as concerns by the majority of district and school staff interviewed (in individual and group interviews). These delays are primarily caused by LISD's current approval workflow requirements – configured in the district's financial information system, MUNIS. LISD's approval criteria requires every PO, regardless of the dollar amount, to be approved by the Senior Director of Purchasing. Errors discovered during the process require the entire process to be restarted from the beginning, and inadequate planning before school starts pushes too many procurement activities into the school year when time is of the essence. The combination of these factors creates delays in PO processing time. This audit suggests a re-engineering of the PO approval process that will improve process efficiency without sacrificing necessary internal controls.
- **Underutilization of the Procurement Card (Pro-Card) program.** The district's procurement card program (called Pro-Card at LISD), designed to expedite low-dollar purchases, is not experiencing

the expected efficiency or control advantages due to how the program is implemented. Current practices inhibit accountability and are inefficient; as a result, the Pro-Card program is underutilized. Recent restrictions intended to improve controls have inadvertently increased reliance on the inefficient PO process described above, further delaying the purchasing process. The district should maximize the benefits of the Pro-Card program by assigning cards to individuals (rather than groups or departments) and streamlining the Pro-Card transaction process. Pro-Card oversight can be further improved through the Finance Department's monthly analytical review – via data analytics – of Pro-Card transaction activity, in addition to spot-check testing of transactions and supporting documentation.

The results of this audit suggest that, while LISD is not understaffed, it feels understaffed because of inefficient processes. In this context, this audit identified six recommendations to improve the efficiency and effectiveness of the procurement function in Leander ISD. Table 1 lists all the recommendations, along with the audit team's assessment of priority.

Table 1. Audit Recommendation Summary Table

No.	Priority	Recommendation
1	High	Develop performance measures for the Purchasing Department.
2	Medium	Update and upgrade purchasing resource guides and training.
3	Medium	Develop standard district contract templates.
4	High	Streamline the purchase order approval workflow.
5	High	Strengthen vendor approval controls.
6	High	Restructure the Pro-Card program.

Source. Gibson Consulting Group, 2025

Project Objectives and Scope

The objectives of this audit were to evaluate the compliance, efficiency, and effectiveness of the Leander ISD Purchasing Department and to identify opportunities for improvement. Four major areas of the procurement function were analyzed during this audit:

1. Organization and Management;
2. Competitive Procurement and Contracting;
3. Purchasing (Purchase Orders and Pro-Cards); and
4. Receiving.

The audit addressed the following questions, organized by the major functional categories:

Organization and Management

- Have comprehensive policies, administrative regulations, and procedures been established for the procurement function at the district? Are these policies and procedures documented and communicated to all appropriate staff responsible for purchasing decisions?
- How does the district monitor compliance with applicable laws, policies, and administrative regulations governing procurements and contracting?
- Is the procurement function logically aligned within the district?
- How is functional performance measured and monitored? Do key performance indicators exist?
- What documented procedures exist to guide district staff through their procurement responsibilities? Are these procedures thorough, clear, and easily accessible?
- What professional development opportunities exist for procurement staff?
- How does procurement staff provide support to campus and departmental personnel?

Competitive Procurement and Contracting

- How does the district ensure they are receiving the best value for goods and services procurements?
- Are contracts appropriately reviewed and approved before execution?
- What processes exist for ensuring that performance obligations in contracts are met?
- Are contracts executed in a timely manner to ensure that goods and services are acquired when needed?
- How does the district ensure that purchases that are required to be competitively procured are solicited according to Texas Education Code (TEC) requirements?
- Do evaluation criteria align with TEC requirements? Are evaluation processes documented and monitored?

Procurement and Pro-Card

- Are POs used appropriately for district procurements?
- Are POs executed before the receipt and billing for goods and services?
- Are there adequate internal accounting controls, including segregation of duties, associated with purchasing and disbursement functions? Has information system use in procurement processes been maximized?
- Is the processing time for procurement activities, from requisition to PO issuance, aligned with district standards and industry best practices?
- Are there adequate controls over the issuance of Pro-Cards?
- Are district employees using their Pro-Cards for business purchases?

- Are Pro-Card transactions processed in a timely manner?
- Are Pro-Card transactions being settled appropriately by the district?
- Are Pro-Card purchases adequately documented and reviewed?

Receiving

- Are goods received on time?
- How is quality and quantity assessed before marking the order as received?
- What processes exist for communicating with the vendor if there is an issue with the order?
- What delivery requirements does the district place upon vendors to ensure that goods are securely received?
- How manual is the receiving process? Are paper receiving forms in use?

Project Approach

The findings and recommendations included in this report were informed by an approach that applied the following data collection and analytical activities.

Extant Data Analysis

The audit team reviewed Purchasing Department organizational charts, job descriptions, historical staffing and expenditure levels, and policies and procedures related to the procurement function. Data sets from the district's financial information system, MUNIS, were analyzed and used for audit testing and data analytics (described below). Pro-Card data sets were also reviewed. The audit team reviewed competitive procurement files to understand and test this procurement process.

Interviews and Focus Groups

In October of 2025, the Gibson audit team conducted 10 individual interviews and six focus group sessions with the Superintendent, central office administrators and staff, Purchasing Department staff, campus administrators, and campus Bookkeepers. The objectives of the interviews and focus group sessions were to gather information about LISD's procurement function and to assess stakeholder perceptions regarding areas of strength and opportunities for improvement.

A complete list of interviewees and focus group participants can be found in Appendix A: Interviews and Focus Groups List.

Audit Testing

Audit testing is an important component of an audit in that it involves the examination of actual transactions to ensure that policies and procedures are applied and that effective controls are in place. During testing, Gibson corroborates each aspect of the transaction selected through the review of all documentation retained for the transaction. Statistical sampling is not applied, nor is it necessary for the purposes of the audit. The audit team judgmentally selected items that were deemed representative of the population.

Data Analytics

Data analytics, different from the data "analysis" described above, encompasses a review of an entire population of transactional data over a defined time period to detect any anomalies that would indicate non-compliance with policies and procedures, lack of controls, and potential inefficiencies in processes. Examples of anomalies can include improper authorization (evidenced by the invoice date occurring before the PO date), splitting purchases to bypass purchasing thresholds (evidenced by multiple POs to the same supplier for similar items during a short window of time), and the identification of duplicate or "ghost" vendors (evidenced by the same contact information across multiple vendors).

Table 2 provides a summary of the audit transaction testing and data analytics performed during this audit.

Table 2. Audit Transaction Testing and Data Analytics Summary

Procedure	Procedure Name	Sample Size	Procedure Overview
Test 1	Competitive Procurement	10	To validate that district policies regarding competitive bidding were followed, that the proper evaluation criteria were used, that the appropriate evaluation committee was established, that vendor responses supported scoring and selection of awarded vendors, and that the competitive procurement was properly approved by the board, if required.
Test 2	Contracts	10	This test could not be performed and is discussed later in this report.
Test 3	Pro-Card Transactions	20	To validate that the proper supporting evidence was submitted, appropriate approval was obtained, the proper budget code was used, and the transaction amount was below the approved Pro-Card limit.
Test 4	PO Issuance	20	To validate that requisitions were submitted with the appropriate supporting documents, that requisitions were from an approved vendor, that POs were properly approved by the Purchasing Department, and that the proper budget code was used.
Test 5	Receiving	20	To validate that receipt of goods occurred after the issuance of the PO and that it was properly communicated to the Accounts Payable Department.
Analytics 1	Procurement Cost per PO	N/A	To compare LISD's procurement cost per PO to Council of the Great City Schools (CGCS) metrics.
Analytics 2	Unusual PO Numbers	N/A	To validate proper PO numbers were used.
Analytics 3	Unusual PO Dates	N/A	To validate POs were issued on proper dates.

Procedure	Procedure Name	Sample Size	Procedure Overview
Analytics 4	Long-standing Open POs	N/A	To validate the aging of open POs.
Analytics 5	Improperly Issued POs	N/A	To validate POs were issued before the invoice date.
Analytics 6	Procurement Administrative Lead Time (PALT) for Informal Solicitations	N/A	To compare LISD's number of days from the receipt of requisition by the Purchasing and Contracts Department to date of PO issuance to CGCS metrics.

Source. Gibson Consulting Group, 2025

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

Chapter 2: Organization and Management

Chapter 3: Competitive Procurement and Contracting

Chapter 4: Procurement (Purchase Orders and Pro-Card)

Chapter 5: Receiving

Appendix A: Interviews and Focus Groups List

Chapter 2: Organization and Management

This Chapter presents the regulatory framework for the procurement function and assesses several components related to the organization and management of the LISD Purchasing Department.

Regulatory Framework

School districts in Texas are required to follow federal and state laws and procedures applicable to purchasing. The purpose of competitive bidding requirements found in the TEC, Section 44.031, is to stimulate competition, prevent favoritism, and secure the best goods and services needed for district operations at the lowest possible price. The Texas Education Agency (TEA) developed a comprehensive purchasing module in the Financial Accountability System Resource Guide (FASRG), which is available as a resource for district purchasing.

In addition to TEC 44.031, several board policies govern the purchasing and contracting process in Leander ISD. Below is an overview of the key policies. Legal policies are those required by state law; local policies are additional policies not required by law but adopted by the Leander ISD Board of Trustees.

Policy CH (Legal) outlines the methods and requirements for competitive procurement, including contract award criteria. TEC 44.031 is the basis for this policy.

Policy CH (Local) outlines additional requirements for purchasing at LISD. These are described below.

- Authority and Responsibility: The Superintendent or designee is authorized to make purchases for the district, following board-approved budget allocations and applicable laws and regulations.
- Purchasing Procedures: All purchases must comply with state and federal laws, including competitive bidding requirements. The district may use cooperative purchasing programs to obtain goods and services efficiently. Vendors must meet district standards and may be evaluated based on price, quality, and service.
- Ethical Standards: Employees involved in purchasing must avoid conflicts of interest. Gifts or favors from vendors are prohibited to maintain integrity in procurement.
- Contract Management: Contracts must be reviewed and approved by authorized personnel. Multi-year contracts require board approval unless otherwise delegated.
- Emergency Purchases: In urgent situations, the Superintendent may authorize purchases outside of normal procedures, with documentation and justification.

Policy CHE (Legal) outlines the requirement for vendors to communicate any conflicts of interest (via a conflict-of-interest questionnaire) if the vendor has a business relationship with the district and:

a. Has an employment or other business relationship with an officer of the district, or a family member of the office described by Local Government Code 176.003(a)(2)(A); or

b. Has given an officer of the district, or a family member of the officer, one or more gifts with the aggregate value specified by Local Government Code 176.003(a)(2)(B), excluding any gift described by Local Government Code 176.003(a-1); or

c. Has a family relationship with a local government officer of the district.

The policy states that the district should post the completed conflict of interest questionnaires on the district's website.

Additionally, this policy lists required contract boycott provisions:

- *Israel:* The district may not enter into a contract with a company for goods and services unless the contract contains a written verification from the company that it does not boycott Israel and will not during the term of the contract.
- *Energy companies*: The district may not enter into a contract with a company for goods or services unless the contract contains a written verification from the company that it does not boycott energy companies and will not boycott energy companies during the term of the contract.
- *No discrimination against firearm and ammunition industries*: The district may not enter into a contract with a company for the purchase of goods or services unless the contract contains a written verification from the company that it does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association, and will not discriminate during the term of the contract against a firearm entity or firearm trade association.

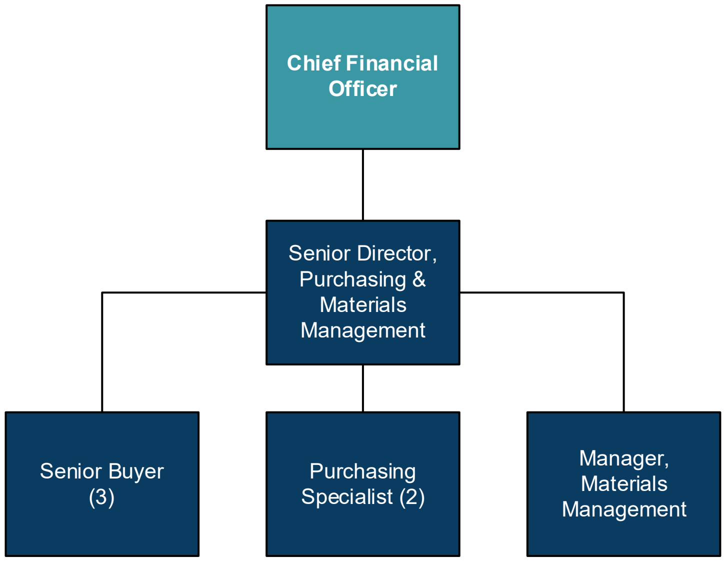
Additional purchasing policies are referenced later in this report. During the 89th session of the Texas Legislature in 2025, several changes were made that affected procurement activities in school districts. Under Senate Bill 1173, the increase in the minimum expenditure level requiring competitive purchasing was changed from greater than $50,000 to greater than $100,000. Stricter rules governing contracts with vendors who have business relationships with school board members or their relatives were implemented under House Bill 210. As of the date of the audit field work, revised board policies related to these changes had not been distributed by the Texas Association of School Boards (TASB). LISD, like most Texas school districts, uses this policy service. Accordingly, for the purposes of this audit, prior law was applied.

Departmental Overview

All Leander ISD purchasing functions, with the exception of food service procurement, are managed centrally by the Purchasing Department. The district has a central warehouse that stores certain maintenance supplies, food and commodities for child nutrition services, and instructional materials. Warehouse operations are outside the scope of this audit.

The Purchasing Department is aligned under the Chief Financial Officer (CFO). The organizational structure of this department changed during the audit. At the start of the audit in August 2025, the Purchasing Department had seven FTE. During the audit, two departmental positions were merged into one, and the department was reduced to five FTE's including the Senior Director of Purchasing & Materials Management and four Procurement Officers. The Senior Director of Purchasing & Materials Management also oversees the Manager of Materials Management, who does not have procurement responsibilities. Figure 1 depicts the organizational structure of the Purchasing Department as it existed in August 2025.

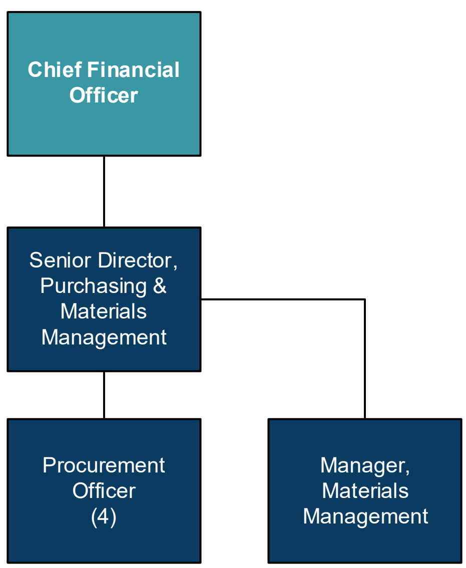
Figure 1. Purchasing Department Organization Chart, August 2025



Source. Created by Gibson based on interviews

During the audit, the Senior Buyer and Purchasing Specialist positions were converted/promoted to "Procurement Officer" positions. The current organizational chart appears in Figure 2. These changes created consistency across the team, strengthened support for end users, and should help achieve better alignment in the distribution of workload.

Figure 2. Purchasing Department Organizational Chart, November 2025



Source. Created by Gibson based on interviews

Overview of Major Responsibilities

The Senior Director of Purchasing is responsible for managing the purchasing function in LISD. The Senior Director is a signatory on district contracts and assists in high-value, complex, competitive solicitations. The Senior Director is ultimately accountable for compiling and submitting documents to the Board of Trustees in support of purchases requiring board approval.

Below are responsibilities of the previous departmental positions, as this structure was in effect during our field work:

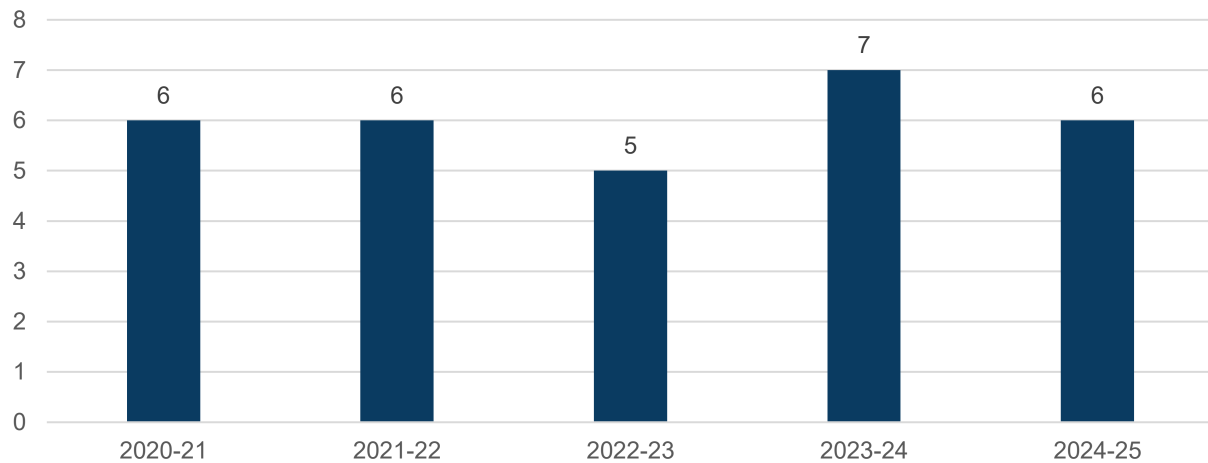
- The Senior Buyer is responsible for procuring supplies, equipment, and services to support district operations, ensuring purchases are made at the best value and in compliance with applicable laws and policies. This role manages complex and district-wide procurements, develops and issues solicitations, evaluates vendor responses, and oversees contract awards. The Senior Buyer also manages vendor relationships, the district's Pro-Card program, and contract agreement management, while providing training to staff and acting as a liaison between vendors and district personnel. The position requires strong analytical, negotiation, and organizational skills, as well as the ability to handle multiple projects and ensure compliance with district and legal requirements.
- The Purchasing Specialist is tasked with purchasing supplies, equipment, and services to meet the ongoing needs of district campuses and departments, ensuring compliance with statutes, policies, and guidelines. Acting as a liaison for assigned customer groups, the Specialist analyzes requirements, sources vendors, and assists with the development and management of solicitations and contract awards. The role includes reviewing purchase requisitions, managing documentation for audits, supporting the Pro-Card program, and facilitating contract agreement management. The Purchasing Specialist also provides training to staff, participates in departmental meetings, and maintains a high standard of customer service and ethical conduct.
- The Manager of Materials Management oversees distribution operations, including warehousing, instructional materials, records retention, mail, surplus goods, and courier services, as well as document production and new school templates. This role provides leadership in managing, developing, and evaluating employees and departmental processes, and is responsible for material and inventory control, timely delivery of goods, and surplus disposal. The Manager forecasts resource needs, implements process improvements, and ensures compliance with policies and deadlines. Additionally, the role involves staff training, operational planning, and fostering effective communication across departments to support efficient supply chain management and continuous improvement. This role is not included in the scope of this audit.

The new Procurement Officer position is responsible for acquiring supplies, equipment, and services to support district operations, ensuring all purchases deliver best value and comply with applicable laws, policies, and guidelines. This role manages complex and district-wide procurements, develops and issues solicitations, evaluates vendor responses, and oversees contract awards and agreement management. Acting as a liaison for campuses and departments, the Procurement Officer analyzes requirements, sources vendors, reviews requisitions, and maintains documentation for audits. Additional responsibilities include managing vendor relationships, supporting the Pro-Card program, providing staff training, and upholding high standards of customer service, ethical conduct, and compliance while handling multiple projects effectively.

Department Staffing and Expenditures

Figure 3 presents departmental full-time equivalents (FTEs) over the past five years. Departmental FTEs in 2024-25 were the same as they were in 2020-21, but annual amounts have fluctuated. The most recent decrease in 2024-25 was due to budget cuts implemented throughout the district. By way of comparison to similar-sized school districts, Round Rock ISD has five purchasing positions and Killeen ISD has eight.

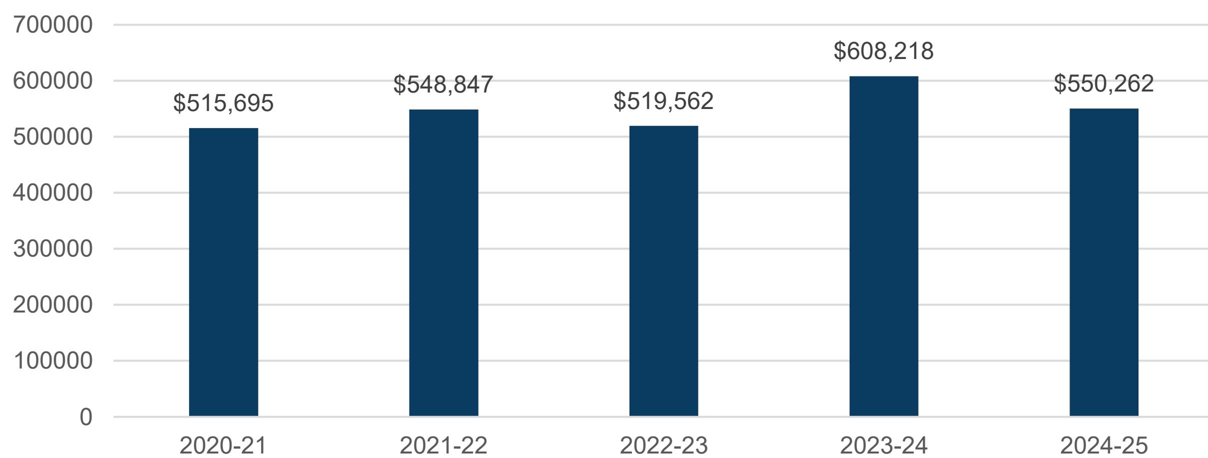
Figure 3. LISD Purchasing Department FTE, 2020-21 to 2024-25



Source. LISD staffing data, 2020-21 to 2024-25

Purchasing Department expenditures have fluctuated in a similar manner over the five-year period, as the majority of expenditures represent payroll costs. Figure 4 presents department expenditures over the past five years.

Figure 4. Purchasing Department Expenditures, 2020-21 to 2024-25



Source. LISD expenditure data, 2020-21 to 2024-25

Systems Overview

The district uses MUNIS as its Enterprise Resource Planning (ERP) system for financial and human resources information processing. MUNIS is used to capture all purchasing transactions for the district and facilitates the process from requisition to payment.

In addition to MUNIS, the district uses a variety of systems to manage different aspects of the procurement and contracting functions, including the following:

- IonWave is a supplier registration database and e-bid system. The system houses bids, supplier information, and administrative information and has the ability to run reports related to procurement.
- Access is a system used by the district for contract management and vendor management.
- Google Suite is used by the district to streamline collaboration and communication by providing tools such as Google Drive, Google Docs, and Google Sheets. These tools enable secure file sharing, real-time document editing, and centralized access to resources.

Operating Procedures

Standard operating procedures (SOPs) describe the activities required to execute purchasing transactions in accordance with board policy. LISD publishes a Purchasing Manual each fiscal year that is accessible online by LISD employees. Topics include procurement procedures, including thresholds, commodity codes, required information, and allowable purchases, among others. This manual serves as the primary procurement guidance for staff districtwide.

Training

There are two categories of procurement training – one for departmental staff and one for departmental leaders and staff, and school administrators and staff, who initiate and/or approve purchasing transactions.

Departmental and campus Administrative Assistants and Bookkeepers play a critical role in LISD's procurement process. These staff members initiate requisitions for goods and services on behalf of their campus or department, monitor expenditures against the budget, and assist in managing available funding. They also process Pro-Card transactions, reconcile monthly spending, and report totals to the district's Pro-Card Coordinator.

In performing these duties, Bookkeepers and Administrative Assistants are required to comply with all applicable state laws, district policies, and established procedures to ensure consistency across campuses and departments. The Purchasing Department provides targeted training for these positions at the beginning of each school year. This training event includes:

- Information regarding the department's intranet;
- Departmental contacts;
- Purchasing cut-off dates;

- Purchasing thresholds;
- Purchasing ethics and policies;
- Pro-Card processes and procedures;
- Vendor registration and modification processes;
- Communications to expect from the department;
- Commodity code overview; and
- MUNIS's requestion workflow and receiving workflow.

Findings and Recommendations

Finding 1: The lack of performance measures limits the ability to hold the Purchasing Department accountable for performance.

Through interviews and document requests, the audit team found that the Purchasing Department does not develop or track any measures to evaluate departmental performance. This inhibits the ability of senior district leadership to hold the department accountable and limits the ability of department leadership to hold department staff accountable.

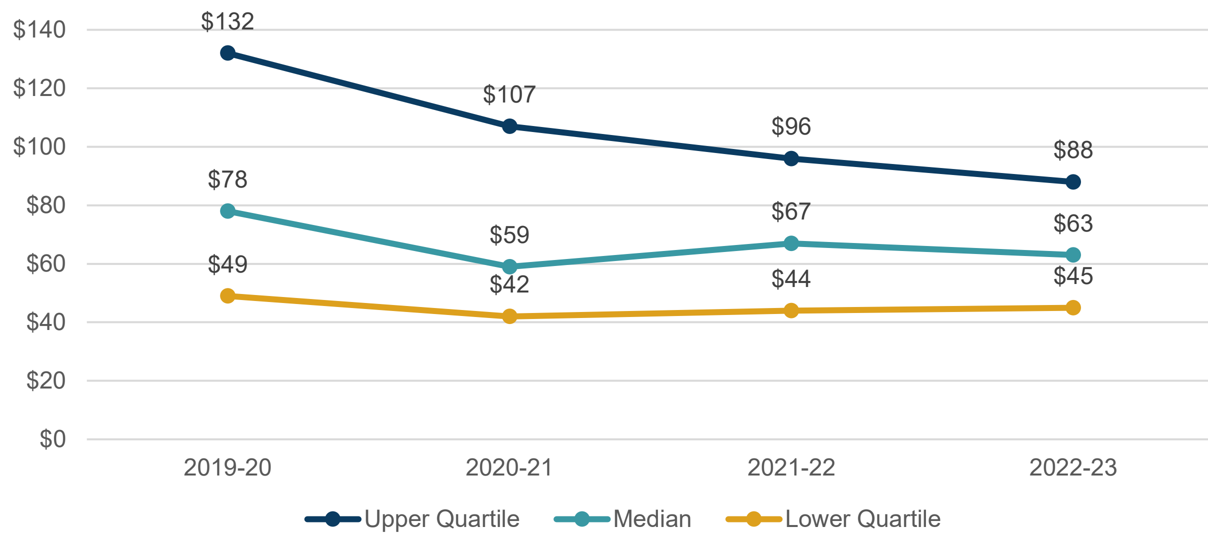
The CGCS collects data from urban districts (voluntarily) that are used to calculate and compare performance measures across many district departments and functions, including purchasing. While LISD does not meet the definition of an urban district, Gibson has found that several of these benchmarks provide reasonable comparisons for larger suburban school districts. Below are examples of performance measures tracked by the CGCS related to purchasing. Most of these measures generally exclude construction expenditures:

- Purchasing Department cost per purchase order;
- Ratio of competitive procurements to total procurements;
- Ratio of Pro-Card procurements to total procurements;
- Average Pro-Card procurement dollar amount per transaction;
- Ratio of cooperative purchasing to total procurements;
- Average number of days between purchase requisition date and PO date;
- Average number of days between PO date and receipt date;
- Average number of days between Request for Proposal (RFP) issuance and resulting contract date;
- Ratio of purchasing staff with a professional certification to total purchasing staff; and
- Purchasing Department staff turnover.

The audit team calculated the LISD procurement cost per PO for the 2024-25 school year by dividing the total Purchasing Department costs by the total number of POs that were processed by the department.

Gibson then compared it to the CGCS metrics in order to determine how LISD's procurement cost per PO aligned with CGCS benchmarks. A higher procurement cost likely indicates departmental inefficiencies, such as manual processing or higher personnel costs. A lower procurement cost indicates processing efficiencies, such as automated procure-to-pay and efficient staffing. Figure 5 presents the CGCS lower, median, and upper quartile ranges for the urban school districts reporting.

Figure 5. CGCS Procurement Cost per PO, 2019-20 to 2022-23



Source. Managing for Results in America's Great City Schools, 2024

LISD's procurement cost per PO in 2024-25 was $93.25 ($550,262 of expenditures/5,901 issued POs), falling above the 2022-23 upper quartile of the CGCS metric. LISD's measure is two years later than the most recent CGCS data above, but the CGCS data is trending downward or is flat depending on the quartile. The above analysis shows the benefit of tracking key performance measures to support a broader assessment of efficiency and effectiveness by LISD on an ongoing basis.

Recommendation 1: Develop performance measures for the Purchasing Department.

The district should consider and experiment with CGCS measures, in addition to other measures the administration believes would help evaluate and continuously improve the efficiency and effectiveness of the procurement function. The district should also take advantage of available features within the MUNIS ERP system to automate data collection and possible reporting for these metrics.

Management Response: Management agrees with this recommendation.

Finding 2: There is insufficient training on purchasing processes and procedures.

The district currently provides annual training for campus Bookkeepers and departmental Administrative Assistants, supplemented by refresher sessions upon request and quarterly newsletters addressing common purchasing issues. Training resources, including annual training materials, are housed in the TRAIN depot, which is intended to serve as a central repository for manuals and guides. However, our assessment of the TRAIN depot through read-only access, supported by interviews and focus groups, reveals that these efforts are not fully meeting staff needs. The TRAIN depot contains outdated materials and is difficult to navigate, making it challenging for staff to locate relevant information efficiently. For example, Gibson's assessment noted that approximately 65% of links pertaining to purchasing documents were non-functional, and that the most recent file update dated back to the 2022-23 school year. Content completeness and clarity are also inconsistent. Staff members reported uncertainty about correct purchasing procedures and expressed frustration with not knowing whom to contact for support. This can result in processing errors, leading to extended processing times.

Recommendation 2: Update and upgrade purchasing resource guides and training.

The district should undertake a comprehensive review of its purchasing training program and resource repository. All manuals, guides, and reference materials in the TRAIN depot should be updated to ensure they are current, accurate, and aligned with district policies and best practices. The TRAIN depot interface should be redesigned to facilitate intuitive navigation and quick access to frequently used resources, with clear categorization of topics. Mandatory, periodic training sessions, outside of the annual training, should be implemented for all staff involved in purchasing, with targeted modules addressing common pain points and updates to procedures. Additionally, the district should publish and regularly update a contact list for purchasing support, ensuring staff know whom to approach for specific questions. Establishing a formal process for staff to provide feedback on training effectiveness and resource usability will help drive continuous improvement. These actions will increase staff competence, reduce errors and inefficiencies, and ensure compliance with district policies, ultimately fostering a culture of continuous improvement and accountability within the procurement function.

Management Response: Management agrees with this recommendation.

Chapter 3: Competitive Procurement and Contracting

The TEC 44.031 outlines the methods to be used by the district to procure goods and services. TEC 44.031 serves as the basis for Board Policy CH (Legal), which states that all district contracts (with the exception of vehicle fuel and produce) of $50,000 or more in the aggregate for each 12-month period should be made by the method that provides the best value for the district. This policy changed in the 2025-26 school year, increasing this amount from greater than $50,000 to greater than $100,000. However, as of November 2025, LISD had not yet received the recommended policy change from the TASB. Accordingly, this audit applied prior law.

Table 3 presents the required documentation, competitive solicitation requirements, and advertising requirements for different purchasing levels and types in Leander ISD.

Table 3. LISD Procurement Thresholds and Requirements

Is it an Existing Awarded Vendor?	Purchase Amount	Documentation Required	Formal Procurement Methods	Advertising
No	Purchases less than $1,500	One quote	Not required	Not Required
No	Purchases between $1,500 and $99,999	Quote summary form and three quotes	Not required	Not required
No	Purchases above $100,000	Solicitation award	Required	Required
Yes	Purchases up to $250,000	One quote	District award or cooperative contract	Not Required
Yes	Purchases above $250,000	Quote summary form and three quotes	District award or cooperative contract	Not Required

Note. RFQ stands for Request for Qualifications.

Source. LISD Purchasing Manual, 2025

The State of Texas Procurement and Contract Management Guide (developed by the Texas Comptroller's Office) describes the competitive procurement activities in the public procurement cycle in five steps:

- **Step 1 – Procurement Planning:** Define the business need and establish the procurement objectives;
- **Step 2 – Procurement Method Determination:** Identify the appropriate procurement method and, if applicable, issue a solicitation;

- **Step 3 – Vendor Selection:** Fairly and objectively select the vendor that provides the best value to the organization;
- **Step 4 – Contract Formation & Award:** Ensure that the awarded contract complies with applicable procurement laws and contains provisions that achieve the procurement objectives; and
- **Step 5 – Contract Management:** Administer and enforce the terms of the contract.

In Leander ISD, the Purchasing Department manages the competitive procurement process for assigned commodities and vendors. It collaborates with the requesting campus or department to develop proposal or bid specifications, while the campus or department defines the scope of work. Once finalized, the requesting unit reviews and approves the proposal or bid package before it is advertised. In compliance with TEC 44.031, the district advertises locally for two weeks, and each solicitation is assigned a sequential number.

Before initiating a competitive bid or proposal, Procurement Officers also review LISD board-approved purchasing cooperatives to identify whether goods or services are available at competitive pricing. These cooperatives are listed below:

- 1GPA (1Governmental Procurement Alliance);
- BB (TASB BuyBoard);
- CP (Choice Partners – Harris County Department of Education);
- CTPA (Central Texas Purchasing Alliance);
- DIR (Texas Department of Information Resources);
- E&I (E&I Cooperative Services);
- EQUALIS (EQUALIS Group);
- ESC2 (GoodBuy);
- ESC3 (Purchasing Cooperative of America);
- ESC5 (Southeast Texas Purchasing Cooperative);
- ESC6 (EPIC6);
- ESC8 (TIPS);
- ESC16 (TEXBUY);
- ESC19 (Allied States Cooperative);
- ESC20 (Texas 20);
- GSA (US General Services Administration);
- HGAC (Houston-Galveston Area Council);
- KPN (Keystone Purchasing Network);
- OMNIA;
- PACE;

- SCWL (Sourcewell/NJPA);
- TASB EC (TASB Energy Cooperative);
- TEA (Texas Education Agency);
- TEEBC (Texas Educational Employers Benefit Cooperative);
- TEJAS (Tejas School Services Purchasing Cooperative); and
- TXSPD (Texas State Purchasing Department).

The primary purpose of competitive bidding is to encourage fair competition and secure the lowest practical price for the goods, services, or work required. According to the FASRG, this process requires that all RFPs be formally evaluated and that awards are made strictly based on the specifications, terms, and conditions outlined in the RFP. Awards must reflect the bid prices offered by vendors and consider other relevant factors that could impact contract performance. Once bids are opened, pricing cannot be negotiated or altered.

The competitive sealed proposal process follows the same terms and conditions as competitive bidding, with one key difference: flexibility after opening. Unlike bids, proposals allow for negotiations regarding the nature of the proposal or pricing after the initial opening, enabling the district to consider additional factors and achieve the best overall value.

To determine if a competitive procurement is needed, the requestor should reach out to the procurement team to ensure it is necessary. To facilitate the competitive procurement process, the district uses an e-procurement system called IonWave. Using this software, interested vendors may register and access the details of the bids/proposals and respond electronically with all necessary forms. A "bid solicitation" is created in IonWave by the Director or Procurement Officer for all bids and proposals. Procurement personnel meet with the requestor to discuss timelines and to determine specs in order to create an appropriate RFP. At the creation of the bid solicitation, a due date is designated for vendors to submit their bid/proposal. IonWave tracks all responses and makes them available to be viewed by the Director or Procurement Officer on the closing date. Hard copy responses are also accepted. However, the district encourages vendors to use IonWave.

After the due date, an evaluation committee is designated by the requesting department or campus to review submissions along with the requesting department/campus. Proposals are evaluated based on the scope of work set forth in the bid invitation.

Contract awards are based on an evaluation of the potential vendor responses using all the criteria set forth in the bid solicitation. Evaluation of responses is handled by the requesting department/campus and involves any related departments or campuses, as needed. Documentation of the evaluations typically includes price tabulations and copies of the responses from vendors. Depending on the bid/proposal, multiple vendors may be awarded. Once a vendor is awarded, a letter is sent to the selected vendor.

Audit Testing and Data Analytics

The audit team performed transaction testing and data analytics (both described in Chapter 1) on competitive procurements. The following presents a description of each audit activity, the approach applied, and the audit results.

Audit Test 1: Competitive Procurement Testing

The audit team designed a test to determine if appropriate procedures are conducted for competitive procurements.

Test Approach

- Gibson obtained a record of all competitive procurements that occurred between July 2024 and September 2025;
- Judgmentally selected 10 samples for testing;
- Obtained supporting documentation from LISD;
  - Ensured district policies regarding competitive bidding were followed **(Test 1)**;
  - Determined if the listed evaluation criteria were appropriate **(Test 2)**;
  - Ensured the evaluators were appropriate, given the nature of the request **(Test 3)**;
  - Determined if vendor responses supported the scoring and selection of awarded vendors **(Test 4)**;
  - Ensured the response for the awarded vendor was complete **(Test 5);**
- Obtained the board agenda containing the agenda item to vote on the competitive procurement; and
- Determined if the competitive procurement was appropriately presented to the board **(Test 6)**.

Test Results

Please refer to Table 4 below. “P” indicates that the sample passed the test, “F” indicates that the sample failed the test, and “N/A” indicates that the test was not applicable for the sample or could not be performed.

Table 4. Competitive Procurement Testing Results

Sample	Test 1	Test 2	Test 3	Test 4	Test 5	Test 6
1	P	P	P	P	P	P
2	P	P	P	P	P	P
3	P	P	P	P	P	P
4	P	P	P	P	P	P
5	P	P	P	P	P	P
6	P	P	P	P	P	P

Sample	Test 1	Test 2	Test 3	Test 4	Test 5	Test 6
7	P	P	P	P	P	P
8	P	P	P	P	P	P
9	P	P	P	P	P	P
10	P	P	P	P	P	P

Source. Gibson Consulting Group, 2025

- **Test 1 – Were district policies regarding competitive bidding followed?**
  - 10 out of 10 samples followed district policies regarding competitive bidding.
- **Test 2 – Were the evaluation criteria appropriate?**
  - 10 out of 10 samples had appropriate evaluation criteria.
- **Test 3 – Were the evaluators appropriate, given the nature of the request?**
  - 10 out of 10 samples included appropriate evaluators.
- **Test 4 – Did vendor responses support scoring and selection of awarded vendors?**
  - 10 out of 10 samples included vendor responses that supported the scoring and selection of awarded vendors.
- **Test 5 – Was the response for the awarded vendor complete?**
  - 10 out of 10 samples contained complete responses from the awarded vendors.
- **Test 6 – Was the competitive procurement appropriately presented to the board?**
  - 10 out of 10 samples were appropriately presented to the board.

Audit Test 2: Contract Testing

The audit team designed a test to determine if current contracting practices are in accordance with Purchasing Department procedures.

Test Approach

- Gibson obtained a record of all current contracts that were active as of September 2025;
- Judgmentally selected 10 samples for testing;
- Obtained contract documentation;
  - Ensured the contract obtained proper approvals **(Test 1)**;
  - Ensured the purchased items were included in the scope of the contract **(Test 2)**; and
  - Ensured the contract was executed before the PO was created **(Test 3).**

Test Results

Please refer to Table 5 below. “P” indicates that the sample passed the test, “F” indicates that the sample failed the test, and “N/A” indicates that the test was not applicable for the sample or could not be performed.

Table 5. Contract Testing Results

Sample	Test 1	Test 2	Test 3
1	P	P	P
2	P	P	P
3	P	P	P
4	P	P	P
5	P	P	P
6	P	P	P
7	P	P	P
8	P	P	P
9	P	P	P
10	P	P	P

Source. Gibson Consulting Group, 2025

- **Test 1 – Were proper approvals obtained for the contract?**
  - 10 out of 10 samples contained proper contract approval.
- **Test 2 – Were the items purchased included in the scope of the associated contract?**
  - 10 out of 10 samples were items purchased that were included in the scope of the associated contract.
- **Test 3 – Was the contract date prior to the PO date?**
  - 10 out of 10 samples had a contract date prior to the PO date.

Findings and Recommendations

Finding 3: The district overly relies on vendor-provided contracts.

The district’s current competitive contracting process does not utilize district-developed contract templates. Instead, contracts are typically based on vendor-provided documents or cooperative agreements. This practice was confirmed through contract testing, interviews with procurement staff, and a review of contract files.

This approach appears to be extending the time it takes to execute a contract and may contribute to other risks. Under the current approach, each contracting cycle requires a thorough legal review to ensure that all necessary terms and conditions are included and current. Staff reported that the absence of standardized district contracts makes it difficult to guarantee that all compliance requirements and legal protections are sufficiently and consistently incorporated into contractual agreements. Furthermore, contracts often lack embedded performance metrics or expectations, limiting the district's ability to monitor vendor outcomes and hold suppliers accountable for results.

Recommendation 3: Develop standard district contract templates.

The district should create and adopt standard contract templates for use in all competitive procurement activities. These templates should be developed in collaboration with legal counsel and relevant stakeholders to ensure that all essential district terms, compliance requirements, and legal protections are included by default. Standard contract language should address key areas such as indemnification, termination rights, data privacy, and dispute resolution. Importantly, the templates should also incorporate clear performance metrics and improvement plans, enabling the district to monitor vendor performance and drive accountability. By implementing district-owned contract templates, the procurement team can streamline the contracting process, reduce review time, and ensure consistency across agreements. The district should also leverage features within the MUNIS system to support contract management, including tracking contract terms, renewal dates, and performance outcomes. This approach will improve efficiency, mitigate risk, and strengthen the district's position in vendor negotiations.

Management Response: Management agrees with this recommendation.

Chapter 4: Purchasing

This Chapter reflects the results of audit procedures conducted for purchases that are under $50,000. These procurements do not require competitive bidding. For these purchases, the district uses either POs or Pro-Cards to procure goods and services with approved vendors. A Pro-Card is a credit card typically used for small dollar purchases, and has additional controls available to control and monitor spending. Pro-Cards help the school district obtain lower-priced goods more quickly, since a PO is not required for each transaction.

The following sections present descriptions of the PO and Pro-Card processes.

Purchase Order Process

The district predominantly uses POs to procure goods and services. During the audit period, the district processed over 6,000 POs with an associated value of over $303 million. Table 6 displays the POs stratified by individual PO value. While PO transactions not subject to competitive bidding represented 87.2% of total PO purchases, they represented only 13.8% of the total PO dollar volume.

Table 6. PO Volume by Dollar Category, May 2024 to August 2025

PO Value	No. of POs	Percent	Value of POs	Percent
$0-$1,000	1,513	23.9%	$680,851	0.2%
$1,001-$5,000	1,996	31.5%	$5,292,698	1.8%
$5,001-$10,000	775	12.3%	$5,583,602	1.9%
$10,001-$20,000	545	8.6%	$7,985,624	2.6%
$20,001-$50,000	688	10.9%	$22,219,371	7.3%
Sub-Total (< or = $50,000)	**5,517**	**87.2%**	**$41,762,146**	**13.8%**
>$50,000	811	12.8%	$261,345,426	86.2%
Total	**6,328**	**100%**	**$303,107,572**	**100%**

Note. POs greater than $50,000 were subject to competitive bidding.

Source. Purchase Order Listing, FY2025

The PO process begins when a district staff member, typically a department Administrative Assistant, school Administrative Assistant, or Bookkeeper, submits a purchase requisition via MUNIS. The requester is responsible for entering the associated budget code, commodity code,[1] and awarded contract number (if applicable), and attaching all required backup documentation, including quotes for non-awarded vendors

[1] A commodity code is a six- to 10-digit international identification number used to classify goods for shipping, customs declarations, and tax purposes.

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over $1,500. Before submitting a requisition, staff should verify if the needed items are available through the district warehouse.

MUNIS "workflow" functionality allows transactions to be transmitted electronically for required approvals through a pre-defined sequence and approval criteria. Approval criteria may include the amount of the purchase, the type of purchase, the source of the procurement (e.g., a school), the budget code, and funding source. The workflow is configured by the district to reflect which positions have authority to approve purchases and in what sequence. Before initiating the procurement, the requester must ensure sufficient funds are available in the intended budget code. If sufficient funds are not available, a budget transfer request must be submitted and approved by the Finance Department within MUNIS. MUNIS is configured to prevent a purchase requisition from being processed without sufficient funds.

Requisitions using federal funds are routed to the Federal Programs Department, which reviews the requisition for compliance with grant requirements and verifies that three quotes have been obtained, when required. For purchases qualifying as exemptions or professional services, the requisition is routed according to district and statutory guidelines.

The Purchasing Department provides a final review of the requisition, verifying compliance with LISD bid awards, cooperative purchasing requirements, contract information, and federal purchasing rules. Only district staff with delegated signature authority may approve and sign contract agreements, and agreements flagged for legal review are routed to LISD Legal Services. If the vendor is not active in MUNIS, the requester must coordinate completion of the Vendor Information Form (VIF) to enable vendor setup.

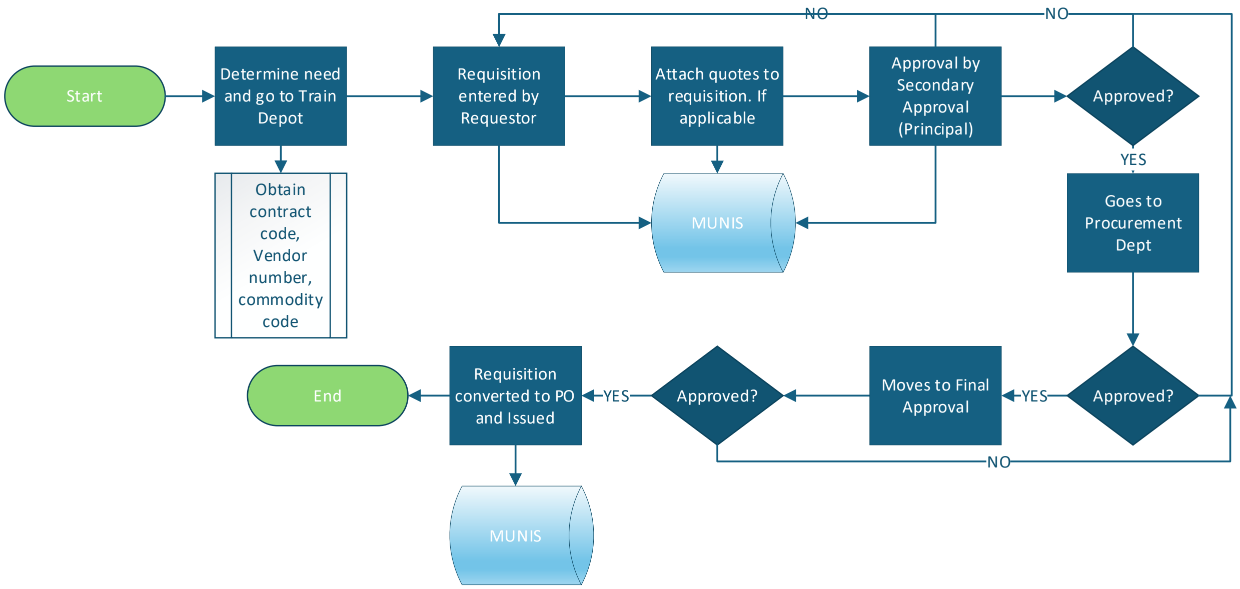
For requisitions exceeding $50,000 in aggregate under a commodity code within a fiscal year, a formal competitive award process is required, and additional approvals are triggered. The Purchasing Department's review consists of the following attributes:

- LISD Bid Award
  - Correct bid number, commodity code, vendor, pricing, and shipping
  - General notes
  - Supporting documents are attached
  - Account code is correct
- Cooperative Purchases
  - Review cooperative bid requirements for correct bid number, commodity code, vendor, pricing, and shipping
  - General notes
  - Supporting documents are attached
  - Account code is correct
- Contracted Services
  - Review contract information for correct pricing, vendor, dates, and account code
  - Contractor form is completed, reviewed by employee services, and attached

  - Only district staff with delegated signature authority may approve/sign contract agreements
  - Agreements flagged for legal review are routed to LISD Legal Services
- Federal Purchases
  - Review information for award bid number, account code, vendor, pricing, and shipping
  - General notes include Campus Improvement Plan (CIP) goal
  - One attachment includes three quotes and marked "NO" for public view
  - One attachment for the invoice or quote and marked "YES" for public view

The requester must also select the appropriate receiving method, either "Receive by Quantity" for itemized purchases or "Receive by Amount" for services and blanket POs, to ensure proper processing. Figure 6 presents the MUNIS purchase requisition workflow applied by LISD.

Figure 6. MUNIS Purchase Requisition Workflow



Source. Created by Gibson Consulting Group, based on the LISD Procurement and Contracts Process and Procedures Manual, FY2026

After all reviews and approvals are completed, the Senior Director of Purchasing and Materials Management converts the requisition to a PO. MUNIS assigns a PO number, and the PO is submitted to the vendor as specified in the vendor profile. The process is paperless, supporting efficient processing.

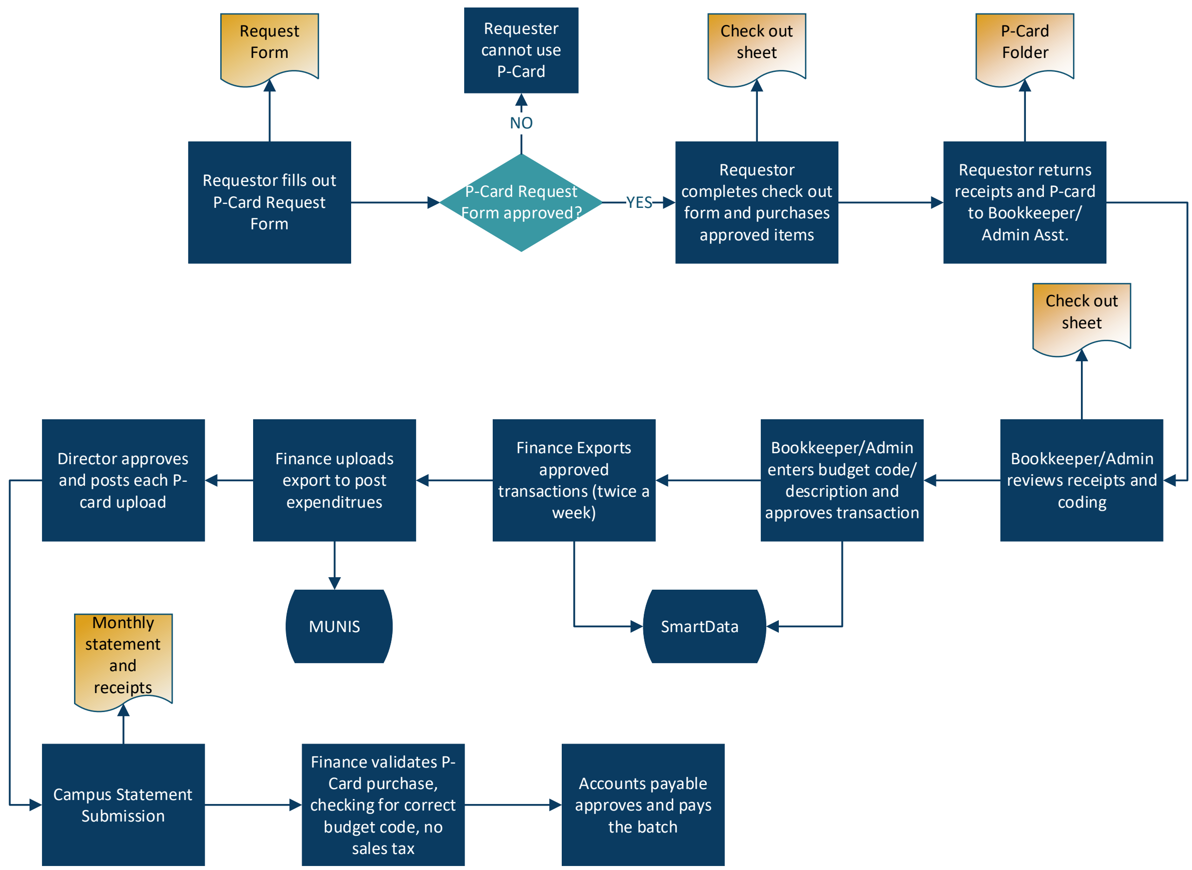
Blanket POs (BPOs) are used for recurring purchases from the same vendor and are tracked in MUNIS by encumbered amount and commodity code. If a vendor does not accept a PO or check, and prior approval is obtained from the Senior Director of Purchasing and Materials Management, a Pro-Card may be used in accordance with district policy.

Pro-Card Process

Pro-Cards are credit cards that have controls to limit and monitor spending. When used appropriately, Pro-Cards can increase the purchasing efficiency of lower-priced items. The ability to purchase smaller value items without issuing a formal PO can save districts time, allowing more Procurement Department effort to be devoted to higher dollar procurements. The Pro-Card program is governed by the administrative procedures outlined in the Procurement Card Manual.

The district follows a structured process to ensure proper use and reconciliation of Pro-Card transactions. Figure 7 illustrates this process, which is described below.

Figure 7. Pro-Card Process Map



Source. Gibson Consulting Group, based on LISD interviews

The process begins when a requestor completes a check-out form and uses the Pro-Card to purchase approved items. After the purchase, the requestor returns the receipt to the designated Pro-Card Specialist, typically a Bookkeeper or Administrative Assistant. The Pro-Card Specialist reviews the receipt for compliance, including verifying that no sales tax was charged, and records the appropriate budget code on the check-out sheet. Next, the Pro-Card Specialist logs into the JPMorgan Chase SmartData system to review the charges. Budget code allocations are entered from the check-out sheet along with a description of the business purpose for each transaction. Once this information is verified, the Specialist approves the transaction in SmartData.

Twice weekly, Finance and Accounts Payable Department staff export all approved transactions from the SmartData Online (SDOL) system. This export file is then provided to the Finance Accounting Technician, who imports the data into MUNIS by uploading a general journal containing the transactions and descriptions to post to the appropriate expenditure accounts. The Accounting Technician resolves any account code errors generated by MUNIS and releases the journal into the workflow for approval. The Director then reviews and approves each Pro-Card general journal upload.

At the end of each cycle, campuses submit a paper copy of the monthly statement signed by the budget manager, along with all receipts and any sales tax reimbursement documentation. Accounting Technicians review these reports to validate budget codes and confirm that no sales tax was paid. If necessary, journal entries are posted to correct any account coding errors.

Audit Testing and Data Analytics

Audit Test 3: Pro-Card Transaction Testing

The audit team designed a test to determine if proper procedures are followed in the district when Pro-Cards are used.

Test Approach

- Gibson obtained a record of all Pro-Card transactions from July 2024 and June 2025;
- Judgmentally selected 20 samples for testing;
- Obtained supporting evidence;
  - Ensured supporting evidence was submitted for the transaction **(Test 1)**;
  - Reviewed the applied budget coding to determine if the correct codes were applied **(Test 2)**;
- Obtained evidence of approvals;
  - Ensured proper approval was obtained **(Test 3)**;
- Obtained Pro-Card limits for selections on transaction dates; and
  - Ensured each transaction amount was below the approved Pro-Card limit **(Test 4)**.

Test Results

- Please refer to Table 7 below. “P” indicates that the sample passed the test, “F” indicates that the sample failed the test, and “N/A” indicates that the test was not applicable for the sample or could not be performed.

Table 7. Pro-Card Transaction Testing Results

Sample	Test 1	Test 2	Test 3	Test 4
1	P	P	P	P
2	P	P	P	P
3	P	P	P	P
4	P	P	P	P
5	P	P	P	P
6	P	P	P	P
7	P	P	P	P
8	P	P	P	P
9	P	P	P	P
10	P	P	P	P
11	P	P	P	P
12	P	P	P	P
13	P	P	P	P
14	P	P	P	P
15	P	P	P	P
16	P	P	P	P
17	P	P	P	P
18	P	P	P	P
19	P	P	P	P
20	P	P	P	P

Source. Gibson Consulting Group, 2025

- **Test 1 – Was proper supporting evidence submitted by the cardholder?**
  - 20 out of 20 samples submitted supporting evidence.
- **Test 2 – Was required approval obtained?**
  - 20 out of 20 samples obtained required approval on the monthly statements.
- **Test 3 – Was the proper budget code used?**
  - 20 out of 20 samples used the proper budget code.
- **Test 4 – Was the transaction amount under the approved limit?**
  - 20 out of 20 samples had a transaction amount under the approved limit.

Audit Test 4: PO Issuance Testing

The audit team designed a test to determine if POs are issued according to purchasing procedures.

Test Approach

- Gibson obtained a record of all POs issued by the Purchasing Department between May 2024 to August 2025;
- Judgmentally selected 20 samples for testing;
- Obtained the budget code used for the requisition and PO;
  - Reviewed the requisition, PO, and applied budget code to determine if the correct codes were applied **(Test 1);**
- Obtained approved vendor listing;
  - Ensured the selected vendor was included on the approved vendor listing **(Test 2)**;
- Obtained evidence of PO approval;
  - Determined if the PO obtained the appropriate approval **(Test 3)**; and
  - Determined if the PO was submitted with the appropriate supporting documentation **(Test 4).**

Test Results

Please refer to Table 8 below. “P” indicates that the sample passed the test, “F” indicates that the sample failed the test, and “N/A” indicates that the test was not applicable for the sample or could not be performed.

Table 8. Requisition and PO Issuance Testing Results

Sample	Test 1	Test 2	Test 3	Test 4
1	P	F	P	P
2	P	F	P	P
3	P	F	P	P
4	P	P	P	P
5	P	F	P	P
6	P	P	P	P
7	P	P	P	P
8	P	F	P	P
9	P	P	P	P
10	F	P	P	P
11	F	P	P	P
12	F	P	P	P

Sample	Test 1	Test 2	Test 3	Test 4
13	P	P	P	P
14	P	P	P	P
15	P	P	P	P
16	P	P	P	P
17	P	P	P	P
18	F	F	P	P
19	F	F	P	P
20	P	F	P	P

Source. Gibson Consulting Group, 2025

- **Test 1 – Was the proper budget code used?**
  - 15 out of 20 samples used the proper budget code.
  - Five out of 20 samples used an incorrect budget code.
- **Test 2 – Does the requisition and PO indicate use of an approved vendor?**
  - 12 out of 20 samples contained approved vendors.
  - Eight out of 20 samples used an unapproved vendor.
- **Test 3 – Was the required approval obtained for the PO?**
  - 20 out of 20 samples obtained the required approval.
- **Test 4 – Was proper supporting documentation submitted with the requisition?**
  - 20 out of 20 samples contained appropriate supporting documentation.

Data Analytics 1: Unusual PO Numbers

Analytics Approach

Gibson obtained a listing of all POs processed during the audit period (6,328). The listing was analyzed and stratified to identify anomalies in the data. The listing below is a summary of the data analytics results.

Analytics Results

Gibson did not identify any PO numbers that did not follow the expected eight-digit format.

Data Analytics 2: Unusual PO Dates

Analytics Approach

This analysis looked for PO dates that occurred on holidays or weekends.

Analytics Results

Gibson did not identify any PO dates that occurred on holidays or weekends.

Data Analytics 3: Longstanding Open POs

Analytics Approach

This analysis looked at all outstanding open POs that were issued no less than one year ago. POs that are open for more than one year likely encumber funds across multiple fiscal years, locking up funds that could be used for other purposes.

Analytics Results

Gibson did not identify any POs that have been outstanding for one year or more at the time of this audit.

Data Analytics 4: Improperly Issued POs

Analytics Approach

Gibson obtained PO and accounts payable disbursement data sets for FY2025 and FY2026 (as of September 15, 2025) in order to identify the magnitude of potentially improperly issued POs.

Gibson compared each PO issuance date to the associated invoice date. The logic behind this comparison is that, if the vendor invoice date is prior to the PO date, it would indicate an improperly issued PO.

Analytics Results

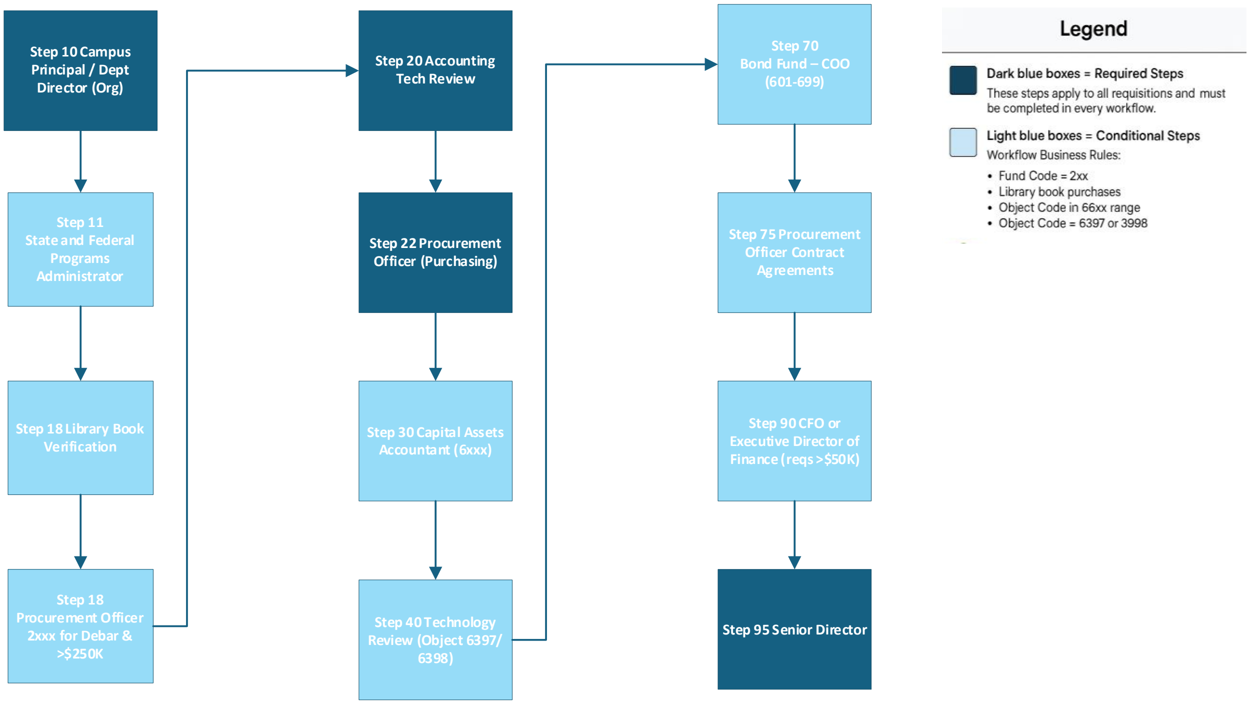
Gibson did not identify a single PO that was issued after the corresponding invoice.

Findings and Recommendations

Finding 4: The district's PO approval process is inefficient and contributes to longer PO processing times.

Sample testing, manual review of PO records in MUNIS, and staff interviews indicate that the district's PO process experiences significant delays. The current approval workflow, as documented in the requisition process map above, requires a minimum of four sequential approval steps within the Procurement Department, with additional steps triggered by certain budget codes (e.g., technology, capital assets, bond funds, federal programs, or library books). Each approval depends on the prior step, creating a linear process where any delay extends the full processing timeline. Figure 8 illustrates the requisition approval workflow. Please note the step numbers listed are automatically assigned by MUNIS and are not sequential.

Figure 8. Requisition Approval Workflow



Source. Leander ISD Procurement Department, FY2026

The current configuration of the MUNIS workflow approval for purchase requisitions requires the Senior Director to approve all purchase requisitions, regardless of the dollar amount. Due to the transaction volume, this alone can cause delays in the process. Other factors can also contribute to delays. For example, incorrect commodity code entry during the requisition phase does not halt the process until Step 22 (the second non-conditional approval step – and fifth overall – in the process above), requiring the process to restart. Another example cited during interviews was the lack of adequate planning for materials and supplies needed during the year. LISD staff perceived that many purchases could have been done in bulk during the summer, reducing the need for multiple orders (under time pressure) during the school year. While separate from the process itself, this issue could significantly reduce transaction volumes related to purchase requisitions.

The combination of the factors above appears to be directly contributing to processing delays. Staff reported that processing can take several days to several weeks, affecting timely procurement of materials, supplies, and low-cost equipment such as walkie talkies.

Audit Testing

Audit Test 5: Processing Time

Test Approach

In order to corroborate information discovered in interviews, the audit team performed transaction testing analyzing the number of days from the receipt of requisition by the Purchasing Department to the date of PO issuance. Twenty-five (25) samples were selected from a listing of POs from July 2024 to September 2025. The audit team then calculated the time between receipt by the Purchasing Department and assigned ranges to each sample selection.

Test Results

Table 9 presents the results of this testing. Sample items shaded in green represent six days or less of processing time. Sample items shaded in yellow represent seven to 10 days, and items shaded in red represent more than 10 days. Out of 25 samples, 28% fell into the yellow range and 28% were in the red range, or 56% combined.

Table 9. Comparison to CGCS PALT for Informal Solicitations Metrics

Sample	Days in Purchasing
1	5
2	4
3	5
4	9
5	4
6	35
7	4
8	6
9	9
10	9
11	10
12	19
13	13
14	8
15	7
16	5

Sample	Days in Purchasing
17	5
18	22
19	4
20	14
21	12
22	1
23	5
24	7
25	11

Source. Gibson Consulting Group, 2025

Recommendation 4: Streamline the PO approval workflow.

To address delays in the PO process, the district should make several changes to the requisition approval process. Five implementation strategies are recommended:

- **Staggered approval levels** – The Senior Director of Purchasing should not need to approve all POs regardless of size. A minimum level required for the Senior Director's review should be determined by the CFO, and the MUNIS workflow should be adjusted accordingly. As shown above, 55% of all PO transactions are less than $5,000. LISD could start with a lower threshold, then increase it over time after weighing the balance of improved efficiency with adequate financial controls.
- **Amount-based thresholds for approved vendors** – LISD should consider establishing amount-based aggregate thresholds (at or below legal limits) so that low-dollar requisitions from approved vendors can move directly to PO conversion, while higher-value purchases follow appropriate approval paths.
- **Parallel approvals** – Parallel approvals, such as allowing the Accounting and Purchasing Departments to review requisitions simultaneously, will reduce wait times and shorten overall cycle time.
- **Targeted training** – The requisition approvers should identify the most frequent errors detected in the process (e.g., commodity code entry, documentation requirements) and provide targeted training in those areas to staff entering the requisition in MUNIS.
- **System controls** – Available system controls within MUNIS should be researched and implemented to identify errors before submission and also allow corrections without restarting the process.

The PO process map should be updated and shared with all staff involved in the process. Regular monitoring and reporting of PO processing times using MUNIS features will help identify ongoing issues and support continuous improvement.

In addition, the district should implement pre-planning for recurring purchases by encouraging campuses and departments to forecast and initiate orders ahead of peak periods, such as before the start of the school year. Pre-ordering essential supplies in advance (during the summer) would help reduce the likelihood of bottlenecks during the school year. Operational "readiness" at the beginning of the school year would help ensure that campuses have the necessary resources when they need them.

Management Response: Management agrees with this recommendation.

Finding 5: Non-approved vendors are used in the purchasing process.

Testing of procurement transactions (Test 3 above) revealed multiple instances where purchases were made from vendors who had not been formally approved by the district. Interviews with staff further indicated that the vendor setup process can be lengthy, often taking several weeks due to extended approval timelines. This delay in onboarding new vendors leads some staff to bypass established procedures in order to meet urgent purchasing needs.

The use of non-approved vendors introduces compliance and legal risks, as purchases may not adhere to district policies or state regulations. Additionally, this practice represents a breakdown in internal controls, undermining the integrity of the procurement process and increasing the potential for errors or fraud. The overall purchasing process is further slowed by the time required to approve new vendors, compounding inefficiencies and making it more difficult for campuses and departments to obtain necessary goods and services in a timely manner.

Recommendation 5: Strengthen vendor approval controls.

To address these issues, the district should reinforce internal controls to ensure that purchases are only made from approved vendors. This includes implementing system safeguards within MUNIS to prevent the processing of POs for non-approved vendors and conducting regular audits of procurement transactions for compliance. The vendor setup process should be reviewed and streamlined to reduce approval times, such as by automating documentation collection, clarifying approval responsibilities, and leveraging self-service modules for vendor onboarding. Clear communication and training should be provided to all staff regarding the importance of vendor approval and the risks associated with non-compliance. By strengthening controls and expediting the vendor setup process, the district can mitigate legal and compliance risks, improve internal controls, and enhance the overall efficiency of purchasing operations.

Management Response: Management agrees with this recommendation.

Finding 6: The district's use of Pro-Cards does not achieve the intended benefits of the program.

Pro-Cards are designed to support a highly efficient process for small-dollar purchases while holding individuals with authorized cards accountable for spending. LISD's current Pro-Card transaction process does not hold individuals accountable, is not efficient, and is accordingly underutilized. Each of these topics is discussed further below.

Lack of Individual Accountability

Pro-Cards are typically assigned to individuals. Spending controls can be established for each individual, including dollar limit per month, dollar limit per transaction, a restricted list of vendors, budget codes, and even the time of day or day of the week when use is allowed. Currently, LISD has 424 Pro-Cards in use; however, only 31 (or 7.3%) are assigned to individuals. The remaining 393 cards are assigned to groups or departments. The individual spending controls described above cannot be effectively applied at the group level, since the transaction will only identify the card and not the individual that used it. As a result, the control benefits of the Pro-Card are substantially diminished.

Inefficient Processing

As a result of the above approach, Pro-Card transactions are processed much like other purchasing transactions. Each transaction, along with supporting documentation, is submitted by the card user or the Administrative Assistant or Bookkeeper with access to the card to a member of the administrative support staff, who reviews, approves, and enters the information on the SmartData online platform. The card user is not always responsible for data entry or uploading receipts, as this responsibility lies with the Administrative Assistant or Bookkeeper in the department. The Pro-Card process was designed to place the burden of the transaction process on the card user who is benefiting from its use. The card user should enter the transaction data, including budget codes, and upload supporting documentation.

Underutilization

In the 2024-25 school year, the Purchasing Department recognized that Pro-Cards were not being appropriately used. In response, the department decided to limit the use of Pro-Cards. A notification was sent to all individuals and groups authorized to use Pro-Cards that the cards should only be used in instances where a traditional PO was not accepted. Due to this change, Gibson conducted a year-over-year analysis to determine the extent to which Pro-Card use has changed. As shown in Table 10 below, Pro-Card use has drastically decreased from the prior year due to this change.

Table 10. LISD Pro-Card Usage, October 2024 and October 2025

Date	Transaction Count	Transaction Amount
October 2024	5,627	$1,766,138
October 2025	3,635	$645,879
Percent Change	-35.4%	-63.4%

Source. Calculated by Gibson Consulting Group using LISD Pro-Card Transaction Listings, October 2024 to October 2025

During interviews, Gibson heard many concerns related to the new Pro-Card limitations. The PO process was already perceived as taking too long, and the delays in that process increased further after the P-Card limitations were implemented. While blanket POs can be used, the Finance Department has restricted the number of items per blanket PO to 10, which limits their effectiveness for recurring, low-dollar purchases.

Recommendation 6: Restructure the Pro-Card program.

Through a phased approach, the district should redesign the Pro-Card program to align with industry best practices. This will significantly improve purchasing efficiency and support stronger accountability for Pro-Card use. There are several elements to this recommendation, which are discussed below:

- In the initial phase, Pro-Cards should be issued to high-frequency users. Over time, all Pro-Cards should be issued to individual staff members when appropriate, and reduce the number of groups or departments cards to ensure accountability and traceability of purchases.
- Spending controls should be established for each individual cardholder (or groups of cardholders with identical privileges, if the SmartData system supports this), applying the control variables described above, plus consideration of any additional controls offered through the SmartData system.
- Pro-Card holders should be responsible for entering transaction data and uploading supporting documentation (via scanning or photograph) into the SmartData system.
- Administrative support staff time at the department and school levels should no longer be needed to support Pro-Card transaction processing.
- Because Pro-Card purchases are small-dollar amounts, the supervisory review (by the Finance Department) can occur on a spot-check basis, using the Pro-Card information system to run data analytics on spending to detect unusual anomalies. Spot checks can result in increased oversight of individuals or prompt the termination of Pro-Card privileges. Approvals are not necessary at the transaction level, and administrative support time is not necessary.
- The Finance Department should be responsible for performing data analytics on the Pro-Card transaction data on a weekly basis initially, identifying anomalies and investigating questionable use. Each cardholder, regardless of the analytics, should be subject to an audit of one month's transaction data each year. Repeated improper use should result in the loss of Pro-Card privileges. Once the Finance Department sees evidence of consistent compliance, data analytics and audit testing could be done less frequently.
- Pro-Card procedures should be updated to reflect the roles and responsibilities of the participants in the new process, step-by-step processes for SmartData entry and uploading, a description of the controls to be applied and consequences for non-compliance, frequency and content of required Pro-Card training, and the required Pro-Card reporting of the Finance Department.

Management Response: Management agrees with this recommendation. The Procurement Department will fully oversee and manage all Pro-Cards for the district. Training and stricter guidelines will be implemented for all department/campus cards.

Chapter 5: Receiving

Bookkeepers and Administrative Assistants at each campus or department are responsible for receiving deliveries under LISD's direct delivery model, where vendors ship goods directly to the final location rather than to a central warehouse. The district does maintain a central warehouse for specific items such as maintenance supplies, food and commodities for nutrition services, and instructional materials. Orders placed through the district warehouse are delivered by warehouse staff to campuses or departments.

Upon delivery, Bookkeepers or Secretaries inspect the goods before recording receipt in MUNIS. They compare the packing slip to the contents of the shipment to ensure accuracy and completeness. If issues arise, such as incorrect or damaged items, they contact the vendor to resolve the problem or seek assistance from the Procurement Officers.

Once the goods are verified or any discrepancies are resolved, the Bookkeeper or Secretary records receipt in MUNIS using the PO number. They access the PO in the system and enter the quantity of items received. This confirmation is then visible to the Accounts Payable Department, which processes payment upon receipt of the vendor's invoice.

Audit Testing

Three-way matching is a process used in many organizations to prevent incorrect or fraudulent invoice payment. The three-way match process involves comparing the PO, invoice, and goods receipt to make sure they match, prior to approving the invoice. Receiving is the third and final step of the three-way matching process.

Test 4: Receiving Testing

The audit team designed a test to determine if the receipt of goods occurred after the issuance of the PO and if the receipt was properly communicated to the Accounts Payable Department.

Test Approach

- Gibson obtained a record of all items received by the district between July 2024 and September 2025;
- Judgmentally selected 20 samples for testing;
- Obtained the PO for each sample;
  - Compared the date of the PO to the date the goods/services were received to ensure that the receipt of goods occurred after issuance of the PO **(Test 1)**;
- Obtained evidence of communication to the Accounts Payable Department; and
  - Ensured that the receipt of goods was properly communicated to the Accounts Payable Department **(Test 2)**.

Test Results

- Please refer to Table 11 below. "P" indicates that the sample passed the test, "F" indicates that the sample failed the test, and "N/A" indicates that the test was not applicable for the sample or could not be performed.

Table 11. Receiving Test Results

Sample	Test 1	Test 2
1	P	P
2	P	P
3	P	P
4	P	P
5	P	P
6	P	P
7	P	P
8	P	P
9	P	P
10	P	P
11	P	P
12	P	P
13	P	P
14	P	P
15	P	P
16	P	P
17	P	P
18	P	P
19	P	P
20	P	p

Source. Gibson Consulting Group, 2025

- **Test 1 – Did the PO issuance date occur before the goods/services were received?**
  - All samples had a date of receipt that occurred after the PO issuance date.
- **Test 2 – Did the receiver communicate to the Accounts Payable Department that the goods were received?**
  - All samples had evidence of proper communication to the Accounts Payable Department.

No audit findings were identified for Receiving.

Appendix A: Interviews and Focus Groups List

Interviews

- Becky Wolfenburger, District Trainer
- Dr. Bruce Gearing, Superintendent
- Dana Paulson, Executive Director of Finance
- Jennifer Anderson, Manager, Materials Management
- Jennifer Vananzi, Senior Director of Purchasing and Materials Management
- Kandace Ding, District Trainer
- Karen Schagel, Specialist, Purchasing
- Loretta Posada, Specialist, Purchasing
- Maryann Noble, Senior Buyer
- Pete Pape, Chief Financial Officer

Focus Groups

- Department Leaders
- Department Secretaries
- Elementary Principals
- Elementary Secretaries
- Secondary Principals
- Secondary Secretaries

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Leander ISD Board Meeting Agenda Item Information

Meeting Date: Thursday, June 4, 2026

Agenda Item:	Consider Approval of a Delegate and Alternate to the 2026 Texas Association of School Boards (TASB) Delegate Assembly
Purpose:	☐ Discussion Item/Report Only ☒ Action Requested
Administrator Responsible:	Chris Clark, Ed.D., Superintendent of Schools
Attachments:	N/A

Background Information:

The Texas Association of School Boards (TASB) Delegate Assembly provides school boards across Texas with an opportunity to directly influence TASB's advocacy priorities, leadership, and legislative direction for public education.

As active members of TASB, each local school board has the exclusive right to appoint a Delegate and Alternate Representative to represent their board and community at the Delegate Assembly. Delegates play an important role in shaping TASB's priorities for the upcoming legislative session, electing members of the TASB Board, and helping guide the future direction of the Association.

The 2026 TASB Delegate Assembly will be held in conjunction with txEDCON 2026 (TASA-TASB Convention) in Houston on Friday, October 9, 2026.

Board participation in the Delegate Assembly ensures that Leander ISD's voice is represented in statewide discussions impacting Texas public education.

Administrative Recommendation:

Administration recommends the Board appoint an Official Voting Delegate and an Alternate representative to the 2026 TASB Delegate Assembly.

Sample Motion:

I recommend that the Board of Trustees name _____________________ as the Official Voting Delegate and _____________________ as the Alternate to the 2026 TASB Delegate Assembly.

Leander ISD Board Meeting Agenda Item Information

Meeting Date: Thursday, June 04, 2026

Agenda Item:	Resolution Regarding Financial Sustainability and Long-Range Planning for Leander Independent School District Update
Purpose:	☒ Discussion Item/Report Only ☐ Action Requested
Administrator Responsible:	Jeremy Trimble, M.Arch, Chief Operations Officer
Attachments:	Resolution Regarding Financial Sustainability and Long-Range Planning for Leander Independent School District Update Presentation *(Uploaded to BoardBook on 06-03-26)*

Background Information:

During the September 30, 2025, Special Board Meeting, the Board adopted the Resolution Regarding Financial Sustainability and Long-Range Planning, intended to guide the district's work related to enrollment trends, operational efficiency, financial stewardship, facility utilization, and community engagement. Since adoption of the resolution, administration has initiated and advanced multiple efforts aligned to the Board's direction related to campus operations, program analysis, facilities and asset management, revenue generation strategies, expenditure reduction strategies, community and staff engagement, and reporting processes.

As this work has progressed, administration identified increasing interdependencies among enrollment, facilities, finance, academics, staffing, programming, and long-term operational sustainability. These interconnected considerations have reinforced the importance of transitioning from individual initiative implementation toward the development of a coordinated long-range planning framework.

The purpose of this presentation is to provide the Board with an update on work completed to date, demonstrate how these efforts are increasingly connected across the organization, and establish the foundation for a future-focused, community-informed long-range planning process designed to support district planning and decision-making over the next decade.

Administrative Recommendation:
N/A

Sample Motion:
N/A

June 4, 2026

Resolution Regarding Financial Sustainability and Long-Range Planning for Leander Independent School District Update

PURPOSE

Provide status on implementation of Board "Be It Resolved" directives and next steps

Resolution Regarding Financial Sustainability and Long-Range Planning for Leander Independent School District Update

Purpose of Discussion

From Immediate Action to Long-Term Stewardship

- Revisit the resolution statements adopted by the Board

- Share administration's response- launching multiple operational initiatives simultaneously

- The district is now reaching the point where these individual efforts must connect into a coordinated long-range framework

Purpose of Discussion

What We Learned Through the Work

Over the past several months, administration's work on the resolution revealed an important reality:

- These subjects are deeply interconnected
- Individual operational decisions cannot be sustainably addressed in isolation
- Long-term enrollment, facilities, academics, staffing, finance, and programming decisions increasingly influence one another

Comprehensive Long-Range Planning and Timeline

Subject	Progress	Key Progress
Campus Operations & Consolidation	☑ Complete	• Low-enrollment thresholds, explore mitigation strategies
	☐ Ongoing	• Annual report on campus utilization following the demographic update
Program Analysis & Modifications	☑ Complete	• INITIAL Evaluation of programs for opportunities to identify potential efficiencies, access, enrollment and demand
	☐ Ongoing	• Evaluate programs for opportunities to identify potential efficiencies, access, enrollment and demand • Engage with stakeholders before implementing any changes to educational programs
Facilities & Asset Management	☐ Ongoing	• Impacts of long-range planning on both debt service (I&S) and operating (M&O) funds • evaluate opportunities to generate revenue from real estate assets

I&S = Interest & Sinking   *M&O = Maintenance & Operations*

Comprehensive Long-Range Planning and Timeline

Subject	Progress	Key Progress
Facilities & Asset Management, cont'd.	☐ Ongoing	• Consider meeting district facility needs, using existing facilities and resources through co-location and/or repurposing • Analysis of voter-approved bonds
Revenue Generation Strategies	☑ Complete	• Detailed analysis of available copper penny tax options* • Implement the open enrollment policy beginning with the 2026-27 school year • Formally request Commissioner Mike Morath and the Texas Education Agency ensure the District receives all House Bill 2 funding with no loss in hold harmless protection
	☐ Ongoing	• Prioritize enhanced attendance improvement strategies • Explore revenue-generation opportunities
Expenditure Reduction Strategies	☑ Complete	• Develop staffing guidelines, applicable district-wide, addressing both low-enrollment and high-enrollment campus efficiency standards

**complete for the 26-27 Budget Year Process*

Comprehensive Long-Range Planning and Timeline

Subject	Progress	Key Progress
Expenditure Reduction Strategies	Complete	• Consider the impact on campuses that experienced prior reductions when making recommendations* • Complete the Texas Association School Boards (TASB) central office staffing study
	Ongoing	• Conduct a comprehensive historical staffing analysis
Community & Staff Engagement	Ongoing	• Engage the community, including families and staff members as partners in implementing solutions • Commit to transparent, phased communication, distinguishing exploration and/or recommendations from action
Governance & Reporting	Complete	• The Resolution shall guide the Administration's budget planning process*
	Ongoing	• The Board commits to multiple workshop-format meetings • Administration shall provide regular updates on long-range planning and its impact on financial planning, academics and the student experience

**complete for the 26-27 Budget Year Process*

Future-Focused Planning

Comprehensive **Long-Range Planning** and Timeline:

"BE IT RESOLVED, the district shall develop a comprehensive long-range planning process..."

LEANDER ISD 2037

Bridging between where we are and where we want to be in 10 years, highlighting adaptability as we move forward.

Our **next steps** are much like building a **framework** for a **bridge.** The **framework** is the solid, well-thought-out structure that supports our work, while the **bridge** represents the pathway to the future. By combining these elements, we can connect today's decisions to tomorrow's opportunities with **clarity** and **purpose.**

Connecting to a Broader Long Term Perspective

CFAC = Citizens' Facility Advisory Committee

Transitioning to Future-Focused Planning

CFAC 26

The current bond being planned and for potential consideration is largely about *maintaining* the **student** and **staff experience**, **stewarding community investments**, and **sustaining our facilities** over the next few years.

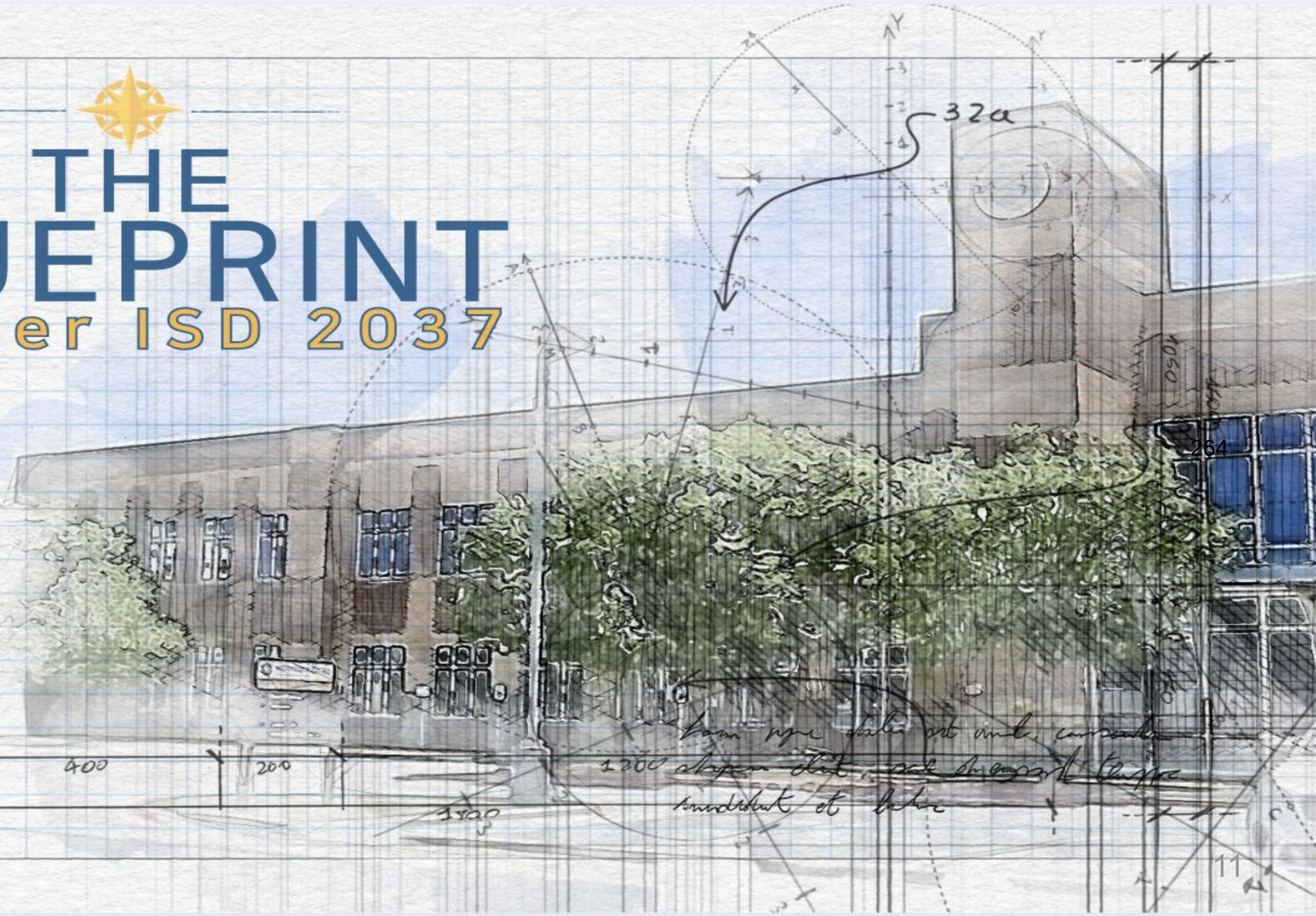
263

LEANDER ISD 2037

The future focused planning process is about determining how we can potentially **improve** those **experiences** and position the district for the **next decade**. One addresses **known needs;** the other helps define **future opportunities**. Responsible **stewardship** requires both.

THE BLUEPRINT

Leander ISD 2037



Connecting to a Broader Long Term Perspective

Bond

- Maintains high-quality infrastructure worthy of Leander ISD staff & for generations

Strategic Plan

- Develops strategy map for next five years
- Aligns all aspects of the district, from the Boardroom to the Classroom

Long-Range Planning

- Responsive to Fall 2025 resolution
- Incorporates community input to chart a sustainable future

LEANDER ISD 2037

Future-Focused Planning:

- Staffing Analysis & Guidelines
- Program Analysis & Modifications
- Revenue Generation Strategies
- Community & Staff Engagement
- Facility & Asset Management
- Reimagining Campuses
- Expense Reduction Strategies
- Additional Strategic Decisions

Long-Range Planning & Financial Sustainability

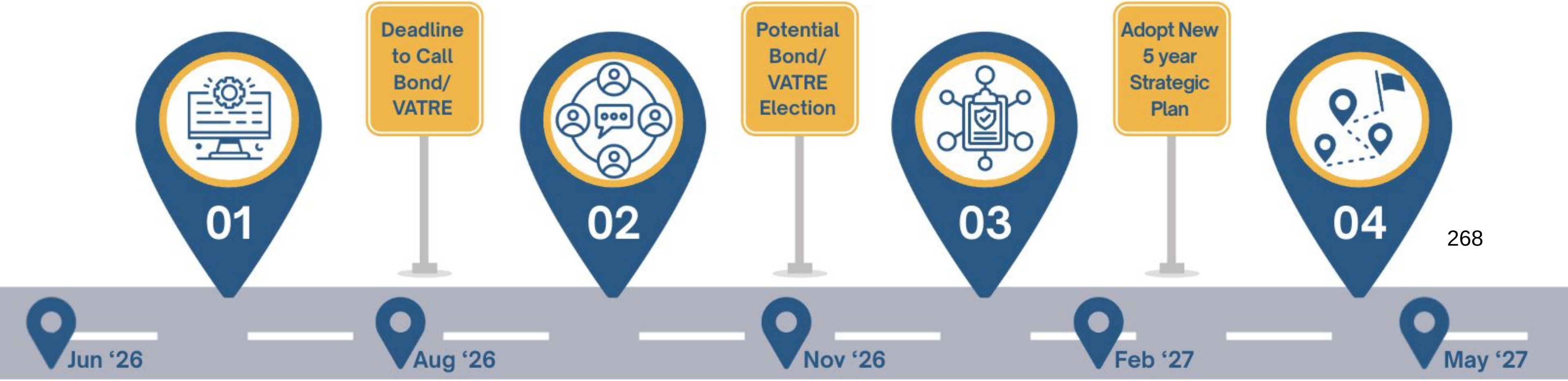
Future-Focused Planning

CSG
Civic Solutions Group

Partnering in the work...

- **CSG will support the district's long-term planning processes, including:**
    - Advising and partnering with district staff on engagement
    - Developing a framework for decisions, creating initial and final considerations based on data analysis
    - Producing detailed school profile reports for every Leander ISD school
    - Partnering with any Strategic Initiatives or other efforts to establish a multi-year phased approach to address ongoing demographic, financial, and operational trends in the district.
- **Beyond these core activities, CSG will interface regularly with internal and external stakeholders, provide project management support, and collaborate on communications strategies related to long-term planning.**

Future-Focused Roadmap



Data Gathering
Collect and consolidate relevant academic, financial, operational, and facilities data from all available sources to inform all aspects of the *Leander ISD 2037* process.

Engagement & Visioning
Partner with all stakeholders to create an envisioned future that encompasses campus operations, staffing, program analysis, facilities and asset management, revenue generation, expense reduction, and community engagement

Framework Development
Create a transparent framework for strategic and long-term planning that incorporates the unique context, values, and experience of Leander ISD stakeholders.

Strategic Development
Conduct comprehensive engagement with trustees, staff, and community members related to draft scenarios that address the key components of the Fall 2025 long-term planning resolution.

VATRE = Voter-Approval Tax Rate Election

Future-Focused Engagement

Core Principles of *Leander ISD 2037* Engagement

TRANSPARENCY

Clear communication channels with stakeholders regarding how data is used to drive long-range decisions.

INCLUSIVITY

Engagement must be continuous, accessible, and utilize multiple platforms to ensure broad feedback.

PARTNERSHIP

Stakeholders will be treated as genuine partners throughout the process in the development and refinement of scenarios.

STUDENT-CENTERED

All engagement will be anchored around Leander ISD's commitment to to academic excellence and the student experience.

Future-Focused Engagement

Advisory Group(s)

Cabinet Discussions

Thought Exchange

270

Leander ISD 2037 Website

Community Engagement

Presentations to Existing Civic Groups

Workshops for Parents, Teachers, Admin, etc

Central Office Staff Conversations

Ongoing Trustee Input

Future-Focused Engagement

Trustees will not just receive updates - they will be key participants in shaping outcomes.

Recurring Check-Ins

Trustees engage in multiple rounds of small group conversations regarding foundational principles, key data, and potential long-range planning strategies.

Board Request:
Small Group Discussion

Priority Approval

Trustees formally approve community-driven priorities to establish a coherent vision for *Leander ISD 2037.*

Board Request:
Vote

Board Workshops

District staff and CSG present key information, share community feedback, and facilitate a Board discussion of possible long-range planning outcomes.

Board Request:
Receive & Group Discussion

Approval & Implementation

Trustees approve long-range planning recommendations, with proposed implementation strategies.

Board Request:
Vote

DISCUSSION

Leander ISD Board Meeting Agenda Item Information

Meeting Date: Thursday, June 4, 2026

Agenda Item:	Consider Approval to Transfer Funds from the Assigned General Fund Balance to the Self-Insured Health Care Fund
Purpose:	☐ Discussion Item/Report Only ☒ Action Requested
Administrator Responsible:	Pete D. Pape, Ed.D., CPA, Chief Financial Officer
Attachments:	N/A

Background Information:

The Self-Insured Health Care Fund ended fiscal year 2025 with a fund balance of $7.0 million, which was a decrease of $6.2 million from the prior year's ending fund balance. Typically, claims tend to be higher in September and October due to increased utilization during the summer months; however, this fall, the claims have not decreased as in the past.

During the December 11, 2025, meeting, the Board approved transferring $2 million from the Assigned General Fund balance to the Self-Insured Health Care Fund. The Self-Insured Health Care Fund has continued to incur larger claims than normal, and as such, the Self-Insured Health Care Fund needs additional funds.

Administration is recommending the Board approve the transfer of $2 million of the Assigned General Fund balance for employee health care.

Administrative Recommendation:

The recommendation is for the Board of Trustees to approve transferring $2 million from the Assigned General Fund balance to the Self-Insured Health Care Fund.

Sample Motion:

I move the Board approve the transfer of $2 million from the Assigned General Fund to the Self-Insured Health Care Fund.